



Executive Committee

Tue 11 Mar
2025
6.30 pm

Oakenshaw Community
Centre, Castleditch
Lane,
Redditch
B98 7YB



If you have any queries on this Agenda please contact
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If you have any questions regarding the agenda or attached papers, please do not hesitate to contact the officer named above.

Notes:

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6.30 pm

Oakenshaw Community Centre

Agenda

Membership:

Cllrs:	Joe Baker (Chair)	Jen Snape
	Sharon Harvey (Vice-Chair)	Jane Spilsbury
	Juliet Barker Smith	Monica Stringfellow
	Bill Hartnett	Ian Woodall
	Wanda King	

1. Apologies

2. Declarations of Interest

To invite Councillors to declare any Disclosable Pecuniary Interests and / or Other Disclosable Interests they may have in items on the agenda, and to confirm the nature of those interests.

3. Leader's Announcements

4. Minutes (Pages 5 - 14)

5. Future Cemetery Provision (Pages 15 - 48)

This item is due to be the subject of pre-scrutiny at a meeting of the Overview and Scrutiny Committee scheduled to take place on 10th March 2025. Any recommendations arising from that meeting will be published in a supplementary pack for the consideration of the Executive Committee.

6. Data Strategy (including Data Standards Policy) (Pages 49 - 86)

7. Warm Homes Local Grants funding and resources (Pages 87 - 94)

8. UK Shared Prosperity Fund 2025/26 (Pages 95 - 110)

This item is due to be the subject of pre-scrutiny at a meeting of the Overview and Scrutiny Committee scheduled to take place on 10th March 2025. Any recommendations arising from that meeting will be published in a supplementary pack for the consideration of the Executive Committee.

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9. Redditch Council Plan (Pages 111 - 126)

This item is due to be the subject of pre-scrutiny at a meeting of the Overview and Scrutiny Committee scheduled to take place on 10th March 2025. Any recommendations arising from that meeting will be published in a supplementary pack for the consideration of the Executive Committee.

10. Members Ward Budget Scheme (Pages 127 - 136)

11. Quarter 3 Revenue and Performance Monitoring 2024/25 (Pages 137 - 190)

12. Finance Recovery Programme Report (Pages 191 - 202)

13. Minutes / Referrals - Overview and Scrutiny Committee, Executive Panels etc.

To receive and consider any outstanding minutes or referrals from the Overview and Scrutiny Committee, Executive Panels etc. since the last meeting of the Executive Committee, other than as detailed in the items above.

14. To consider any urgent business, details of which have been notified to the Head of Legal, Democratic and Procurement Services prior to the commencement of the meeting and which the Chair, by reason of special circumstances, considers to be of so urgent a nature that it cannot wait until the next meeting



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MINUTES

Present:

Councillor Joe Baker (Chair), Councillor Sharon Harvey (Vice-Chair) and Councillors Juliet Barker Smith, Bill Hartnett, Wanda King, Jen Snape, Jane Spilsbury, Monica Stringfellow and Ian Woodall

Also Present:

Councillors Brandon Clayton, Claire Davies, Matthew Dormer, Joanna Kane, David Munro, Rita Rogers and Craig Warhurst

Officers:

Peter Carpenter, Mike Dunphy, Claire Felton and Sue Hanley

Democratic Services Officers:

Jess Bayley-Hill

79. APOLOGIES

There were no apologies for absence.

80. DECLARATIONS OF INTEREST

There were no declarations of interest.

81. LEADER'S ANNOUNCEMENTS

The Leader highlighted that a number of papers, including three supplementary agenda packs, had been published for consideration at the meeting. These packs included copies of the Council Tax Resolutions, Appendix A to the Medium Term Financial Plan (MTFP) 2025/26 to 2027/28 and an additional recommendation in respect of the MTFP that had been added following publication of the main agenda.

In addition, the supplementary packs detailed recommendations arising from a recent meeting of the Budget Scrutiny Working Group (BSWG) at which the MTFP had been considered. On behalf of the Executive Committee, the Leader thanked the BSWG for their hard work and noted that their recommendations would be considered alongside that report.

Chair

82. MINUTES**RESOLVED that**

the minutes of the meeting of the Executive Committee held on 4th February 2025 be approved as a true and correct record and signed by the Chair.

83. LOCAL DEVELOPMENT SCHEME

The Strategic Planning and Conservation Manager presented the Local Development Scheme for Members' consideration.

The Committee was advised that the Local Development Scheme detailed the proposed timetable for the production of the new Local Plan for the Borough of Redditch. This report had been produced in response to instructions arising from the Government as part of the new National Planning Policy Framework (NPPF). Councils had been notified of the need to produce new Local Development Schemes within a period of 12 weeks of receiving this instruction. Councils that failed to do so were at risk of Government intervention. The Local Development Scheme addressed key timelines and deadlines but did not specify the proposed content of the future Local Plan.

New guidance was due to be issued at a national level in respect of Local Plans by the end of the year. In the meantime, Officers were in the process of preparing an issues and options appraisal, which would be subject to public consultation. This was the first stage of the Local Plan process and would provide an opportunity for local residents and other interested stakeholders to contribute their views and aspirations for the Local Plan. There would be two more rounds of consultation before the Council reached the public inquiry stage.

Following the presentation of the report, Members discussed the content and in doing so noted that the timeframes available to Councils to produce a Local Plan had changed under the new NPPF. In previous years, Councils had been able to dedicate years to work on the preparation of a Local Plan. Under the new arrangements, the Council would have 30 months to prepare a Local Plan. In this context, it was suggested that the authority might require additional external support to help complete the preparation of the new Local Plan according to deadline.

Reference was made to the opportunities that would be available for Members to contribute to the development of the new Local Plan. The Committee was informed that meetings of the Planning

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Advisory Panel (PAP) would take place throughout the process and all Members could attend these meetings. The Leader therefore urged Members to attend PAP meetings in order to help shape the Local Plan.

RECOMMENDED that

- 1) Redditch Borough Council Local Development Scheme 2025 is approved as the Council's programme for plan-making, effective as of 24th February 2025; and**
- 2) delegated authority be granted to the Assistant Director for Planning and Leisure Services, following consultation with the Portfolio Holder for Planning, Regeneration and Governance, to approve updates to the Local Development Scheme as required.**

84. COUNCIL TAX RESOLUTIONS 2025/2026 (TO FOLLOW)

The Deputy Chief Executive and Section 151 Officer presented the Council Tax Resolutions 2025/26 for the Committee's consideration.

Members were informed that the report provided instructions to Officers to issue Council Tax requests to local residents on behalf of precepting authorities. The Council had set the Council Tax Base in January 2025 at 26,455.5 for the whole area and for dwellings in the Parish Precept area of Feckenham Parish at 382.1. The Council Tax Resolutions focused on the next stage of the Council Tax setting process and an increase of 2.99 per cent, in terms of Council Tax contributions for the Borough, was being proposed in line with Government assumptions.

The Committee was reminded that the Council collected Council Tax on behalf of Redditch Borough Council as well as other precepting authorities. The other precepting authorities were Worcestershire County Council, the Police and Crime Commissioner for West Mercia and Hereford and Worcester Fire and Rescue Service. The proportion of Council Tax payments from households paid to each precepting authority differed, with Worcestershire County Council receiving the largest contribution.

Following the presentation of the report, Members discussed the content and in doing so noted that a 2.99 per cent increase to Council Tax in 2025/26 would be necessary in order to address a pressure in the budget arising from a 0 per cent increase in the Local Government Settlement for the authority.

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RESOLVED to NOTE that at meetings of the Executive and Council held in January 2025, Members approved the calculated Council Tax Base 2025/26 as:

- (a) for the whole Council area as 26,455.5 [item T in the formula in section 31B of the Local Government Finance Act 1992, as amended (the “Act”)]; and**
- (b) for dwellings in those parts of its area to which a parish precept relates; this being Feckenham Parish, as 382.1.**

RECOMMENDED

- 1) the calculation for the Council Tax requirement for the Council’s own purposes for 2025/26 (excluding parish precepts) as £7,345,116.71;**
- 2) that the following amounts be calculated for the year 2025/26 in accordance with sections 31 to 36 of the Act:**
 - a) £50,366,2909.22 being the aggregate of the amounts which the council estimates for the items set out in section 31A(2) of the Act (taking into account all precepts issued to it by Parish Councils) (i.e., gross expenditure)**
 - b) £42,961,173.51 being the aggregate of the amounts which the council estimates for the items set out in section 31A(3) of the Act. (i,e gross income);**
 - c) £7,405,116.71 being the amount by which the aggregate of 1.2.2(a) above exceeds the aggregate of 1.2.2(b) above, calculated by the Council, in accordance with section 31A(4) of the Act, as its Council Tax requirement for the year. (Item R in the formula in section 31B of the Act);**
 - d) £279.91 being the amount at 1.2.2(c) above (Item R), all divided by Item T (1.1(a) above), calculated by the Council, in accordance with section 31B of the Act, as the basic amount of its council tax for the year (including parish precepts);**
 - e) £60,000 being the aggregate amount of all special items (Feckenham Parish precept) referred to in section 34(1) of the Act;**
 - f) £277.64 being the amount at 1.2.2(d) above less the result given by dividing the amount at 1.2.2(e) above**

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by Item T (1.1 (a) above), calculated by the Council, in accordance with section 34(2) of the Act, as the basic amount of its Council Tax for the year for dwellings in those parts of its area to which no parish precept relates;

- g) £434.67 being the amount given by adding to the amount at 1.2.2(f) the amount for the special item relating to the parish of Feckenham 1.2.2(e), divided by the amount in 1.1(b) above;
- h) the amounts shown below given by multiplying the amounts at 1.2.2(f) and 1.2.2(g) above by the number which, in the proportion set out in section 5(1) of the Act, is applicable to dwellings listed in a particular valuation band, divided by the number which in that proportion is applicable to dwelling listed in band D, calculated in accordance with section 36(1) of the Act, as the amounts to be taken into account for the year in respect of categories of dwelling listed in different valuation bands

Valuation Band	Proportion of Band D paid	Feckenham Parish Council Precept £	Parish of Feckenham Total £	All other parts of the council area £
A	6/9ths	104.69	289.78	185.09
B	7/9ths	122.13	338.07	215.94
C	8/9ths	139.58	386.37	246.79
D	1	157.03	434.67	277.64
E	11/9ths	191.93	531.27	339.34
F	13/9ths	226.82	627.86	401.04
G	15/9ths	261.72	724.45	462.73
H	18/9ths	314.06	869.34	555.28

- 3) that it is to be noted that for the year 2025/26, Worcestershire County Council, Police and Crime Commissioner for West Mercia, and Hereford and Worcester Fire Authority have issued precepts to the Council in accordance with section 40 of the Act for each category of dwelling in the Council's area as indicated below:

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	Valuation Bands							
	A	B	C	D	E	F	G	H
	£	£	£	£	£	£	£	£
Worcestershire County Council	1,077.14	1,256.66	1,436.19	1,615.71	1,974.76	2,333.80	2,692.85	3,231.42
Police and Crime Commissioner for West Mercia	194.33	226.72	259.11	291.50	356.28	421.06	485.83	583.00
Hereford and Worcester Fire Authority	68.15	79.50	90.86	102.22	124.94	147.65	170.37	204.44

- 4) that having calculated the aggregate in each case of the amounts at 1.2.2(h) and 1.2.3 above, that Redditch Borough Council in accordance with sections 30 and 36 of the Local Government Finance Act 1992 hereby sets the amounts shown below as the amounts of Council Tax for 2025/26 for each part of its area and for each of the categories of dwellings;

Valuation Band	Proportion of band D paid	Parish of Feckenham Total £	All other parts £
A	6/9ths	1,629.40	1,524.71
B	7/9ths	1,900.95	1,778.82
C	8/9ths	2,172.53	2,032.95
D	1	2,444.10	2,287.07
E	11/9ths	2,987.25	2,795.32
F	13/9ths	3,530.37	3,303.55
G	15/9ths	4,073.50	3,811.78
H	18/9ths	4,888.20	4,574.14

- 5) that the Director of Resources be authorised to make payments under section 90(2) of the Local Government Finance Act 1988 from the collection fund by ten equal instalments between April 2025 to March 2026 as detailed below:

	Precept (£)	Surplus/Deficit on Collection Fund (£)	Total to Pay (£)
Worcestershire County Council	42,744,416.00	708,645.00	43,453,061.00
Police and Crime Commissioner for West Mercia	7,711,778.25	127,783.69	7,839,561.94
Hereford and Worcester Fire and Rescue Authority	2,704,281.25	44,768.03	2,749,049.28

- 6) that the Director of Resources be authorised to make transfers under section 97 of the Local Government Finance Act 1988 from the collection fund to the general fund the sum of £7,405,116.71 being the Council's own demand on the collection fund (£7,345,116.71) and parish

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precepts (£60,000) and the distribution of the surplus/deficit on the collection fund (£125,184.84);

- 7) that the Director of Resources is authorised to make payments from the general fund to Feckenham Parish Council the sums listed above (£60,000) by two equal instalments on 1st April 2025 and 1st October 2025 in respect of the precept levied on the Council;**
- 8) that the above resolutions to be signed by the Chief Executive for use in legal proceedings in the Magistrates' Court for the recovery of unpaid Council Taxes; and**
- 9) notices of the making of the said Council Taxes signed by the Chief Executive are given by advertisement in the local press under section 38(2) of the Local Government Finance Act 1992.**

85. MEDIUM TERM FINANCIAL PLAN 2025/26 TO 2027/28 TRANCHE 2 (FOLLOWING CONSULTATION)

The Deputy Chief Executive and Section 151 Officer presented the Medium Term Financial Plan (MTFP) 2025/26 to 2027/28 Tranche 2 report for Members' consideration.

Members were reminded that the Committee had previously considered the report at a meeting held on 4th February 2025, when recommendations on this subject had been endorsed by the Executive Committee, and this had been reflected in the report. However, at that time, Appendix A to the report had not been available to consider and therefore arrangements had been made for the Committee to reconsider the item in order to provide an opportunity to note the content of that Appendix.

Since that date, the Council had received a letter from Birmingham City Council, which managed the funding due to all Councils that had previously been members of the former Greater Birmingham and Solihull Local Enterprise Partnership (GBSLEP). This letter, a copy of which had been sent to all former members of the GBSLEP, had asked that no business cases be submitted in 2025/26 requesting funding. The Council was challenging this request. However, it was considered prudent to update the MTFP to list access to these funds as a risk in the 2025/26 financial year.

During consideration of this item, Members noted that the MTFP 2025/26 to 2027/28 Tranche 2 report had been pre-scrutinised at a meeting of the BSWG held on Tuesday 18th February 2025. At that meeting, Members had proposed the following recommendations for the consideration of the Executive Committee:

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- 1) *“That the Council review as a priority all grants and funding available to ensure that the Council’s use of them is maximised.*
- 2) *To note that Budget Scrutiny Working Group is dissatisfied with the Budget as presented and has major concerns about the viability and inherent risks of this Medium Term Financial Plan (MTFP). The Executive is asked to take action to mitigate the risks to the Budget outlined in the MTFP Tranche 2 report.”*

The Executive Committee discussed each of these recommendations in turn. In respect of the first recommendation, Members suggested that the Council already reviewed all grants and funding sources available to the Council as part of the ongoing budget setting process. The Council was also due to recruit to a new post, of a bid writer for the Council, which would enable the Council to maximise any attempts to access additional grant funding available to local government. Under these circumstances, the Executive Committee suggested that this recommendation from the BSWG was not necessary.

In respect of the second recommendation from the BSWG, Members commented that they disagreed with the premise of the recommendation. Instead, Executive Committee Members commented that viable proposals had been included in the MTFP 2025/26 to 2027/28. Furthermore, Members commented that a significant amount of work had been undertaken to identify and mitigate against risks identified in the report. There was also greater certainty in respect of reserves and balances, following the submission of three sets of accounts. In this context, Members commented that they would not be supporting this recommendation from the BSWG.

In concluding their remarks, Members thanked the BSWG for their hard work in reviewing the budget and for making suggestions for the Executive Committee’s consideration.

RECOMMENDED that

the additional risk, in terms of access to existing former Greater Birmingham and Solihull Local Enterprise Partnership funds from Birmingham City Council in 2025/26 be added to the Risk Log for the Medium Term Financial Plan.

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The Leader confirmed that there were no outstanding recommendations from the meeting of the Overview and Scrutiny Committee held on 3rd February 2025 requiring consideration.

RESOLVED that

the minutes of the Overview and Scrutiny Committee meeting held on 3rd February 2025 be noted.

87. MINUTES / REFERRALS - OVERVIEW AND SCRUTINY COMMITTEE, EXECUTIVE PANELS ETC.

Members were informed that there were no referrals from the Overview and Scrutiny Committee or Executive Advisory Panels for consideration on this occasion.

The Meeting commenced at 6.30 pm
and closed at 6.54 pm

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Future Cemetery Provision

Relevant Portfolio Holder	Cllr Harvey
Portfolio Holder Consulted	Yes
Relevant Assistant Director	Simon Parry
Report Author	Job Title: Environmental Services Manager Contact email: doug.henderson@bromsgroveandredditch.gov.uk Contact Tel: 07483 151469
Wards Affected	Greenlands & Lakeside Ward & Winyates Ward
Ward Councillor(s) consulted	N/A
Relevant Council Priority	Parks and Open Spaces/Community Safety & Regeneration
Key Decision	
If you have any questions about this report, please contact the report author in advance of the meeting.	

1. RECOMMENDATIONS**The Executive Committee RESOLVE that:-**

- 1) Land located at the current Abbey Cemetery site, as indicated in Figure 2 in Appendix 1, be utilised for earth burial provision for an interim period of up to 10 years commencing in January 2027.**
- 2) A review be commissioned of the potential to use the site indicated at Figure 3 of Appendix 1 for burial provision in the long-term.**

The Executive Committee is asked to RECOMMEND that:-

- 3) To begin a process of incorporating new burial provision within the new Borough of Redditch Local Plan.**

2. BACKGROUND

- 2.1 Redditch Borough Council operates and manages three cemeteries, Plymouth Road, Edgioake Lane and Abbey Cemetery and St Stephen's, St Luke's and Feckenham closed church yards.
- 2.2 Plymouth Road is closed to new burials, Edgioake Lane Cemetery has approximately five years burial provision available at its current usage, and Abbey had approximately 2 years left. These figures are only

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indicative based on trends; however, they can change for a number of reasons; including continued increase in cremations versus burials and fluctuating local/county death rates.

- 2.3 Work had been undertaken in recent years to assess the suitability of several different sites across the Borough to provide additional burial capacity, included in various reports to Council.
- 2.4 In total 26 sites were originally reviewed across the Borough with The Council previously agreed upon the Ipsley Church lane site as the most favourable option. This was agreed at the meeting of the Executive in December 2021 and subsequently at Council in January 2022.
- 2.5 The appropriation of land off Ipsley Church Lane was agreed at the meeting of the Executive on 13th December 2022.
- 2.6 Following the elections in May 2024, a new Labour Administration took on the leadership of the council, and their manifesto included putting a hold on any further works on the Ipsley Church Lane site whilst a review of alternative sites was carried out.
- 2.7 In November 2024, a new site review was independently commissioned with CDS Consultants that provide expert advice within a range of topics including Cemetery Provision. CDS looked at 10 locations, comprising a total of 13 sites. These sites were assessed in accordance with a holistic site search criteria tailored to cemetery development to further interpret their suitability.
- 2.8 Of the original 13 sites, eight sites were found to be potentially suitable for cemetery development.
- 2.9 The results of the review produced a short list of the most viable sites.
 - 2.9.1 Proposed Site 2A – Land North of Morrisons and West of the B4497, B98 0JD. (South of Arrow Valley Country Park).
 - 2.9.2 Proposed Site 2B – Land North of Morrisons and West of the B4497, B98 0JD. (South of Arrow Valley Country Park).
 - 2.9.3 Proposed Site 5B – Ipsley Church Lane, Ipsley, B98 0TJ. (South of St Peters Church).
 - 2.9.4 Proposed Site 4 – Edgioake Cemetery, Astwood Bank, B96 6BG.
- 2.10 Further analysis reduced this list further. Site 2A is effectively too small and wooded which would only give up to 15 years burial space at best with significant woodland clearance required so has been discounted. The potential extension at Edgioake Cemetery has been discounted because the land in question is privately owned, and following some initial enquiries, the owner has no interest in selling.

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- 2.11 With only 2 years of full earth burial space left at Abbey Cemetery and the risk of Funeral Directors diverting business to Bromsgrove sites should Abbey close for burials the following additional option was tabled.

To reuse a section of land at the Abbey Cemetery that has previously been used for ashes scattering . This land identified has not been scattered on since mid-2024 and was only used sporadically before that. There are no laws that prohibit this , so the main challenge for the council will be around the communication used to raise this with the community.

- 2.12 Following this the planning team also tabled the idea that burial provision should be considered in the next round of local plans as more new houses come online.

- 2.13 This then led to the current set of recommendations outlined in this paper that gives a short-, medium-, and long-term strategy for burial provision in the local area.

3. OPERATIONAL ISSUES

- 3.1 The purpose of the consultant's (CDS) report was to review the risk analysis of the two resolutions for the future burial provision for Redditch Borough Council.
The Bromsgrove and Redditch area is reaching a capacity for new burial space, furthermore, as stated in the Redditch Local Plan, 1.7 hectares of land is required for burial provision.
Both options were assessed against burial information across the Bromsgrove and Redditch area, with local policy in mind. Furthermore, the risk for each option was assessed using Risk Register analysis. Figure 1 shows the location of both Resolution 1 at Abbey Cemetery, B97 6RR and Resolution 2 (Proposed Site 2B) at Land North of Morrisons and West of the B4497, B98 0JD.

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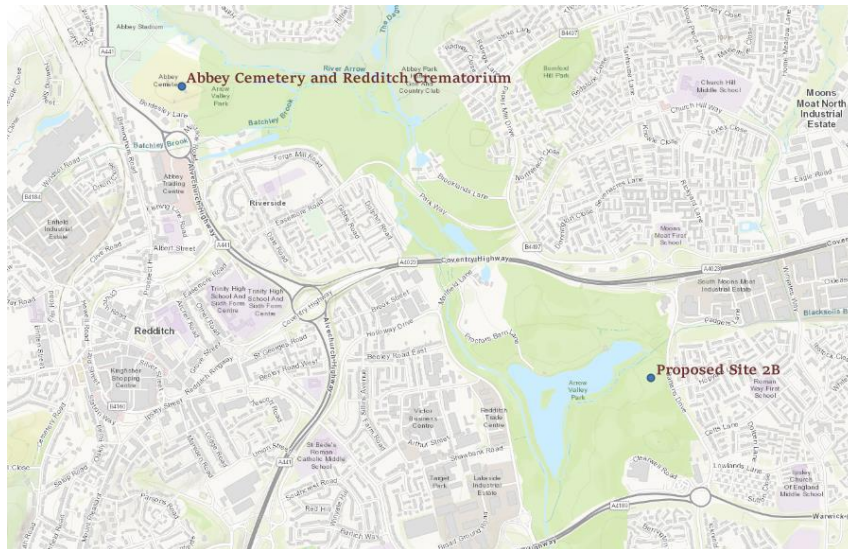


Figure 1. the location of Resolution 1 (Abbey Cemetery) and Resolution 2 (Proposed Cemetery) within the Redditch Area.

- 3.2 **Resolution 1** Abbey Cemetery and Redditch Crematorium, B97 6RR, has been proposed by Redditch Borough Council as an option for further burial accommodation. This would be achieved by repurposing existing space designation for ash scattering and using it to accommodate for full body interment .



The blue box to the left highlights the ashes scattering area being proposed for reuse as full burial, with the purple area denoting the remaining ashes scattering area.

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There is limited information on repurposing ash scattering land for burials. However, the reuse of graves is a similar topic, and it is understood from The Law Commission that a grave can be reused after 75 years of the original burial. This is of course permitting consent from the family of the deceased person, should there be an objection no reuse can occur for another 25 years.

It is therefore concluded that there is no current legislation stating that the repurposing of ash scattering land for burial use is not permitted. Furthermore, as this land is not including a physical burial or physical memorialisation, this topic can be taken lightly in comparison to burial re-use.

This resolution does however come with potential reputational risk due to the repurposing of up to 30% of the existing ashes scattering space that wraps round the back of the Crematorium for full earth burials. People may be upset at the idea so a clear well structure communication plan is needed with councillor support to mitigate the potential adverse reactions from some. It should also be noted that this resolution still leaves 3 acres of land for scattering with an open aspect looking over the hills behind the site.

With the land already within the boundary of the existing cemetery the costs will be for the ongoing installation of plinths, an opportunity to enhance roadways, paths, and landscaping to separate the new space from the rest of the ashes scattering area.

- 3.3 **Resolution 2.** The Land North of Morrisons and West of the B4497, B98 0JD was considered a suitable site for cemetery development following a site feasibility report undertaken by CDS. This site was referenced Proposed Site 2B alongside the total 13 sites assessed (of which eight were deemed suitable). The redline boundary of Proposed Site 2B is shown in Figure 3. The proposed site is approximately 6.2 acres. This would provide for an estimated 4,960 burials (excluding consideration for burial buffers and space for landscaping and potential infrastructure). The site is flat, open and has good transport links. Against the average of 71 new burials per annum, this would provide burial accommodation for a further 69 years. This is of course a high-level calculation based off estimates, which should be noted.

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Figure 3. The redline boundary of resolution 2 (Proposed site 2B)

As long as Resolution 1 is granted which will give 10 years additional full earth burials and gives enough time for the council to pursue a new site. As stated, the 2 main immediate concerns around Site 2b are any potential issues with geology & groundwater and from previous cases the potential impact Sport England could have due to the land having been used in the past for sport provision. There is a hope as this was only ever a temporary sport provision that this may not turn out to be a problem, but it is worth tackling it head on in the initial stages of the process.

Aside from this the land does currently hold 'Primarily Open Space' status within the existing Redditch Local plan that needs to be addressed.

At this early-stage initial funding will be utilised to investigate ground water and geology issues as this will dictate next steps.

Appendix 1 point 48 page 14 outlines a timeline.

- 3.4 **Recommendation 3** . Explore all feasible options for providing new burial space or funding the provision of new burial space though the policies and allocations in the new Borough of Redditch Local Plan, this

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will if successful attempt to keep pace with new housing stock and provide a long-term solution.

- 3.5 To conclude it essential that Resolution1 is agreed which will then give the council 10 additional years of burial provision . This then enables the council to progress resolution 2 which as proven by the process around Ipsley will take considerable time. This is because of items such as geology and hydrology work taking up to a year to assess , the overall planning process, consultations, council processes etc.

4. FINANCIAL IMPLICATIONS

- 4.1 The funding for new burial provision is included within the medium-term financial plan for 2025/6.

5. LEGAL IMPLICATIONS

- 5.1 Local Authorities Cemetery Order 1977 must be adhered to when identifying a new location for a cemetery.
- 5.2 As an authority we have no statutory duty to provide a cemetery however as a community resource to support the local population it could be argued there is a moral obligation. If no cemetery is provided, then people would have to travel further afield to find a location for a burial which could be of either a whole coffin or of a cremated remains casket.

6. OTHER - IMPLICATIONS**Relevant Council Priority**

- 6.1 This is aligned with the Parks & Green Spaces/Community Safety & Regeneration short and medium- long-term priorities within the Council Plan 2023 & 2024.

Climate Change Implications

- 6.2 As part of the environmental impact assessment to be carried out for the proposed burial site consideration should be given to the potential contamination of the soil and groundwater from the chemicals used in the embalming process. This will include options to mitigate any impact that is found a part of the assessment.

Equalities and Diversity Implications

- 6.3 A lack of cemetery provision within the Borough could lead to additional hardship for local families such as increased travel costs attending a

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site outside the Borough. This could further be difficult for the more vulnerable members of the Borough for whom traveling has to be by specialist arrangement.

A potential lack of cemetery provision could also lead to longer term health and social issues as families may struggle to grieve in the traditional way at a grave side.

The council will make sure that the new cemetery will provide the opportunity and capability to offer a number of alternative styles of burial as well as a greater range of memorial styles to provide greater emphasis on creativity, in addition areas for specific faith groups will be facilitated to include significant provision for the Muslim community, something which in a dwindling space at Abbey we have been unable to enhance for some years.

7. RISK MANAGEMENT

- 7.1 The authority may be at reputational risk if a new cemetery site is not provided as this could lead to the private sector opening a facility (subject to the standard planning approval process). This might lead to higher fees and charges being charged than would otherwise been the case if the authority had provided the service.
- 7.2 The authority may be at financial risk should a competing facility be opened within the Borough by the private sector. If this were to happen then the income levels projected in future plans will drop.
- 7.3 The authority may put other council owned cemeteries under pressure should Abbey close to further full earth burials and an alternative site is not secured.
- 7.4 Resolution 1 comes with reputational risk from the repurposing existing ashes scattering ground for full earth burials due to upset from the public.
- 7.5 Resolution 2 comes with the risk of failing to secure planning permission and the requirement to find yet another potential parcel of land .

8. APPENDICES and BACKGROUND PAPERS

Appendix 1 – A Risk and Options appraisal report for a new Cemetery
– Author CDS.

9. REPORT SIGN OFF

Executive Committee
2025

11th March

Department	Name and Job Title	Date
Portfolio Holder	Cllr Harvey	24 th Feb 2025
Lead Director / Assistant Director	Simon Parry	20 th Feb 2025
Financial Services	Pete Carpenter	20 th Feb 2025
Legal Services	Nicola Cummings	20 th Feb 2025
Climate Change Team (if climate change implications apply)	Matthew Eccles	19 th Feb 2025

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A Risk and Options Appraisal Report for a New Cemetery.

Redditch Borough Council

Date: February 2025

**The CDS Group, Building 51, Wrest Park, Silsoe, Bedfordshire, MK45 4HS
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1 Introduction

- 1 The purpose of this report is to review the risk analysis of two options for the future burial provision for Redditch Borough Council.
- 2 The Bromsgrove and Redditch area is reaching a capacity for new burial space, furthermore, as stated in the Redditch Local Plan, 1.7 hectares of land is required for burial provision¹.

1.1 Options

- 3 There are two potential options this report will consider for Redditch Borough Council. These options include:
 - **Option 1** - Repurpose an area of existing ashes scattering ground at Abbey Cemetery, B97 6RR.
 - **Option 2** – Next Steps for the proposed site 2B: Land North of Morrisons and West of the B4497, B98 0JD. (South of Arrow Valley Country Park).
- 4 Both options will be assessed against burial information across the Bromsgrove and Redditch area, with local policy in mind. Furthermore, the risk for each option will be assessed using Risk Register analysis. Figure 1 shows the location of both Option 1 at Abbey Cemetery, B97 6RR and Option 2 (Proposed Site 2B) at Land North of Morrisons and West of the B4497, B98 0JD.

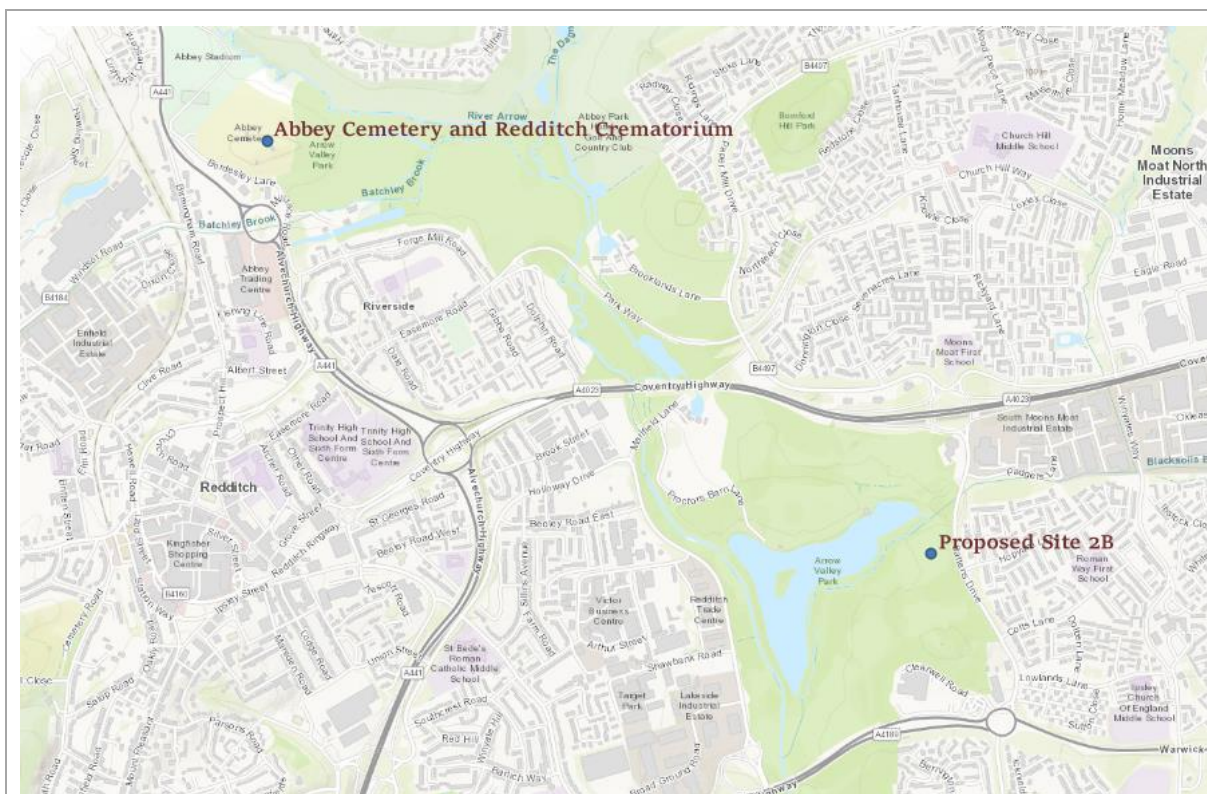


Figure 1. The Location of Option 1 (Abbey Cemetery) and Option 2 (Proposed Cemetery) Within the Redditch Area.

¹ Redditch Borough Council (2017). Available from: [Adopted Borough Of Redditch Local Plan No4 2011 2030](#)

2 Background

2.1 Population Demographics

- 5 The number of individuals living across Bromsgrove and Redditch has shown to have increased (Redditch by 3.4%² and Bromsgrove by 5.9%³) between the 2011 and 2021 Census. Additionally, both areas have been projected a growing and also aging population between 2018 and 2040, this has been presented in Table 1.
- 6 Both an increasing and aging population will produce a strain on current burial provision in the area.

Table 1. Population Projections and Aging Population of Bromsgrove and Redditch (2018-2040).

	2018	2040
Bromsgrove All Persons	98,662	115,103
Bromsgrove 65+	22,168	29,827
% 65+ within Whole Population of Bromsgrove	22.47%	25.91%
Redditch All Persons	84,989	85,819
Redditch 65+	15,450	19,147
% 65+ within Whole Population of Redditch	18.18%	22.31%

2.1.1 Muslim Population

- 7 The percentage of individuals practicing the Muslim faith has been presented in Table 2. This has been accounted for within demographic analysis as all Muslim deaths result in burials, therefore it is important that there is burial space accounting for this religious requirement. Table 2 demonstrates that the Muslim population is increasing across the Bromsgrove and Redditch areas as well as more broadly across the West Midlands.

Table 2. Muslim Individuals Across Bromsgrove and Redditch (2011-2021).

	2011	2021
Bromsgrove Muslim Population %	0.5	0.9
Redditch Muslim Population %	3.4	4.2
West Midlands Muslim Population %	6.7	9.6

2.2 Existing Cemeteries

- 8 The burial numbers from the last five years have been presented in Table 3. The average number of multi-faith new coffin graves (burials) from 2020 to 2024 has been calculated as 71 per annum. This equates to approximately 1-2 burials per week.

² ONS (2023). Available from: [How life has changed in Redditch: Census 2021](#)

³ ONS (2023). Available from: [How life has changed in Bromsgrove: Census 2021](#)

Table 3. Burials Per Annum Across the Bromsgrove and Redditch Area (2020-2024).

Year	2020	2021	2022	2023	2024
New Coffin Grave (Multi-faith)	77	86	61	70	65
Reopen Coffin Burial (Multi-faith)	69	64	65	70	60
New Coffin Grave (Muslim faith)	17	9	8	12	13
Reopen Coffin Burial (Muslim faith)	0	0	0	0	0

- 9 Further to this, Table 4 presents the list of cemeteries within the Bromsgrove and Redditch area, including whether there is accommodation for new burials and whether the cemeteries can accommodate for Muslim burials.

Table 4. New Burial Provision within Bromsgrove and Redditch Cemeteries.

Cemetery	Accommodating for New Burials?	Muslim Burial Provision?	Notes
Bromsgrove New Cemetery, Church Road, Bromsgrove B61 8QH	No	No	No new graves are available.
North Bromsgrove Cemetery, Barley Mow Lane, Catshill, Bromsgrove B61 0LU	Yes	Yes	The newest of cemeteries under Bromsgrove and Redditch Council, enough space remaining for many years currently with the authority owning the land next door and beyond. This Cemetery also holds a Muslim burial section.
Bromsgrove Old Cemetery, Church Lane, Bromsgrove B61 8QH	No	No	No new graves are available.
Abbey Cemetery and Redditch Crematorium, Bordesley La, Redditch B97 6RR	Yes	Not Currently	Approximately 50 full grave spaces left. Work currently underway to source room for a further 15 Muslim burials.
Plymouth Road Cemetery, Plymouth Road, Redditch, B97 4PX	No	No	Plymouth Road is closed, and no new graves are available.
Edgioake Cemetery, Edgioake Lane, Redditch, B96 6BG	Yes	No	sufficient room for roughly 50 grave spaces.

- 10 There are a recorded 100 new grave plots remaining between Abbey Cemetery and Edgioake Cemetery. Moreover, from satellite imagery screening, there appears to be approximately 1 acre of free space remaining at North Bromsgrove Cemetery. CDS assume that there is space for approximately 800 burials per acre. Therefore, there is a calculated total of 900 burial spaces remaining.
- 11 From the average of 71 burials per annum across Bromsgrove and Redditch areas (in Table 3), this leaves approximately 12 years remaining of burial space.
- 12 From the published minutes of the Redditch Borough Council Executive Committee meeting (2021) regarding new cemetery provision, it was stated that deciding to not provide new provision would impact in the region of 100 families each year ⁴.

⁴ Redditch Borough Council (2021). Available from: [Issue - items at meetings - New Cemetery Provision](#)

3 Option 1 - Repurpose an area of existing ashes scattering ground at Abbey Cemetery

3.1 Background and Location

- 13 Abbey Cemetery and Redditch Crematorium, B97 6RR, has been proposed by Redditch Borough Council as an option for further burial accommodation. This would be achieved by repurposing existing space designation for ash scattering and using it to accommodate for full body interment.
- 14 The redline boundary of Abbey Cemetery (Option 1) can be seen in Figure 2, the satellite imagery shows that there is potential space for burials to the eastern area of the site, the purple polygon represents this remaining space. The yellow polygon shows the proposed area for burials and the blue polygon represents this space following a 30% contingency for hard infrastructure, tree protection orders, among others. It is understood that without repurposing the area for ash scattering, there are approximately 50 new burial plots left.



Figure 2. The Redline Boundary of Option 1 (Abbey Cemetery)

3.2 Burial Provision

- 15 From satellite imagery, it appears as if there is approximately 0.9 acres of land remaining for use (the yellow polygon in Figure 2). It is unclear how much of this land has been reserved for future burials (although as stated it has been provided that there are approximately 50 new burial plots remaining) and how much is currently used for ash scattering. However, applying a 30% contingency to the 0.9 acres (to allow for infrastructure, root protection areas etc.) leaves 0.63 acres. This provides an estimated 504 burials. Against the average of 71 new burials per annum,

this would provide burial accommodation for a further estimated 7 years which would help alleviate the burden of burial capacity across the Bromsgrove and Redditch area in the short term.

- 16 Table 5 shows the new burials for multi faith and Muslim faith alongside the numbers of new and re-open loose burials (scattered cremated remains within a plot) of the last five years. There is evidently a greater need for burial accommodation over ash scattering. This is likely because individuals will prefer to keep the ashes of the deceased to scatter in a preferred place with sentimental value.

Table 5. Selected Burials Per Annum at Abbey Cemetery (2020-2024).

Year	2020	2021	2022	2023	2024
New Coffin Grave (Multi-faith)	32	22	27	26	37
New Coffin Grave (Muslim)	11	3	5	8	8
New Purchased Loose Burial	1	1	3	1	0
Re-Open Loose Burial	2	5	8	2	5
Exhumation of Ashes	1	1	2	0	2

3.3 Limitations of Repurposing

- 17 There is limited information on repurposing ash scattering land for burials. However, the reuse of graves is a similar topic and it is understood from The Law Commission that a grave can be reused after 75 years of the original burial⁵. This is of course permitting consent from the family of the deceased person, should there be an objection no reuse can occur for another 25 years.
- 18 It is therefore concluded that there is no current legislation stating that the repurposing of ash scattering land for burial use is not permitted. Furthermore, as this land is not including a physical burial or physical memorialisation, this topic can be taken lightly in comparison to burial re-use.

3.3.1 Public Objection

- 19 It can therefore be suggested that there is reasoning to repurpose ash scattering land for full body interment. However, there may be objection from the public regarding the existing scattered ashes in the memorial garden of Abbey Cemetery. But as there was no original burial (full body interment or ash interment), it would not be possible for any retrieval in exhumation.
- 20 During any grave reuse process, families of the buried must be consulted regarding any changes to the use of the burial ground, land management is therefore dependant on open communication⁶. Although repurposing ash scattering land is a different situation, it is still regarding the repurpose to burial accommodation and surrounds a sensitivity of the deceased. A long-term approach of communications would be necessary.

3.3.2 Loss of Revenue on Memorialisation

- 21 Should the area of memorialisation and ash scattering be repurposed for burials then there would be a loss in revenue for the service of scattering ash remains. This is a charge of £111.00 (Scattering Cremated Remains in Grave or in rose/memorial garden (Roll Back Turf) 18 years and over) as per

⁵ The Law Commission (2024). Available from: <https://lawcom.gov.uk/law-commission-considers-changes-to-update-centuries-old-burial-laws/>

⁶ FOIL (2024). Available from: <https://www.foil.org.uk/wp-content/uploads/2024/10/Burial-Laws.pdf>

the Redditch Borough Council⁷. However, should this be repurposed for burials, the cost of a ‘full earth burial’ (18 years and over) is £802.00.

3.4 Capital Expenditure

22 Based on The CDS Group (CDS) experience and previous projects, the estimated cost for the necessary infrastructure improvements to repurpose the existing ash scattering ground at Abbey Cemetery is anticipated to be approximately £250,000. This estimate accounts for the key elements required to prepare the site for full-body interment, including internal roadway modifications, minor landscaping enhancements, and biodiversity improvements.

23 The primary scope of capital expenditure (CAPEX) includes:

- **Internal Roadway Development (£250k Allocation):**
 - Construction or reinforcement of internal access roads to ensure ease of movement for funeral services and visitors.
 - Potential resurfacing or widening of existing paths to accommodate increased footfall and vehicle access.
- **Site Preparation:**
 - No releveling required, minimizing groundwork costs.
 - Clearance and preparation of designated burial sections to ensure optimal land utilization.
- **Drainage Considerations:**
 - As no major drainage works are required, only minor adjustments may be necessary to ensure adequate surface water management and prevent localised flooding.
- **Landscaping and Biodiversity Enhancements:**
 - Minor landscaping to integrate the new burial ground seamlessly within the existing cemetery layout.
 - Planting of native species and biodiversity improvements to enhance ecological value and maintain a respectful, natural setting.

24 Given the estimated 7-year burial capacity provided by the repurposed area, this investment ensures the sustainable use of available land while balancing financial feasibility and long-term cemetery management goals. Future considerations may include incremental improvements based on public feedback and operational needs.

25 It should be noted that this is an estimate at this stage without a detailed design, and actual costs could be higher depending on various factors such as unforeseen ground conditions, additional infrastructure requirements, or regulatory considerations. Therefore, a contingency of 20-25% is recommended at this stage to account for potential cost variations. Additionally, we advise the council to undertake a **Certificate of Lawfulness** planning application once a concept design has been developed to ensure that the proposed plans align with extant permissions and legal requirements.

⁷ Redditch Borough Council (2024). Available from: [Redditch-Fees-Charges 2024-Apr](#)

4 Option 2 - Next Steps for the Proposed Site 2B: Land North of Morrisons and West of the B4497, B98 0JD. (South of Arrow Valley Country Park).

4.1 Background and Location

- 26 The Land North of Morrisons and West of the B4497, B98 0JD was considered a suitable site for cemetery development following a site feasibility report undertaken by CDS.
- 27 This site was referenced Proposed Site 2B alongside the total 13 sites assessed (of which eight were deemed suitable). The redline boundary of Proposed Site 2B is shown in Figure 3.
- 28 Furthermore, the site's location in relation to local amenities has been presented in Figure 4, the proposed cemetery location is situated within open space, south of the Arrow Valley Country Park along the B4497.



Figure 3. The Redline Boundary of Option 2 (Proposed Site 2B).

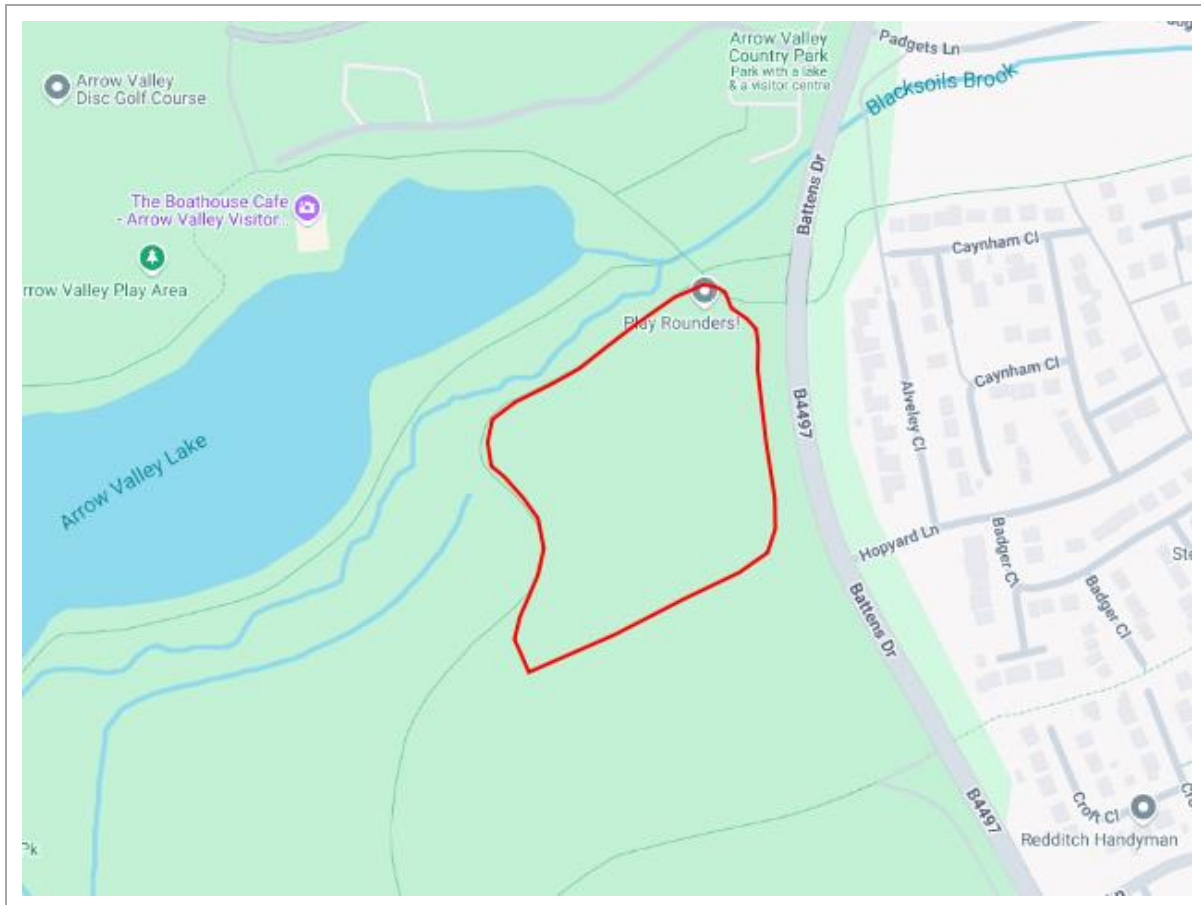


Figure 4. The Redline Boundary of Option 2 (Proposed Site 2B) Alongside the Local Amenities.

4.2 Burial Provision

- 29 The proposed site is approximately 6.2 acres. This would provide for an estimated 4,960 burials (excluding consideration for burial buffers and space for landscaping and potential infrastructure).
- 30 Against the average of 71 new burials per annum, this would provide burial accommodation for a further 69 years. This is of course a high-level calculation based off estimates, which should be noted.

4.3 Feasibility and Potential Constraints

- 31 The site feasibility report originally completed by CDS for potential burial provision across the Bromsgrove and Redditch areas assessed Proposed Site 2B. The key concerns found with the site include:
- Local Policy – The site is designated as Primarily Open Space as per the Redditch Local Plan policies map.
 - Vehicular Access - There is an existing entrance to the east of the site along the B4497 although it is currently warded off with bollards and overgrown. It would therefore need clearing up. The entrance is on a bend but the road is 40 mph and visibility splays are over 120 metres, therefore it is acceptable. Reconfiguring of the road to allow for smooth entry and exit of the site is likely.
 - Geology – There is an absence of superficial soils in the south-eastern half of the site, with deposits of Alluvium in the northwestern half. Alluvium is granular in nature and highly

permeable. The bedrock is of the Mercia Mudstone Group however which is impermeable in nature lowering the risk.

- Hydrogeology - The superficial aquifer is Secondary A and the bedrock aquifer is Secondary B.
- Groundwater Monitoring - To the north of the site there are reported groundwater strikes with groundwater encountered <1.00m depth below ground level.
- Ecology - There are areas of dense woodland surrounding the site and Arrow Valley Lake, further mitigation could be required as both are likely to provide habitats for a number of species.

4.3.1 Policy

32 There are no past or present planning applications that are impacting the site. The site is not constrained by any major local planning policy. However, as per the Redditch Local Plan policies map, the site is in a designated Primary Open Space.

33 Policy 13 'Primarily Open Space' of the Redditch Local Plan states:

"Open space will be protected and, where appropriate, enhanced to improve quality, value, multifunctionality and accessibility. In order to maintain the levels of open space provision in the Borough, proposals which would result in the total or partial loss of Primarily Open Space will not normally be granted planning permission unless it can be demonstrated that the need for development outweighs the value of the land as an open area"

34 Additionally:

"Proposals for development on Primarily Open Space land that contribute to both the Green Infrastructure Network in the Borough and the nature and purpose of the open space may be deemed acceptable by the Borough Council."

35 This demonstrates that a cemetery development would not be impacting Primary Open Space as a cemetery is green and would be protecting the 'Green Infrastructure Network' and enhancing the open space by serving the community.

4.3.2 Environment Agency – Geology and Groundwater

36 As previously stated, there are concerns regarding the geology and groundwater at the site. The geology comprises of either absent superficial deposits or highly granular superficial deposits such as alluvium. The bedrock is a more impermeable group of Mercia Mudstone however. Despite this, it is likely the Environment Agency may object to development of a cemetery at this site, due to risk of burial pollutants encountering groundwater.

37 This objection is more likely due to the previous records of boreholes accounting shallow groundwater at depths less than 1m below the surface.

38 Further investigative works such as a Tier 2 will be required to determine the suitability for a cemetery.

4.3.3 Sport England – Playing Field

39 Upon further investigation this site appears to be listed by Sport England data as a grass pitch. However, satellite imagery suggests this site has not been used as such since 2013 as there are no evident markings of a pitch or playing field following this date. Figure 5 demonstrates the changes in satellite imagery from 2013 (left) to 2025 (right).

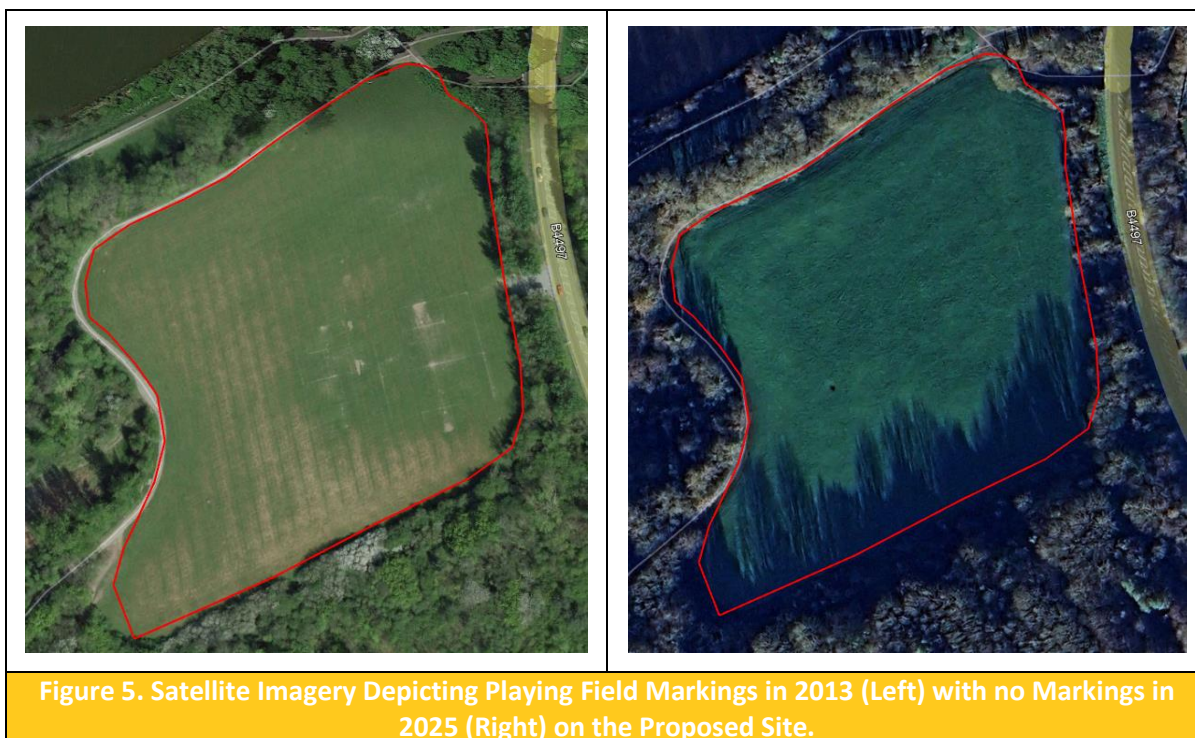


Figure 5. Satellite Imagery Depicting Playing Field Markings in 2013 (Left) with no Markings in 2025 (Right) on the Proposed Site.

40 It is therefore believed that the site is no longer used as a playing field or for sporting use of any kind. However, there is still likely to be objection from Sport England.

4.3.4 20/01774/FULL1 – Objection Example

41 The planning application for a cemetery at Orchard Fields, Bromley, SE20, 8BG is an example of a cemetery proposal objected to by Sport England due to an existing playing field on site. This playing field in question appears neglected (for several years) and is also on a private site, not accessible to the public.

42 The letter of objection, dated 25/08/2020 concludes that *“Sport England objects to the application because it is not considered to accord with any of the exceptions to Sport England’s playing fields policy or with Paragraph 97 of the NPPF.”*

43 Furthermore, Paragraph 97 in question, now Paragraph 104 in the latest edition of the National Planning Policy Framework⁸, states as such:

“Existing open space, sports and recreational buildings and land, including playing fields and formal play spaces, should not be built on unless:

- a) an assessment has been undertaken which has clearly shown the open space, buildings or land to be surplus to requirements; or*
- b) the loss resulting from the proposed development would be replaced by equivalent or better provision in terms of quantity and quality in a suitable location; or*
- c) the development is for alternative sports and recreational provision, the benefits of which clearly outweigh the loss of the current or former use.”*

44 There is strong reason to believe that Sport England will therefore object to a planning application that threatens the recorded playing field on the Proposed Site 2B, whether it is in use or not.

4.4 Public Objection

⁸ NPPF (2024). Available from: [National Planning Policy Framework](#)

45 Due to the site's location, south of the Arrow Valley Country Park, there is likely to be public objection. The site (as shown in Figures 3 and 4) is surrounded by public footpaths and the development of a cemetery may restrict the previous use that members of the public will have had with this site, such as dog walking and family games, among others.

4.5 Capital Expenditure and Timeline.

46 The estimated cost to achieve full planning permission for Proposed Site 2B is approximately £100,000, which includes professional fees and necessary planning assessments. The full site development cost is estimated between £1.25 million to £1.75 million, depending on the level of infrastructure and landscaping works required. Given the uncertainties at this stage, a contingency of 25% is recommended to account for potential unforeseen costs.

47 The primary costs involved in the development include:

- **Planning and Approval Costs (£100k at risk):**
 - Environmental Agency (EA) assessments to address groundwater and geological concerns.
 - Full planning application submission, including potential objections from Sport England and considerations for open space policy.
 - Biodiversity Net Gain (BNG) compliance requirements and mitigation measures.
- **Site Development Costs (£1.25m - £1.75m):**
 - Groundworks and drainage to meet EA and planning standards.
 - Roadway and pathway construction for site access and visitor circulation.
 - Landscaping, biodiversity improvements, and buffer zones.
 - Additional infrastructure such as fencing, memorial areas, and service facilities.

48 Estimated Project Timeline:

- **Planning Application & Approvals (18-24 months):**
 - Completion of required environmental and technical assessments.
 - Consultation with key stakeholders, including EA, Sport England, and local authorities.
 - Submission and review of the full planning application.
- **Post-Planning Design & Procurement (6-12 months):**
 - Development of detailed design based on planning conditions.
 - Tendering and procurement of contractors for site development.
- **Construction & Site Development (6 months):**
 - Groundworks, drainage, and infrastructure implementation.
 - Final landscaping, biodiversity enhancements, and service installations.
- **Settlement & Establishment Period (6-12 months):**
 - Allowing for ground settlement and grass establishment post-construction before the site becomes operational.

49 The total estimated timeline from the initial planning stages to project completion is approximately 3.5 to 4 years. Due to the higher risks associated with securing planning permission compared to Abbey Cemetery, careful consideration of regulatory requirements and stakeholder engagement will be essential to progressing the project efficiently.

5 Risk Analysis

50 The risk for both options has been assessed via Risk Register analysis. These have been presented in Tables 6 and 7. Within the risk register assessment for each option, a list of risks will be assessed for the impact level and the probability level of each risk, these will both be scored on a scale of 1-5, 1 being low risk and 5 being high risk. The overall score is assessed against the Risk Matrix, seen in Figure 6.

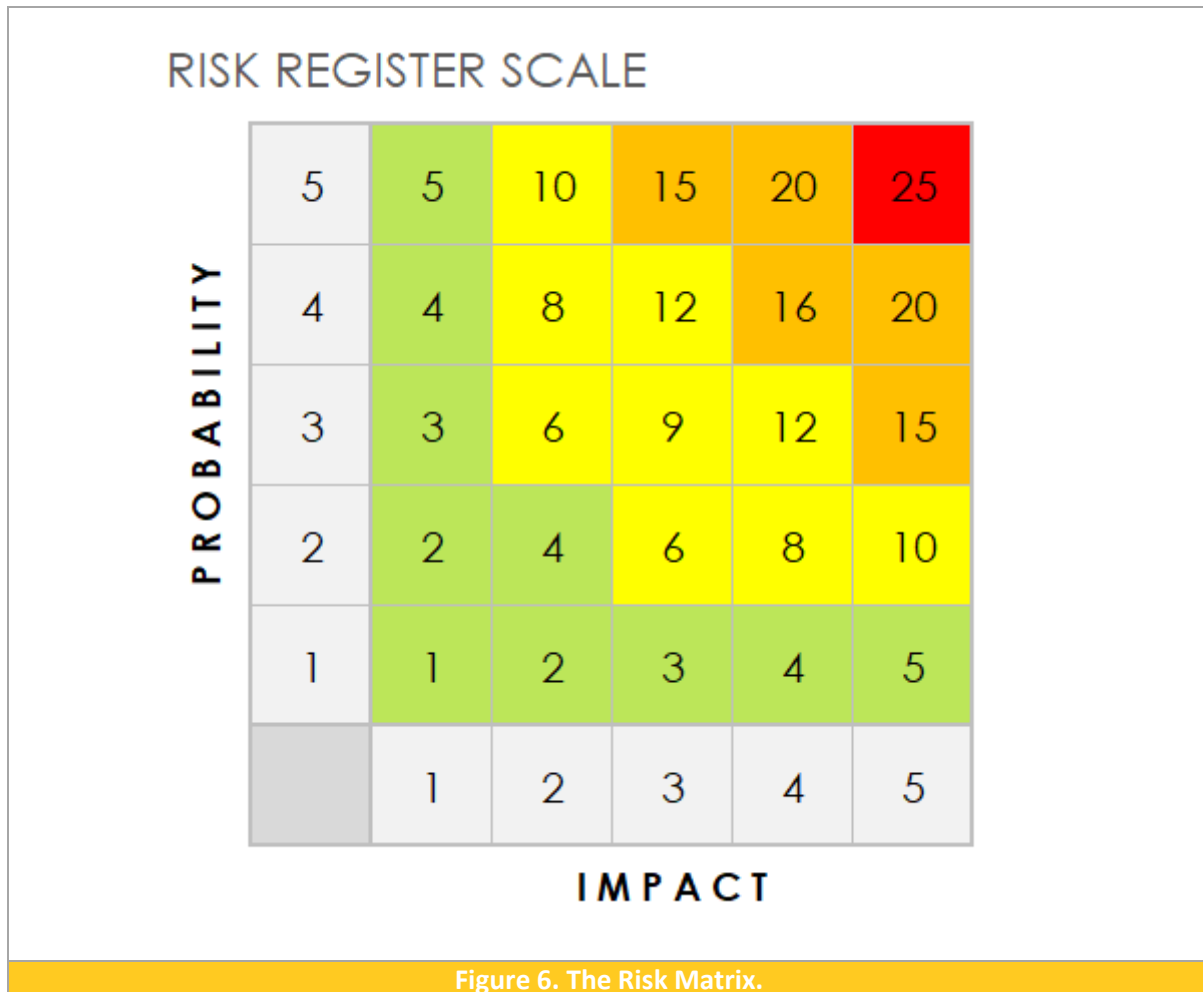


Table 6. Risk Register Assessment for Option 1.

RISK DESCRIPTION	IMPACT DESCRIPTION	IMPACT LEVEL	PROBABILITY LEVEL	PRIORITY LEVEL	MITIGATION NOTES	OWNER
Planning Risks						
Environment Agency Objection	Due to the burial use the EA will need to be consulted. There is a low probability level due to the nature of the existing site (Abbey Cemetery) being a burial ground.	5	2	10	Further field investigative works to be completed at earliest opportunity.	Environmental Engineer / Planning Agent
Public objection	Risk moderate due to sensitivity of repurposing land. However, due to the current legislative permission to conduct re-burials and carry out exhumation, there is less of a legal concern but rather a moral objection.	3	5	15	Need to conduct comprehensive public consultation to ensure the public understand need for burial space.	Planning Agent / Council
Highways	Access is already established for the existing cemetery, therefore the risk is low.	3	1	3	Engage with a highways consultant at earliest convenience.	Planning Agent/ Traffic Consultant
Site Risks						
Attenuation Basin Requirement	Surface water issues could result in the requirement for an attenuation basin which could reduce burial space on site, due to the requirement for a 30m burial buffer around drainage features.	2	3	6	Liaise with a drainage engineer early on	Civil Engineer

Drainage Outfall	Need to ensure there is a drainage outfall and get permission from the LLFA and utility company (if required). There is a risk of not being able to contain consent if the current infrastructure is overstretched.	3	2	6	Liaise with a drainage engineer early on	Civil Engineer
Contamination	Could be made ground below the site which needs treating, risk highlighted due to surrounding roads but is low as the site is not in direct proximity.	3	2	6	A Tier 2 investigation would highlight the probability of this risk	Environmental Engineer
Earthworks	Moderate risk due to nearby road.	4	2	8	Any earthworks close to road, must consult with necessary stakeholders.	Civil Engineer
TPO's / tree felling licenses	To free up burial space, tree felling may be required, the risk is moderate due to multiple trees on site.	3	3	9	Arboricultural assessment required.	Arboricultural surveyor
Project Risks						
Budgets	Investment required to accommodate burial land, this is council owned land so the risk is low. The requirement for a full planning application and extensive programme increases risk of inflation and therefore increases probability.	5	2	10	Consistent cost plans against the business case must be undertaken. A balancing measure against a new out of borough site must be reviewed.	Council / Agent
Burial Space	Certain constraints could reduce the overall burial capacity, due to new EA guidance.	4	3	12	Need to undertake all necessary pre-application steps to mitigate and reduce risk.	Planning Agent / Design team

Average Risk	8.5
Total Risk	85

Table 7. Risk Register Assessment for Option 2.

RISK DESCRIPTION	IMPACT DESCRIPTION	IMPACT LEVEL	PROBABILITY LEVEL	PRIORITY LEVEL	MITIGATION NOTES	OWNER
Planning Risks						
Environment Agency Objection	Due to a change of use - the EA will need to be consulted, and a Tier 2 Groundwater assessment will need to be completed. Moderate probability level due to site having geology of moderate risk (absent and alluvium superficial deposits) and groundwater monitoring would be required due to the recorded shallow groundwater.	5	4	20	Tier 2 Groundwater Assessment to be completed at earliest opportunity.	Environmental Engineer / Planning Agent
Archaeology Risk	Due to change of use, we will have to liaise with the county archaeologist, they may request a geophysical survey which could result in further archaeological works required. Due to the intrusive nature of burials - sometimes archaeology can be prohibitive to development on areas of the site and can result in major costs for trial trenching. However, there are no mapped archaeological sites or listed buildings in the area making this low risk.	4	1	4	To conduct early discussions with County Archaeology	Planning Agent

Public objection	Risk moderate due to sensitivity of replacing open land within a park space, the risk is therefore moderate to high.	3	5	15	Need to conduct comprehensive public consultation to ensure the public understand need for burial space.	Planning Agent / Council
Sport England Objection	The risk is moderate to high due to the site being mapped as a grass pitch on the Sport England database. Satellite imagery shows this playing field to no longer be in use, Sport England will aim to protect open space for health and wellbeing.	5	4	20	To conduct early discussions with Sport England.	Planning Agent
Ecological risks	Possibility of having to do further surveys to attain planning permission, there is dense woodland and Arrow Valley Lake bordering the site. Both are likely to provide habitats for a number of species, this provides a moderate to high risk.	4	4	16	Conduct a PEA survey at the earliest opportunity.	Planning Agent / Ecologist
Biodiversity Net Gain	Required on all new sites - must achieve >10% net gain. There are no current conservation designations on site, there is a dense woodland bordering the site, risk would be moderate. If conditions are not met planning could be rejected.	5	3	15	Need to do an early screening analysis - landscape architect must work closely with an ecologist at the earliest opportunity.	Planning Agent / Ecologist / Landscape Architect
Highways	There is historic established access currently prevented via bollards. This could be made accessible and current visibility splays are clear which provides a low risk.	4	2	8	Engage with a highways consultant at earliest convenience to undertake assessment.	Planning Agent/ Traffic Consultant

Planning Consent	This application is not impacted by any conservation policy but there is the difficulty of geology and groundwater risk. If all necessary steps are taken and the need is strong to be placed on this site, then a consent could be granted but risk is moderate.	5	4	20	Need to undertake all necessary pre-application steps to mitigate and reduce risk.	Planning Agent
Site Risks						
Attenuation Basin Requirement	Surface water issues could result in the requirement for an attenuation basin which could reduce burial space on site, due to the requirement for a 30m burial buffer around drainage features.	2	3	6	Liaise with a drainage engineer early on	Civil Engineer
Drainage Outfall	Need to ensure there is a drainage outfall and get permission from the LLFA and utility company (if required). There is a risk of not being able to contain consent if the current infrastructure is overstretched.	3	2	6	Liaise with a drainage engineer early on	Civil Engineer
Contamination	Could be made ground below the site which needs treating, risk highlighted due to surrounding roads, but is low as the site is not in direct proximity.	3	2	6	The Tier 2 investigation will highlight the probability of this risk	Environmental Engineer
Earthworks	Moderate risk due to nearby road.	4	2	8	Any earthworks close to road, must consult with necessary stakeholders.	Civil Engineer
TPO's / tree felling licenses	To free up burial space, tree felling may be required, the risk is low with trees only bordering the site.	1	3	3	Arboricultural assessment required.	Arboricultural surveyor

Project Risks						
Budgets	Significant investment required for change of use to burial land, this is council-owned land so the risk is lower. The requirement for a full planning application and extensive programme increases risk of inflation and therefore increases probability.	5	3	15	Consistent cost plans against the business case must be undertaken. A balancing measure against a new out of borough site must be reviewed.	Council / Agent
Burial Space	Certain constraints could reduce the overall burial capacity, due to new EA guidance.	4	3	12	Need to undertake all necessary pre-application steps to mitigate and reduce risk.	Planning Agent / Design team
Average Risk				11.6		
Total Risk				174		

5.1 Summary

- 51 The risk register analysis shows both Option 1 and Option 2 to be of moderate risk during a planning application process. Option 2 does have a higher total risk of 174 with an average of 11.6, Option 1 in comparison has a risk total of 85 and an average risk of 8.5.
- 52 The key risks for Option 1 include the archaeological risk and public objection. The key risks for Option 2 include the potential objection from the Environment Agency and the risk of ecology, public objection, and Sport England objection regarding a lack of playing field facilities. Furthermore, as this development would require a change of use, unlike Option 1, there is a greater risk retrieving planning consent.
- 53 When considering burial capacity timeframes, Option 1 would be suitable for short-term alleviation by providing burial capacity for a further estimated 7 years, whereas burial space as a result of a full planning application for a change of use (such as Option 2) would future proof burial provision.
- 54 Of course, the budgeting outcomes do differ and CAPEX analysis shows Option 2 to have a predicted cost of £100,000 for a full planning application, followed by £1.25 million to £1.75 million for full site development. Whereas the cost for development for Option 1 is approximately £250,000.
- 55 It is recommended that the risk register analysis in Tables 6 and 7 are thoroughly considered to review an option moving forward. Option 1 is initially recommended as it would alleviate the burden of burial capacity in the short-term, but a further planning application for a cemetery is recommended in the long-term. CDS recommend that Redditch Borough Council begin considering the provision of a new cemetery as this type of development can take approximately four to five years from inception to operation.

6 Conclusion

- 56 The purpose of this report was to review the risk analysis of two options for the future burial provision for Redditch Borough Council. Option 1 being to repurpose an area of existing ash scattering land at Abbey Cemetery, and Option 2 being the next steps for the Proposed Site 2B cemetery development.
- 57 The demographic analysis of the Bromsgrove and Redditch area showed both an increasing and aging population which would provide a strain on current burial provision. Investigation into burial statistics in the area demonstrated the average number of multi-faith new coffin graves (burials) from 2020 to 2024 to be calculated as 71 per annum.
- 58 Moreover, of the existing cemeteries across the Bromsgrove and Redditch area, there are a recorded 100 new grave plots remaining between Abbey Cemetery and Edgioake Cemetery and from satellite imagery screening, there appears to be approximately 1 acre of free space remaining at North Bromsgrove Cemetery. This has been calculated to provide a predicted 12 years remaining of burial space. Therefore, an option providing the most burial provision is strongly advised.
- 59 Option 1 (repurposing at Abbey Cemetery) provides an estimated burial accommodation for a further 7 years (including a 30% contingency) and Option 2 provides an estimated burial accommodation for a further 69 years.
- 60 Regarding the possibility of repurposing ash scattering land (Option 1), there is limited information on this action across existing burial grounds. Public objection is a main concern due to the ethical issue of reusing a memorial space for burials, however its closest similarity of conducting new burials in the replacement of old existing burials, is permitted (under regulation). Moreover, there is no current legislation stating that the repurposing of ash scattering land for burial use is not permitted.
- 61 Option 1 is the Less costly of the two options as it is an existing burial ground and would be a case of road infrastructure to allow access. If the decision is to move forward with Option 1, obtaining a certificate of lawfulness is recommended once a concept design has been developed.
- 62 Option 2 is the more costly of the two as full planning application for change of use required. There is the potential for EA and Sport England concerns, due to the higher risks associated with securing planning permission compared to Abbey Cemetery, careful consideration of regulatory requirements and stakeholder engagement will be essential to progressing the project efficiently.
- 63 Redditch Borough Council should consider the CAPEX and risk register analysis for both options, with focus on Tables 6 and 7. Following an option choice, it is recommended that these potential objections are to be addressed and stakeholder engagement and relevant surveys should be instigated.
- 64 When regarding the remaining burial space across the Bromsgrove and Redditch area, Option 1 would be suitable for short-term alleviation by providing burial capacity for a further estimated 7 years. This allows Redditch Borough Council time to investigate developing future burial provision by a new planning application for a cemetery. CDS recommend that Redditch Borough Council begin considering the provision of a new cemetery as this type of development can take approximately four to five years from inception to operation.

7 Report Verification

Report Completed By: Jessica Cheal MSc, Graduate Planner

Report Sign Off: Ben Copeland BSc (Hons), Senior Planning Projects Manager

Date: 17/02/2025

Version Control: Version V1.5

Executive Committee**11th March 2025****Data Strategy (including Data Standards Policy)**

Relevant Portfolio Holder	Councillor Baker
Portfolio Holder Consulted	Yes
Relevant Assistant Director	Peter Carpenter
Report Author	Job Title: Business Improvement Manager Contact: Helen Mole email: h.mole@bromsgroveandredditch.gov.uk Contact Tel: 01527 881685
Wards Affected	No specific ward relevance
Ward Councillor(s) consulted	None
Relevant Council Priority	High Quality Services
Non-Key Decision	
If you have any questions about this report, please contact the report author in advance of the meeting.	

1. RECOMMENDATIONS**The EXECUTIVE Committee: RESOLVE**

That the proposed Data Standards Policy be agreed and implemented as a guidance policy for all employees.

2. BACKGROUND

- 2.1 During 2024, it was understood that the data the organisations captured, stored and used could be improved, so we embarked on engaging with managers, service teams, and corporate leadership to investigate this further. This confirmed the need to prioritise our data to improve data management and quality across the organisations.
- 2.2 Considerable progress has been made, and in order to build upon our current position this Data Standards Policy has been developed.
- 2.3 The Business Improvement Team (BIT) has engaged with service teams, managers and leadership, researching extensively around data improvement alongside ongoing collaboration with Local Government Association (LGA) to build the content covered in this policy.
- 2.4 The policy details clear guidelines and best practices to ensure consistency, quality, compliance, increased data security, efficiency, interoperability, trust, and transparency, in data management.

Executive Committee**11th March 2025**

- 2.5 The BIT intend to continue in facilitating and supporting the organisations move to being a data driven authority. Further detail can be found in the supporting information.
- 2.6 The Data Standards Policy supports the existing Customer Digital Strategy 2022 - 2026 to provide the following:
- 2.6.1 A clear guidance framework for standardising and managing our data for consistency and quality across both organisations.
 - 2.6.2 A standard to improve the quality of our customer centric data to improve accessibility and availability.
 - 2.6.3 An accountability framework for roles and responsibilities regarding the management and processing of our customers data.
 - 2.6.4 Improved data quality standards for better insight and performance management.
 - 2.6.5. A standard to support a 'single source of truth' or 'golden record' for our customers

3. OPERATIONAL ISSUES

- 3.1 Data quality is needed for improvement, organisation wide to ensure we meet customer demand and expectations.
- 3.2 The policy will provide a guide and framework to move from a fragmented and siloed approach to how we manage our data, to a more consistent and formalised process.
- 3.3 Using consistent data formats will enable collaborative and joined up working to improve efficiencies, cross service and system working and data security.
- 3.4 Culturally we will move to become a data driven organisation, through engagement, collaboration, knowledge, and training.
- 3.5 There potentially will be operational implications moving forward relating to HR and ICT, but these will be managed as encountered, within services workforce planning, service business plans, widescale collaboration and aid in the forthcoming local government reform and devolution preparation.

4. FINANCIAL IMPLICATIONS

- 4.1 Estimating the financial costs of improving data, namely standardising data formatting, in both existing and future technical systems is challenging. Research has shown the circumstances and current

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positions of other local authorities on improving data journey are all varied therefore have no similar comparisons.

- 4.2 System adjustments depend on specific requirements, obtaining accurate quotes is difficult without comprehensive details, which will only become available as the process progresses.
- 4.3 Given these uncertainties, an estimate of £10,000 per system is proposed as a reasonable approximation to start addressing data cleansing issues in our six core Systems, which hold almost 90% of our data.
- 4.4 This estimate of £60,000 acknowledges that actual costs may differ based on the complexity and scope of necessary requirements.
- 4.5 Currently the main systems are:
- Civica CX (Housing)
 - Civica X Press (Elections)
 - Civica Open Revs (Revenues and Benefits)
 - IDOX – Uniform (Planning/Building Control & Env Services/Legal)
 - Abavus - (Env Services)
 - TechOne (Finance)
- 4.6 Regulatory Compliance (Adopting common data standards helps ensure compliance with regulations like GDPR and therefore non-compliance can lead to fines and reputational damage).
- 4.7 Operational efficiency: standardised data can streamline processes, reducing costs and improving decision making, however initial implementation needs to be driven and properly resourced.
- 4.8 Data Security – data governance reduces risk of data breaches which can result in financial and legal liabilities.

5. LEGAL IMPLICATIONS

- 5.1 Data Protection Law specifically requires data protection policies to be held by organisations where proportionate. The detail of the policy may vary from organisation to organisation but the Information Commissioner is clear that adopting an effective Data Standards Policy provides a robust framework to assist organisations to take practical steps to ensure compliance with Data Protection Law.

Executive Committee**11th March 2025****6. OTHER - IMPLICATIONS****Relevant Council Priority**

6.1 The policy links into the Councils priorities by:

6.1.1. To support the improvement and quality of our data standards which will provide the valuable insight required to measure performance against our council priorities.

6.1.2 Improving data will improve decision making.

6.1.3 Enabling High Quality Services

6.2 Climate Change Implications

None

6.3 Equalities and Diversity Implications

6.3.1 If implemented effectively, the policy should have a positive impact on EDI as the data we hold would be more accurate and timely and any changes/updates to data would be easier to apply, ensuring that we hold the relevant and up-to-date information on our residents, making it more likely we could deliver appropriate services.

6.3.2 A more standardised and streamlined process could reduce manual errors and improve efficiency, which would benefit people with a protected characteristic as their data will be accurate and a less disjointed view of our residents, especially the most vulnerable, may allow the organisation to undertake appropriate and proportionate preventative measures.

- Effective standards would also allow the organisation to better meet the requirements of the Public Sector Equality Duty, as meaningful data would allow the organisation to:
 - understand and respond to the needs of communities and the workforce
 - uncover and address discrimination, biases and inequalities
 - understand the impact of policies and practices on people who share particular protected characteristics.

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6.3.3 The policy also prioritises the robust management of data and through applying the requirements of GDPR, equalities related data, including that classified as 'special category data' would be both effectively used and meaningfully protected. As the organisations data use grows, further equality assessment will be undertaken, in collaboration with Information Management, to ensure that equality and ethical questions are considered and addressed as appropriate.

7. RISK MANAGEMENT

Please see Section 3 (Operational Issues)

8. APPENDICES and BACKGROUND PAPERS

Data Standards Policy 2025 – 2028
Data Standards Policy Information Pack

Links:

Customer Digital Strategy 2020 – 2026 [RBC](#)
LGA Data Maturity [LGA Maturity Model](#)

9. REPORT SIGN OFF

Department	Name and Job Title	Date
Portfolio Holder	Cllr Baker	Feb 25 (PC)
Lead Director / Assistant Director	Peter Carpenter	19/2/25
Financial Services	Peter Carpenter	19/2/25
Legal Services	Claire Green	11/02/25
Policy Team (if equalities implications apply)	Rebecca Green	11/02/25

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Climate Change Team (if climate change implications apply)	Matthew Eccles	11/02/25
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Bromsgrove District and Redditch Borough Councils Data Standards Policy



Purpose



People



Pride



Performance

Date issued: Jan 2025

Version number: 1



**Bromsgrove
District Council**
www.bromsgrove.gov.uk



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1. Introduction

Effective management and utilisation of data is increasingly important in our digitally connected council. As the Local Authority we are custodians of our resident's data and information, we must ensure that data is collected, stored, shared and disposed of in a standardised, compliant, and secure manner.

This Data Standards Policy is designed to serve as a guide to ensure consistent practices and procedures are implemented for data management by outlining the standards, guidelines, and responsibilities that we must adhere to in all transactions and interactions with data whilst emphasising the importance of protecting sensitive information and complying with data protection regulations.

By establishing clear standards, this policy aims to enhance data quality, accessibility, and interoperability across all service areas, systems, and external stakeholders.

Maintaining the ongoing integrity and quality of data is vital to enable effective decision-making and improved service delivery for our customers.

This policy applies to all council employees, contractors, and third-party service providers who handle council data, including, but not limited to digital files, databases, paper records, and information systems. It includes data collected, processed, and shared within council operations, and data exchanged with external partners, government agencies, and members of the public.

Senior Leadership Team and Corporate Leadership Team supported by the System and Data Governance Board and Group (made up of ICT, Business and Data Improvement Officers and other enabling Service Managers) will ensure that appropriate resources and training are provided to support implementation and compliance with this policy.

A Summary Policy Document providing an overview of the key aspects of this policy is shown in Appendix Three.

2. Data Governance and Documentation

Data governance and documentation are vital in today's connected data-driven world. Effective data governance helps the organisation to maximise the value of its data, mitigate risks, and comply with regulatory requirements.

Documentation involves the systematic recording of data-related strategies, policies, processes, guidelines, standards and procedures. It provides a comprehensive reference point for data governance practices, ensuring transparency, clarity, and consistency in data management.

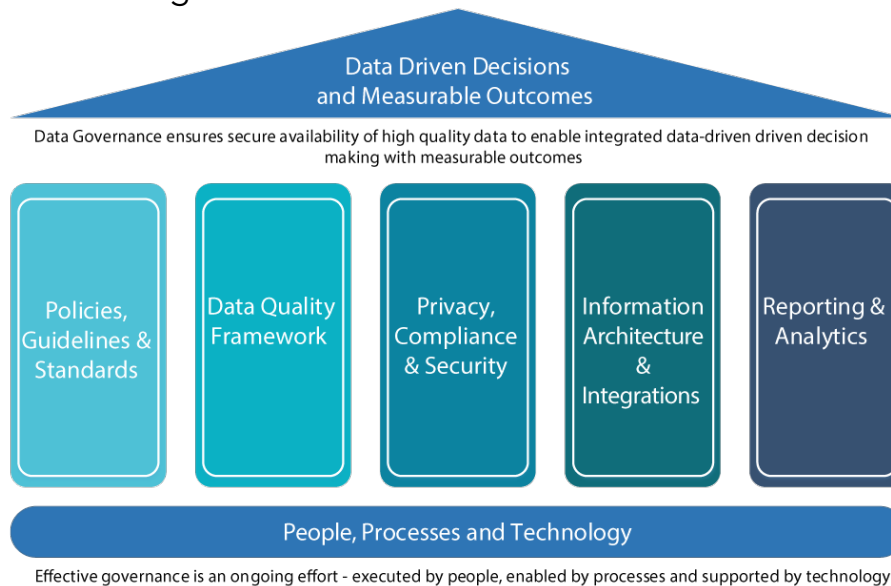


Image source: <https://cio.ubc.ca/node/3215>

Data Governance:

A System and Data Governance Board has been established to provide governance for the overall management, control, and protection of the organisation's data assets. The Board will be responsible for establishing strategies, policies, processes, standards and guidelines to ensure the proper collection, storage, usage, and sharing of data.

The Systems and Data Governance Board aims to promote data quality, consistency, integrity, and security across the organisation.

Key components of data governance include:

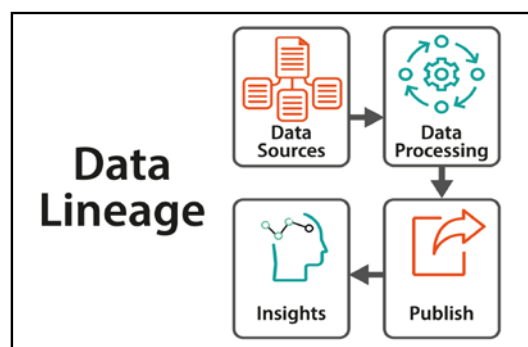
- **Data, Performance, and Insight Strategy:** a strategic plan that aligns data management practices with business objectives, defining data governance goals, and establishing roles and responsibilities.
- **Data Policies and Strategies:** strategies, policies, guidelines and standards that dictate how data should be managed, including data quality standards, data retention policies, and data access and usage guidelines.
- **Data Business Management:** designating people in service areas (Data Stewards) who are responsible for ensuring data integrity, compliance with policies, and promoting data quality within their respective services.
- **Data Lifecycle Management:** managing data throughout its lifecycle, including data collection, storage, retention, sharing, and disposal, in compliance with our data protection and retention practices and the customers rights.
- **Data Quality Management:** implementing processes and controls to monitor and improve the quality of data, including data validation and cleansing against an agreed data model.

Documentation:

By documenting data governance practices, the organisation can establish clear guidelines, facilitate communication, ensure consistency, ownership and provide a reference for training and auditing purposes. It helps in promoting transparency, accountability, collaboration, knowledge sharing and compliance with regulations and industry best practices. It can also enhance decision-making by supporting more reliable and actionable insights from data assets by having a structured and comprehensive record of data-related processes, policies and procedures.

Effective documentation includes:

- **Data Dictionary:** a document that defines and describes the data elements, their attributes, and relationships for each system. It helps in standardising terminology and promoting consistent understanding of data across the organisation. This should be developed when new systems are implemented.
- **Data Lineage Diagrams:** visual representations of how data moves within a system and in the wider organisation, illustrating data sources, transformations, and destinations. Data flow diagrams help in understanding data dependencies and identifying potential risks or bottlenecks.
- **Data Strategies, Policies, Procedures and Information Asset Register:** documenting the strategies, policies, standards and guidelines, and procedures related to data and information management, data security, data privacy, and data usage. These documents provide a reference for employees to understand and adhere to data governance principles.
- **Responsibilities:** clear responsibilities for data input to ensure staff understand what is required of them in their roles.
- **Data input standards, processes, and guidelines:** to provide staff with a reference point for accurate and consistent data entry (Appendix One)



3. Data Principles

The System and Data Governance Board will be the platform for decisions relating to the key data principles below:

- **Data Quality, Validation and Verification:** Data shall be accurate, complete, relevant, and timely, with defined procedures for data validation, verification, and cleansing. KPIs will be used to measure performance².
- **Standardised Data Formats:** These should be used to provide a common structure and syntax to allow data to be easily shared, exchanged, and interpreted across different systems, applications, and organisations. Standardised data formats facilitate interoperability and promote seamless data integration and analysis.
- **Data Sharing and Interoperability:** Council departments shall adopt common data formats, standards, and protocols to facilitate seamless data sharing and interoperability between systems and external stakeholders.
- **Data Retention and Disposal:** Retention periods for distinct types of data shall be defined, along with secure disposal methods to ensure compliance with data protection legislation.
- **Data Access and Transparency:** Council data shall be made accessible to the public in accordance with Freedom of Information and Transparency requirements, while safeguarding sensitive or confidential information. (see section 9).
- **Data Privacy and Security:** Measures shall be implemented to protect data from unauthorised access, loss, alteration, or disclosure, in compliance with data protection laws and regulations. Personal and sensitive information shall be managed in accordance with data protection principles, respecting individuals' rights to privacy and confidentiality. The Council is committed to maintaining the following relevant accreditations to ensure that we meet the minimum standards imposed by legislation and regulation: Public Services Network (PSN), Data Security and Protection (DSP) Toolkit, NHS Data Security and Protection Toolkit.

4. Data Quality, Validation and Verification

The System and Data Governance Board will be the platform for decisions relating to the data quality, validation, and verification, including identifying measurable KPIs:

Data validation and verification are critical for maintaining high-quality data. They are essential processes in data management that ensure the accuracy, completeness, and reliability of data. They help prevent errors, identify discrepancies, and improve the trustworthiness of data for effective decision-making, reporting, and operational processes. Both processes are typically performed before data is entered into a system or used for analysis and decision-making.

Data Validation

Data validation involves checking the integrity and quality of data to ensure it meets predefined rules, standards, and requirements. It provides an opportunity to verify whether the data to be used in the system is valid, consistent, and appropriate for its intended use.

The main objectives of data validation are:

- **Completeness:** Ensure that all required fields or data elements are present and populated accurately.
 - **KPI examples:** % missing values, % fields that contain data, Ratio of complete records to total number of records.
- **Accuracy:** Verify that data is entered correctly and matches the expected values or formats. Perform all necessary checks to ensure that mandatory fields are populated appropriately.
 - **KPI examples:** % of incorrect values in a dataset (error rate), % of data that is accurate, number of data points outside accepted predefined ranges.
- **Consistency:** Check for logical consistency and coherence within the data. This includes verifying relationships between data elements, identifying discrepancies, and ensuring compliance with any predefined rules or constraints.
 - **KPI examples:** number of conflicting records, % of data that complies to predefined data standards, cross-field and cross system consistency rate.
- **Integrity:** Ensure that data is free from errors, duplication, or corruption. This involves detecting and resolving data inconsistencies or conflicts. Check all data inputs for completeness, accuracy, and consistency before entering them into the system.
 - **KPI examples:** % of data duplication rates, data anomaly detection (patterns and outliers in data), consistency in relationships between tables in a database.

Data Verification

Data verification focuses on confirming the accuracy and authenticity of data by comparing it against reliable and authoritative sources. It involves cross-referencing data with trusted references or validating it through independent means. The main objectives of data verification are:

- **Source Verification:** Confirm the accuracy and reliability of data by verifying it against reliable sources, such as official documents, databases, subject matter experts or individual customers when necessary.
- **Accuracy Verification:** Perform checks or comparisons to verify the accuracy of data, ensuring that it aligns with expected values or information from reliable sources.
- **Data Integrity Verification:** Ensure the integrity of data by checking for data consistency, completeness, and adherence to predefined standards or business rules
- **Implementation and use of Automated Validation:** This includes use of data entry controls, such as format checks, range validations, and logical consistency checks, where applicable.

5. Standardised Data Formats

Standardised data formats refer to the use of consistent and predefined formats for representing and structuring data elements within a system or across different systems (Appendix Two). These formats establish a set of rules and conventions that govern how data is organised, stored, transmitted, and interpreted.

The System and Data Governance Board will be the platform for decisions relating to the standardised data format below:

- **Consistency and Interoperability:** ensuring consistency in how data is represented and interpreted across different systems, applications, or platforms. This promotes interoperability and seamless data exchange between systems, allowing for efficient integration and data sharing.
- **Data Integrity and Accuracy:** defining specific data formats throughout the system, such as field lengths, data types (text, numeric, date), and formats (e.g., date formats like dd/mm/yyyy), helps to maintain data integrity and accuracy. They prevent data entry errors, ensure data is stored and transmitted correctly, and reduce the risk of data corruption or misinterpretation.
- **Data Integration and Analysis:** facilitating data integration and analysis processes. When data is consistently formatted, it becomes easier to combine and compare data from multiple sources, perform data transformations, and conduct meaningful analysis. This leads to more reliable insights and informed decision-making.
- **Efficiency and Automation:** simplifies data processing and automation tasks. With consistent formats, automated processes can be designed and implemented to manipulate, validate, and transform data efficiently. This reduces manual effort, minimises errors, and improves overall operational efficiency.
- **Reporting and Compliance:** supports reporting requirements and compliance with regulatory frameworks. Many reporting standards and frameworks mandate the use of specific data formats to ensure consistency, comparability, and transparency in reporting practices. Especially when reporting performance data to central government or senior management.

- **Data Migration and System Upgrades:** when migrating data between systems or upgrading existing systems, standardised data formats facilitate a smooth transition. Consistent formats simplify data mapping and transformation tasks, reducing the complexity and effort involved in data migration projects. Create a standardised data migration plan that is adaptable to each scenario and includes UAT, SIT and other activities.
- **Data Governance and Documentation:** contribute to effective data governance practices. They enable clear documentation of data structures, field definitions, and data relationships, promoting transparency, consistency, and understanding across the organisation.

Mandatory Fields

Mandatory fields, also known as required fields or compulsory fields, are data input fields that must be completed or populated before a form or system can be submitted or saved successfully. These fields are marked as mandatory to ensure that essential information is provided and to prevent incomplete or inaccurate data from being entered. Mandatory fields should also be formatted to a standard across all systems. E.g.: UPRN, Name, Postcode.

It is essential to strike a balance between collecting necessary information and burdening users with an excessive number of mandatory fields. Clear communication, user-friendly interfaces, and well-defined data input standards can help with the effective implementation of mandatory fields in systems.

Purpose of Mandatory Fields

- **Ensuring Completeness and Uniformity:** ensures that all necessary information is captured and consistent and no vital data is missing.
- **Data Integrity and Accuracy:** improves data quality and accuracy, reducing errors and inconsistencies.
- **Enforcing Data Standards:** promotes adherence to predefined data standards, conventions, and validation rules.

Identification of Mandatory Fields

- **Visual Indicators:** mandatory fields are typically marked with asterisks (*), labels indicating their mandatory status, or visual cues like bold or highlighted text. Appropriate error messages or prompts should be provided on screen when mandatory fields are left blank. % of errors/blank fields will be reported to SADG as part of the Data Steward auditing responsibility.
- **System Prompts:** users may receive error messages or prompts if mandatory fields are left blank when attempting to submit or save a form.
- **Documentation:** data input guidelines or accompanying instructions should identify which fields are mandatory, providing clarity to users. These should be clearly communicated to users. Ideally this should be specified when new systems are implemented.
- **Definition and maintenance:** of mandatory fields will be overseen by the Systems and Data Governance Board.

Importance of Completing Mandatory Fields

- **Data Integrity:** ensure that critical data required for accurate record-keeping, analysis, or decision-making is captured consistently. Ensure that staff understand the importance of completing all required fields accurately and promptly.
- **Business Processes:** facilitates smooth workflow processes, as missing or incomplete data can lead to delays or errors in subsequent tasks or actions
- **Regulatory Compliance:** may align with regulatory or legal requirements, ensuring the organisation captures essential information to meet compliance obligations.

Considerations for Designating Mandatory Fields

- **Relevance:** only essential fields should be designated as mandatory to avoid unnecessary activity for users and data overload
- **User Experience:** maintain a balance between data collection needs and a user-friendly experience, ensuring that mandatory fields are clearly identified and easily navigable.
- **Data Validation:** mandatory fields often accompany data validation checks to ensure the accuracy and completeness of the entered information. These should be audited by the Data Stewards.

Controlled Vocabularies and Code Lists

Controlled vocabularies and code lists are two tools used in information management and data organisation to ensure consistency and standardisation in the representation and classification of data in a system. The key difference between controlled vocabularies and code lists is the level of granularity and usage. Controlled vocabularies focus on providing standardised terms or phrases for describing concepts, while code lists focus on providing standardised codes or identifiers for specific data values

Controlled Vocabularies: refer to a predefined and limited set of terms or phrases that are used to describe or categorise information within a specific domain or context. These vocabularies should be carefully managed to ensure that the terms used to describe things are consistent, unambiguous, and widely understood. Controlled vocabularies are more suitable for text descriptions and can be used for indexing, searching, and retrieval purposes.

Code Lists: are a collection of codes or identifiers that represent specific types, categories, or values of data in a system or database. These codes are typically alphanumeric and are assigned to specific attributes or options within a dataset. Code lists are often used in databases, data exchange formats, or programming interfaces to ensure consistency in data representation and interoperability between systems.

Examples of these would be country codes or product codes etc.

It is important that each service in accordance with standards and subject to approvals from the SAD Governance Group and Application Support:

- Utilise controlled vocabularies and code lists for standardising specific fields where appropriate, such as street types, service categories, or other relevant classifications.
- Maintain and update these lists regularly to accommodate changes and new requirements.

NB: where fields become relevant in the future for reporting purposes that are not mandatory, it will be service management responsibility to acknowledge and work with service Data Stewards and Application Support to add mandatory fields as appropriate and to provide update to users appropriately

6. Data Ownership - Roles and Responsibilities

Data ownership should form part of service users' responsibilities (as subject matter experts) who currently have responsibility for reviewing, reporting, and/or auditing data within their service areas across all systems and data sources.

A) Data Entry/Input

- Responsible for inputting data accurately and efficiently into the system.
- Ensures that all required fields are completed according to the data input standards.
- Performs data validation checks and verifies the accuracy and completeness of entered data.
- Reports any inconsistencies, errors, or issues encountered during data entry to the relevant supervisor or manager.
- Adheres to data privacy and security protocols, ensuring the confidentiality of sensitive information.

B) Service Data Stewards (Data Custodians)/ Service Manager (Data Owners)

- Are the data owners of data sets within their service areas.
- Establishes and maintains data input standards, processes, and guidelines for their service/s area.
- Provides guidance, training, and support to staff with responsibility for data entry.
- Performs regular quality checks and audits on entered data to identify and rectify errors or inconsistencies.
- Collaborates with relevant departments to define and update data validation rules and controls.
- Monitors data input performance and identifies areas for improvement and implements necessary changes to enhance data quality.
- Ensures compliance with data protection regulations, records management and organisational data governance policies.
- Creates and updates data reports for statutory, strategic and regulatory measures on behalf of the service.
- Works and communicates with the System and Data Governance Board and Group members.

C) System Administrator

- Ensures that the data input systems and applications are configured properly to support accurate and efficient data entry.
- Maintains user roles, access controls and permissions within the systems.
- Monitors system performance and troubleshoots any technical issues related to data input.
- Collaborates with the IT Service team to implement system updates, patches, and enhancements.
- Conducts system backups and data recovery procedures to prevent data loss (undertaken by the IT Service team).
- Ensures that data sets are adequately documented, including metadata descriptions, data dictionaries, and data catalogues. This enables data users to understand the meaning, structure, and context of shared data.

D) System and Data Governance Board and System and Data Governance Group

- Board profile is Director, Assistant Director, ICT and Business Improvement.
- Group Profile is Assistant Director, ICT, Business Improvement and 4th Tier Management representation.
- Establishes, updates and embeds data strategy and policy.
- Drives a data driven culture of valuing high quality data across the organisation.
- Documents and communicates expectations and requirements to ensure data is compliant and stored, used, shared and disposed of in accordance with corporate standards and relevant legislation.
- Documents and communicates expectations and requirements across the organisation in respect of the data standards and quality
- Prioritises systems and data projects.
- Prioritises the enablement for data initiatives and automation.
- Drives data literacy, training and development throughout the organisation to enhance the workforce data and analytical skills.
- Oversees the procurement of new systems.

E) Assistant Directors

Are accountable for the accuracy and quality of performance data and information within their service area.

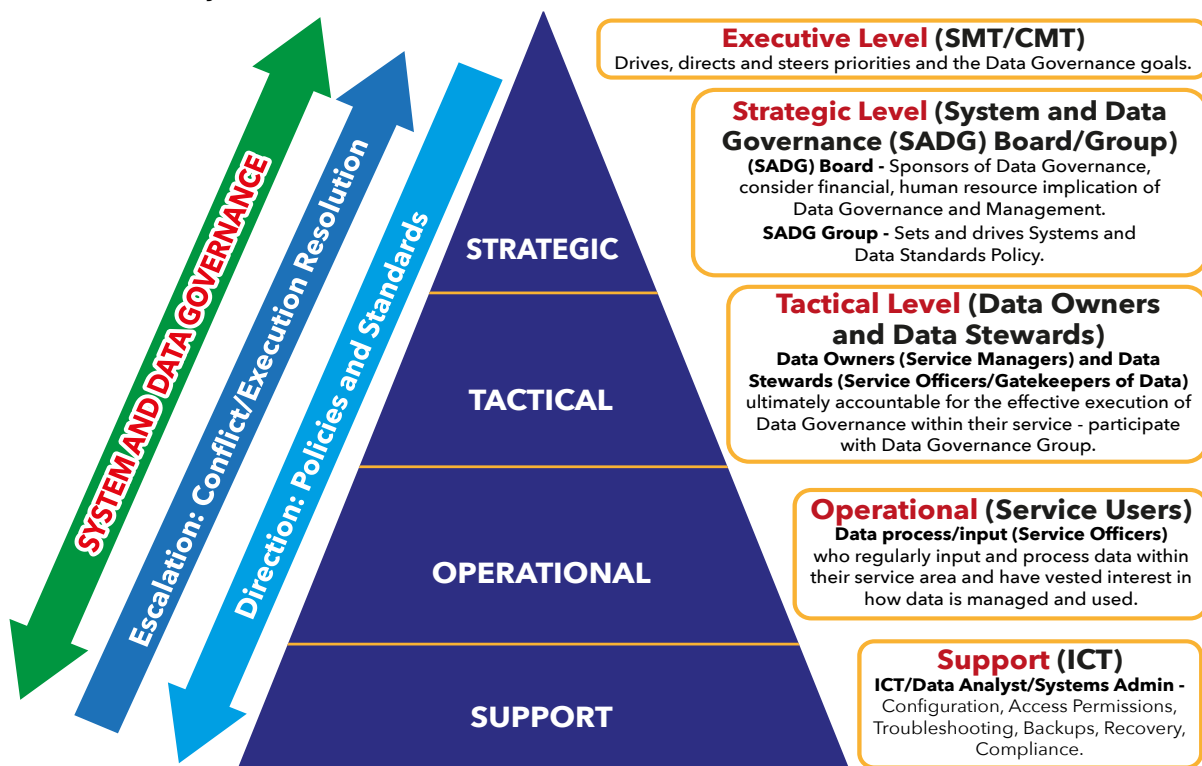
F) Senior Management Team/Directors

Has overall responsibility for challenging performance and data quality.

The above roles and responsibilities provide a general framework and it is recommended to adapt and refine them based on service specific needs and the wider organisational context.

G) All Employees

Responsible for adhering to data privacy and security protocols, ensuring the confidentiality of sensitive information.



7. Data Sharing and Interoperability

Data sharing and interoperability refers to the principles and practices that enable the exchange and compatibility of data between different systems, departments, and organisations within the local government environment.

Data sharing involves the intentional and controlled sharing of data between various stakeholders, such as government agencies, departments, or external organisations, to enhance collaboration, decision-making, and service delivery.

Interoperability focuses on ensuring that different systems, databases or applications can work together seamlessly and exchange data effectively. It involves the use of common standards, protocols, and formats to enable data compatibility and integration across various platforms or entities. Interoperability allows different systems to understand and utilise shared data without data loss, misinterpretation, or technical barriers.

This policy provides guidelines and rules for data sharing and interoperability. It requires the organisation to have these elements in place:

- **Data Governance:** Implement governance mechanisms to manage data quality, accuracy, security and privacy throughout its lifecycle. This includes data stewardship, data validation processes and data sharing agreements.
- **Data Access and Permissions:** Clearly define who can access and share data, including roles, responsibilities and authorisation processes. It ensures that data sharing is done in accordance with privacy and data protection regulations.
- **Data Standards:** Establish common data standards, formats, and classifications to ensure consistency and compatibility across different systems. This enables data from diverse sources to be integrated and analysed effectively.
- **Technical Infrastructure:** Develop and utilise interoperable systems, software, and technologies that support seamless data exchange and integration. This may involve adopting open standards, application programming interfaces (APIs) and data integration platforms.
- **Metadata and Documentation:** Ensure that data sets are adequately documented, including metadata descriptions, data dictionaries, and data catalogues. This enables data users to understand the meaning, structure, and context of shared data.
- **Uniqueness:** Ensure data items in a dataset are distinct from one another and represents a unique piece of information.
- **Collaboration and Partnerships:** Encourage collaboration and partnerships with external stakeholders, such as other government agencies/authorities, non-profits, or private organisations. This promotes data sharing and interoperability beyond the local government boundaries, leading to enhanced insights and improved public services.

Data sharing and interoperability supports a culture of collaboration, innovation, and evidence-based decision-making. It will enable the organisation to leverage data assets effectively, improve service delivery and address complex challenges by harnessing the collective power of data from multiple sources.

8. Data Retention and Disposal

Data retention and disposal refers to the process of managing and controlling the lifespan of data held by the council in accordance with the data retention and disposal schedules.

Data Retention: the purpose of data retention is to ensure that the council does not retain data past its retention period to meet its legal, regulatory, and operational requirements. Distinct types of data may have different retention periods based on the nature of the information and applicable laws or regulations. For example, financial records may need to be retained for a longer duration than general correspondence.

The data retention schedule defines the retention periods for distinct categories of data, specifying the minimum duration for which data must be retained. Once the retention period for specific data has expired, services need to initiate the disposal process.

As part of the accountability principle, all systems should have a retention and disposal policy built in, with a trigger to assist with compliance.

Data Disposal: involves permanently deleting, destroying, or anonymising data to ensure it cannot be accessed or retrieved by unauthorised individuals. Disposal methods should comply with applicable privacy and data protection laws to prevent any unauthorised access, disclosure, or misuse of information.

The data disposal process should be carefully planned and executed, ensuring that all copies or backups of the data are appropriately removed or destroyed. Depending on the sensitivity of the data, disposal methods may include physical destruction of storage media or secure deletion of digital files.

It is essential that all services adhere to these schedules to ensure compliance with relevant laws, protect individual privacy, and minimise the risks associated with retaining unnecessary or outdated data.

Data Access and Transparency

Data access and transparency in the council refers to the principles and practices that govern how data is made available to authorised individuals or entities, and how the council ensures openness and accountability in its data management processes.

Data Access: refers to the ability of authorised individuals or groups to retrieve, view and use the council's data. Access controls and permissions should be implemented to ensure that only authorised personnel can access sensitive or confidential information. This helps protect privacy, prevent data breaches and maintain the integrity of the council's data assets.

Transparency: refers to the council's commitment to openness and accountability in its data management practices. It involves providing clear information about the council's data holdings, data collection processes and how the data is used. The council should state its commitment to transparency and its intent to make relevant data available to the public, subject to privacy and security considerations.

To ensure transparency, the council should include provisions for publishing datasets that are non-sensitive, non-confidential and in the public interest. This can be achieved through the creation of customer portals where customers can access their own data alongside other approved datasets.

While transparency is a stated aim, it is important to ensure that published data is done in accordance with data protection. It is vital that openness and accessibility is balanced with the protection of sensitive information and individual privacy rights.

By undertaking to share its data in a safe and legal way the council can foster an environment of accountability, public trust and greater engagement. It can enhance collaboration, support evidence-based decision-making and encourage innovation through the responsible and ethical use of its data.

9. Data Privacy and Security

Data privacy and security are crucial aspects of protecting sensitive information from unauthorised access, use, disclosure, alteration or destruction.

Data Privacy: refers to the right of individuals to have control over their personal information and how it is collected, used, and shared. It involves safeguarding personal data from being accessed or used in ways that are inconsistent with the individual's consent or legal requirements. Data privacy regulations, such as UK GDPR outline the obligations of organisations when handling personal data, including obtaining consent, transparency, and ensuring individuals' data rights are maintained.

Data Security: focuses on protecting data from unauthorised access, loss, or damage. It involves implementing measures to ensure the confidentiality, integrity, and availability of data. This includes employing technical and organisational safeguards, such as encryption, access controls, firewalls, security audits, and cyber security to prevent data breaches and unauthorised access.

Both are crucial in maintaining the confidentiality and trustworthiness of sensitive data. Consequently, it is vital that services

- Comply with all relevant data protection regulations, including the UK GDPR, when inputting personal data.
- Obtain necessary consent and ensure the appropriate level of data anonymisation or pseudonymisation are in place.
- Adhere to established data security policies and practices to protect sensitive information from unauthorised access or disclosure.

10. Training

All Employees:

Training is crucial for ensuring good data input and governance across the organisation. Training provides individuals with the necessary knowledge and skills to effectively handle data, understand data governance policies and follow established processes. It equips employees with the expertise to accurately capture, validate and enter data into systems, minimising errors and ensuring data quality. Regular training can help to foster a culture of data compliance and risk mitigation.

- Ensure a comprehensive training plan is provided to all staff members involved in data input, emphasising the importance of accurate and validated data. Especially when new systems are implemented.
- Ensure ongoing access to resources, such as user manuals, policies and standards, to address questions or issues related to data input.
- All staff accessing our Council systems currently must complete information Security Policy training, data protection training and Cyber security training.

Data Stewards:

Specific, tailored training programmes will be developed for the Service Data Stewards aligning to their roles and responsibilities for data stewardship, auditing and analytical reporting. The System and Data Governance Board and Group will work closely with the Human Resource team and Service Managers to review skills and competencies and agree and develop appropriate and timely training provision.

Appendix One

Data Input Standards, Processes, and Guidelines

Effective data input is crucial for maintaining accurate and consistent information within our systems. This Appendix outlines the data input standards, processes, and guidelines to ensure staff have a reference point for accurate and consistent data entry. Adhering to these standards will help maintain data integrity and enhance the quality of our organisational data.

1. Data Input Standards

1.1. Accuracy

- Input data accurately, ensuring that information is entered as intended and without errors.
- Double-check data entries for accuracy before submitting or saving them.

1.2. Completeness

- Fill in all required fields, ensuring that no essential information is left blank.
- Avoid leaving optional fields empty when relevant information is available.

1.3. Consistency

- Follow standardised formats, conventions, and terminology as specified for each data field.
- Use consistent abbreviations, spellings, and capitalisation throughout the data entry process.

1.4. Validity

Validate data against reliable sources, such as official documents or authorised databases e.g. the NLPG for address data etc. Implement and adhere to national standards such as BS7666 Data Standards.

BS 7666 is a standard that provides guidelines for organising and managing information about addresses and geographic locations. It helps to make sure that addresses are recorded and presented in a uniform and structured manner. It defines how different elements of an address should be arranged, such as the house number, street name, city, and postal code. By following these guidelines, it becomes easier to store, exchange and compare address data across different systems and databases.

BS 7666 also covers geographic locations, like points of interest, landmarks, and boundaries. It establishes a common framework for identifying and describing these places, which helps in mapping and navigation systems

- Perform necessary checks to ensure data entered meets predefined validation rules and criteria.

2. Data Input Processes

2.1. Familiarise Yourself with Input Screens/Forms and the System

- Understand the purpose and structure of the data input screens/forms or system before entering data.
- Review any accompanying instructions or guidelines to ensure accurate data entry.

2.2. Verify and Validate Data

- Validate data against relevant sources to ensure accuracy and completeness.
- Cross-check data against existing records to avoid duplicates or conflicting information.

2.3. Follow User Level Guidance

- Refer to user guidance or tooltips provided within the data input screens/forms or system.
- Ensure that the correct data type, format, and length are used for each field.

2.4. Review and Edit

- Review the entered data for accuracy, completeness, and consistency.
- Make necessary edits or corrections before finalising the data entry.

2.5. Seek Clarification

Seek assistance or clarification from managers, supervisors or colleagues when encountering ambiguous or complex data.

3. Additional Guidelines

3.1. Data Privacy and Security

- Adhere to data protection regulations, including obtaining necessary consent and protecting personal information.
- Use secure login credentials and follow security protocols when accessing data input systems.

3.2. Timeliness

- Enter data promptly to ensure that information is up to date and relevant.
- Avoid unnecessary delays in data entry to maintain the accuracy and usefulness of the data.

3.3. Documentation

- Maintain appropriate records or documentation related to data sources, validation processes, or any changes made during data entry.
- Document any issues, errors, or discrepancies encountered during the data input process.

4. Training

- Attend training sessions or workshops to enhance data skills and knowledge.
- Seek assistance from managers, supervisors and administrators when encountering challenges or uncertainties during data entry.

Appendix Two

Common Data Fields and Formats

The most common data fields in use across all our systems are:

- Title (Mr, Mrs, Ms, Dr, Prof etc)
- Name (First, Middle, Surname)
- Unique Property Reference Number (UPRN)
- Address (Line 1, Line 2, Line 3, Line 4, Postcode)
- Date of birth (dd/mm/yyyy)
- Customer Recognition Number
- Contact telephone number
- Email address

Whilst this data is routinely captured in our systems, it must be done so consistently, following the same formats across as many of our systems as possible. (See table below)

Address data should be held as BS7666 standard format (See Appendix One)

The Unique Property Reference Number (UPRN) should also be used across the councils' systems.

Standardised Format	
Item	Item Description
System	What is the Software System
Standard Field Name	Field name (eg: First name, Surname, Address line 1 etc)
Definition	What is this used for eg: UPRN a reference for address location
Key Identifier/ Primary Key	Is this field a Primary Key or Key Identifier eg: Name, CRN, Address, Postcode, UPRN, Telephone, Email
Data Type	AutoNumber, input number, long / short integer, text, date
Format	What characters accepted/standards - set characters, variable characters, case sensitive, full details, part details, abbreviations
Validation	What validation is set for this field eg: how data is inputted, is it automated or manually inputted, is there restricted input/choice, lookup, prefixes, no of spaces etc.
Mandatory Field	Yes or No (must be completed or automated or unable to move to next etc)
Character Length	Max no of characters
Based on/Source	What is the standard / where has the data derived from (eg: UPRN from GeoPlace - Ordnance Survey)
Verification	Is this assigned field? - eg: UPRN is assigned based on address and not manual entry
Comments	Why is it important - is it used to integrate, index, access through a Portal, report etc.
Version	Updates
Approval Date	SADG sign off date

Appendix Three

Summary Document - Data Standards Policy

1. Introduction

This summary document outlines the details of our Data Standards Policy and is designed to ensure consistency, transparency, and security in the handling of data across all service areas. The policy aims to establish a framework that supports efficient data management, sharing, and usage while complying with relevant legal and regulatory requirements.

2. Scope

This policy summary document applies to all data collected, stored, processed, shared, and disposed of by council employees, including data from external partners, contractors, and service providers. It covers both structured and unstructured data across all formats, including digital and physical records.

3. Data Governance

Data governance and documentation are vital in today's connected data-driven world. Effective data governance helps the organisation to maximise the value of its data, mitigate risks, and comply with regulatory requirements.

A System and Data (SAD) Governance Board has been established to provide governance for the overall management, control, and protection of the organisation's data assets. The Board will be responsible for establishing strategies, policies, processes, standards and guidelines to ensure the proper collection, storage, usage, and sharing of data. The SAD Board aims to promote and provide support on data quality, consistency, integrity and security across the organisation by:

- **Key Service Roles and Responsibilities:** Establishing clearly defined roles for data governance, including Data Owners, Data Stewards, and Data Users, with specified responsibilities for data management, quality, reporting and security.
- **Data Management Plan:** Each service area must have a data management plan outlining how data is collected, stored, processed, and disposed of in accordance with this policy summary document.
- **Data Lifecycle:** Data should be managed through its entire lifecycle, from creation and usage to archiving and deletion, in line with legal requirements and retention schedules.

4. Objectives

- **Consistency:** Ensure uniform data formats, structures, and processes across all service areas to facilitate seamless integration and interoperability.
- **Transparency:** Enable clear and accessible data records to promote accountability and public trust.
- **Security:** Protect data from unauthorised access, breaches, and misuse, ensuring compliance with data protection laws.
- **Efficiency:** Optimise data handling processes to reduce redundancy, improve accuracy and support decision-making.
- **Compliance:** Adhere to all relevant legislation, including the Data Protection Act 2018, GDPR and Freedom of Information Act 2000.

5. Data Classification

Data must be classified according to its sensitivity and criticality, as follows:

- **Public:** Data that can be freely shared with the public, e.g., public service information.
- **Internal:** Data intended for use within the local government, e.g., internal memos, routine administrative data.
- **Confidential:** Data that should only be accessible to authorized personnel, e.g., personal data, financial records.
- **Restricted:** Highly sensitive data requiring strict access controls, e.g., national security-related information.

6. Data Quality

All data should meet the following quality criteria:

- **Accuracy:** Data must be correct and reflect reality.
- **Completeness:** All necessary data elements must be captured.
- **Consistency:** Data should be consistent across all systems and formats.
- **Timeliness:** Data must be up-to-date and available when needed.
- **Validity:** Data must conform to established and agreed formats and standards.
- **Uniqueness:** Duplicate records should be minimised and managed appropriately to create a 'single version of the truth'.

7. Data Standards

- **Metadata:** All datasets must include metadata that describes the data's source, date of creation, update history, format, and any relevant classifications. (these will be owned by each service area).
- **Data Formats:** Data should be stored in open, non-proprietary formats wherever possible (e.g., CSV, JSON, XML) to ensure long-term accessibility and interoperability.
- **Standardise Naming Conventions:** Standardised naming conventions must be used for files, databases, and field names to ensure clarity and consistency.
- **Data Models:** Common data models should be adopted across all services to enable interoperability and data sharing.
- **BS 7666 standard** should be adhered to and is a standard that provides guidelines for organising and managing information about addresses and geographic locations. It helps ensure addresses are recorded and presented in a uniform and structured manner. It defines how different elements of an address should be arranged, such as the house number, street name, city, and postal code. By following these guidelines, it becomes easier to store, exchange, and compare address data across different systems and databases.

8. Data Security

- **Access Control:** Implement role-based access controls to ensure that data is only accessible to authorised individuals.
- **Encryption:** Sensitive data must be encrypted both at rest and in transit to prevent unauthorised access.
- **Incident Management:** Establish procedures for reporting, responding to, and mitigating data breaches or other security incidents.
- **Auditing:** Regularly audit data processes and access logs to ensure compliance with security protocols.

9. Data Sharing

- **Inter-Governmental Sharing:** Establish protocols for securely sharing data between local government bodies, including data sharing agreements that define the terms and conditions of use.
- **Public Access:** Data intended for public access should be published in open data formats and made available through appropriate channels, subject to confidentiality and privacy considerations.
- **Third-Party Sharing:** Any data sharing with third parties must be governed by formal agreements that specify data protection, usage and security requirements.

10. Compliance and Monitoring

- **Legal Compliance:** Ensure all data handling practices comply with the Data Protection Act 2018, GDPR, and other relevant legislation.
- **Monitoring and Auditing:** Regularly review data processes, security measures and compliance with this policy summary document. Audits should be conducted annually or as needed.
- **Training:** Provide regular training for all employees on data standards, security practices, and their roles in ensuring compliance.
- **Tailored Training:** provide tailored training for data stewards and analysts to support auditing, reporting and standardisation.

11. Review and Update

This policy summary document should be reviewed and updated annually or whenever there is a significant change in relevant legislation, technology, or organizational structure.

12. Exceptions

Any exceptions to this policy summary document must be formally documented, justified and approved by the relevant authority (SAD Board) with a clear plan for mitigating any associated risks.

13. Consequences of Non-Compliance

Non-compliance with this policy summary document may result in disciplinary action, including potential legal ramifications, depending on the severity of the breach.

This policy serves as a summary guide for managing data within the organisation and supports the full Data Standards Policy.

Version Control				
Title		Data Standards Policy		
Description		To support the delivery of Customer & Digital Strategy 2020-2026 in relation to improving and aligning data		
Created by		Business Improvement Team, Business Transformation, Organisational Development and Digital Strategy Directorate		
Date created		January 2025		
Maintained by		Business Improvement Team		
Next Review Date		March 2026 (Aligned to Customer and Digital Strategy 2020 - 2026)		
Version number	Modified by	Modifications made	Date modified	Status
1				

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Data Standards Policy

Information Pack

Contents:**Data Standards****1. Where are we at?**

- 1.1 Importance of having Data Standards
- 1.2 System and Data Governance (SADG)
- 1.3 LGA Data Maturity (Assessment Score)

2. Where do we need to be?

LGA Data Maturity Model (Assessment Levels)

3. How will we get there?

- 3.1 System And Data Governance (SADG) Projects (Hierarchy)
- 3.2 Data Standards Project Overview
- 3.3 Data Stewards Project Overview
- 3.4 System Procurement Project Overview
- 3.5 Project Timeline

1. Where are we at?

- 1.1 *Importance of having Data Standards:*

“Data Standards Policy” Why is it important?:

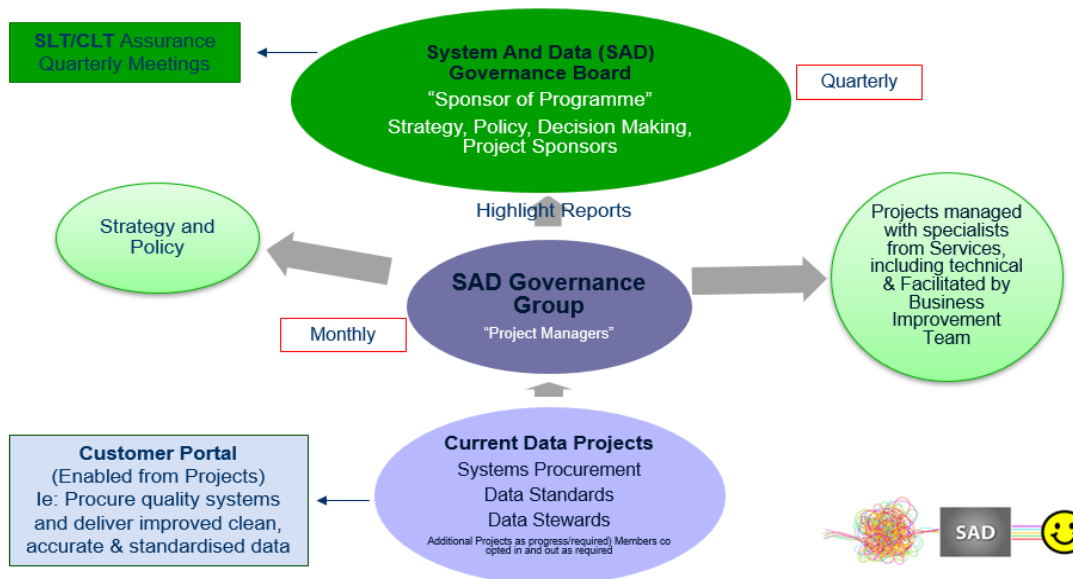
The Data Standards Policy provides a foundation and guidance for effective data governance to help safeguard our organisations data assets and is essential for several reasons:

1. **Consistency and Quality:** It supports consistent, accurate and reliable data across the organisation to support informed business decisions and provide access to reliable data for our residents.
2. **Compliance:** It helps the organisation to comply with legal and regulatory requirements, such as GDPR. This reduces the risk of legal issues.
3. **Data Security:** It establishes guidelines for data protection, helping to safeguard sensitive information from breaches and unauthorised access.
4. **Efficiency:** By standardising data management practices and streamlining our processes we improve operational efficiency and reduce duplication of effort. This can lead to cost savings and better resource management.
5. **Interoperability:** Standardising data helps facilitate the exchange of information between different systems and teams, breaking down silo working and enhancing and improving collaboration across services.
6. **Trust and Transparency:** Clear data standards build trust among stakeholders by ensuring that data is handled responsibly and transparently.



1.2 System and Data Governance (SADG)

What is the System and Data Governance Structure ?



1.3 Data Maturity LGA Assessment Results:

A group of 4th Tier Management and Business Improvement Officers carried out an assessment of our Data Maturity against the LGA Data Maturity Assessment Tool with the following results:

SCORE: 2.7

2.6 - 3.4	Level 3	Organisations that are developing their capacity and capabilities in terms of data.
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Organisations at this level of data maturity typically have these characteristics:

- These organisations are developing their capacity and capabilities in terms of data.
- There is a developing culture that supports the use of data, but services are mostly delivered according to existing practice rather than evidence of the needs of local people.
- There is some senior leadership commitment to the use of data.
- The use of data is consistent with standard practices.
- There is some investment in systems and tools for data.
- These organisations have reasonable levels of skills and capabilities in relation to data.
- The organisation is compliant with statutory data governance responsibilities, holding data securely and aware of risks and cyber security issues.
- It has basic data engagement arrangements in place.

2. Where do we need to be?

Next level up

More mature organisations tend to demonstrate the following behaviours and practices:

- These organisations exhibit good practice and use industry standard approaches.
- These organisations are broadly evidence driven and prioritise the use of data.
- They have some senior leadership data capability. Data practices throughout the data lifecycle are well-managed and use industry standard approaches.
- The organisation has a strong infrastructure of systems and tools for data.
- These organisations have a good level of skills and capabilities needed to manage data well, and data is on the whole well governed, with all processes compliant with statutory data governance responsibilities.

Key to the levels

1 - 1.8	Level 1	Organisations that have poor and inconsistent practices around data.
1.8 - 2.6	Level 2	Organisations that are beginning their journey in terms of working with data.
2.6 - 3.4	Level 3	Organisations that are developing their capacity and capabilities in terms of data.
3.4 - 4.2	Level 4	Organisations that exhibit good practice and use industry standard approaches.
4.2 - 5	Level 5	Organisations that innovate in terms of techniques and approaches and are considered leaders amongst their peers.

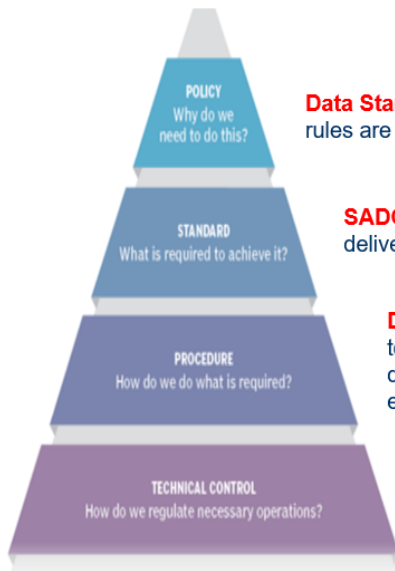
3. How will we get there?

3.1 SADG Projects Hierarchy

How do we deliver this?



Hierarchy



Data Standards Policy: a foundation and guide to ensure standards and rules are consistent and clear across the organisation.

SADG Board and Group: to oversee **key projects** to embed and deliver the data standards across the organisation.

Data Standards: to review top 6/7 systems across the organisation to establish and implement organisational rules for how we input data, focussing on key identifier fields across all systems.
eg: UPRN, Address, Postcode, Name, Customer ID etc.

Data Stewards: Officers to regulate and audit service level data operations supported by Service Managers/ICT/BIT/SADG

Systems Procurement: to regulate the procurement of new systems



3.2 Data Standards Project Overview

Data Standards Project Group



Purpose: Standardising data across the organisation involves several key steps to ensure consistency, accuracy, usability and improved data sharing and interoperability :

- **Understand our Data Sources:**
 - Identify all the different data sources of top 5/6 systems across the organisation
 - Document types of data each source generates and how they are currently formatted (focus - key identifiers eg: UPRN (Property/Postcode), Name, Customer ID etc.)
- **Develop a Data Dictionary:**
 - Create a data dictionary that defines standard formats, naming conventions and acceptable values for key data elements and ensure it is accessible to all relevant stakeholders
- **Data Cleaning:**
 - Clean data to remove duplicates, correct errors, and fill in missing values.
- **Data Transformation:**
 - Convert data into the standard formats defined in your data dictionary.
- **Integration and Consolidation:**
 - Potential to Integrate data from different sources into a centralised system.
- **Quality Assurance:**
 - Data Stewards to carry out quality assurance and audit checks to verify that the data meets the defined standards.
- **Training and Documentation:**
 - Data Stewards to develop and train officers on the importance of data standardisation and how to adhere to the standards.
- **Continuous Improvement:**
 - Regularly review and update the data standards to adapt to new requirements and technologies and consideration for devolution.



3.3 Data Stewards Project Overview



Data Stewards Project Group

Purpose: To assess and identify opportunities for Data Stewardship across the organisation

Data Stewards:

- Focussed on the implementation, monitoring, auditing and enforcement of SAD Governance and Data Standards Policy.
- When deviations from policy are detected and not resolved, the data steward is the focal point for issue resolution.
- The data stewards are the super users in the organisation, visible, action-oriented engine of the SADG effort.
- Anticipation that steward duties will generally form a 'part-time role' of existing resources in the organisation, rather than a full-time dedicated role. (Subject to assessment).



3.4 System Procurement Project Overview



System and Data Procurement Group

Purpose: To regulate the procurement of new systems

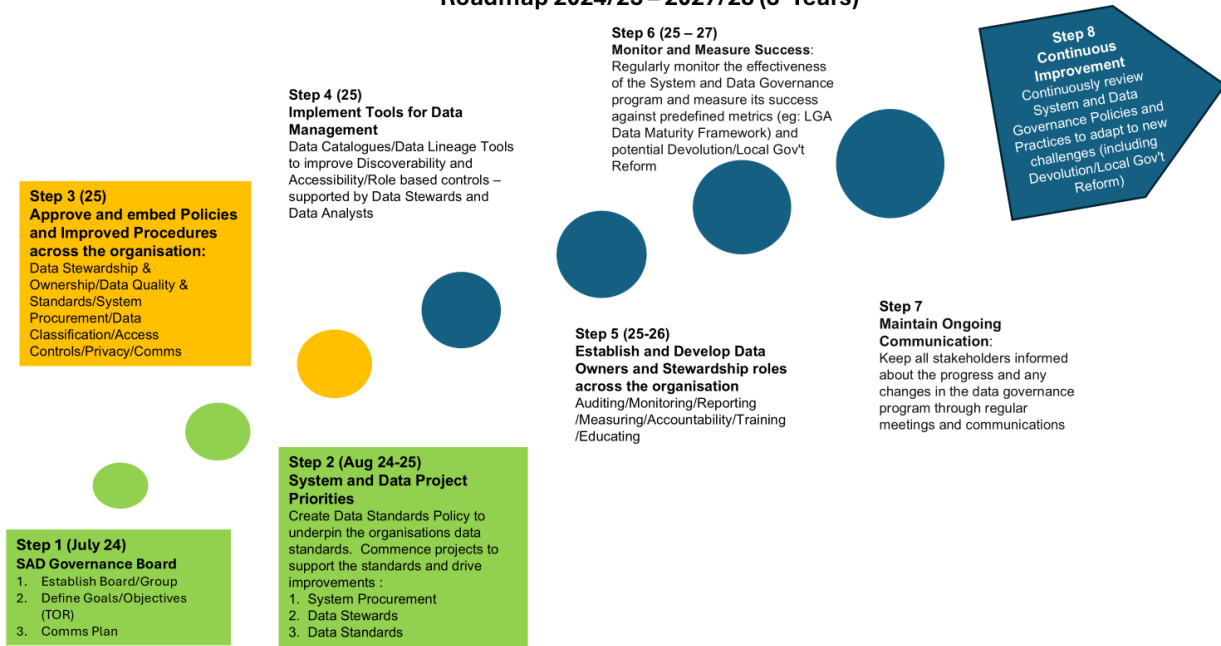
AIM: The SADG Procurement Group aim to create a structured process that prioritises and maximises due-diligence to ensure we challenge suppliers to provide the most cost effective and efficient system that supports our delivery to our customer and aligns with our standards, prioritising our customer centric data to enable system interoperability and integration for provision towards customer accessible and shared data.

It is also important to promote the top key systems that have ability and functionality to provide shared outcomes across the organisation and to assess and benchmark best practice, considering devolution with our neighbouring and wider authority partners.



3.5 Project Timeline

**System and Data Governance Board and Group
Roadmap 2024/25 – 2027/28 (3 Years)**



Business Improvement Team
February 2025

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Executive Committee
202511th March**Warm Homes Grant Funding Resources**

Relevant Portfolio Holder	Councillor Jen Snape
Portfolio Holder Consulted	Yes
Relevant Head of Service	Judith Wills
Report Author	Job Title: Climate Change Manager Contact email: matthew.eccles@BromsgroveandRedditch.gov.uk Contact Tel: 07816112073
Wards Affected	All
Ward Councillor(s) consulted	
Relevant Strategic Purpose(s)	All
Non-Key Decision	
If you have any questions about this report, please contact the report author in advance of the meeting.	

1. RECOMMENDATIONS**The Executive Committee is asked to RECOMMEND that: -**

- 1) The Capital and Revenue Budgets are increased to receive Redditch Borough Council's Warm Homes Local Grant Funding (WHLG) of the indicative £1,204,615.38 or the final grant awarded.**

The Executive Committee is asked to RESOLVE that

- 2) Authority be delegated to the Assistant Director of Community and Housing Services following consultation with the Portfolio Holder for Climate Change to administer the funding received in the WHLG in line with the grant conditions.**

2. BACKGROUND

- 2.1 The Warm Homes: Local Grant scheme, set to begin in 2025, aims to provide energy performance upgrades and low carbon heating to low-income households in England. The scheme targets homes with an Energy Performance Certificate (EPC) rating between D and G that are privately owned. Local authorities will deliver measures such as insulation, solar panels, and air source heat pumps, tailored to individual homes. Occupants on a low income will not contribute to the cost of these upgrades.

Executive Committee
202511th March

- 2.2 The Warm Homes Local Grant (WHLG) provides an opportunity for Redditch Borough Council to directly address fuel poverty and improve the energy efficiency of homes within the Borough. By retrofitting homes with energy-saving measures, Redditch Borough Council can work towards achieving the authority's climate goals, enhance the well-being of residents, and create employment in the green sector.
- 2.3 Additionally, the WHLG aligns with the UK government's objectives to improve the energy performance of homes and reduce fuel poverty nationwide. This program is a key component of the broader strategy to achieve Net Zero emissions by 2050 and ensure that all homes meet minimum energy efficiency standards by 2030.

3. OPERATIONAL ISSUES

The following operational matters are being considered:

3.1 Planning

- Location Identified: In Redditch, the initial project delivery will focus on the Woodrow area, which features a mix of tenures and allows for a collaborative approach with Redditch Borough Council Housing using both WHLG and WSHF funding.

3.2 Engagement

- Resident Engagement: Develop and implement an engagement strategy to encourage participation in the program, with a focus on the target area in Redditch. Work to engage residents on the owner-occupier side.
- Act on Energy Partnership: Collaborate with Act on Energy to leverage their expertise in engaging residents and encourage applications for the program through the owner-occupier part of the programme.
- Community Engagement: Partner with local community groups and organisations to promote the programme and address any concerns or barriers.

3.3 Procurement

- Retrofit Assessment and Coordination: Conduct a robust procurement process to secure a qualified and experienced Retrofit Assessor and Coordinator.
- PAS 2035 Retrofit Installer: Secure a qualified and experienced PAS 2035 retrofit installer/contractor to undertake the retrofit works. This will include a clear specification for the retrofit measures to be delivered,

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emphasising quality and value for money, as well as experience of working across multiple grant schemes.

- Framework Utilisation: Utilise existing procurement frameworks wherever possible to expedite the process and ensure compliance.

3.4 Delivery

- Retrofit Works: Implement the retrofit works according to the agreed plans and required standards set out within PAS 2035, ensuring a smooth and efficient process with minimal disruption to residents.
- Quality Assurance: Conduct regular inspections and quality checks throughout the retrofit process.
- Resident Liaison: Maintain regular communication with residents to keep them informed of progress and address any issues.

3.5 Monitoring and Reporting

- Monthly Reports to MNZH: Submit monthly progress reports to the Midlands Net Zero Hub (MNZH), the consortium lead, to ensure transparency and alignment with the overall programme goals.
- Financial Monitoring: Track project expenditure and ensure adherence to the budget.
- Data Collection: Collect data on retrofit measures, costs, and impacts on residents to inform future projects and report on outcomes.

3.6 Evaluation

- Project Review: Conduct a comprehensive review of the project's performance upon completion, highlighting lessons learned.
- Impact Assessment: Assess the long-term impact of the program on carbon emissions, fuel poverty, and resident well-being.

4. FINANCIAL IMPLICATIONS**4.1 Funding Allocation:**

- Redditch: £1,204,615.38 (including £120,461.54 for administrative and ancillary costs)
- Funding will be allocated to the general Capital and Revenue budgets

4.2 Potential Number of Homes Retrofitted:

Based on an average cost per home of £15,000, the WHLG funding can be utilized to retrofit approximately:

- Redditch: 80 homes (£1,204,615.38 / £15,000 per home)

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4.3 Funding Source:

- The funding is sourced from the WHLG grant allocations.

4.4 Monitoring:

- Regular Financial Reporting: The project will submit regular financial reports to MNZH as part of the consortium, ensuring transparency and adherence to the budget.

4.5 Eligibility

- IMD:ID Eligible Postcodes: Households located in postcodes that fall within the most deprived 25% according to the Index of Multiple Deprivation (IMD) are eligible. These households are classified as auto eligible.
- Households with a gross income below £36,000 per year or a net income of £20,000 or less after housing costs or Households must be classified as low-income, which can be demonstrated by receiving specific means-tested benefits.
- Properties must have an EPC rating between D and G.

5. LEGAL IMPLICATIONS**5.1 Contractual Arrangements:**

- The Council will need to enter into contracts with qualified retrofit installers and service providers to ensure compliance with PAS 2035 standards. This will need to be delivered in line with the Council's procurement process.
- Service level agreements (SLAs) will need to be established to define the roles and responsibilities of all partners involved.

5.2 Relevant Legislation:

- **Energy Act 2011:** Provides the legislative framework for the UK's energy policy, including measures to improve energy efficiency and reduce carbon emissions.
- **Climate Change Act 2008:** Sets legally binding targets for reducing greenhouse gas emissions and requires the government to develop policies to achieve these targets.

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-
- **Building Regulations 2010:** Sets standards for the energy performance of buildings, including requirements for insulation and energy efficiency measures.
 - **Local Government Act 1972:** Includes provisions related to local government responsibilities and powers, which may be relevant to the implementation of the WHLG program.
 - **Warm Homes and Public Sector Decarbonisation Devolution Programme:** Government initiative providing funding and guidance for local authorities to improve the energy efficiency of public sector buildings and homes.

5.3 Accountancy Treatment:

- Grant funding and associated expenditures will be accounted for in line with the Council's financial regulations and accounting standards.

6. OTHER - IMPLICATIONS**6.1 Relevant Strategic Purpose**

Redditch Borough Council is committed to achieving Net Zero carbon emissions by 2040. Addressing fuel poverty and reducing emissions from housing are key priorities within underpinning the authority's strategic objectives. The WHLG program and potential collaboration with the Warm Homes Social Housing Fund (WHSHF) directly align with these priorities.

The Warm Homes Local Grant (WHLG) project directly aligns with the green thread, which runs through the Council Plan. By improving the energy efficiency of homes and reducing carbon emissions, the project contributes to creating a clean and green environment. Additionally, addressing fuel poverty and enhancing residents' well-being supports sustainable development and improves the overall quality of life for the community. This initiative also fosters economic growth through job creation in the green sector and promotes the Council's commitment to addressing environmental and climate impacts

6.2 Climate Change Implications:

- **Carbon Emissions Reduction:** Residential energy consumption is a significant contributor to carbon emissions. Improving home energy efficiency is crucial to achieving net-zero goals.
- **Health Benefits:** Enhanced home energy efficiency can lead to improved health outcomes for residents by reducing exposure to cold and damp conditions.

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6.3 Equalities and Diversity Implications:

- Fuel Poverty: The WHLG program targets households most affected by high energy costs, helping to alleviate fuel poverty and its associated health and social inequalities.
- Inclusive Approach: The programme will ensure that all eligible residents, regardless of background, have access to the benefits of the retrofit measures.

7. RISK MANAGEMENT**7.1 Identified Risks and Mitigation Strategies:****1. Lack of Resident Participation:**

- Risk: Insufficient resident engagement may lead to low participation in the WHLG programme.
- Mitigation: Develop and implement a comprehensive engagement strategy, including outreach and education efforts, to encourage resident participation. Utilise partnerships with community groups and Act on Energy to increase awareness and involvement.

2. Challenges in Finding Qualified Contractors:

- Risk: Difficulty in securing suitably qualified and experienced contractors to undertake retrofit works.
- Mitigation: Conduct a robust procurement process to secure experienced PAS 2035 retrofit installers/contractors. Establish a reserve list of qualified professionals to ensure project continuity.

3. Supply Chain Issues for Retrofit Materials:

- Risk: Disruptions in the supply chain may lead to delays in obtaining necessary materials for retrofit works.
- Mitigation: Monitor supply chain trends and establish contingency plans for securing retrofit materials. Engage with multiple suppliers to diversify sources and minimise risk.

4. Overspending or Financial Mismanagement:

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- Risk: The project may exceed its budget or face financial mismanagement.
- Mitigation: Implement strict financial monitoring and reporting processes. Submit regular financial reports to MNZH to ensure adherence to the budget and transparency.

5. Delays in Project Delivery:

- Risk: The project may face delays in implementation, affecting timelines and outcomes.
- Mitigation: Develop a detailed project timeline with built-in contingencies to address potential delays. Maintain regular communication with contractors and stakeholders to ensure timely progress.

6. Negative Publicity or Community Dissatisfaction:

- Risk: Issues during the project may lead to negative publicity or community dissatisfaction.
- Mitigation: Maintain transparent communication with the community throughout the project. Address any concerns or feedback promptly and effectively to build trust and support.

7. Poor Quality Work Being Delivered:

- Risk: The quality of retrofit works may not meet required standards, leading to dissatisfaction and potential rework.
- Mitigation: Conduct regular quality checks and inspections throughout the retrofit process. Ensure contractors adhere to PAS 2035 standards and address any issues promptly.

8. Complexity of Working Across Two Grant Funding Streams:

- Risk: Managing both the WHLG and WSHF funding streams may lead to administrative complexities and potential overlaps.
- Mitigation: Establish clear guidelines and protocols for managing both funding streams. Ensure coordination and communication between teams to streamline processes.

9. Misunderstanding of Eligibility Requirements by Residents:

- Risk: Residents may misunderstand the eligibility requirements for the WHLG program.

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- Mitigation: Provide clear and accessible information to residents about eligibility requirements. Offer assistance through community engagement events and support from Act on Energy.

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UK Shared Prosperity Fund 2025/26

Relevant Portfolio Holder	Councillor Joe Baker Portfolio Holder for Planning, Regeneration and Governance
Portfolio Holder Consulted	Yes / No
Relevant Assistant Director	Rachel Egan Assistant Director Regeneration & Property
Report Author	Job Title: UK Shared Prosperity Fund Manager Contact email: Georgina.harris@bromsgroveandredditch.gov.uk Contact Tel: 01527 534082
Wards Affected	No specific ward relevance
Ward Councillor(s) consulted	No
Relevant Council Priority	Run and Grow a Successful Business Aspiration, Work and Financial Independence Communities which are Safe, Well Maintained and Green
Key Decision	
If you have any questions about this report, please contact the report author in advance of the meeting.	

1. RECOMMENDATIONS**The Executive Committee RESOLVE that:-**

- 1) The Investment Plan (Appendix 1) is approved; and**
- 2) Authority to vary the Investment Plan, in order to maximise the use of the grant be delegated to the Assistant Director Regeneration & Property following consultation with the Portfolio Holder for Planning, Regeneration and Governance**

2. BACKGROUND

- 2.1 The UK Shared Prosperity Fund (UKSPF) was established in 2022 to replace the EU Structural Funds that the UK no longer has access to.
- 2.2 The initial UKSPF allocation was for the 3-year period from 1 April 2022 to 31 March 2025. Redditch Borough Council received the following funding over the 3-year period:

Year	Capital	Revenue	Total
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2022/23	£108,500	£195,147	£303,647
2023/24	£298,550	£308,744	£607,294
2024/25	£468,250	£1,122,859	£1,591,109

- 2.3 The UKSPF focussed on the 3 investment priorities of Communities & Place, Supporting Local Business, and People & Skills. These investment priorities were sub-divided into more than 50 interventions which described the intentions of the investment priorities. The available funding increased significantly in 2024/25 due to funding from the European Social Fund for activity relating to People & Skills ending in March 2024. To access the funding, the Council was required to submit an investment plan to government in August 2022.
- 2.4 In the investment plan, the Communities & Place investment priority was allocated £928,541 which has been used to make improvements to the Town Centre, improvements to parks, and community safety measures. Funding was also made available to the voluntary and community sector to deliver cultural events, to support volunteering and to deliver advice and support to households vulnerable to fuel poverty.
- 2.5 The Supporting Local Business investment priority was allocated £859,856 which has been used to fund a suite of programmes designed to help businesses to start-up, grow and innovate in a sustainable way.
- 2.6 The People & Skills investment priority was allocated £613,571 which has been used to provide employability support to young people via Redditch Youth Hub and to support economically inactive people to progress towards employment. It has also been used to provide grants to businesses to upskill their workforce.

3. OPERATIONAL ISSUES

- 3.1 In the October 2024 budget the Chancellor announced an extension to UKSPF. The budget confirmed that UKSPF will be continued at a reduced rate for a further year, a transitional arrangement allowing local authorities to invest in growth, in advance of wider funding reforms.
- 3.2 On 13 December 2024, the Government published the UKSPF allocations for 2025/26. Redditch Borough Council will receive the following funding:

Capital	Revenue	Total
£151,128	£667,408	£818,536

This represents a 49% reduction in the allocation from the previous year.

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- 3.3 Under the grant conditions, capital funding must be spent on capital expenditure; however, revenue funding can be spent on either revenue or capital.
- 3.4 The Government has also published a technical note updating the UKSPF prospectus. The fund is still structured around the 3 investment priorities of Communities & Place, Supporting Local Business and People & Skills and can support the same range of activities as in previous years. However, the list of interventions has been replaced with 5 themes and 12 sub-themes that reflect the Government's missions.
- 3.5 The sub-themes, and how they relate to the investment priorities, are as detailed below:

Investment Priority	Sub-theme
Communities & Place	Improve health & wellbeing
	Reduce crime & the fear of crime
	Bringing communities together, tackling homelessness
	Development of the visitor economy
	High streets and town centre improvements
Supporting Local Business	Advice & support to business
	Enterprise culture and start up support
	Business sites and premises
People & Skills	Supporting people to progress towards and into employment
	Support for young people who are or at risk of being NEET
	Essential skills (including numeracy, literacy, ESOL and digital)
	Employment related skills

- 3.6 As the existing investment plan covers the period up to 31 March 2025 it is necessary to prepare a new investment plan for the financial year 2025/26.
- 3.7 The Investment Plan (Appendix 1) is primarily based on delivering priorities in the local Labour manifesto that align with the UKSPF.

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- 3.8 When preparing the investment plan, the performance of the current UKSPF funded programmes and the lessons learned from their delivery have been taken into account. Consideration has been given to which activities are reliant on UKSPF funding and which are funded primarily through other sources. The findings from the recent Community Survey on budget priorities have also contributed to shaping the investment plan.
- 3.9 Initial consultation with the Redditch Town Deal Board, in its role as Local Partnership Group for the UKSPF, has highlighted youth unemployment and business support as key priorities. The draft investment plan will be considered by the board at their meeting on 6/3/25 and their formal response will be included in supplementary papers.
- 3.10 In the investment plan, following the deduction of 4% for management and administration, the net allocation is distributed among the three investment priorities as follows:

Investment Priority	% of Allocation	Amount
Communities & Place	33.4%	£261,933
Supporting Local Business	33.3%	£261,931
People & Skills	33.3%	£261,931

- 3.11 The Investment Plan allocates 100% of the UKSPF funds to be received in 2025/26 to projects. However, experience delivering the UKSPF programme to date suggests that there is a risk that some projects may not fully utilise their allocated funds potentially resulting in an underspend at the end of the programme. Any monies not spent by 31 March 2026 will have to be returned to Government.
- 3.12 In order to maximise the use of the grant, authority is sought to vary the investment plan to allow any underspend towards the end of the programme to be allocated to alternative projects.

4. FINANCIAL IMPLICATIONS

- 4.1 The UK Shared Prosperity Fund allocation for 2025/26 has been included in the Medium-Term Financial Plan.
- 4.2 The grant conditions allow 4% of the allocation to be used for management and administration of the fund.

5. LEGAL IMPLICATIONS

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- 5.1 Delivery of the investment plan will require the Council to enter into contracts or other agreements with external organisations. The awarding of contracts or other agreements will be subject to the Council's procurement rules and subject to appropriate due diligence.
- 5.2 The Council will be required to enter into a Memorandum of Understanding with the Ministry for Housing, Communities and Local Government to deliver the interventions included in the plan. Appropriate legal advice will be sought prior to entering any legal agreement.

6. OTHER - IMPLICATIONS**Relevant Council Priority**

- 6.1 The investment plan supports delivery of the Council's priorities Run and Grow as Successful Business; Aspirations, Work and Financial Independence; Living Independent, Active and Healthy Lives; and Communities which are Safe, Well Maintained and Green.

Climate Change Implications

- 6.2 The investment plan includes interventions that will improve green spaces, reduce energy use by residents and may support businesses to develop carbon reducing technologies and grow sustainably.

Equalities and Diversity Implications

- 6.3 Equality and diversity implications will be considered throughout the delivery of the plan.

7. RISK MANAGEMENT

- 7.1 The current investment plan expires on 31 March 2025. The Council is required to report to Government how it will spend its UKSPF allocation for 2025/26 by 1 May 2025. Failure to develop an investment plan for 2025/26 may delay receipt of the funding.
- 7.2 The Council will continue to implement appropriate programme and project management arrangements for the UKSPF allocation for Redditch in order to manage risks relating to the funding programme and to any projects for which it is directly responsible.
- 7.3 Any UKSPF monies that have not been spent by 31 March 2026 will have to be returned to government. Delivery of projects and the costs

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associated will be monitored throughout the programme to ensure maximum use of the grant. Any underspend that is identified will be allocated to alternative projects that will deliver the priorities in the Investment Plan.

- 7.4 Delivery of the UKSPF investment plan will be included on the corporate risk register.

8. APPENDICES and BACKGROUND PAPERS

Appendix 1 UK Shared Prosperity Fund Investment Plan 2025/26

UK Shared Prosperity Fund Prospectus

[UK Shared Prosperity Fund: prospectus - GOV.UK](#)

UK Shared Prosperity Fund 2025/26 Technical Note

[UK Shared Prosperity Fund 2025-26: Technical note - GOV.UK](#)

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9. REPORT SIGN OFF

Department	Name and Job Title	Date
Portfolio Holder	Councillor Joe Baker Portfolio Holder for Planning, Regeneration and Governance	24/2/25
Lead Director / Assistant Director	Rachel Egan Assistant Director Regeneration & Property	5/2/25
Financial Services	Debra Goodall Assistant Director Finance & Customer Service	12/2/25
Legal Services	Nicola Cummings Principal Solicitor	24/2/25
Policy Team (if equalities implications apply)	n/a	
Climate Change Team (if climate change implications apply)	n/a	

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UK Shared Prosperity Fund Investment Plan 2025/26

Redditch Borough Council has been allocated £818,536 of UK Shared Prosperity Fund (UKSPF) for the period 2025/26. The funding will primarily be used to deliver missions in the local Labour manifesto which are informing the emerging Council Plan. The way in which the funding will be deployed to do this is detailed below.

Economy and Regeneration

The Council has an ambition to build a local economy fit for the future. To achieve this, we will support and encourage new businesses and support local independent businesses to grow and create employment.

Business start-up rates are higher in Redditch than the national, regional and county rates. The 3-year survival rate for new businesses also compares favourably with the regional and county rates but is slightly lower than the UK rate.¹ The current UKSPF funded start-up programme has experienced strong demand for pre-start support. Whilst this has not translated into new businesses starting up there is often a time lag between receiving support and starting a business. In the previous programme demand for support from early years businesses was low. Continuation of this programme will see it re-focussed to respond to the needs of new entrepreneurs.

Demand for grants to help established businesses to grow has been high. This support is usually taken up by micro businesses looking to make various investments including new equipment, improvements to premises and marketing. The provision of grants encourages small businesses to invest in their growth and realise their potential.

Whilst demand for grants is high, business owners often find identifying suitable funding and the process of applying for a grant challenging. Take up of business support programmes is lower in Redditch than other districts in the county. To ensure equitable access to business advice and grants for businesses in the borough it is necessary to provide specialist help to identify and apply for support.

We will:

¹ Source: ONS - Business Demography 2023 [Business demography, UK - Office for National Statistics](#)

- co-fund the delivery of the Enterprising Worcestershire start-up programme providing specialist support to help Redditch entrepreneurs to be enterprise ready. Match-funded grants will also be available to help businesses to start-up and become established.
- continue to offer match-funded grants to local, independent businesses to help them to invest in measures to help them to grow and create employment.
- continue to fund the Worcestershire Growth Hub to help businesses to identify, and apply for, national, regional and local programmes of support. Through the Growth Hub we will provide specialist advice and coaching on a range of key business topics to help businesses to grow and create employment.

One of the key objectives of the UK Shared Prosperity Fund is to build pride in place. How people feel about where they live is often reflected in how they feel about their local town centre. Redditch town centre is the focus for retail and services for the whole of the borough. It is dominated by the Kingfisher Shopping Centre which serves as a draw for both residents and visitors from further afield. The Church Green, whilst in the heart of the town centre, is perceived as a secondary retail location. The conservation area, with its pleasant, outdoor environment, represents an opportunity to extend the town centre retail, hospitality and leisure offer and to enhance its appeal to residents and visitors alike.

We will:

- continue to improve the town centre public realm to create a welcoming environment.
- promote the town centre and its retail, hospitality and service offer.

One of the key regeneration projects is the development of an Innovation Centre. Productivity in Redditch, measured in GVA per hour, is lower than the UK average (£32.3 per hour compared to £39.7 per hour).² The figure has been stagnant over the past 6 years where the national average has been growing. The Council's commitment to build the centre is designed to address this

² Source: ONS Subregional Productivity June 2024 [Subregional productivity: labour productivity indices by local authority district - Office for National Statistics](#)

issue and help to build a local economy fit for the future. The centre will be the focus of support to help businesses to adopt innovative processes to improve their productivity.

We will:

- procure an organisation to deliver an impactful business innovation programme offering advice and grants to help entrepreneurs and existing businesses to develop innovative products and services and to help established businesses to adopt new processes. This programme will be aligned with the development of the Innovation Centre and will create an opportunity to identify and engage with potential occupiers.

The Council's regeneration plans focus on creating opportunities for good local jobs and investing in skills, in order to have a thriving borough where businesses want to invest and residents can access well paid employment.

Redditch has a relatively high economic activity rate with 84.5% of residents in employment, self-employment or actively looking for work.³ This is higher than the rate for the West Midlands (79.5%) and the national rate (78.4%). Reasons for economic inactivity include being a student, early retirement, caring responsibilities, health conditions and people whose circumstances discourage them from working. The unemployment rate in Redditch in December 2024 was 4%.⁴ Whilst higher than the rate for the County (3.2%), it is lower than for the West Midlands (5.6%) and for England (4.3%). A growing economy creates employment and demand for a skilled, readily available workforce. With 4% of the population seeking employment and 15.5% of the working age population economically inactive, it is necessary to ensure that any barriers to employment that these groups are experiencing are addressed.

Whilst unemployment rates are low, young people are much more likely to be unemployed than the general population. The December 2024 unemployment rate for 18-24 year olds was 6.7% compared with 4% for all working age residents. The rate is also

³ Source: ONS Local Authority Profile [Labour Market Profile - Nomis - Official Census and Labour Market Statistics](#)

⁴ Source: Worcestershire County Economic Summary [Worcestershire County Economic Summary](#)

higher than the rate for Worcestershire (4.9%) and England (5.6%).⁵ Statistics for young care leavers are even more concerning. Around 50% of care leavers are NEET (not in employment, education or training).⁶

Redditch residents are reasonably well qualified with a higher proportion of the population having qualifications at every level than the West Midlands and national average. For example, 48.7% of residents are qualified to RQF Level 4⁷ and above compared to 42.5% of the West Midlands and 47.3% of Great Britain.⁸ Despite these levels of educational attainment, employers frequently cite a lack of a skilled workforce as a barrier to growth. Consultation that took place in the development of the Worcestershire Local Skills Improvement Plan (LSIP) identified a lack of common skills, ie transferable skills such as communication, teamwork and organisation; technical skills and knowledge such as AI, cyber security, data analytics, CNC programming; and leadership and management skills. As the local economy grows and develops, it is essential that all sections of the community have the necessary skills to take advantage of new opportunities.

We will:

- deliver a programme of support, via the Family Hubs, to help people caring for young children to develop employability skills in preparation for returning to the jobs market. The programme will also assist participants to access funded childcare provision to enable them to re-enter the jobs market.
- procure delivery of a targeted employability support programme designed to assist the economically inactive, to move closer to the jobs market. The programme will complement existing, national provision including recently announced programmes such as Connect to Work and WorkWell. The programme will support those that are not able to access mainstream support due to their complex barriers to employment.
- continue to fund the Redditch Youth Hub, providing support to young people aged 16 to 24 years old who are not in employment, education or training (NEET). This programme provides wrap around support for education and career choices

⁵ Source: Worcestershire County Economic Summary [Worcestershire County Economic Summary](#)

⁶ Source: Worcestershire County Council

⁷ Regulated Qualifications Framework Level 4 is equivalent to a Higher National Certificate (HNC)

⁸ Source: ONS Local Authority Profile [Labour Market Profile - Nomis - Official Census and Labour Market Statistics](#)

and engages with employers to open up opportunities to young people. In the first 6 months of delivery, the Youth Hub has supported 158 young people.

- provide opportunities for residents in employment to upskill through the provision of fully funded training or grants to fund specialist courses.

Voluntary & Community Sector

The voluntary and community sector plays a major role in supporting the people of the borough. The Council recognises the benefits of volunteering for both the volunteers and those that they help. Volunteering builds community connections and helps volunteers develop valuable, transferable skills for the workplace.

We will:

- provide grants to voluntary and community organisations to build capacity and support opportunities to volunteer.
- provide fully funded training to upskill the sector covering key topics such as leadership & management and bid writing.

Health & Wellbeing

The health and fitness of the borough is vitally important for residents to lead independent and fulfilling lives. A positive leisure and cultural offer provides opportunities for communities to enjoy being active and involved.

We will:

- deliver a programme of improvements to parks and green spaces to enhance opportunities for residents to be active and to enjoy the natural environment.

Green Redditch 2030

Redditch Borough Council is committed to a Green Redditch in 2030. They are encouraging green policies across the council and the borough. A key objective is to help residents to find affordable solutions and products to reduce energy bills and save the environment.

We will:

- fund Act on Energy caseworkers to provide intensive support to households to adopt energy efficiency measures. The support will be focussed on those that are vulnerable to fuel poverty and will help them to reduce fuel bills, keep warmer and reduce CO2 emissions.

Expenditure

Priority	Project	Deliverer	Capital	Revenue	Total
Economy & Regeneration	Enterprising Worcestershire Specialist advice for pre-start businesses	Worcestershire County Council		£25,000	£25,000
	Business Grants Grant funding for new and existing businesses to support them to start-up and grow.	RBC	£32,000	£44,931	£76,931
	Growth Hub Business signposting and account management service helping enterprises to access support. Delivery of the specialist advisor programme providing coaching and advice covering key business topics such as marketing, growth planning and financial management.	Worcestershire Growth Hub		£60,000	£60,000
	Town Centre Improvements	RBC	£20,000	£21,933	£41,933

	Improvements to the town centre public realm and promotion of the town centre and its services				
	Business Innovation & Productivity Programme Specialist programme of support to help new and existing businesses to development new to market products or services or for existing businesses to adopt new processes	To be procured	£20,000	£80,000	£100,000
	Employability Support in Family Hubs Support to economically inactive people with caring responsibilities to move towards employment through the development of employability skills, job search support and accessing help with childcare.	RBC		£20,000	£20,000
	Employability Skills Programme Support for economically inactive people to move towards employment through the development of employability skills.	To be procured		£56,000	£56,000
	Redditch Youth Hub Bespoke advice to young people 16 – 24, including those who are NEET or at risk of becoming NEET, to move into employment, education and training	Careers Worcestershire		£150,000	£150,000
	In-employment Training Provision of grants and fully funded training to upskill the workforce	To be procured		£35,931	£35,931
Voluntary & Community Sector	Voluntary & Community Sector Support	RBC		£90,000	£90,000

	Provision of grants and training to the voluntary sector to increase capacity and sustainability of organisations				
Health & Wellbeing	Parks & Green Spaces A programme of improvements to parks and green spaces	RBC	£80,000		£80,000
Green Redditch 2030	Community Caseworker Providing advice and support to households vulnerable to fuel poverty to take up energy efficiency measures	Act on Energy		£50,000	£50,000
	Management & Administration of UKSPF			£32,741	£32,741
Total			£152,000	£666,536	£818,536

**Executive Committee
2025**11th March**Redditch Council Plan 2025/28**

Relevant Portfolio Holder	Councillor Joe Baker
Portfolio Holder Consulted	Yes
Relevant Assistant Director	Sue Hanley, Chief Executive
Report Author Rebecca Green	Job Title: Policy Manager Contact email: r.green@bromsgroveandredditch.gov.uk Contact Tel: 01527 881616
Wards Affected	All
Ward Councillor(s) consulted	
Relevant Council Priority	All
Non-Key Decision	

1. RECOMMENDATIONS**Executive Committee RECOMMEND that:-**

1. **The Council Plan attached at Appendix 1 be approved.**
2. **Authority be delegated to the Chief Executive, following consultation with the Portfolio Holder for Planning, Regeneration and Governance in respect of any changes as result of the Local Government reorganisation.**

2. BACKGROUND

- 2.1 Work to develop a new Council Plan began in 2024, with the new Executive Committee working closely with the Corporate Leadership Team and supported by the Local Government Association. Building on the election manifesto, sessions were undertaken to pull together the priorities, supported by data, evidence and service specific expertise and guidance.

3. OPERATIONAL ISSUES

- 3.1 The Council Plan and the priorities contained within it will help to set the direction for the Council and how it works with its partners. Service areas will be working towards these priorities, which will inform the development of service business plans. The Council Plan will be reviewed annually and supported by quarterly measures (where applicable) to ensure that the key objectives and projects are actioned. These will be included in a separate Implementation Plan to sit alongside the Council Plan, which will detail how the key objectives and projects will be monitored and progress reported.

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4. FINANCIAL IMPLICATIONS

- 4.1 Finance and performance reporting are already aligned through the quarterly reports and the Council Plan, by setting out the priorities, objectives and projects, will help to structure the service business planning process and will underpin the medium-term financial planning.

5. LEGAL IMPLICATIONS

- 5.1 There are no legal implications arising directly from this report.

6. OTHER - IMPLICATIONS**Council Priorities**

- 6.1 This Council Plan proposes three new Council Priorities, based on data, evidence and community engagement:
- Economy & Regeneration
 - Green, Clean & Safe Redditch
 - Community & Housing

Climate Change Implications

- 6.2 The new Council Plan has 'Green, Clean & Safe Redditch' as one of the three priorities, and explicitly supports work around climate change through the identification of a key objective on renewable energy and key projects to work with the community on climate change, support the Warm Homes initiative and increasing the number of electric vehicle charging points.

Equalities and Diversity Implications

- 6.3 There are no equality and diversity implications arising directly from this report; however, the Council Plan highlights the importance of listening to communities and will empower officers to meet the needs of those communities, which could include specific issues relating to equality and diversity.
- 6.4 Specific Equality Impact Assessments (EQIAs) of projects detailed within the Council Plan will be undertaken as required.

7. RISK MANAGEMENT

- 7.1 By publishing a Council Plan the strategic direction of the Council will be clear to employees and Members and as such will support the

REDDITCH BOROUGH COUNCIL**Executive Committee
2025**11th March

management of risks identified around robust decision making and the accuracy/effectiveness of performance data.

- 7.2 The annual review process will allow for any risks potentially arising from the local government reorganisation process to be addressed.

8. APPENDICES and BACKGROUND PAPERS

Appendix 1- Redditch Council Plan 2025-28

9. REPORT SIGN OFF

Department	Name and Job Title	Date
Portfolio Holder	Cllr Joe Baker, Leader of the Council	26/02/25
Lead Director / Assistant Director	Sue Hanley, Chief Executive	18/02/2025
Financial Services	Peter Carpenter, Director of Resources/Deputy Chief Executive	20/02/2025
Legal Services	Claire Felton, Assistant Director of Legal Democratic and Procurement Services	13/02/2025
Policy Team (if equalities implications apply)	Rebecca Green, Policy Manager	20/02/2025
Climate Change Team (if climate change implications apply)	Judith Willis, Assistant Director of Community and Housing Services	13/02/2025

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Introduction- Cllr Joe Baker, Leader of the Council

This council plan is a fresh start for Redditch and since this administration was elected in May, we have started in the way we mean to go on. We have saved the library, and work has started to transform the Town Hall into a community hub for services, retaining the Council Chamber. But we now need to look forward. I am delighted to launch this plan, setting out the direction of the Council for the next 4 years, with communities' aspirations and needs at its heart.

Our council plan is based on our manifesto pledges, as well as feedback from our residents, communities, businesses, and, of course, the budget, to ensure we are working together to deliver the best for Redditch.

We have split the plan into three core priorities. Firstly, a strong focus on economic development. We want to provide job opportunities for residents, particularly our young people so they can choose to stay in their hometown. We will look to attract inward investment to achieve this, attracting new businesses to move Redditch and supporting existing businesses to grow and thrive.

Secondly, we want to create a clean, green, and safe Redditch that everyone can be proud of, starting with the basics: reducing litter-dropping and dog-fouling; increasing the renewable energy this Council uses, and working with communities on climate change. We want residents to see improvements straight away, but we will also continue to focus on delivering on **our** longer-term goals.

Our third priority is Community and Housing. We want to provide more homes for our residents to reduce the social housing waiting list and provide affordable rental properties. Above all, it is vital that homes are safe, warm and built to a high standard. We have listened. We know that damp and mould is a distinct priority to address, and we will be investing in additional resources to deal with this. We are very proud of our culture and heritage and the green and open spaces the Borough is so famous for. By improving walking and cycling routes, we can encourage our residents to use and enjoy the open spaces to improve their own health and well-being.

We are aspirational for Redditch to be:

- A happy and safe place to live, work and grow up through the provision of decent homes, crime prevention, reducing anti-social behaviour and improving community engagement
- A welcoming place for everyone, with something to offer all - children, young people, older people and families. A place where people take pride in our communities and heritage.
- A prosperous place where businesses thrive, so that everyone can achieve their hopes and aspirations for the future.
- A green and healthy place, preserving our open spaces and working in partnership to address health indicators such as levels of obesity, drug and alcohol addiction.

Underpinning this plan and our priorities is our commitment to our strategic planning and being a principles-driven organisation. By prioritising financial and organisational stability, recognising the importance of supported governance, focusing on our communities and delivering high-quality services we aim to meet our resident's needs whilst also being somewhere our employees can thrive. This plan will be used by our officers to structure and deliver business plans for their own service areas so that our ambitions and high aspirations for Redditch will become a reality throughout the Borough.

Rest assured, we will continue to listen to, and work for, our communities.

Our vision & priorities

•A Council which listens to and delivers quality services for our communities, residents and businesses

**Economy,
Regeneration
& Prosperity**

**Green, Clean
& Safe**

**Community
& Housing**

About Redditch Borough

Redditch Borough is located in North Worcestershire, approximately 15 miles south of Birmingham and covers an area of 5,435 hectares (13,430 acres). The Borough is situated at the outer edge of the Green Belt boundary for the West Midlands.

The Borough is split into the urban area of Redditch in the north, accounting for 50% of the area and 93% of the population; and the rural area to the south with 7% of the population. The rural area consists predominantly of Green Belt land, but also open countryside, as well as the villages of Astwood Bank and Feckenham.

Redditch Borough has many open spaces with a rich biodiversity; there are 6 Sites of Special Scientific Interest and 24 Special Wildlife Sites, plus numerous Local Nature Reserves.

Key demographic characteristics include:

- A population of 87,000 (2021 Census)
- Redditch has a young population with 19.3% aged 15 or under at the last Census (2021)
- The population are 82.4% white British, but it has diverse communities including 6.6% other white and 5.7% Asian/Asian British
- Life expectancy is 11.6 years lower for men and 10.4 years lower for women in the most deprived areas of Redditch than in the least deprived areas
- Estimated levels of excess weight in adults (aged 18+) are higher than the England average
- The unemployment claimant count for Redditch was 4% in October 2024, rising to 6.5% for the 18–24-year-old cohort.

The borough also faces some challenges. Greenlands, Abbey, Church Hill and Winyates wards all include Lower Super Output Areas (LSOA) ranking in the top 10% most deprived nationally (Indices of Multiple Deprivation 2019). According to Government data, 11 LSOAs in the district have fuel poverty levels of 20% or higher (2024 release, 2022 data).

The percentage of students in Redditch achieving the English Baccalaureate at grade 4 (a standard pass) or above was 3rd lowest in the region at a district/borough level during academic year 2023/24 (Department for Education 2024).

Redditch is a vibrant manufacturing hub and a key driver of the regional economy, home to renowned household names such as GKN, Baylis & Harding, and Halfords. These industry leaders, alongside a rich industrial heritage and a skilled workforce, underpin the town's reputation for innovation and excellence. With a thriving local economy and a commitment to business growth, Redditch continues to attract investment and create opportunities for prosperity across the region. The Borough of Redditch is also identified within a national needs assessment called 'Pride in Place' (Royal Society of Arts Trade and Commerce Heritage Index 2020), placing 3rd in a league table of 10 councils (out of 157 in England) with the highest heritage potential.

Redditch Local Plan

The Redditch Local Plan is the most important planning document at the local level, as it provides a set of policies which will inform how development across the Borough will take shape.

A Local Plan guides decisions on future development proposals, addresses the needs and opportunities of the area, and ensures that protected areas remain free from inappropriate development. Topics that Local Plans cover include housing, employment, open spaces, heritage, climate change and infrastructure

The current Local Plan was adopted in 2017 sets out the state of Redditch as it was then and there was a vision and objectives that set out what Redditch aimed to be like by the end of the Plan period. The Council are about to embark on preparing a new Local Plan. This plan will be developed over the next few years, which, when adopted, will support the Council in delivering many of the key projects identified in this Council Plan.

Economy & Regeneration

We want a healthy and thriving economy, building on and celebrating the existing businesses within the borough. We will ensure that your council tax is used to provide the services you need and that the assets the Council has are used for the benefit of residents and communities. Having a clear and consistent economic strategy will enable us to shape both public and private investment in economic development and regeneration.

Regenerating the borough involves both where people live, and the opportunities they have available to them. It is vitally important to prioritise good local jobs and investing in skills in order to have a thriving borough where businesses want to invest, and our residents can access well paid employment opportunities.

Key objectives

- More high-quality local jobs
- Greater opportunities to develop new skills
- Increase footfall in the town centre
- Engage with communities to understand the needs of our district centres
- Support local independent businesses
- Support and encourage new start-up businesses
- Collaborate with partners to secure public and private investment
- Attract businesses to locate in Redditch

Key projects

- Regeneration of the Town Hall
- Redditch outdoor market
- Forge Mill Museum enhancements
- Innovation Centre
- Utilise land and assets for the benefit of residents
- Develop an approach to Community Wealth Building
- New Economic Development Strategy for Redditch

Green, Clean & Safe Redditch

We will support communities in reducing energy bills through exploring affordable green solutions. We will campaign for sustainable and comprehensive public transport and safer walking and cycling routes across the Borough. We will look to encourage green policies across the council and beyond.

We are committed to making Redditch a cleaner and safer place for our residents, whether that is by addressing litter and dog mess or the impact of fly-tipping and antisocial behaviour. We will work with the Police, partners and stakeholders to understand the impact of crime, raise awareness and explore preventative measures. We will make it easier and clearer for people to get rid of their unwanted items, particularly those people who might need assistance.

Key objectives

- Improve street cleanliness of our neighbourhoods and local environment
- Support voluntary groups litter picking in their communities
- Improve recycling rates
- Protect and enhance open spaces
- Enhancing biodiversity
- Work with partners to tackle ASB, Serious Violence, Burglary and Drugs Misuse as part of the statutory Community Safety Partnership
- Increase the amount of renewable energy generated by the Council
- Utilise brown field and industrial sites for development
- Ensure large developments provide better green space and invest in existing open spaces

Key projects

- Develop a programme to reduce fly-tipping
- Review options for disposal of bulky waste
- Develop a campaign to reduce littering and dog fouling in the Borough
- Implement a Neighbourhood Warden scheme
- Implement locally the Worcestershire Drug & Alcohol Strategy 22-27
- Implement food waste collection and improve quality of recycling
- Review future cemetery provision
- Work with the community on climate change
- Warm Homes programme
- Electric vehicle charging points
- Undertake an audit of biodiversity requirements and actions
- Ensure the protection and provision of open spaces through the Local Plan
- Identify land for development through the Local Plan

Community & Housing

We will work with partners across the county to deliver the Worcestershire Housing Strategy 2023-2040 and the Worcestershire Homelessness Strategy. We want to build more Council houses and will work with communities and partners to understand where and what we need, utilising modern and energy efficient building techniques. We will work to improve and upgrade our housing stock

The health and fitness of the borough is vitally important for people to lead independent and fulfilling lives. We will work with partners to help ensure that the health and wellbeing offer within the borough meets the needs of our residents. A positive leisure and cultural offer will provide opportunities for our communities to enjoy being active and involved, as well as having a positive impact on the mental wellbeing of local residents of all ages.

It is incredibly important for us to work with and support the local voluntary and community sector as they play a major role in supporting our communities, particularly in the cost-of-living crisis. We are also very proud of the dedicated volunteers who give their time for others. We are committed to our grants process and will make this focused on our local communities through involvement of elected members on the panel. We will work alongside the partners of the Cultural Compact for North East Worcestershire to deliver the Arts and Culture Strategy for the Borough, encouraging of the people of Redditch to become more creative and developing local creative talent and capacity building support for the local cultural sector.

Key objectives

- Build more Council houses
- Reduce the housing waiting list
- Reduce the number of families in temporary accommodation
- Ensure our housing stock is clean & safe to live in
- Improve time taken for repairs to be completed
- Work with partners to improve health and wellbeing
- Provide high quality play provision
- Promote the establishment of community fitness and mental health groups
- Provide more walking & cycling routes
- Maximise funding available to the sector
- Engagement with the voluntary sector
- Support the development of the local creative and cultural sectors
- Improve the Shopmobility scheme

Key projects

- Specific damp and mould resource
- Implementation of Total Mobile project
- Use stock condition data to create improvement programmes
- Buy back scheme
- Bringing empty houses back into use
- Support community allotments by implementing the Leisure Strategy
- Improvements to play area provision via clarifying prioritisation
- Address the provision of walking and cycling routes through the Local Plan
- Support the work of the Redditch District Collaborative
- Implement a Town Hall Community Hub
- Restore the elected member grant panel
- Develop an internal Bid Writer role
- Review how we support the 3rd sector
- Review Dial-a-Ride charges
- Support Reimagine Redditch
- Deliver the ReNEW Sharing Stories Shaping Futures campaign
- Work with the community to develop an engagement forum
- Develop a Youth Council for the Borough

Organisational Priorities

A fresh start for the Council and the Borough will see us continuing to focus on financial stability and transparency, making sure we have adequate funds going forward all while we work to meaningfully involve our residents, communities and businesses in decision making and project design and delivery. We will undertake a full review of council decision-making procedures and increase transparency through the live streaming of council meetings.

Key organisational priorities:

- **Financial Stability**
- **Organisational Stability**
- **Community Focus**
- **High Quality Services**
- **Supported Governance**
- **Principles Driven** (4 p's- Purpose; People; Pride; Performance)



- **Purpose:** Aligns all actions and decisions with the council's overarching strategic goals, ensuring every task contributes to the collective vision and priorities, whether at a corporate, departmental, team or personal level. It provides a sense of direction, helping staff understand how their roles directly impact the community and reason for their work.
- **People:** This principle showcases the importance of 'our people' as our greatest asset, valuing and empowering staff, as well as recognising other important people or stakeholders that impact our work, from members to communities and partners. This principle aims to create a thriving working environment, supporting our people and offering wellbeing initiatives, development opportunities, flexibility, policies, and frameworks that ultimately enhance morale, productivity and the happiness of our staff.
- **Pride:** Taking pride in our work and our community is a key building block in maintaining high standards and a sense of achievement for our employees. By celebrating our successes and learning from challenges, pride encourages ownership, passion, and integrity in our day-to-day work life.
- **Performance:** By setting clear goals, measuring outcomes, and striving for excellence, we can drive continuous improvement and ensure that our work leads to tangible benefits for the community. This allows us to recognise our successes, set future objectives and identify areas for growth and improvement.

Whilst each principle has its own meaning, they are designed to work in a unified way to ensure a good culture where our staff are dedicated to delivering outstanding public services.

Local Government Reorganisation

TBC...

Engagement, Partnership and Collaborative Working

Communities are at the heart of this plan, so meaningful engagement with our residents, tenants, businesses, community organisations and other stakeholders is vital to make many of our ambitions a reality. This could be through consultation events, surveys or forums; enabling people to have their say in a way that is both accessible and timely will ensure that local voices truly influence the services we provide and support the communities we serve.

For the Borough Council to effectively deliver its Council Plan, there is a need to work in partnership with other agencies across the different sectors. This means, instead of each organisation working separately in isolation, we will proactively support local agencies to come together and address issues in a more cohesive way for the benefit of local residents.

We will make use of all available opportunities for effective partnership working in Redditch, including through the relatively newly established and evolving Redditch District Collaborative. Redditch District Collaborative (RDC) originated in 2021. The Collaborative builds on the strong and effective working relationships between Redditch GP practices (Kingfisher and Nightingales PCNs), Redditch Borough Council, Worcestershire County Council, and Public Health. The purpose of RDC is to enable and facilitate strong collaborative working that brings about long-term, positive health and wellbeing outcomes for Redditch residents.

Other partnership activities include:

- Working to deliver the latest North Worcestershire Community Safety Partnership Plan.
 - The North Worcestershire Community Safety Partnership deliver a range of community safety initiatives and work with agencies and communities to achieve the Partnership's vision of keeping "North Worcestershire a safer place to live, work and visit"

- Supporting the Cultural Compact for North East Worcestershire, in order to increase active and creative behaviours and connectivity with open space.
 - A Culture Compact is a strong and sustained collaboration between strategic place-based partners which support co-design and deliver a vision for culture within a place. The partnership brings together local authorities, business, education providers, cultural and community leaders, driven by a shared ambition for culture and place, to co-design and deliver a vision for culture within North East Worcestershire.

Monitoring, Review & Reporting- our Measures, Projects & Progress

Progress will be monitored quarterly (where the data is available), allowing us to adjust, as needed, to keep the plan on track. Quarterly Monitoring Reports (Performance & Project Monitoring) and an Annual Review of the plan will be considered by the Executive, Overview and Scrutiny and the Corporate Leadership Team, with the updates being available to the public on the website.

In order to ensure we deliver the objectives and projects in this plan, we will develop an Implementation Plan to sit alongside it, helping the organisation to monitor our progress and to understand the difference that has been made within our communities. This plan will identify relevant and meaningful performance measures, projects to be monitored corporately and how annual progress will be reported.

Risk Management

The Council is committed to managing our risks effectively, efficiently, and proportionally, ensuring that risk management is fully embedded across the organisation. Corporate Risks are set out on a quarterly basis to the Audit, Governance and Standards Committee. This Committee has an active “Risk Champion”.

Mitigations for the risks identified are set out in Audit Reports as well as departmental risks that link to these Corporate Risks. An Officer Risk Board continues to take place quarterly to embed processes and validate risks on the register, with each department having as representative. The Corporate Management Team are updated on risk management issues in their monthly “assurance” meeting. The Risk Level now stands at Moderate Assurance, as of May 2023.

Budget and Resources

Ensuring that we make the best use of our resources, capital and assets is essential in order to balance the books and provide our residents with value for money and confidence in the Council's ability to manage the budget. The priorities detailed within this plan will underpin our medium-term financial planning and financial management expertise informs all of our strategic decision making.

The 2025/6 to 2027/8 Medium Term Financial Plan was approved at Council on the 24th February 2025. That Budget can be summarised as follows:

Year	2025/6	2026/7	2027/8
	£000	£000	£000
Updated Totals	-30	435	345

Overall there is a net £30k surplus in 2025/26, rising to a deficit of £435k in 2026/27, before reducing to £345k in 2027/28. This is an overall call on general fund reserves of £750k.

Presently, the General Fund sits at a value of £7.312m (taking account of the Tranche 2 position) at the 31st March 2028. This sum is approximately 15% of gross expenditure which is well above the 5% benchmark quoted by the Government as being a minimum requirement. Earmarked Reserve balances which at the 31st March 2028 sit at a value of £14.868m.

Capital expenditure, including carry forward amounts are £51m of which £23m is Grant Funded.

REDDITCH BOROUGH COUNCIL**Executive 11th March 2025****Member Ward Budget Scheme**

Relevant Portfolio Holder	Councillor Ian Woodall, Finance Portfolio Holder
Portfolio Holder Consulted	Yes
Relevant Head of Service	Debra Goodall
Report Author	Job Title: Head of Finance & Customer Services email: Debra.Goodall@bromsgroveandredditch.gov.uk Contact Tel: 0152764252
Wards Affected	N/A
Ward Councillor(s) consulted	N/A
Relevant Strategic Purpose(s)	All
Non-Key Decision	
If you have any questions about this report, please contact the report author in advance of the meeting.	

1. SUMMARY

Funding was approved in the 2025/26 Budget for purpose of the implementation of a Member Ward Budget Scheme. This report sets out the operating principals for that Scheme.

2. RECOMMENDATIONS

Executive are asked to RESOLVE that:

- **The Ward Budget Scheme be Agreed:**

3. KEY ISSUES

- 3.1 Redditch Borough Council is proposing that an allocation of funding will be distributed to individual ward members to work within the Borough to improve facilities and outcomes for their communities. The scheme is set out in **Appendix A**, and the Individual Member Application Forms at **Appendix B**.
- 3.2 In this proposal each Councillor will receive £2,000 for the 2025/26 financial year, and the following two financial years which they can recommend allocating to projects and/or services within their ward. These allocations must comply with policy as set out in the Redditch Councillor Grant Facility (RCGF). This Pilot Scheme has been agreed as part of the 2025/6 Medium Term Financial Plan Process. The initial funds for the 3 year pilot for all 27 Members at £2,000 a year will cost £162,000 and then to this an administration cost of circa £6,000 a year will be required at a total cost of £180,000.

REDDITCH BOROUGH COUNCIL**Executive 11th March 2025****Application Process**

- 3.3 Any application to spend funds in the members ward must be made on the form provided and submitted to the Director of Resources/Deputy Chief Executive via the email address via his Directorate Support Officer Sarah Carroll – sarah.carroll@bromsgroveandredditch.gov.uk. Based on the information provided a decision will be made on whether the proposal is reasonable and lawful.
- 3.4 Forms can be submitted electronically via the Council's e-mail account only, or in paper with the necessary signature/s.
- 3.5 Applications direct from organisations will not be considered.
- 3.6 Funds will not be paid to Councillors but direct to the project/organisation nominated on the form.
- 3.7 Do not include account details on the submission form. If the payee's details are not contained within the Council's financial system they will be contacted directly in order that they provide us with their account details.
- 3.8 Payment will be made by BACS Transfer as it is a secure method of making payment and is cost effective to the Council. **Payments will not be made by Cheque or Cash.**

Be clear about how the money will be spent

- 3.9 A clear statement will be required as to how the money will be spent and how the economic, social or environmental well-being of their Ward may be promoted or improved by its use. It is anticipated that there will be evidence that the service/ project is required by the community / residents and that once implemented there is a clear benefit that can also be evidenced.
- 3.10 The application will only be cleared for payment if this is clear and officers can see that it is appropriate and legal.
- 3.11 Once an application has been agreed it will be held for public inspection (on request) at the Council House for 6 years and a summary will be published as part of the quarterly Finance and Performance Monitoring Report as well as being held on the Council Website.
- 3.12 A quarterly update will be made available to Councillors on the spend / balance of their fund.

REDDITCH BOROUGH COUNCIL**Executive 11th March 2025****Declarations of Interest**

- 3.13 You need to declare that you have no disclosable pecuniary interest in the proposal (this includes the interests of spouse/partner as well as you) – and/or, if another disclosable interest exists, make a clear statement as to the type and nature of the interest.
- 3.14 No organisation will be able to benefit from the funding if you hold a disclosable pecuniary interest.
- 3.15 Being appointed to a particular body by the Borough Council should not normally create a disclosable interest. However, each case must be considered individually and early advice should be sought on the nature of any potential interest.
- 3.16 Members can join with other Members to “pool” their Ward Funds for specific Council wide projects and initiatives to make the overall sums greater. However, members should note that they should not support such initiatives if they are linked to managing boards as this would be a conflict of interest. Members can also allocate their funds outside their specific Wards for specific initiatives as long as there is no conflict of interest.

Publicity

- 3.17 Any publicity arising from use of the Fund should not be party political and should refer to the Borough Council’s contribution. The Ward Councillor/s is responsible for ensuring that any publicity complies with this.
- 3.18 Be clear that the payment is from the Borough Council and not you individually.
- 3.19 The scheme will be suspended during any periods of purdah relating to the Borough Council elections.

Audit

- 3.20 The Ward Members Fund can be subject to review by the Council’s Internal Audit service to ensure financial probity and value for money in how public money is spent. Appropriate records should be kept by all applicants in case their application is audited.
- 3.21 Appropriate records will be kept by officers of the funding approved and expenditure incurred by the Council. Every project (both approved and rejected) must have a completed application form and a record of the decision taken.

4. Legal Implications

- 4.1 No Legal implications have been identified.

REDDITCH BOROUGH COUNCIL**Executive 11th March 2025****5. Strategic Purpose Implications****Relevant Strategic Purpose**

- 5.1 The Strategic purposes are included in the Council's corporate plan and guides the Council's approach to budget making ensuring we focus on the issues and what are most important for the borough and our communities. Our Financial monitoring and strategies are integrated within all of our Strategic Purposes.

Climate Change Implications

- 5.2 The green thread runs through the Council plan. Every report has potential financial implications and these in term can have implications on climate change. These will be addressed and reviewed through individual reports when relevant by climate change officers will ensure the correct procedures have been followed to ensure any impacts on climate change are fully understood.

6. Other Implications**Customer / Equalities and Diversity Implications**

- 6.1 None as a direct result of this report.

Operational Implications

- 6.2 Managers meet with finance officers to consider the current financial position and to ensure actions are in place to mitigate any overspends.

7. RISK MANAGEMENT

- 7.1 The financial monitoring is included in the corporate risk register for the authority

8. APPENDENCES

Appendix A – Draft Scheme

Appendix B – Individual Proposal Form

AUTHOR OF REPORT

Name: Pete Carpenter– Director of Resources/Deputy Chief Executive
E Mail: Peter.Carpenter@bromsgroveandredditchbc.gov.uk

REDDITCH BOROUGH COUNCIL**Executive 11th March 2025****Appendix A****Redditch Councillor Grant Facility**

The Redditch Councillor Grant Facility empowers ward councillors to help their local communities. Other Councils have this approach, including Worcestershire County Council, Worcester City Council and Bromsgrove District Council. These have been used as a basis for the principles of this scheme.

In this draft scheme each of Redditch's 27 members will have an allocation of £2,000 (per financial year), to spend on locally determined initiatives within their Ward. They have reasonable discretion as to how to spend their allocation, as long as they are lawful for the Council, rational and are properly recorded.

The Redditch Councillor Grant Facility (RCGF) is aimed at one-off items of expenditure or supporting community activity, local and national charities or voluntary organisations within the local Division.

Formal applications for bids to the RCGF can only be submitted by the Ward Councillor; however, individuals or organisations can contact their local Councillor and seek support from the Fund. The public will be encouraged to contact their Ward Councillors for support, in order to provide them with information on how support from the RCGF would promote or improve the economic, social or environmental well-being of the local area, or those people within it.

The proposed Pilot Scheme will run for three years with a review after year 2 to evaluate its effectiveness and suitability for ongoing funding.

The cost of the scheme is £54,000 a year, which over the three year period would be a cost of £162,000. There is the requirement to administer the scheme which is estimated to cost circa £13k a year (25% of expenditure) linking to finance, procurement, legal and service specific support. This is £201,000 in total.

The scheme could be funded in 2 different ways:

- 1) Including a Budget for the Redditch Councillor Grant Facility of £67k a year for the next 3 years and have this approved as part of the budget process.
- 2) As part of the budget process, approve the setting up of an earmarked reserve of £201k in order to fund the scheme.

1. Guiding Principles

1.1 The purpose of the Redditch Councillor Grant Facility (RCGF) is to enable Councillors to allocate funds to facilitate 'good works' in and for the benefit of their respective Wards and thereby become more closely involved in their communities.

1.2 Members have considerable discretion in how they allocate funds.

REDDITCH BOROUGH COUNCIL**Executive 11th March 2025**

1.3 Allocations of public money from the Fund must be done lawfully and transparently ie within the Council's legal powers, on a rational basis, and a formal public record made of the spending decision. The Fund must not be used in a way contrary to Council policy.

1.4 The RCGF is intended to be, as much as possible, a self-regulating scheme. If Members are unsure about the propriety of their intended allocation or whether it adheres to guidelines they should seek guidance from the Council's Section 151 Officer or Monitoring Officer or their staff. If still unsure: don't!

1.5 Members should ensure that their use of the RCGF adheres to legislation and Borough Council guidelines (either set out within this Scheme or as given from time to time) and that it is made very clear that any funding which is provided originates from Borough Council public resources.

2. Scheme principles

2.1 The Scheme operated for a trial period from 1 April 2025 until 31 March 2028. The Scheme will be reviewed at the end of the second year for it's ongoing support.

2.2 The Scheme is established under s236 of the Local Government and Public Involvement in Health Act 2007 which allows local Members to discharge the Council's well-being functions in relation to their local electoral Division (now included within s1 of the Localism Act 2011) and has been agreed by the Leader of the Council in respect of executive functions and full Council in respect of non-executive functions.

2.3 Members are being given wide discretion as to how the economic, social or environmental well-being of their Ward may be promoted or improved by their use of the RCGF for the benefit of the whole or any part of their Ward or those within it.

2.4 The RCGF enables each Member to decide items of expenditure which are for the well-being of their Ward. This expenditure will be drawn from a specific RCGF budget allocated to each Member and which may not be exceeded.

2.5 This proposed RCGF budget will be a maximum of £2,000 per financial year for each Member to spend on 'good works' within their Ward. The Scheme will only allow individual Members to carry forward to the following financial year any underspent amount if it has been agreed 3 months before the end of the financial year (and is being earmarked as part of a wider scheme either within the Ward or across a number of Wards (see point 3.7 below)).

2.6 There must be a transparent audit trail in respect of decisions under this Scheme. In compliance with the legislation, the individual Member is responsible for ensuring a record is made in writing of any decision or action she or he has taken in connection with this Scheme and must ensure that record is provided to the Administration Team within 1 month of the decision or action. The rationale must be clear – any that are unclear will be referred back to the Member, thus causing delay. A standard template will be supplied for this purpose which will form both the request to process a particular payment and also the record of that decision and reasons for it. Any electronic communication about the Scheme (forms, confirmation of joint Scheme) etc. must be sent from an authorised email address.

2.7 The Section 151 Officer will keep a record of RCGF expenditure in respect of each Ward and either they or the Monitoring Officer will inform Members on request of the balance remaining. The Section 151

REDDITCH BOROUGH COUNCIL**Executive 11th March 2025**

Officer or Monitoring Officer will also make an annual report to the Overview and Scrutiny Committee, setting out the actual expenditure in each Ward and any issues arising from the operation of the Scheme. Financial Monitoring Reports to Executive may also refer to expenditure under the Scheme.

2.8 Priority will be given to maintaining a high profile for the RCGF and the records of expenditure under the Scheme (ie a summary of the member request form above) will be publicly viewable on the Council's website and will be held for public inspection on request for 6 years by the Council.

3. Scheme Specifics

3.1 Any decision under this scheme must not be contrary to Redditch Borough Council policy, and the Council must have legal powers to make the decision and incur the expenditure proposed.

3.2 The Members' Code of Conduct applies to the exercise of the Scheme. Members must declare any Disclosable Pecuniary Interest (DPI) or Other Disclosable Interest (ODI) in the proposal. No proposal may be put forward in which the Member has a DPI or ODI which would require the Member to have withdrawn from a meeting. Where there is any doubt over the legality or propriety of the expenditure, either the Section 151 Officer or the Monitoring Officer will determine whether the expenditure is lawful and proper, and their decision as statutory officers will be final. Accordingly, where there is any potential concern about the lawfulness or propriety of the proposed expenditure, no firm commitment for expenditure should be made or promised until such advice has been sought and a determination made as needed.

3.3 Members may wish to have regard to any Community Profiling in respect of their Ward in relation to proposals for the RCGF.

3.4 The RCGF should not be used to provide grant-support to commercial enterprises (such as Private Care Homes, Private or Public Limited Companies). The RCGF may be used to support local or national charities or voluntary bodies working within a Member's Ward if for the specific well-being of the Ward. The RCGF may be used to purchase goods or services from commercial enterprises in order to promote public well-being through use of those goods or services in the local community (see below).

3.5 The RCGF should be used for one-off items of expenditure and not for expenditure that would create an on-going financial commitment.

3.6 The RCGF cannot be used for direct employment of staff or for gifts or hospitality payments.

3.7 Two or more Members may agree on a joint proposal for the whole or part of their WCDF budgets - formal confirmation will be required from all Members involved in the joint proposals. Note that a joint proposal must be of benefit to the Wards of all Members putting it forward.

3.8 Proposals to use the RCGF for road repairs and highway schemes will be referred by the Member to the Environmental Services Directorate to determine the feasibility and cost. Funding for speed cameras is permissible if the camera is used under the guidance, authority and training of the Police.

3.9 Members should consider the financial viability of a potential recipient (such as a local voluntary body) in order to reduce the risk of public money being wasted, and in cases of uncertainty or concern are encouraged to seek advice from the Section 151 Officer.

REDDITCH BOROUGH COUNCIL**Executive 11th March 2025**

3.10 Members will be responsible for organising and facilitating any publicity in relation to expenditure from the RCGF which should, where possible, clearly state the link to Redditch Borough Council. Any publicity must be non-party political and in accordance with legal restrictions on the Council, with the periods before elections particularly sensitive.

3.11 Where a proposal is for a project that requires funding from more than one source (and not all sources are the RCGF) members are advised to allocate funding to a specific part of the project (e.g. new carpets, disabled toilets, painting etc) rather than put monies into a larger pot. If the payee is VAT registered and can recover VAT on goods or services to be funded, the RCGF grant should be net of VAT.

3.12 Under the rules of HM Revenue and Customs, if the grant is to be paid to an individual (rather than a group or committee) to provide a service as opposed to purchasing goods, it is necessary to consider whether the recipient should be classed as an employee of the Borough Council or self-employed. Only if it has been established that the work to be undertaken is one of self-employment can a payment be made. It is not permitted to engage anyone as an employee using the RCGF. Advice on this can be obtained from Human Resources.

3.13 Where a grant is in excess of £1,000 and the payment is to be made directly to a supplier (e.g. to buy football kit on behalf of a team), Financial Regulations must be followed and competitive quotations obtained. Advice on this can be obtained from Financial Services and Strategic Procurement within the Resources Directorate.

3.14 If for any reason the project for which the RCGF has been used does not go ahead, the recipient of the funding must contact the Member in question to discuss alternative proposals for the use of the funding and ensure that any allocation is returned to the Council. Members must ensure that any funding for such projects must be made subject to these conditions, should ensure the RCGF grant has been used for the intended purpose and must update the record supplied to the Section 151 Officer to reflect any subsequent variation.

3.15 Authorisation of expenditure from the RCGF must be made on the pro-forma provided and returned to the Administration Team who will arrange publication of the decision and forward it to the Section 151 Officer. Orders will be placed, where appropriate, using the Council's usual procurement arrangements (for which details can be obtained from Strategic Procurement), or alternatively a cheque will be produced in the name of the recipient.

3.16 In the year of a Borough Council election, no commitments, payments or related publicity may be undertaken once the Notice of Election has been published until after the date of the election. In a year of County Council elections the presumption would be the same if the member is likely to be a candidate.

4. Review

4.1 The proposed Scheme operates for a trial period from 1 April 2025 until 31 March 2028. The Scheme will be reviewed at the end of the second year for its ongoing support.

REDDITCH BOROUGH COUNCIL

Executive 11th March 2025

Appendix B

Redditch Borough Council

Application for use of the Redditch Councillor Grant Facility

Councillor's name:

Ward:

Details of proposed spend

Amount requested:

Recipient details (name, address, e-mail and phone number)

Description of how the economic, social or environmental well-being of their Ward may be promoted or improved by their use of the Redditch Councillor Grant Facility (RCGF) for the benefit of the whole or any part of their Ward or those within it:

Details of any consultation carried out (e.g: with Parish Council, voluntary or community bodies or other partners):

REDDITCH BOROUGH COUNCIL**Executive 11th March 2025****Declaration by Councillor/s:**

I/we confirm that the proposed payment

- Is legal;
- Does not commit the Council to ongoing revenue costs;
- Will not be used to pay for insurance, planning etc application costs, solicitors' or other fees;
- Will not be used to meet direct staffing costs.

I confirm that I/we do not have a disclosable pecuniary interest in the proposal. I have no other disclosable interest in the proposal, unless detailed below.

Signed:**Date:**

Please Return to Sarah Carroll
(on behalf of Pete Carpenter – Executive Director of Resources/Deputy Chief Executive)

sarah.carroll@bromsgroveandredditch.gov.uk

REDDITCH BOROUGH COUNCIL**Executive****11th March 2025****Quarter 3 Finance and Performance Report 2024/25**

Relevant Portfolio Holder	Councillor Woodall – Portfolio Holder for Finance and Governance
Portfolio Holder Consulted	Yes
Relevant Head of Service	Debra Goodall
Report Authors	Head of Finance and Customer Services Debra.Goodall@bromsgroveandredditch.gov.uk Business Improvement Manager H.Mole@bromsgroveandredditch.gov.uk
Wards Affected	All Wards
Ward Councillor(s) consulted	No
Relevant Strategic Purpose(s)	All
Key Decision	
If you have any questions about this report, please contact the report author in advance of the meeting.	

1. RECOMMENDATIONS**The Executive is asked to RESOLVE that:**

- 1) The current Revenue overspend position of £138k and actions the Council are taking to mitigate this position be noted.**
- 2) The current Capital spending of £4.72m against a budget of £20.5m be noted.**
- 3) The HRA Position is noted.**
- 4) There is an updated procurements position set out in Appendix C, with any new items over £200k to be included on the Executive Committee's Work Programme.**
- 5) The Quarter 3 Performance data for the Period October to December 2024 be noted and that this will change over the year to link into the new administration's priorities.**
- 6) The Council submit a bid for £2.425m to Birmingham City Council for funding allocated to Redditch by the former Greater Birmingham and Solihull Local Enterprise Partnership to support the Digital Manufacturing Innovation Centre.**

The Executive is asked to RECOMMEND that:

- 7) The Balance Sheet Monitoring Position for Quarter 3 is noted – which is the Treasury Monitoring Report and required to be reported to Council.**

REDDITCH BOROUGH COUNCIL**Executive****11th March 2025****2. BACKGROUND**

2.1 The purpose of this report is to set out the Council's draft Revenue and Capital Outturn position for the third quarter of the financial year October 2024 – December 2024 and associated performance data. This report presents:

- The Council's forecast outturn revenue monitoring position for 2024/25 based on data to the end of Quarter 3.
- The position in respect of balance sheet monitoring as requested by the Audit, Governance and Standards Committee.
- The updated procurement pipeline of Council projects to be delivered over the next 12 months in order to properly plan for the delivery of these projects.
- The organisation's performance against the strategic priorities outlined in the Council Plan Addendum, including operational measures to demonstrate how the council is delivering its services to customers.

3. DETAILED PERFORMANCE**Financial Performance**

- 3.1 As part of the monitoring process a detailed review has been undertaken to ensure that issues are considered, and significant savings and cost pressures are addressed. This report sets out, based on the position at the end of Quarter 3, the projected revenue outturn position for the 2024/25 financial year and explains key variances against budget.
- 3.2 The £10.8m full year revenue budget included in the table below is the budget that was approved by Council in April 2024. Formats are in the original format and so do not account for the setting up of the new Regeneration and Property department.

REDDITCH BOROUGH COUNCIL**Executive****11th March 2025**

Service Description	2024-25 Approved Budget	2024-25 Approved Q3 Budget	Q3 Adjusted Spend	Q3 Budget Variance	Full Year Forecast	Full Year Budget Variance
Business Transformation and Organisational Development	1,781,837	1,336,378	1,441,760	105,382	1,856,453	74,616
Community and Housing GF Services	1,742,562	1,306,921	1,009,408	-297,513	1,858,454	115,892
Corporate Services	-1,996,267	-1,497,200	981,049	2,478,249	-2,295,037	-298,770
Environmental Services	2,701,088	2,025,817	2,813,034	787,217	3,844,342	1,143,254
Financial and Customer Services	2,067,408	1,550,556	-4,663,136	-6,213,692	2,914,686	847,278
Legal, Democratic and Property Services	2,098,369	1,573,776	1,679,193	105,417	2,233,969	135,600
Planning, Regeneration and Leisure Services	1,067,182	800,387	949,043	148,656	1,166,359	99,177
Regulatory Client	562,038	421,529	333,132	-88,397	605,598	43,560
Rubicon Client	777,747	583,310	1,145,995	562,685	777,747	0
Starting Well	0	0	73,377	73,377	0	0
Grand Total	10,801,965	8,101,474	5,762,855	-2,338,619	12,962,571	2,160,606

Service Description	2024-25 Approved Budget	2024-25 Approved Q3 Budget	Q3 Adjusted Spend	Q3 Budget Variance	Full Year Forecast	Full Year Budget Variance
Corporate Financing	-10,801,965	-8,101,474	-7,276,672	824,802	-12,824,004	-2,022,039
Grand Total	-10,801,965	-8,101,474	-7,276,672	824,802	-12,824,004	-2,022,039
TOTALS	0	0	-1,513,817	-1,513,817	138,567	138,567

Budget Variances

- 3.3 The draft position is set out in the above table. As this is expenditure at Q3 it is important to note that, at this stage in the financial year there are a number of instances where annual expenditure or accruals may distort the profiling as reflected in the Q3 actual. The above profiles have assumed support services and grant are adjusted to budgetary levels and accruals are netted out of the figures.
- 3.4 Overall, the Council is currently forecasting a full year revenue overspend of £138k at Quarter 3. This is mainly due to the additional fleet costs described below. This position will continue to be reviewed particularly given the impact of the increasing costs linked to inflation and further updates will be provided to Councillors throughout 2024/25. This compares to an overspend position of £299k at Q2 (a £161k decrease).

This includes service projections as follows:

Business Transformation £75k overspend

Within Business Transformation, HR is overspending by £191k due to salaries and professional fees, while there are underspends in Corporate Staff Costs of £84k due to vacancies and £32k within Commercialism due to savings on professional fees.

Community and Housing GF Services £116k overspend

Within Community and Housing GF Services there is a projected overspend due to expenditure on CCTV telephone lines £21k, loss on income on Community Transport of

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£27k, additional expenditure in Domestic Abuse of £16k and temporary accommodation £295k offset by salary savings of £243k.

Corporate Services £298k underspend

Within Corporate Services, the main variance is due to savings on pensions £347k as there are a number of staff vacancies. Postage costs have increased by £31k while there is an expected overspend on external audit costs of £18k.

Environmental Services £1,143k overspend

Within Environmental Services there are a number of variances as detailed below:

- Redditch Waste Collection Team is forecast to overspend by £207k due to additional fuel costs of £24k, costs linked to delayed fleet replacement programme £87k, fleet maintenance of £84k and vehicle hire £12k.
- Redditch Place Teams is forecast to overspend by £226k due to an income shortfall of £18k on bulky waste, £51k on fleet maintenance, £21k on General Materials and increased shared service charges of £136k.
- There is a drop in expected income from Bereavement Services and Cremation Fees of £159k, increase in utility expenditure of £97k and professional fees of £50k.
- Shared Service arrangements across a number of departments are forecast to overspend by £404k. This is linked to the delayed fleet replacement programme which is being finalising for the wider ES fleet but has knock on implications in other areas.

Financial and Customer Services £847k overspend

Within Finance and Customer Services, there are overspends in Finance due to agency staff £853k which are offset by salary savings of (£153k) due to issues with recruitment in finance which is a national issue and therefore we have higher agency staff costs as a result of this. There are also overspends on ICT purchases £327k and costs relating to TechOne £76k offset by additional income due to £256k shared services.

Legal and Democratic Services £136k overspend

Legal, Democratic and Property Services are forecast to overspend £136k. While there are some underspends due to staff savings within Learning Online £43k and savings in Property Services of £14k on agency costs, these savings are offset by additional expenditure within Building Management due to agency and shared services £70k, expenditure within Elections of £67k, salary overspends within Building Services of £14k, salary overtime in Council Market £10k and £32k in various smaller overspends.

REDDITCH BOROUGH COUNCIL**Executive****11th March 2025****Planning, Regeneration & Leisure Services £99k overspend**

Within Planning, Regeneration & Leisure Services there are a number of variances in the service due to variances on Planning Application income compared to budget along with various smaller overspends which are under review.

Regulatory Client £44k overspend

Within Regulatory Client, there are overspends in Pest Control £8k and Pollution £13k due to additional professional fees while there are additional costs for WRS amounting to £23k.

Rubicon Client £0k overspend

Within Rubicon Client, while there are overspends of £89k on the Management Fee and £40k on General Fees, these overspends are covered by the Rubicon Reserve of £580k.

Starting Well £0k overspend

Within Starting Well, there are overspends on salaries amounting to £86k which are offset by additional income for room hire at £12k. These additional costs are grant funded.

- 3.5 The above overspends of £2.161m are offset by additional income of £2.022m in Corporate Financing from additional grant income £1.69m together with increased investment interest receivable £248k and lower interest payable £82k.

3.6 Cash Management**Borrowing**

- As of the 31st December 2024, there were nil short-term borrowings. The Council has long-term borrowing of £103.9m.

Investments

- On 31st December 2024, the Council has £13.5m short term investments held.

Capital Monitoring

- 3.7 A capital programme of £20.5m was approved in the Budget for 2024/25 in February 2024. This has been fully reviewed as part of the MTFP using actual data as at the end of December 2023. The table below and detail in **Appendix A** set out the Capital Programme schemes that are approved for the MTFP time horizon.
- 3.8 Many of these schemes are already in partial delivery in the 2024/25 financial year. By approving this list, the Council also agreed sums not spent in 2023/24 (and 2022/23 by

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default if schemes originated earlier than 2023/24 as sums have been carried forward through to the 2023/24 MTFS Report) to be carried forward into 2024/25. The table also splits amounts by funding source, Council or third party.

Year	Total Programme	Council Funded	Grant Funded
2024/5	20,507,674	6,089,386	14,418,288
2025/6	5,956,180	2,302,316	3,653,864
2026/7	4,938,263	4,232,399	705,864
2027/8	2,200,918	1,495,054	705,864
2028/9	3,680,154	2,974,290	705,864

- 3.9 Included in this funding the Council also have the following Grant Funded Schemes which are being delivered in 2024/25.
- 3.10 The three Towns Fund schemes – Digital Manufacturing and Innovation Centre (DMIC), Library Public Square, and Public Realm which are funded via £15.2m of Government Funding.
- 3.11 The Library will now not move to the Town Hall to become part of the Town Hall Hub. This was agreed by the Council at meetings on the 29th July following the change in administration. A meeting with DLUHC (now known as MHCLG) experts on the 23rd May 2024 identified that, were the Council minded not to proceed with the current proposals, the following options could be considered:
- Invest the £4.2m in the Digital Manufacturing and Innovation Centre (DMIC) with improved outputs and outcomes.
 - Invest in additional public realm improvements.
 - Assessments of delivery in an alternative building that will give similar outputs to the library site will not be deliverable within required grant funding timescales.
- 3.12 Either option (or mix of options) requires a MHCLG Project Adjustment Request (PAR) form to be completed and for any changes to be agreed. On 30th January 2025 the Towns Deal Board agreed that the funding should be allocated to additional investment in the DMIC and a PAR has now been submitted to MHCLG. MHCLG have agreed an extension to March 2027 to spend the funds.
- 3.13 DMIC – Designs for DMIC are continuing to progress in line with the available budget of £14,862,000. Funding consists of £11,937,000 Town Deal Capital; £400k Town Deal Revenue; £2,425,000 GBS LEP; £100,000 UKSPF. Note that £3,937,000 of Town Deal capital is still subject to approval of the PAR by MHCLG to utilise underspend from the cancelled library project (expected in March 2025). As part of this process, once costs for the DMIC are finalised, an application will be made to Birmingham City Council for funds

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allocated to Redditch by Greater Birmingham & Solihull Local Enterprise Partnership (GBS LEP) for further funding of £2.425m. GBS LEP funds are ringfenced for Redditch but are subject to the development and approval of a full business case. Stage 2 designs are now nearing completion. The construction phase is scheduled to commence in January 2026 with an anticipated 52-week construction programme. The site has already been cleared and is ready for development. Additional enabling works are currently taking place, so that construction can commence promptly following main contractor appointment later in the year.

- 3.14 Public Realm – Redditch Public Realm works are under construction and remain on track to complete in line with original Town Deal timescales (end of March 2026). Total funding to complete these works is £3,363,000 which consists of £3,263,000 Town Deal Capital; £176,000 Section 106; and £224,000 Council Capital. Note that £263,000 Town Deal capital is still subject to approval of Project Adjustment Request (PAR) by MHCLG to utilise underspend from cancelled library project (expected by end of February 2025).

Community Hub

- 3.15 Reports were received by Executive in July and September setting out a new design for the Town Hall Hub which now does not include the Library. The strip out of the building has started in January and is expected to be completed in March. Seddons are expected to complete a design and cost plan by March. Conversations are taking place with prospective new tenants. There will be a write-off of design works that have been expended in relation to the library as this is not able to be capitalised.
- 3.16 The outturn spend at Quarter 3 is £4.715m against a capital budget totalling £20.507m and is detailed in Appendix A. It should be noted that as per the budget decision carry forwards of £8.051m will be rolled forward from 2023/24 into 2024/25 to take account of slippage from 2023/24. UK Shared Prosperity Funding for the year is £1,694,352 (capital and revenue). This must be spent by the 31st March 2025.

Earmarked Reserves

- 3.17 The updated position are set out in **Appendix B**. As part of the 2025/26 MTFP all reserves were thoroughly reviewed for their requirement and additional reserves set up for inflationary pressures such as utility increases. At the 31st December 2024, the Council holds £14.868m of Earmarked Reserves. In the Group Accounts it also holds £0.580m of Rubicon Reserves. The Council holds £7.475m in the General Fund.

Housing Revenue Account

- 3.18 The table below details the financial position for the Housing Revenue Account (HRA) for the period April - December 2024. The major variances are due to the following:
- Repairs & Maintenance - vacancies pending restructure of service areas.
 - Supervision & Management - the variance is predominantly due to vacant posts.

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		2024/25 Full Year Budget £'000	2024/25 Budget Apr - Dec £'000	2024/25 Actual Apr - Dec £'000	2024/25 Variance Apr - Dec £'000	2024/25 Projected Outturn £'000	2024/25 Projected Variance £'000
INCOME							
Dwelling Rents	DR	-27,443	-21,726	-21,945	-220	-27,395	48
Non-Dwelling Rents	NDR	-613	-485	-475	10	-519	93
Tenants' Charges for Services & Facilities	CSF	-617	-488	-562	-73	-658	-41
Contributions towards Expenditure	CTE	-125	-99	-270	-171	-324	-199
Total Income		-28,798	-22,798	-23,252	-453	-28,896	-98
EXPENDITURE							
Repairs & Maintenance	R&M	6,992	5,244	5,629	385	7,315	324
Supervision & Management	S&M	8,877	6,658	2,744	-3,913	8,855	-22
Rent, Rates, Taxes & Other Charges	RRT	576	432	269	-164	513	-63
Provision for Bad Debts	BDP	576	432	0	-432	425	-151
Depreciation & Impairment of Fixed Assets	DEP	6,487	4,865	0	-4,865	6,487	0
Interest Payable & Debt Management Costs	INT	4,179	3,134	-17	-3,151	4,181	3
Total Expenditure		27,687	20,765	8,626	-12,140	27,777	90
Net cost of Services		-1,111	-2,033	-14,626	-12,593	-1,119	-8
Net Operating Expenditure		-1,111	-2,033	-14,626	-12,593	-1,119	-8
		0					
Interest Receivable	IR	-234	-175	0	175	-234	0
Revenue Contribution to Capital Outlay	RCCC	0	0	0	0	0	0
Planned use of Balances	UB	1,344	1,008	0	-1,008	1,352	8
Transfer to Earmarked Reserves	TER	0	0	0	0	0	0

In HRA Capital:

Project	Project Description	2024/25 Full Year Budget £	2024/25 Budget to Date Apr - Dec £	2024/25 Actuals + Comm Apr - Dec £	2024/25 Variance Apr - Dec £	2024/25 Projected Outturn £	2024/25 Projected Variance £
100050	Housing 1-4-1 Purchases/Build	3,000,000	2,250,000	67,406	2,317,406	2,000,000	(1,000,000)
100053	Asbestos General	100,000	75,000	125,193	50,193	125,000	25,000
100054	Structural Repairs	75,000	56,250	496,028	439,778	500,000	425,000
100055	Electrical Upgrade	100,000	75,000	243,157	168,157	250,000	150,000
100056	Boiler Replacement	750,000	562,500	535,017	27,483	650,000	(100,000)
100059	Disabled Adaptations	500,000	375,000	613,914	238,914	650,000	150,000
100060	Environmental Enhancement	250,000	187,500	29,703	157,797	50,000	(200,000)
100061	FRA Works	-	-	26,909	26,909	30,000	30,000
100062	Stock Condition Survey	150,000	112,500	119,712	7,212	125,000	(25,000)
100063	Housing Management System	-	-	253,373	253,373	350,000	350,000
100066	Capitalised Salaries	500,000	375,000	-	375,000	640,000	140,000
100067	Door Entry/CCTV	100,000	75,000	130,346	55,346	150,000	50,000
100068	HRA Hard Wire S	300,000	225,000	111,018	113,982	110,000	(190,000)
100074	Balcony Replacement	300,000	225,000	395,548	170,548	400,000	100,000

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Project	Project Description	2024/25 Full Year Budget £	2024/25 Budget to Date Apr - Dec £	2024/25 Actuals + Comm Apr - Dec £	2024/25 Variance Apr - Dec £	2024/25 Projected Outturn £	2024/25 Projected Variance £
100083	HRA Compartmentation	500,000	375,000	1,088,963	713,963	1,000,000	500,000
100084	Major Voids Works	500,000	375,000	1,270,495	895,495	1,200,000	700,000
100098	HRA-Energy Efficiency	750,000	562,500	1,477,916	915,416	1,500,000	750,000
100115	HRA Stock Remodelling	100,000	75,000	145,474	70,474	150,000	50,000
100116	HRA Estates Garages	400,000	300,000	-	300,000	-	(400,000)
110001	Internal Refurbishment	2,500,000	1,875,000	2,868,057	993,057	2,700,000	200,000
110003	High Trees Project	400,000	300,000	1,084,405	784,405	700,000	300,000
110004	Disrepair Cases	50,000	37,500	204,270	166,770	200,000	150,000
110005	External Refurbishment	500,000	375,000	568,458	193,458	650,000	150,000
110042	Lift Replacement			90,614		150,000	150,000

Project	Project Description	2024/25 Full Year Budget £	2024/25 Budget to Date Apr - Dec £	2024/25 Actuals + Comm Apr - Dec £	2024/25 Variance Apr - Dec £	2024/25 Projected Outturn £	2024/25 Projected Variance £
		11,825,000	8,868,750	11,811,167	2,851,802	14,280,000	2,455,000

3.19 Across the HRA Capital Investment Programme several issues have arisen that require variances to a number of the budget lines for the following reasons.

Structural Repairs – These occur on a reactive basis and as such budget estimating can be difficult, in the current year we have identified properties that require substantial works to remedy these.

Electrical Upgrades – As part of tackling Damp and Mould in our properties we are now installing humidistat fans in both the kitchen and bathroom in void properties to improve ventilation across our housing stock. Through 2024/25 the next cycle of communal electrical testing is to be undertaken and based on the age profile and condition of installations it is anticipated that there will need to be a replacement of systems.

Disabled Adaptations - The budget allows for the newly arising works which are primarily level access showers and ramps however on a rare occasion the only solution, to provide the facilities, identified by the Occupational Therapist, is to build an extension. In the current year two properties have been identified that need to provide families with the additional space to accommodate the adaptation measures required.

Capitalised Salaries – A review has been undertaken of staffing and the apportionment to capital and revenue costs which has led to this increase.

Door Entry/CCTV - Additional blocks of flats have been identified to undertake upgrades to access systems to improve security for tenants and to protect our assets.

Major Voids – A Major Void is where two or more elements (e.g. a Kitchen and Bathroom) need replacing. Whilst the number of voids is unpredictable, as well as the

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scope of works required, the last two financial years the demands on this budget have resulted in the need to increase this budget.

Energy Efficiency - Through 2023/24 the project, partially funded by Social Housing Decarbonisation Funding (SHDF), was mobilised however there were large underspends which have led to pressures in this financial year to deliver these works to improve the energy efficiency of some of our worst performing properties.

Remodelling – Works have been identified to properties to provide larger family housing with elements of adaptations also included.

High Trees Project – The increase in budget is to accommodate a reprofiling of works to complete the next phase of the project.

Disrepair Cases – We have experienced increased levels of Disrepair Cases over the last two financial years which has now resulted on a pressure to carry out corrective works to affected properties.

External Refurbishment - Additional properties have been identified that require roofing works, replacement doors and windows.

Lift Replacement - Having in 23/24 taken responsibility for the lifts in the Housing Stock, the age profile, 30+ years old, of the lifts together with limited parts availability and reliability issues has led to the need to create a programme of replacement of lifts over this and forthcoming financial years.

Additional Requirements

3.20 None.

Balance Sheet Monitoring Position

3.21 There has been the request from Audit Committee that the Council include Balance Sheet Monitoring as part of this report.

This initial balance sheet reporting is set out as the Q3 Treasury Report which is attached as **Appendix C**. This report sets out the Councils debt and borrowing position for Q3 2024/25. Included in this is how the Council is using its working capital as well as measurement of the Councils Prudential Indicators.

Procurement Pipeline

3.22 The Procurement pipeline is shown in **Appendix D**. The Council's Procurement Pipeline includes details of contracts expected to be reprocured and new procurement projects expected to be undertaken in the future. Those happening in the next 12 months will need to be within the next 12 Months and over £200k will need to be put on the forward Plan. The pipeline will be refreshed quarterly.

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- There are 23 contracts between the old threshold of £50k and the new threshold of £200k.
- There are 10 contracts that are over the key decision threshold of £200k
- There are 10 contracts procured by Bromsgrove on behalf of Redditch. These all relate to ICT.

Performance

3.23 This is the first iteration of the new Corporate Performance Indicators. These are based on work undertaken when formulating the New Corporate Strategy with Executive and also the bottom up Business Planning processes that has been undertaken by budget managers. The new format sets out:

- The measure.
- Performance against that measure.
- A commentary.

The measures are set out in **Appendix E**.

3.24 We are committed to reviewing performance reporting and key measures; as this is part of continuous improvement to ensure accountability, transparency, and effectiveness in delivering services to the community.

4. Legal Implications

4.1 No Legal implications have been identified.

5. Strategic Purpose Implications**Relevant Strategic Purpose**

5.1 The Strategic purposes are included in the Council's corporate plan and guides the Council's approach to budget making ensuring we focus on the issues and what are most important for the borough and our communities. Our Financial monitoring and strategies are integrated within all of our Strategic Purposes.

Climate Change Implications

5.2 The green thread runs through the Council plan. The Financial monitoring report has implications on climate change and these will be addressed and reviewed when relevant by climate change officers to ensure the correct procedures have been followed to ensure any impacts on climate change are fully understood.

6. Other Implications**Customer / Equalities and Diversity Implications**

6.1 None as a direct result of this report.

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6.2 Managers meet with finance officers to consider the current financial position and to ensure actions are in place to mitigate any overspends.

7. RISK MANAGEMENT

7.1 The financial monitoring is included in the corporate risk register for the authority.

8. APPENDENCES

Appendix A – Capital Outturn

Appendix B – Reserves Position

Appendix C – Treasury Management Q3 Report

Appendix D – Procurement Pipeline

Appendix E – Performance Indicators

AUTHOR OF REPORT

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Cap Proj	Description	2023/24 Total £	23/24 Spend £	c/f	2024/25 Total (Original) £	2024/25 Total (Incl C/F's) £	2024/25 Spend £
	Large Schemes						
	Towns Fund						
200053	- Innovation Centre	2,500,000	0	2,500,000	4,000,000	6,500,000	18,166
200054	- Library	2,000,000	611,449	1,388,551	1,700,000	3,088,551	1,788,755
200055	- Public Realm	1,500,000	18,574	1,481,426	1,439,000	2,920,426	0
100102,100 108-12	- Town Hall Redevelopment	1,000,000	596,960	403,040	5,100,000	5,503,040	507,325
	UK Shared Prosperity Fund						
100100	- Remainder (to be allocated)	607,294	0	607,294	1,591,109	2,198,403	344,790
	Other Schemes						
100004	Car Park Maintenance	150,000	34,228	115,772	150,000	265,772	223,198
100007	Disabled Facilities Grant	839,000	796,216	42,784	839,000	881,784	928,245
100008	Energy & Efficiency Installs.	0	10,350	-10,350	55,000	44,650	0

Cap Proj	Description	2023/24 Total £	23/24 Spend £	c/f	2024/25 Total (Original) £	2024/25 Total (Incl C/F's) £	2024/25 Spend £
100009	GF Asbestos	0	0	0	38,000	38,000	0
100010	Grassland Mitigation measures- recreating and monitoring grassland habitats in MS and AVCP	0	0	0	5,864	5,864	0
100011	Hedgerow Mitigation measures by restoration and hedge laying with associated fencing and gates at AVP SHM and AVP North	0	0	0	21,500	21,500	0
100012	HMO Grants	25,000	13,500	11,500	25,000	36,500	0
100013	Home Repairs Assistance	40,000	0	40,000	40,000	80,000	0
100018	Improvement to original Pump Track at AVCP	0	86,092	-86,092	60,606	-25,486	4,242
100020	Morgan Stanley Park Infrastructure- Pitch Improvement	0	0	0	25,000	25,000	0
100026	Morgan Stanley Park Infrastructure- General Improvements	0	0	0	8,000	8,000	6,500
100032	Public Building	250,000	224,097	25,903	250,000	275,903	124,205
100035	Fleet Replacement new line	843,000	16,750	826,250	2,663,000	3,489,250	193,652

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Cap Proj	Description	2023/24 Total £	23/24 Spend £	c/f	2024/25 Total (Original) £	2024/25 Total (Incl C/F's) £	2024/25 Spend £
100037	Removal of 5 weirs through Arrow Valley Park	414,000	0	414,000	0	414,000	0
110012	Play Area improvements at Birchfield Road,/Headless Cross Rec Ground. 17/00737/FUL	0	0	0	7,575	7,575	0
100040	Sports Contributions to support improvements to Outdoor facilities at Terry Field	0	0	0	3,000	3,000	0
100042	Lifeline Improvements	0	0	0	120,000	120,000	0
100043	Wheelie Bin purchase	100,000	42,079	57,921	100,000	157,921	54,460
100088	Holly Trees Children Centre Improvements	0	0	0	6,000	6,000	0
100097	Arrow Valley Country Park Access Road	0	0	0	26,634	26,634	35,708
100112	Fire compartmentation works in Corporate buildings	100,000	28,248	71,752	0	71,752	0
100119	Play Areas - Surface Replacement	0	0	0	10,000	10,000	99,994
100121	AVCP - Car Park Extension 25 Spaces	0	0	0	95,000	95,000	110,745
100135	Arrow Valley Visitor Centre Improvements	0	0	0	350,000	350,000	141,701

Cap Proj	Description	2023/24 Total £	23/24 Spend £	c/f	2024/25 Total (Original) £	2024/25 Total (Incl C/F's) £	2024/25 Spend £
100137	Final Play Area Changes	0	0	0	263,386	263,386	0
100139	Movement of ICT Cyber Capital Works Forward	-125,000	0	-125,000	-50,000	-175,000	0
100140	Cyber Security Updates	0	0	0	25,000	25,000	0
100141	Morgan Stanley Park - Footpaths	0	0	0	16,500	16,500	0
100142	Hedge and Shrub Removal	0	0	0	40,000	40,000	0
100143	Fleet Costs	0	0	0	585,000	585,000	0
100144	PRS Housing ICT System	0	0	0	30,000	30,000	0
100146	Play Area Changes - Pre Audit	227,000	0	227,000	155,000	382,000	0
100147	AVCP - Parking Bays near Visitor Centre	0	0	0	12,000	12,000	0
100148	Increased Building Maintenance Costs	0	0	0	150,000	150,000	0
110007	Forge Mill and Bordelsey Open Space Improvements	0	0	0	3,000	3,000	0
110009	Greenlands Sports Pitches MUGA	0	0	0	21,000	21,000	0

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Cap Proj	Description	2023/24 Total £	23/24 Spend £	c/f	2024/25 Total (Original) £	2024/25 Total (Incl C/F's) £	2024/25 Spend £
110019	Server Replacement Est(Exact known Q2 2022)	2,000	93,201	-91,201	177,500	86,299	0
110020	Laptop Refresh	25,000	11,542	13,458	150,000	163,458	20,263
110021	Ipsley Church Lane Cemetary	125,000	2,037	122,963	125,000	247,963	2,000
110036	Footpaths	75,000	66,444	8,556	75,000	83,556	111,292
	Total	10,702,757	2,684,267	8,050,990	20,507,674	28,558,663	4,715,241

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Appendix B - Earmarked Reserves

	Balance	rior Yr B	Transfers	Transfers	Balance	Transfers	Transfers	Balance	Transfers	Transfers	Balance	Transfers	Transfers	Balance
	31-Mar-24	Changes	2024/25	2024/25	31-Mar-25	2025/26	2025/26	31-Mar-26	2026/27	2026/27	31-Mar-27	2027/28	2027/28	31-Mar-28
	£000		£000	£000	£000	£000	£000	£000	£000	£000	£000	£000	£000	£000
General Fund Balances	7,221	1,140		(136)	8,225	30		8,255		(435)	7,820		(345)	7,475
General Fund:														
Business Rates Retention Scheme	4,560	0	0	0	4,560	0	0	4,560	0	0	4,560	0	0	4,560
Community Development	74	0	0	0	74	0	0	74	0	0	74	0	0	74
Community Safety	211	0	0	0	211	0	0	211	0	0	211	0	0	211
Corporate Services	2,594	(550)	0	0	2,044	0	(880)	1,164	0	0	1,164	0	0	1,164
Customer Services	183	0	0	0	183	0	0	183	0	0	183	0	0	183
Economic Growth	718	0	0	0	718	0	0	718	0	0	718	0	0	718
Electoral Services	63	0	0	0	63	0	0	63	0	0	63	0	0	63
Environmental Vehicles	29	0	0	0	29	0	0	29	0	0	29	0	0	29
Equipment replacement	25	0	0	0	25	0	0	25	0	0	25	0	0	25
Financial Services	149	(149)	0	0	(1)	0	0	(1)	0	0	(1)	0	0	(1)
Human Resources Backlog		75	0	0	75	0	0	75	0	0	75	0	0	75
ICT Backlog		74	0	0	74	0	0	74	0	0	74	0	0	74
General Risk reserve	45	0	0	0	45	0	0	45	0	0	45	0	0	45
Housing Benefit Implementation	270	0	0	0	270	0	0	270	0	0	270	0	0	270
Housing Support	1,535	0	0	0	1,535	0	0	1,535	0	0	1,535	0	0	1,535
Land Drainage	129	0	0	0	129	0	0	129	0	0	129	0	0	129
Planning Services	692	0	0	0	692	0	0	692	0	0	692	0	0	692
Sports Development	(18)	0	0	0	(18)	0	0	(18)	0	0	(18)	0	0	(18)
Town Centre	7	0	0	0	7	0	0	7	0	0	7	0	0	7
Warmer Homes	16	0	0	0	16	0	0	16	0	0	16	0	0	16
Transformational Growth	123	0	0	0	123	0	0	123	0	0	123	0	0	123
Pensions	201	0	0	0	201	0	0	201	0	0	201	0	0	201
Regeneration Income	602	0	0	0	602	0	(300)	302	0	0	302	0	0	302
Restart Grants	2,900	0	0	0	2,900	0	0	2,900	0	0	2,900	0	0	2,900
Utilities	0	0	0	0	0	0	0	0	0	0	0	0	0	0
DMIC Start Up					0	600	0	600	0	(300)	300	0	(300)	0
Ward Budgets	0	0	0	0	0	180	(60)	120	0	(60)	60	0	(60)	0
Property Services Review					0	100	(100)	0			0			0
EPR Funding Allocationb					0	814	(100)	714		(356)	358		(356)	2
Covid-19 (General)	2,006	(590)	0	0	1,416	0	0	1,416	0	0	1,416	0	0	1,416
Covid-19 (Collection Fund)	55		0	0	55	0	0	55	0	0	55	0	0	55
TOTALS	17,186	(1,140)	0	0	16,046	1,694	(1,440)	16,300	0	(716)	15,584	0	(716)	14,868

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Appendix C - Treasury Management

Q3 Treasury Management Strategy Report 2024/251. SUMMARY

The purpose of this report is to set out a third quarterly update on the Council's Capital and Treasury Management Strategies, including all prudential indicators.

2. RECOMMENDATIONS

Executive is asked to:

- Note the Council's Treasury performance for Q3 of the financial year 24/25.
- Note the position in relation to the Council's Prudential indicators.

3. BACKGROUNDIntroduction

- 3.1 The Authority has adopted the Chartered Institute of Public Finance and Accountancy's *Treasury Management in the Public Services: Code of Practice* (the CIPFA Code) which requires the Authority to approve, as a minimum, treasury management semi-annual and annual outturn reports.
- 3.2 This half yearly report provides an additional update and includes the requirement in the 2021 Code of quarterly reporting of the treasury management prudential indicators. The non-treasury prudential indicators are incorporated in the Authority's normal quarterly revenue report.

External Context

- 3.3 **Economic background:** The Chancellor of the Exchequer delivered her Autumn Budget at the end of October. Based on the plans announced, the Office for Budget Responsibility reported they would provide a short-term boost to GDP growth before weakening it further out and push inflation higher over the medium-term. This change to the economic and inflation outlook caused financial markets to readjust expectations of Bank of England (BoE) Bank Rate and gilt yields higher. The council's treasury management advisor, Arlingclose, also revised its interest rate forecast upwards in November, with Bank Rate expected to eventually fall to 3.75%.
- 3.4 UK annual Consumer Price Index (CPI) inflation remained above the Bank of England (BoE) 2% target in the later part of the period. The Office for National Statistics (ONS) reported headline consumer prices rose 2.6% in November 2024, up from 2.3% in the previous month and in line with expectations. Core CPI also rose, but by more than

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expected, and remained elevated at 3.6% in November against a forecast of 3.5% and compared to 3.3% in the previous month.

- 3.5 UK economy GDP registered no growth (0.0%) between July and September 2024 and 0.4% between April and June 2024, a further downward revision from the 0.5% rate previously reported by the ONS. Of the monthly GDP figures, the economy was estimated to have contracted by 0.1% in October, following the same size decline in September.
- 3.6 The labour market continued to loosen, but the ONS data still require treating with some caution. Recent figures reported the unemployment rate rose to 4.3% (3mth/year) in the three months to October 2024 and economic inactivity fell to 21.7%. The ONS reported pay growth over the same three-month period at 5.2% for both regular earnings (excluding bonuses) and for total earnings.
- 3.7 The BoE's Monetary Policy Committee (MPC) held Bank Rate at 4.75% at its December 2024 meeting, having reduced it to that level in November and following a previous 25bp cut from the 5.25% peak at the August MPC meeting (5-4 vote to cut). At the December meeting, six Committee members voted to maintain Bank Rate at 4.75% while three members preferred to reduce it to 4.50%. The meeting minutes suggested a reasonably dovish tilt to rates with the outlook for economic growth a concern among policymakers as the Bank downgraded its Q4 GDP forecast from 0.3% to 0.0%.
- 3.8 The November Monetary Policy Report (MPR) showed the BoE expected GDP growth to pick up to around 1.75% (four-quarter GDP) in the early period of the forecast horizon before falling back. The impact from the government's Autumn Budget pushed GDP higher in 2025 than was expected in the August MPR, before becoming weaker. The outlook for CPI inflation showed it rising above the MPC's 2% target from 2024 into 2025 and reaching around 2.75% by the middle of calendar 2025. Over the medium-term, once the near-term pressures eased, inflation was expected to stabilise around the 2% target. The unemployment rate was expected to increase modestly, rising to around 4.5%, the assumed medium-term equilibrium unemployment rate, by the end of the forecast horizon.
- 3.9 Arlingclose, the authority's treasury adviser, maintained its central view that Bank Rate would continue to fall from the 5.25% peak. From the first cut in August 2024, followed by the next in November which took Bank Rate to 4.75%, February 2025 is deemed the likely month for the next reduction, with other cuts following steadily in line with MPR months to take Bank Rate down to around 3.75% by the end of 2025.
- 3.10 The US Federal Reserve continued cutting interest rates during the period, reducing the Fed Funds Rate by 0.25% at its December 2024 monetary policy meeting to a range of 4.25%-4.50%, marking the third consecutive reduction. Further interest rate cuts are expected into 2025, but uncertainties around the potential inflationary impact of President-

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elect Trump's policies may muddy the waters in terms of the pace and magnitude of further rate reductions. Moreover, the US economy continues to expand at a decent pace, suggesting that monetary policy may need to remain more restrictive in the coming months than had previously been anticipated.

- 3.11 The European Central Bank (ECB) also continued its rate cutting cycle, reducing its three key policy rates by 0.25% in December. Euro zone inflation rose above the ECB 2% target in November 2024, hitting 2.2% as was widely expected and a further increase from 2% in the previous month. Inflation is expected to rise further in the short term, but then fall back towards the 2% target during 2025, with the ECB remaining committed to maintaining rates at levels consistent with bringing inflation to target, but without suggesting a specific path.
- 3.12 **Financial markets:** Financial market sentiment was generally positive over the period, but economic, financial and geopolitical issues meant the ongoing trend of bond yield volatility very much remained. In the last few months of the period, there was a general rising trend in yields due to upwardly revised interest rate and inflation expectations, causing gilt yields to end the period at substantially higher levels to where they began.
- 3.13 Over the period, the 10-year UK benchmark gilt yield started at 3.94% and ended at a high of 4.57%, having reached a low of 3.76% in mid-September. While the 20-year gilt started at 4.40%, ended at a high of at 5.08% and hit a low of 4.27% in mid-September. The Sterling Overnight Rate (SONIA) averaged 5.01% over the period to 31st December.
- 3.14 **Credit review:** In October, Arlingclose revised its advised recommended maximum unsecured duration limit on most banks on its counterparty list to six months. Duration advice for the remaining five institutions, including the newly added Lloyds Bank Corporate Markets, was kept to a maximum of 100 days.
- 3.15 Fitch revised the outlooks on Royal Bank of Scotland, NatWest Markets PLC, and National Westminster Bank to positive from stable, while affirming their long-term ratings at A+.
- 3.16 Moody's upgraded the ratings on National Bank of Canada to Aa2 from Aa3, having previously had the entity on Rating Watch for a possible upgrade. Moody's also upgraded the ratings on The Co-operative Bank to A3 (from Baa3) and downgraded the ratings on Coventry Building Society to A3 (from A2) and Canada's Toronto-Dominion Bank to Aa2 (from Aa1).
- 3.17 S&P also downgraded Toronto-Dominion Bank, to A+ from AA-, but kept the outlook at stable

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- 3.18 Credit default swap prices were generally lower at the end of the period compared to the beginning for the vast majority of the names on UK and non-UK lists. Price volatility over the period also remained generally more muted compared to previous periods.
- 3.19 Financial market volatility is expected to remain a feature, at least in the near term and, credit default swap levels will be monitored for signs of ongoing credit stress. As ever, the institutions and durations on the Authority's counterparty list recommended by Arlingclose remain under constant review.

Local Context

- 3.20 On 31st March 2024, the Authority had net borrowing of £10.4m arising from its revenue and capital income and expenditure. The underlying need to borrow for capital purposes is measured by the Capital Financing Requirement (CFR), while balance sheet resources are the underlying resources available for investment. These factors are summarised in Table 1 below.

Table 1: Balance Sheet Summary

	31.3.24 Actual £m	31.3.25 Forecast £m
General Fund CFR	6.7	10.9
Council Housing (HRA) CFR	103.9	103.9
Total CFR	110.6	114.8
External borrowing**	103.9	103.9
Internal borrowing	32.3	19.8
Less: Balance sheet resources	-21.9	-21.9
Net borrowing	10.4	-2.1

* Finance leases, PFI liabilities and transferred debt that form part of the Authority's total debt

** shows only loans to which the Authority is committed and excludes optional refinancing

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- 3.21 The treasury management position at 31st of December and the change over the first nine months of 24/25 is shown in Table 2 below.

Table 2: Treasury Management Summary

	31.3.24	Movement	31.12.24	31.12.24
	Balance £m	£m	Balance £m	Rate %
Long-term borrowing	103.93	0	103.93	3.59
Short-term borrowing	0	0	0	
Total borrowing	103.93	0	103.93	
Short-term investments	9.0	4.5	13.5	4.94
Cash and cash equivalents				
Total investments	9.0		13.5	
Net borrowing	94.93	4.5	90.43	

Borrowing Strategy and Activity

- 3.22 As outlined in the treasury strategy, the Authority's chief objective when borrowing has been to strike an appropriately risk balance between securing lower interest costs and achieving cost certainty over the period for which funds are required, with flexibility to renegotiate loans should the Authority's long-term plans change being a secondary objective. The Authority's borrowing strategy continues to address the key issue of affordability without compromising the longer-term stability of the debt portfolio. At the present time short term interest rates are higher than long term interest rates.
- 3.23 After substantial rises in interest rates since 2021 many central banks have now begun to reduce their policy rates, albeit slowly. Gilt yields were volatile but have increased overall during the period. Much of the increase has been in response to market concerns that policies introduced by the Labour government will be inflationary and lead to higher levels of government borrowing. The election of Donald Trump in the US in November is also expected to lead to inflationary trade policies.

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- 3.24 The PWLB certainty rate for 10-year maturity loans was 4.80% at the beginning of the period and 5.40% at the end. The lowest available 10-year maturity rate was 4.52% and the highest was 5.44%. Rates for 20-year maturity loans ranged from 5.01% to 5.87% during the period, and 50-year maturity loans from 4.88% to 5.69%.
- 3.25 Whilst the cost of short-term borrowing from other local authorities spiked to around 7% in late March 2024, primarily due a dearth of LA-LA lending/borrowing activity during that month, as expected shorter-term rates reverted to a more market-consistent range and were generally around 5.00% - 5.5%. Rising rates were seen towards the end of the period in the LA-LA market.
- 3.26 CIPFA's 2021 Prudential Code is clear that local authorities must not borrow to invest primarily for financial return and that it is not prudent for local authorities to make any investment or spending decision that will increase the capital financing requirement and so may lead to new borrowing, unless directly and primarily related to the functions of the Authority. PWLB loans are no longer available to local authorities planning to buy investment assets primarily for yield unless these loans are for refinancing purposes. The Authority has no new plans to borrow to invest primarily for financial return.
- 3.27 **Loans Portfolio:** At 31st December the Authority held no loans.

Table 3: Borrowing Position

	31.3.24 Balance £m	Net Movement £m	31.12.24 Balance £m
Public Works Loan Board	98.929	0	98.929
Banks (LOBO)			
Banks (fixed term)	5	0	5
Local authorities (long-term)			
Local authorities (short-term)	0	0	0
Total borrowing	103.929	0	103.929

Treasury Investment Activity

- 3.28 CIPFA revised TM Code defines treasury management investments as those which arise from the Authority's cash flows or treasury risk management activity that ultimately represents balances which need to be invested until the cash is required for use in the course of business.

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- 3.29 The Authority does not hold any invested funds, representing income received in advance of expenditure plus balances and reserves held. During the period, the Authority's investment balances ranged between £1.0 and £16.5 million due to timing differences between income and expenditure. The investment position is shown in table 4 below.

Table 4: Treasury Investment Position

	31.3.24	Net	31.12.24	31.12.24	31.12.24
	Balance	Movement	Balance	Income Return	Weighted Average Maturity
	£m	£m	£m	%	days
Banks & building societies (unsecured)					
Banks & building societies (secured deposits)					
Covered bonds (secured)					
Government	0	10.0	10.0	4.94%	
Local authorities and other govt entities	7.5	-7.5	0		
Corporate bonds and loans					
Money Market Funds	1.5	2.0	3.5		
Total investments	9.0	4.5	13.5		

- 3.30 Both the CIPFA Code and government guidance require the Authority to invest its funds prudently, and to have regard to the security and liquidity of its treasury investments before seeking the optimum rate of return, or yield. The Authority's objective when investing money is to strike an appropriate balance between risk and return, minimising the risk of incurring losses from defaults and the risk of receiving unsuitably low investment income.
- 3.31 As demonstrated by the liability benchmark in this report, the Authority expects to be a long-term investor and treasury investments therefore include both short-term low risk instruments to manage day-to-day cash flows and longer-term instruments where limited additional risk is accepted in return for higher investment income to support local public services.
- 3.32 Bank Rate reduced from 5.25% to 5.00% in August 2024 and again to 4.75% in November 2024 with short term interest rates largely being around these levels. The rates on DMADF

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deposits and money market rates ranged between 4.94% and 4.70%

Non-Treasury Investments

- 3.33 The definition of investments in the Treasury Management Code now covers all the financial assets of the Authority as well as other non-financial assets which the Authority holds primarily for financial return. Investments that do not meet the definition of treasury management investments (i.e. management of surplus cash) are categorised as either for service purposes (made explicitly to further service objectives) and or for commercial purposes (made primarily for financial return).
- 3.34 Investment Guidance issued by the Department for Levelling Up Housing and Communities (DLUHC) and Welsh Government also includes within the definition of investments all such assets held partially or wholly for financial return.

Treasury Performance

- 3.35 The Authority measures the financial performance of its treasury management activities both in terms of its impact on the revenue budget and its relationship to benchmark interest rates, as shown in table 5 below.

Table 5: Performance

	Actual	Budget	Over/	Actual	Benchmark	Over/
	£m	£m	under	%	%	under
Total borrowing	103.929	175	71.07			
PFI and Finance leases	0	1.5	1.5			
Total debt	103.929	176.5	72.57			
Total treasury investments	13.5	20	6.5			

MRP Regulations

- 3.36 On 10th April 2024 amended legislation and revised statutory guidance were published on Minimum Revenue Provision (MRP). The majority of the changes take effect from the 2025/26 financial year, although there is a requirement that for capital loans given on or after 7th May 2024 sufficient MRP must be charged so that the outstanding Capital Financing Requirement (CFR) in respect of the loan is no higher than the principal outstanding less the Expected Credit Loss (ECL) charge for that loan.
- 3.37 The regulations also require that local authorities cannot exclude any amount of their CFR from their MRP calculation unless by an exception set out in law. Capital receipts cannot be used to directly replace, in whole or part, the prudent charge to revenue for MRP (there are specific exceptions for capital loans and leased assets).

REDDITCH BOROUGH COUNCIL**Executive****11th March 2025****Compliance**

- 3.38 The Director of Resources and Section 151 officer reports that all treasury management activities undertaken during the period complied fully with the principles in the Treasury Management Code and the Authority's approved Treasury Management Strategy. Compliance with specific investment limits is demonstrated in table 6 below.

Table 6: Investment Limits

	2024/25 Maximum	30.9.24 Actual	2024/25 Limit	Complied? Yes/No
Any single organisation, except the UK Government	£4m each			
UK Central Government	Unlimited	£10.0m	Unlimited	Yes
Unsecured investments with banks and building societies	£2.5m in total			
Loans to unrated corporates	£1m in total			
Money Market Funds	£20m in total	£3.5m	£20m	Yes
Foreign countries	£5m per country			
Real Estate Investment Trusts	£2.5m in total			

- 3.39 Compliance with the Authorised Limit and Operational Boundary for external debt is demonstrated in table 7 below.

Table 7: Debt and the Authorised Limit and Operational Boundary

	2024/25 Maximum	31.12.2024 Actual	2024/25 Operational Boundary	2024/25 Authorised Limit	Complied? Yes/No
Borrowing	175	103.93	175.0	185.0	Yes
PFI and Finance Leases	1.5	-	1.5	1.5	Yes
Total debt	176.5	103.93	176.5	186.5	

- 3.40 Since the operational boundary is a management tool for in-year monitoring it is not significant if the operational boundary is breached on occasions due to variations in cash flow, and this is not counted as a compliance failure

REDDITCH BOROUGH COUNCIL**Executive****11th March 2025****Treasury Management Prudential Indicators**

- 3.41 As required by the 2021 CIPFA Treasury Management Code, the Authority monitors and measures the following treasury management prudential indicators.

Liability Benchmark

- 3.42 This indicator compares the Authority's actual existing borrowing against a liability benchmark that has been calculated to show the lowest risk level of borrowing. The liability benchmark is an important tool to help establish whether the Council is likely to be a long-term borrower or long-term investor in the future, and so shape its strategic focus and decision making. It represents an estimate of the cumulative amount of external borrowing the Council must hold to fund its current capital and revenue plans while keeping treasury investments at the minimum level of £2m required to manage day-to-day cash flow.

	31.3.24	31.3.25	31.3.26	31.3.27
	Actual	Forecast	Forecast	Forecast
Loans CFR	144.67	151.6	153.79	157.7
Less: Balance sheet resources	-23.9	-23.9	-22.9	-22.9
Net loans requirement	120.77	127.7	130.89	134.8
Plus: Liquidity allowance	0.2	0.2	0.2	0.2
Liability benchmark	120.97	127.90	131.09	135.00
Existing borrowing	103.93	113.22	116.87	117.58

- 3.43 Following on from the medium-term forecast above, the long-term liability benchmark assumes capital expenditure funded by borrowing of £0m, minimum revenue provision on new capital expenditure based on a 40-year asset life and income, expenditure and reserves all increasing by inflation of 2% p.a. This is shown in the chart below together with the maturity profile of the Authority's existing borrowing.

Maturity Structure of Borrowing

- 3.44 This indicator is set to control the Authority's exposure to refinancing risk. The upper and lower limits on the maturity structure of all borrowing were:

REDDITCH BOROUGH COUNCIL**Executive****11th March 2025**

	Upper Limit	Lower Limit	31.12.24 Actual	Complied?
Under 12 months	50%	0%	0%	Yes
12 months and within 24 months	50%	0%	0%	Yes
24 months and within 5 years	50%	0%	0%	Yes
5 years and within 10 years	50%	0%	0%	Yes
10 years and above	100%	0%	0%	Yes

3.45 Time periods start on the first day of each financial year. The maturity date of borrowing is the earliest date on which the lender can demand repayment.

Long-term Treasury Management Investments

3.46 The purpose of this indicator is to control the Authority's exposure to the risk of incurring losses by seeking early repayment of its investments. The prudential limits on the long-term treasury management limits are:

	2024/25	2025/26	2026/27	No fixed date
Limit on principal invested beyond year end	£1.5m	£1.0m	£0.5m	£0.5m
Actual principal invested beyond year end	Nil	Nil	Nil	Nil
Complied?	Yes	Yes	Yes	Yes

3.47 Long-term investments with no fixed maturity date include strategic pooled funds, real estate investment trusts and directly held equity but exclude money market funds and bank accounts with no fixed maturity date as these are considered short-term.

REDDITCH BOROUGH COUNCIL**Executive****11th March 2025****Additional indicators****Security:**

- 3.48 The Authority has adopted a voluntary measure of its exposure to credit risk by monitoring the value-weighted average credit rating of its investment portfolio. This is calculated by applying a score to each investment (AAA=1, AA+=2, etc.) and taking the arithmetic average, weighted by the size of each investment. Unrated investments are assigned a score based on their perceived risk.

	2024/25 Target	31.12.24 Actual	Complied?
Portfolio average credit rating	A	UK Govt	Yes

Liquidity:

- 3.49 The Authority has adopted a voluntary measure of its exposure to liquidity risk by monitoring the amount of cash available to meet unexpected payments within a rolling three-month period, without additional borrowing.

	31.12.24 Actual	2024/25 Target	Complied?
Total cash available within 3 months	£10.0m	Nil	Yes
Total sum borrowed in past 3 months without prior notice	Nil	Nil	Yes

Interest Rate Exposures:

- 3.50 This indicator is set to control the Authority's exposure to interest rate risk.

Interest rate risk indicator	2024/25 Target	31.12.31 Actual	Complied?
Upper limit on one-year revenue impact of a 1% <u>rise</u> in interest rates	500,000	0	Yes
Upper limit on one-year revenue impact of a 1% <u>fall</u> in interest rates	500,000	0	Yes

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3.51 For context, the changes in interest rates during the quarter were:

	<u>31/3/24</u>	<u>31/12/24</u>
Bank Rate	5.25%	4.75%
1-year PWLB certainty rate, maturity loans	5.36%	5.19%
5-year PWLB certainty rate, maturity loans	4.68%	5.10%
10-year PWLB certainty rate, maturity loans	4.74%	5.40%
20-year PWLB certainty rate, maturity loans	5.18%	5.84%
50-year PWLB certainty rate, maturity loans	5.01%	5.66%

3.52 The impact of a change in interest rates is calculated on the assumption that maturing loans and investment will be replaced at new market rates.

4. IMPLICATIONS**Legal Implications**

4.1 A number of statutes governing the provision of services covered by this report contain express powers or duties to charge for services. Where an express power to charge does not exist the Council has the power under Section 111 of the Local Government Act 1972 to charge where the activity is incidental or conducive to or calculated to facilitate the Councils statutory function.

Service / Operational Implications

4.2 Monitoring is undertaken to ensure that income targets are achieved, with Treasury Management activities taking place on a daily basis.

Customer / Equalities and Diversity Implications

4.3 The only impact of treasury transactions is in respect of ethical investment linked to the Councils investment counterparties. Presently the Council has a limited counterparty list based on financial risk to the Authority.

5. RISK MANAGEMENT

5.1 There is always significant risk in relation to treasury transactions, this is why Councils appoint Treasury advisors, which in the case of Redditch is Arlingclose. In addition, there is the requirement in this area to provide an Annual Strategy report containing indicators/limits that must be met, a quarterly update and closure report all of which must be reported to full Council.

REDDITCH BOROUGH COUNCIL**Executive****11th March 2025****6. APPENDICES**

None

7. BACKGROUND PAPERS

MTEP 2024/25 – February 2024 which contains this years Capital Strategy, Treasury Management Strategy and MRP Policy.

AUTHOR OF REPORT

Name: Debra Goodall – Head of Finance and Customer Services (Deputy S151)
E Mail: Debra.Goodall@bromsgroveandredditchbc.gov.uk

Appendix D - Procurement Pipeline

REDDITCH BOROUGH COUNCIL**Executive****11th March 2025**

Council	Contract Title	Department	
	Redditch Contracts over £200k		
Redditch	Audio visual system	Environmental Services	
Redditch	DMIC Build	Regeneration	
Redditch	Retrofit WAVE 3 Contractor	Housing Property Services	Awaiting legislation updates
Redditch	Fleet Replacement	Environmental Services	
Redditch	Fleet replacement	Housing Property Services	
Redditch	Civil Engineering Works	Housing Property Services	
Redditch	Remodel - Auxerre House	Housing Property Services	
Redditch	Void Contract	Housing Property Services	
Redditch	Asbestos Management, re-inspections and removals	Housing Property Services	
Redditch	Retrofit WAVE 3 Co-ordinator	Housing Property Services	
Redditch	Retrofit WAVE 3 Retrofit Assessor and Designer	Housing Property Services	Awaiting legislation updates
Redditch	Consultancy Support	Housing Property Services	
Redditch	Communal Boiler Replacement	Housing Property Services	
Redditch	Refurbishment of The Anchorage	Housing Property services	
Redditch	Roofing Repairs and Replacement	Housing Property Services	
Redditch	Microsoft Licenses	ICT	
Redditch	Fire Alarm and Emergency Lighting Servicing, Installation, Repairs and Maintenance	Housing Property Services	
Redditch	Lift Installation and Refurbishment	Housing Property Services	
Redditch	Water Pipe Replacement	Housing Property Services	
Redditch	Underpinning	Housing Capital	
Redditch	Vehicle Hire	Environmental - Fleet	
Redditch	Damp Investigation and Treatment	Housing Property Services	
Redditch	Energy Consultancy Support	Housing Property Services	Awaiting legislation updates
	Redditch Contracts between £50,000 and £200,000		
Redditch	Banners Ln & Lodge Pool Dr play area refurbishments	Parks / Leisure	
Redditch	Throckmorton Rd & Greenlands PL Field play upgrades	Parks / Leisure	
Redditch	Remodel of Caretakers Lodge	Housing Property Services	
Redditch	New Cemetary	Environmental Services	
Redditch	Extension Rebuild - 11 Prospect Road	Housing Property Services	
Redditch	Gutter and window cleaning	Housing Property Services	
Redditch	Multi Use Games Area for MS Park	Parks / leisure	
Redditch	A&A Extension - 13 Drayton Close	Housing Property Services	
Redditch	A&A Extension - 31 Eckington Close	Housing Property Services	
Redditch	Payment Processing	Finance	
	Contracts Purchased on Behalf of Redditch		
Joint	Civil Engineering works	Engineering and Design	
Joint	Corporate Building Electrical contract	Property Services	
Joint	Enforcement Services	Finance and Customer Services	
Bromsgrove	Mobile Veterinary Services	WRS	
Bromsgrove	Parking Maintenance and Improvementschines	Engineering & Design	
Bromsgrove	Microsoft Licenses	ICT	
Bromsgrove	PROVIDE Kennelling of Dogs	WRS	
Bromsgrove	Pest Control	WRS	
Bromsgrove	Air Quality Analysers	WRS	
Bromsgrove	Data Access Services	ICT	

REDDITCH BOROUGH COUNCIL**Executive****11th March 2025****Appendix E****REDDITCH Strategic & Operational Performance Measures****Quarter 3, 2024/25****1. Introduction**

We are committed to reviewing performance reporting and key measures; as this is part of continuous improvement to ensure accountability, transparency, and effectiveness in delivering services to the community.

By assessing performance and utilising benchmarking where appropriate, we can identify areas of improvement, make informed decisions, allocate resources efficiently, and ultimately enhance service delivery to meet the evolving needs of our constituents, therefore how we measure performance is essential.

The Council Plan currently under development will identify priorities and key measures, and these will be the foundation for the performance reporting going forward.

2. Strategic Priorities and Performance Measures

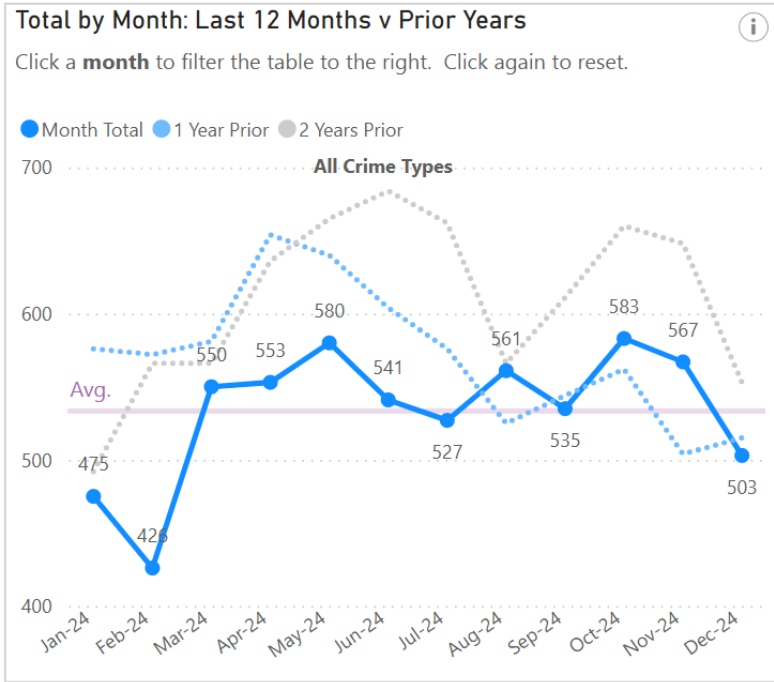
The performance measures shown in the next section were refined as part of the Service Business Planning Framework; the report will be restructured around the new Council Plan when adopted.

Measure:	% of building control applications determined within 5 weeks
Performance	Q3- 100%
Comment:	100% performance for Q3 against a target of 85%.
Measure:	% of media enquiries responded to within agreed timescales
Performance:	100%
Comment:	The team has a media mailbox feature on Outlook which means that all enquiries from the media come to all officers. The query is then allocated by the manager if not picked up by member of the team who would alert colleagues in the Teams chat that it is in hand. Once completed, if

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	<p>necessary the comment is shared with the team, again in the Teams chat in case a similar query is made. This ensures all media queries are dealt with. We further bolster with by regularly reminding media contacts to use the media mailbox address, so queries are not sent to individuals increasing the potential to be missed due to leave, meetings or a busy work schedule.</p>																																																				
<p>Measure:</p>	<p>No. of crimes recorded (excl. ASB)</p>																																																				
<p>Performance:</p>	 <table border="1"> <caption>Total by Month: Last 12 Months v Prior Years</caption> <thead> <tr> <th>Month</th> <th>Month Total</th> <th>1 Year Prior</th> <th>2 Years Prior</th> </tr> </thead> <tbody> <tr><td>Jan-24</td><td>475</td><td>575</td><td>575</td></tr> <tr><td>Feb-24</td><td>426</td><td>575</td><td>575</td></tr> <tr><td>Mar-24</td><td>550</td><td>580</td><td>580</td></tr> <tr><td>Apr-24</td><td>553</td><td>650</td><td>650</td></tr> <tr><td>May-24</td><td>580</td><td>640</td><td>640</td></tr> <tr><td>Jun-24</td><td>541</td><td>600</td><td>600</td></tr> <tr><td>Jul-24</td><td>527</td><td>580</td><td>580</td></tr> <tr><td>Aug-24</td><td>561</td><td>530</td><td>530</td></tr> <tr><td>Sep-24</td><td>535</td><td>560</td><td>560</td></tr> <tr><td>Oct-24</td><td>583</td><td>650</td><td>650</td></tr> <tr><td>Nov-24</td><td>567</td><td>510</td><td>510</td></tr> <tr><td>Dec-24</td><td>503</td><td>510</td><td>510</td></tr> </tbody> </table>	Month	Month Total	1 Year Prior	2 Years Prior	Jan-24	475	575	575	Feb-24	426	575	575	Mar-24	550	580	580	Apr-24	553	650	650	May-24	580	640	640	Jun-24	541	600	600	Jul-24	527	580	580	Aug-24	561	530	530	Sep-24	535	560	560	Oct-24	583	650	650	Nov-24	567	510	510	Dec-24	503	510	510
Month	Month Total	1 Year Prior	2 Years Prior																																																		
Jan-24	475	575	575																																																		
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Oct-24	583	650	650																																																		
Nov-24	567	510	510																																																		
Dec-24	503	510	510																																																		
<p>Comment:</p>	<p>Across North Worcestershire (NW) there has been a 5% (n=218) decrease in offences during Q3 2024/25 compared to the previous quarter. There was also a 9% decrease (n=440) compared to the same quarter in the previous year. The offence categories that showed an increase when compared to the same quarter of the previous year were Vehicle offences (16%, n=53), Theft from the person (18%, n=4), Robbery – business (200%, n=4). The NW district with the largest decrease in offences compared to the previous quarter is Redditch (9%, n=134). The Ward area with the largest volume of offences is Abbey (n=274) and this is a 1% increase in offences when compared to the same quarter of the previous year. The highest volume offences in the Abbey area were Violence without injury (n=83), Shoplifting (n=39), and Violence with injury (n=33). The streets with the largest volume offences</p>																																																				

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	are all located in the Town Centre - Unicorn Hill (n=35), Market Place (n=23), and Kingfisher Walk (n=23).																																																																												
Measure:	% of voluntary community grants funding available being awarded																																																																												
Performance:	100% (new measure)																																																																												
Comment:	A total of £106,068 was awarded last year in grants: £94,392 in the 13 larger grants £9676 in the 5 smaller grants																																																																												
Measure:	% complaints answered within agreed timescales																																																																												
Performance:	<div data-bbox="400 1149 1302 1704" data-label="Figure"> <p>% Responses in 10 Wrkg. Days by Date Received to 26/02/2025 All Services</p> <p>● % Response in 10 w/d ● 1 Yr Prior ● 2 Yrs Prior</p> <table border="1"> <thead> <tr> <th>Month</th> <th>% Response in 10 w/d</th> <th>1 Yr Prior</th> <th>2 Yrs Prior</th> </tr> </thead> <tbody> <tr><td>Jul-23</td><td>88.9%</td><td>75.9%</td><td>75.9%</td></tr> <tr><td>Aug-23</td><td>52.4%</td><td>52.4%</td><td>52.4%</td></tr> <tr><td>Sep-23</td><td>70.6%</td><td>60.0%</td><td>60.0%</td></tr> <tr><td>Oct-23</td><td>60.0%</td><td>60.0%</td><td>60.0%</td></tr> <tr><td>Nov-23</td><td>65.4%</td><td>54.5%</td><td>54.5%</td></tr> <tr><td>Dec-23</td><td>55.0%</td><td>55.0%</td><td>55.0%</td></tr> <tr><td>Jan-24</td><td>78.9%</td><td>46.7%</td><td>46.7%</td></tr> <tr><td>Feb-24</td><td>43.5%</td><td>43.5%</td><td>43.5%</td></tr> <tr><td>Mar-24</td><td>31.6%</td><td>31.6%</td><td>31.6%</td></tr> <tr><td>Apr-24</td><td>63.2%</td><td>63.2%</td><td>63.2%</td></tr> <tr><td>May-24</td><td>36.4%</td><td>36.4%</td><td>36.4%</td></tr> <tr><td>Jun-24</td><td>60.9%</td><td>60.9%</td><td>60.9%</td></tr> <tr><td>Jul-24</td><td>63.6%</td><td>63.6%</td><td>63.6%</td></tr> <tr><td>Aug-24</td><td>78.6%</td><td>78.6%</td><td>78.6%</td></tr> <tr><td>Sep-24</td><td>62.5%</td><td>62.5%</td><td>62.5%</td></tr> <tr><td>Oct-24</td><td>62.5%</td><td>62.5%</td><td>62.5%</td></tr> <tr><td>Nov-24</td><td>62.5%</td><td>62.5%</td><td>62.5%</td></tr> <tr><td>Dec-24</td><td>78.6%</td><td>78.6%</td><td>78.6%</td></tr> </tbody> </table> </div>	Month	% Response in 10 w/d	1 Yr Prior	2 Yrs Prior	Jul-23	88.9%	75.9%	75.9%	Aug-23	52.4%	52.4%	52.4%	Sep-23	70.6%	60.0%	60.0%	Oct-23	60.0%	60.0%	60.0%	Nov-23	65.4%	54.5%	54.5%	Dec-23	55.0%	55.0%	55.0%	Jan-24	78.9%	46.7%	46.7%	Feb-24	43.5%	43.5%	43.5%	Mar-24	31.6%	31.6%	31.6%	Apr-24	63.2%	63.2%	63.2%	May-24	36.4%	36.4%	36.4%	Jun-24	60.9%	60.9%	60.9%	Jul-24	63.6%	63.6%	63.6%	Aug-24	78.6%	78.6%	78.6%	Sep-24	62.5%	62.5%	62.5%	Oct-24	62.5%	62.5%	62.5%	Nov-24	62.5%	62.5%	62.5%	Dec-24	78.6%	78.6%	78.6%
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<p>Analysis:</p>	<table border="1"> <thead> <tr> <th></th> <th colspan="2">Q3</th> <th colspan="2">Q2</th> <th></th> </tr> <tr> <th>Team</th> <th>Last</th> <th>Prior</th> <th>Var.</th> <th>% Var.</th> <th></th> </tr> </thead> <tbody> <tr> <td>Housing Property Services</td> <td>18</td> <td>22</td> <td>-4</td> <td>-18%</td> <td>↓</td> </tr> <tr> <td>Council Tax</td> <td>3</td> <td>6</td> <td>-3</td> <td>-50%</td> <td>↓</td> </tr> <tr> <td>Domestic Waste</td> <td>3</td> <td>1</td> <td>2</td> <td>200%</td> <td>↑</td> </tr> <tr> <td>Neighbourhood & Tenancy</td> <td>3</td> <td>7</td> <td>-4</td> <td>-57%</td> <td>↓</td> </tr> <tr> <td>Place RBC</td> <td>2</td> <td>2</td> <td>0</td> <td>0%</td> <td>▬</td> </tr> <tr> <td>CEO</td> <td>1</td> <td>0</td> <td>1</td> <td>--</td> <td></td> </tr> <tr> <td>Development Management</td> <td>1</td> <td>0</td> <td>1</td> <td>--</td> <td></td> </tr> <tr> <td>Right to Buy</td> <td>1</td> <td>0</td> <td>1</td> <td>--</td> <td></td> </tr> <tr> <td>Strategic Housing</td> <td>1</td> <td>0</td> <td>1</td> <td>--</td> <td></td> </tr> <tr> <td>Trees</td> <td>1</td> <td>0</td> <td>1</td> <td>--</td> <td></td> </tr> <tr> <td>Benefits</td> <td>0</td> <td>1</td> <td>-1</td> <td>-10...</td> <td>↓</td> </tr> <tr> <td>Customer Services</td> <td>0</td> <td>2</td> <td>-2</td> <td>-10...</td> <td>↓</td> </tr> <tr> <td>Development incl Sports</td> <td>0</td> <td>1</td> <td>-1</td> <td>-10...</td> <td>↓</td> </tr> <tr> <td>Engineering/Design/Road Si...</td> <td>0</td> <td>1</td> <td>-1</td> <td>-10...</td> <td>↓</td> </tr> <tr> <td>Homelessness and Housing ...</td> <td>0</td> <td>7</td> <td>-7</td> <td>-10...</td> <td>↓</td> </tr> <tr> <td>Housing Revenue</td> <td>0</td> <td>2</td> <td>-2</td> <td>-10...</td> <td>↓</td> </tr> <tr> <td>Voids & Allocations</td> <td>0</td> <td>1</td> <td>-1</td> <td>-10...</td> <td>↓</td> </tr> <tr> <td>Total</td> <td>34</td> <td>53</td> <td>-19</td> <td>-36%</td> <td>↓</td> </tr> </tbody> </table>		Q3		Q2			Team	Last	Prior	Var.	% Var.		Housing Property Services	18	22	-4	-18%	↓	Council Tax	3	6	-3	-50%	↓	Domestic Waste	3	1	2	200%	↑	Neighbourhood & Tenancy	3	7	-4	-57%	↓	Place RBC	2	2	0	0%	▬	CEO	1	0	1	--		Development Management	1	0	1	--		Right to Buy	1	0	1	--		Strategic Housing	1	0	1	--		Trees	1	0	1	--		Benefits	0	1	-1	-10...	↓	Customer Services	0	2	-2	-10...	↓	Development incl Sports	0	1	-1	-10...	↓	Engineering/Design/Road Si...	0	1	-1	-10...	↓	Homelessness and Housing ...	0	7	-7	-10...	↓	Housing Revenue	0	2	-2	-10...	↓	Voids & Allocations	0	1	-1	-10...	↓	Total	34	53	-19	-36%	↓
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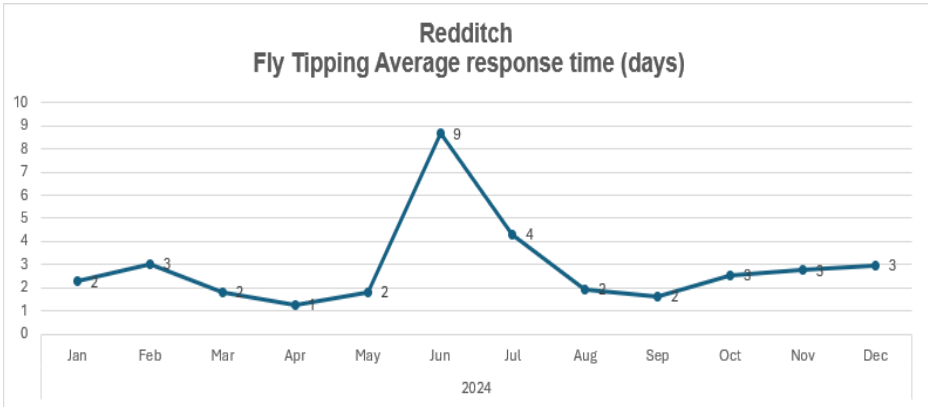
11th March 2025

	<p>period. This means that the numbers of applications involved is reduced and thus when an application goes out of time it has more statistical impact. The Government target remains the same at 70%. Performance for the rolling 1 year period has marginally improved, as more applications determined in the last 12 months have been determined in time or with an extension of time, as a result performance is now 87.85%.</p>																																				
<p>Measure:</p>	<p>% of major planning applications determined within 13 weeks or agreed extension</p>																																				
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	<p>There has been a change as above in how the rolling period is calculated. The Government target remains the same at 60%. Performance for the rolling 1 year period has improved, as all applications determined in the last 12 months have been determined in time or with an Extension of Time (EoT), as a result performance is now 100%.</p>																																				
<p>Measure:</p>	<p>No. of planning enforcement actions taken</p>																																				
<p>Performance:</p>	<p>This is a new measure for inclusion in quarterly reporting and data will be available from Q4 2024/25.</p>																																				

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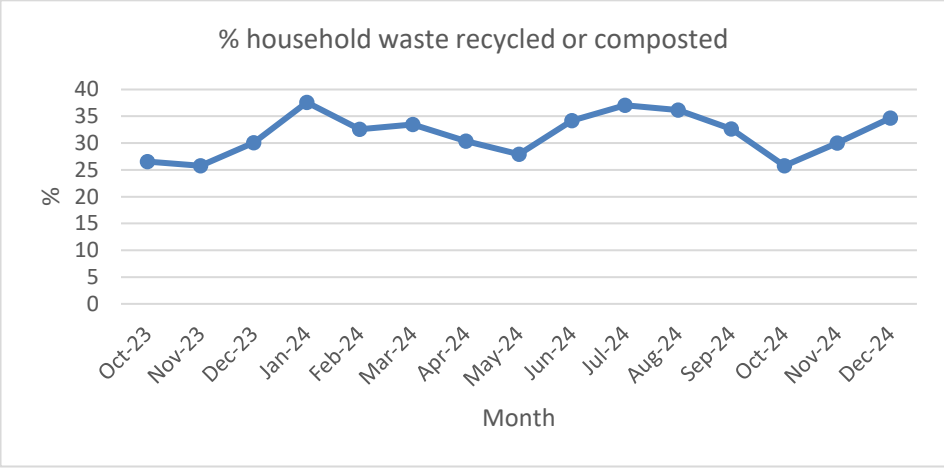
11th March 2025

Measure:	Business grant funding being taken up																													
Performance:		START UP	GROWTH	TOTAL OF GRANTS FOR QUARTER																										
	23/24 Q4	0	£2,571.50	£2,571.50																										
	24/25 Q1	£13,412.00	£16,646.70	£30,058.70																										
	24/25 Q2	£6,806.67	£21,690.00	£28,496.67																										
	24/25 Q3	£8,723.72	£17,962.76	£26,686.48																										
Measure:	No. of environmental enforcement actions taken																													
Performance:	This is a new measure for inclusion in quarterly reporting and data will be available from Q4 2024/25 (with a one-quarter lag)																													
Measure:	Average time taken to remove fly-tipping reported																													
Performance:	 <p style="text-align: center;">Redditch Fly Tipping Average response time (days)</p> <table border="1"> <thead> <tr> <th>Month</th> <th>Average response time (days)</th> </tr> </thead> <tbody> <tr><td>Jan</td><td>2</td></tr> <tr><td>Feb</td><td>3</td></tr> <tr><td>Mar</td><td>2</td></tr> <tr><td>Apr</td><td>1</td></tr> <tr><td>May</td><td>2</td></tr> <tr><td>Jun</td><td>9</td></tr> <tr><td>Jul</td><td>4</td></tr> <tr><td>Aug</td><td>2</td></tr> <tr><td>Sep</td><td>2</td></tr> <tr><td>Oct</td><td>3</td></tr> <tr><td>Nov</td><td>3</td></tr> <tr><td>Dec</td><td>3</td></tr> </tbody> </table>				Month	Average response time (days)	Jan	2	Feb	3	Mar	2	Apr	1	May	2	Jun	9	Jul	4	Aug	2	Sep	2	Oct	3	Nov	3	Dec	3
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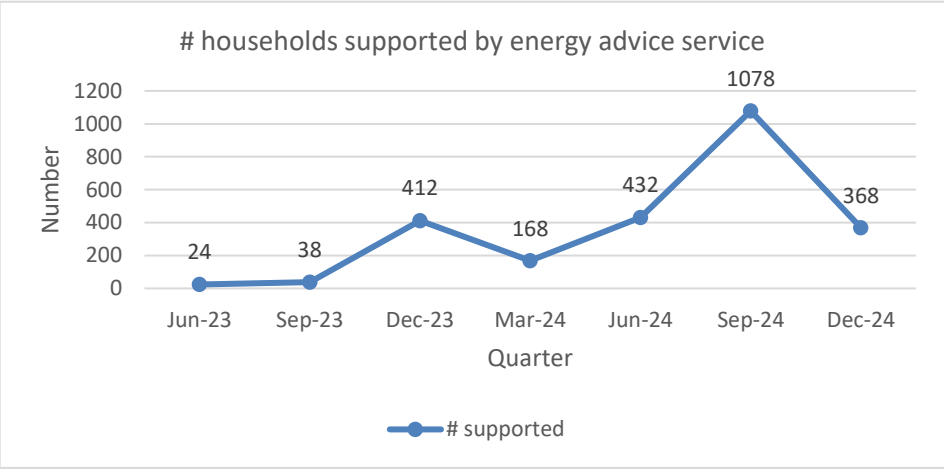
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<p>Comment:</p>	<p>Since June 2024 WRS have taken over the enforcement side of Fly-tipping. The process of dove-tailing the clean-up works carried out by RBC Place teams with the investigation side led by WRS has taken a few months to bed in but is now working effectively with fly-tips being left for no longer than 48 hours in most cases. WRS are moving forward with several cases that should eventually lead to prosecution that will then be utilised in communications to try and vastly reduce the incidents across the Borough.</p>																																
<p>Measure:</p>	<p>% household waste recycled or composted</p>																																
<p>Performance:</p>	 <p>The chart displays the percentage of household waste recycled or composted over a 14-month period from October 2023 to December 2024. The y-axis represents the percentage, ranging from 0 to 40 in increments of 5. The x-axis lists the months. The data points are as follows:</p> <table border="1"> <thead> <tr> <th>Month</th> <th>%</th> </tr> </thead> <tbody> <tr><td>Oct-23</td><td>27</td></tr> <tr><td>Nov-23</td><td>26</td></tr> <tr><td>Dec-23</td><td>30</td></tr> <tr><td>Jan-24</td><td>37</td></tr> <tr><td>Feb-24</td><td>32</td></tr> <tr><td>Mar-24</td><td>33</td></tr> <tr><td>Apr-24</td><td>30</td></tr> <tr><td>May-24</td><td>28</td></tr> <tr><td>Jun-24</td><td>34</td></tr> <tr><td>Jul-24</td><td>36</td></tr> <tr><td>Aug-24</td><td>35</td></tr> <tr><td>Sep-24</td><td>32</td></tr> <tr><td>Oct-24</td><td>26</td></tr> <tr><td>Nov-24</td><td>30</td></tr> <tr><td>Dec-24</td><td>34</td></tr> </tbody> </table>	Month	%	Oct-23	27	Nov-23	26	Dec-23	30	Jan-24	37	Feb-24	32	Mar-24	33	Apr-24	30	May-24	28	Jun-24	34	Jul-24	36	Aug-24	35	Sep-24	32	Oct-24	26	Nov-24	30	Dec-24	34
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<p>Comment:</p>	<p>Performance to the end of Q3 is improved on the same period last year, with a 3.17% increase in the percentage of recycling.</p>																																

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<p>Measure:</p>	<p>No. of households supported by energy advice service (AoE)</p>																
<p>Performance:</p>	 <table border="1"> <caption># households supported by energy advice service</caption> <thead> <tr> <th>Quarter</th> <th>Number</th> </tr> </thead> <tbody> <tr> <td>Jun-23</td> <td>24</td> </tr> <tr> <td>Sep-23</td> <td>38</td> </tr> <tr> <td>Dec-23</td> <td>412</td> </tr> <tr> <td>Mar-24</td> <td>168</td> </tr> <tr> <td>Jun-24</td> <td>432</td> </tr> <tr> <td>Sep-24</td> <td>1078</td> </tr> <tr> <td>Dec-24</td> <td>368</td> </tr> </tbody> </table>	Quarter	Number	Jun-23	24	Sep-23	38	Dec-23	412	Mar-24	168	Jun-24	432	Sep-24	1078	Dec-24	368
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<p>Comment:</p>	<p>In Q3, AOE received a significant number of calls for help, (although a slight decrease compared to the same period in the 2023) highlighting the continued impact of the service on residents in Redditch. These calls resulted in numerous residents accessing support and funding help with their energy bills, including those funded by the HSF, ECO4, and Shared Prosperity Funding. Notably, the Household Support Fund remains the primary source of project funding in Redditch with over 50% of call outcomes seeing residents referred onto the HSF.</p>																
<p>Measure:</p>	<p>% energy improvements grant funding of private housing available being taken up</p>																
<p>Performance:</p>	<p>This measure is currently under development due to ongoing changes to the grant funding options available.</p>																

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<p>Measure:</p>	<p>Number of new homes - total and affordable (annual)</p>																									
<p>Performance:</p>	<p>The first chart, 'Total New Homes Completed', shows the total number of homes completed annually from 2020-21 to 2023-24. The values are 185, 132, 108, and 284 respectively. The second chart, 'New Homes Completed by Property Size', shows the breakdown of homes by property size (1 Bed, 2 Bed, 3 Bed, 4 Bed) for each year. The data is as follows:</p> <table border="1"> <thead> <tr> <th>Year</th> <th>1 Bed</th> <th>2 Bed</th> <th>3 Bed</th> <th>4 Bed</th> </tr> </thead> <tbody> <tr> <td>2020-21</td> <td>11</td> <td>51</td> <td>64</td> <td>39</td> </tr> <tr> <td>2021-22</td> <td>47</td> <td>44</td> <td>24</td> <td>17</td> </tr> <tr> <td>2022-23</td> <td>26</td> <td>25</td> <td>41</td> <td>16</td> </tr> <tr> <td>2023-24</td> <td>139</td> <td>60</td> <td>75</td> <td>10</td> </tr> </tbody> </table>	Year	1 Bed	2 Bed	3 Bed	4 Bed	2020-21	11	51	64	39	2021-22	47	44	24	17	2022-23	26	25	41	16	2023-24	139	60	75	10
Year	1 Bed	2 Bed	3 Bed	4 Bed																						
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<p>Comment:</p>	<p>Total number of homes built in 2023/24:</p> <ul style="list-style-type: none"> • Total Homes Built (including affordable) - 284 (net) • Total affordable homes built - 110 (net) 																									
<p>Measure:</p>	<p>No. of people requiring DFGs</p>																									
<p>Performance:</p>	<p>The line chart shows the monthly number of people requiring DFGs in Redditch from January 2022 to December 2024. The y-axis represents the number of people, ranging from 0 to 80. The x-axis represents the date by month. The data shows significant fluctuations, with a notable peak in August 2023 (around 50) and another peak in August 2024 (around 60). There are also two horizontal lines: a blue line at approximately 25 and a green line at approximately 45.</p>																									
<p>Comment:</p>	<p>Demand for DFG's is subject to the number of qualifying clients identified by external organisations and therefore beyond control of the Authority. The figures do not include those assisted with other related forms of assistance also funded through the council's Better Care Fund allocation.</p>																									

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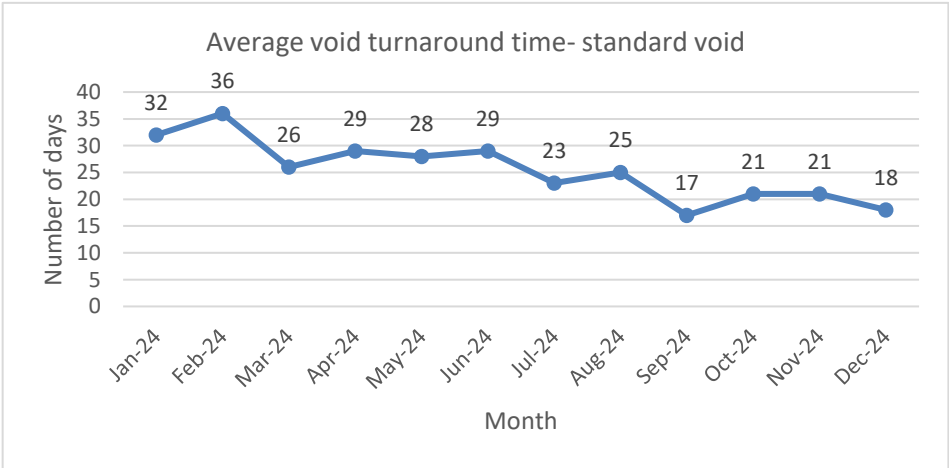
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	Adaptions within RBC stock do not access DFG/BCF and therefore are not included in this data.																																																																	
Measure:	Homelessness: prevention																																																																	
Performance:	<table border="1"> <caption>Number Threatened and Prevented</caption> <thead> <tr> <th>Month</th> <th>Threatened (2024)</th> <th>Prevented (2024)</th> <th>Prior Year Threatened</th> <th>Prior Year Prevented</th> </tr> </thead> <tbody> <tr><td>Jan-24</td><td>2</td><td>1</td><td>2</td><td>1</td></tr> <tr><td>Feb-24</td><td>4</td><td>1</td><td>4</td><td>1</td></tr> <tr><td>Mar-24</td><td>5</td><td>1</td><td>5</td><td>1</td></tr> <tr><td>Apr-24</td><td>4</td><td>1</td><td>4</td><td>1</td></tr> <tr><td>May-24</td><td>9</td><td>1</td><td>9</td><td>1</td></tr> <tr><td>Jun-24</td><td>6</td><td>1</td><td>6</td><td>1</td></tr> <tr><td>Jul-24</td><td>5</td><td>1</td><td>5</td><td>1</td></tr> <tr><td>Aug-24</td><td>9</td><td>4</td><td>9</td><td>4</td></tr> <tr><td>Sep-24</td><td>6</td><td>4</td><td>6</td><td>4</td></tr> <tr><td>Oct-24</td><td>11</td><td>2</td><td>11</td><td>2</td></tr> <tr><td>Nov-24</td><td>9</td><td>1</td><td>9</td><td>1</td></tr> <tr><td>Dec-24</td><td>6</td><td>1</td><td>6</td><td>1</td></tr> </tbody> </table>	Month	Threatened (2024)	Prevented (2024)	Prior Year Threatened	Prior Year Prevented	Jan-24	2	1	2	1	Feb-24	4	1	4	1	Mar-24	5	1	5	1	Apr-24	4	1	4	1	May-24	9	1	9	1	Jun-24	6	1	6	1	Jul-24	5	1	5	1	Aug-24	9	4	9	4	Sep-24	6	4	6	4	Oct-24	11	2	11	2	Nov-24	9	1	9	1	Dec-24	6	1	6	1
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Comment:	This measure will change in future reports, as part of a wider housing data project.																																																																	
Measure:	No. of households in temporary accommodation- snapshot																																																																	
Performance:	This measure is currently under development as part of a wider housing data project.																																																																	
Measure:	% of households in temporary accommodation which have exceeded 6 weeks																																																																	
Performance:	This measure is currently under development as part of a wider housing data project.																																																																	

REDDITCH BOROUGH COUNCIL

Executive

11th March 2025

<p>Measure:</p>	<p>Cost of B & B placements</p>																										
<p>Performance:</p>	<p>This measure is currently under development as part of a wider housing data project.</p>																										
<p>Measure:</p>	<p>Void turnaround time</p>																										
<p>Performance:</p>	 <table border="1"> <caption>Average void turnaround time- standard void</caption> <thead> <tr> <th>Month</th> <th>Number of days</th> </tr> </thead> <tbody> <tr><td>Jan-24</td><td>32</td></tr> <tr><td>Feb-24</td><td>36</td></tr> <tr><td>Mar-24</td><td>26</td></tr> <tr><td>Apr-24</td><td>29</td></tr> <tr><td>May-24</td><td>28</td></tr> <tr><td>Jun-24</td><td>29</td></tr> <tr><td>Jul-24</td><td>23</td></tr> <tr><td>Aug-24</td><td>25</td></tr> <tr><td>Sep-24</td><td>17</td></tr> <tr><td>Oct-24</td><td>21</td></tr> <tr><td>Nov-24</td><td>21</td></tr> <tr><td>Dec-24</td><td>18</td></tr> </tbody> </table>	Month	Number of days	Jan-24	32	Feb-24	36	Mar-24	26	Apr-24	29	May-24	28	Jun-24	29	Jul-24	23	Aug-24	25	Sep-24	17	Oct-24	21	Nov-24	21	Dec-24	18
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<p>Comment:</p>	<p>There were 26 overall properties completed in October with an average void turnaround time of 21 days, (measured by tenancy end date to new tenancy start date). There were overall 28 properties completed in November and 34 properties completed in December</p>																										

REDDITCH BOROUGH COUNCIL

Executive

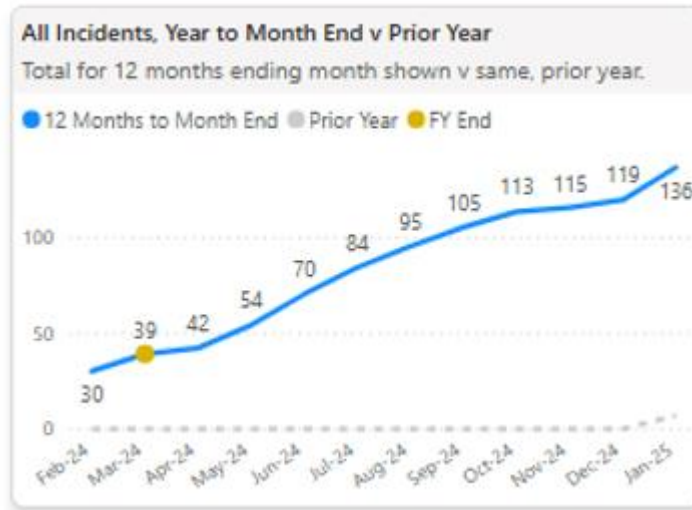
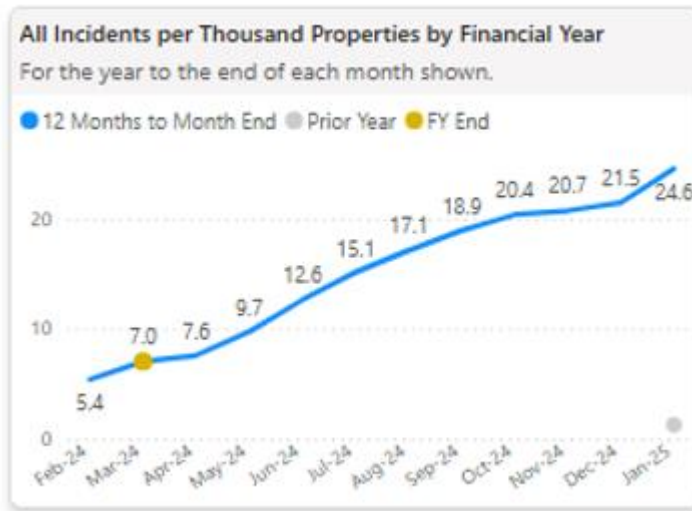
11th March 2025

<p>Measure:</p>	<p>Void rent loss</p>																										
<p>Performance:</p>	<table border="1"> <caption>Void rent loss (all properties)</caption> <thead> <tr> <th>Month</th> <th>Amount (£)</th> </tr> </thead> <tbody> <tr><td>Jan-24</td><td>11,000.00</td></tr> <tr><td>Feb-24</td><td>13,000.00</td></tr> <tr><td>Mar-24</td><td>21,000.00</td></tr> <tr><td>Apr-24</td><td>11,000.00</td></tr> <tr><td>May-24</td><td>23,000.00</td></tr> <tr><td>Jun-24</td><td>19,000.00</td></tr> <tr><td>Jul-24</td><td>36,000.00</td></tr> <tr><td>Aug-24</td><td>28,000.00</td></tr> <tr><td>Sep-24</td><td>17,000.00</td></tr> <tr><td>Oct-24</td><td>29,000.00</td></tr> <tr><td>Nov-24</td><td>13,000.00</td></tr> <tr><td>Dec-24</td><td>8,000.00</td></tr> </tbody> </table>	Month	Amount (£)	Jan-24	11,000.00	Feb-24	13,000.00	Mar-24	21,000.00	Apr-24	11,000.00	May-24	23,000.00	Jun-24	19,000.00	Jul-24	36,000.00	Aug-24	28,000.00	Sep-24	17,000.00	Oct-24	29,000.00	Nov-24	13,000.00	Dec-24	8,000.00
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<p>Comment:</p>	<p>The projected void rent loss for Q3 is £48,569.10. The measure is potential loss of rental income for all the void properties that were completed in Q3, from tenancy end date to new tenancy start date.</p>																										
<p>Measure:</p>	<p>Housing- Antisocial Behaviour incidents- cases recorded</p>																										
<p>Performance:</p>	<table border="1"> <thead> <tr> <th colspan="4">All Incidents, Last 12 Months to end of January 2025</th> </tr> <tr> <th>PER 1K PROPERTIES</th> <th>TOTAL RECORDED</th> <th>PROPERTIES</th> <th>PROPERTY SNAPSHOT</th> </tr> </thead> <tbody> <tr> <td>24.6</td> <td>136</td> <td>5,535</td> <td>31/01/25</td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th colspan="4">All Incidents, Last Financial Year to end of March 2024</th> </tr> <tr> <th>PER 1K PROPERTIES</th> <th>TOTAL RECORDED</th> <th>PROPERTIES</th> <th>PROPERTY SNAPSHOT</th> </tr> </thead> <tbody> <tr> <td>7.0</td> <td>39</td> <td>5,554</td> <td>31/03/24</td> </tr> </tbody> </table>	All Incidents, Last 12 Months to end of January 2025				PER 1K PROPERTIES	TOTAL RECORDED	PROPERTIES	PROPERTY SNAPSHOT	24.6	136	5,535	31/01/25	All Incidents, Last Financial Year to end of March 2024				PER 1K PROPERTIES	TOTAL RECORDED	PROPERTIES	PROPERTY SNAPSHOT	7.0	39	5,554	31/03/24		
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REDDITCH BOROUGH COUNCIL

Executive

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Comment:

Between 01/04/24-31/12/24 that there were 119 reported incidents of ASB in the team. This equates to 21.5 incidents per 1,000 homes within our management. During Q3 24/25 there were 14 incidents recorded.

The previous year we recorded only 39 incidents, but this is because the CX system we use to capture information went live part way through the year and colleagues were still learning how to use the systems. We believe that over the coming months this figure will continue to rise, not because there is more ASB, but because we are all improving our data capture and now have BI tools to allow us to speak to colleagues who

REDDITCH BOROUGH COUNCIL**Executive****11th March 2025**

	maybe underreporting and address this through their 1:1's and appraisals.
Measure:	% of properties with a valid EICR
Performance:	Electrical safety - Q3 - 89%
Comment:	Electrical safety is not governed in the same way as gas safety, as such we are having trouble in accessing our properties even after sending out a series of letters. We are currently in talks with our legal team on a more robust approach as this is an important piece of work which in turn keeps our tenants safe in their homes.
Measure:	% of properties with a valid gas certificate
Performance:	Gas safety – Q3 - 100%
Comment:	This is governed through law so our system of inspection has to be robust in order to comply with our regulatory responsibility.
Measure:	% of properties with valid fire risk assessment
Performance:	Fire safety – Q3 - 100%
Comment:	We have a rolling programme of FRAs to ensure we have compliance. The FRAs have resulted in Remedial Actions ranging from signage to new fire doors and fire stopping as well as ensuring we have person centred risk assessments for highly vulnerable people within our homes.
Measure:	% of properties with valid legionella inspection
Performance:	Legionella and Water safety - Q3 - 100%

REDDITCH BOROUGH COUNCIL

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Comment:	All legionella risk assessments are in place																																																												
Measure:	% of properties with valid asbestos certificate																																																												
Performance:	Asbestos safety - Q3 – 97.65%																																																												
Comment:	This is a rolling programme of re-inspections from Apr through to March; by the end of March we will be at 100%.																																																												
Measure:	% of properties with valid lift safety checks																																																												
Performance:	Passenger Lifts - Q3 - 75%																																																												
Comment:	HPS have recently removed a non-operational lift at Auxerre House. A new lift is being installed and will be operational by Q2 25/26.																																																												
Measure:	% staff turnover																																																												
Performance:	<p>% Staff Turnover: Year to Month End v Prior Years Latest month is provisional. Records may be updated after month end. ● Year to Month End ● 1 Year Prior ● 2 Years Prior All Services</p> <table border="1"> <caption>Staff Turnover Data (Estimated from Chart)</caption> <thead> <tr> <th>Month</th> <th>Year to Month End (%)</th> <th>1 Year Prior (%)</th> <th>2 Years Prior (%)</th> <th>National % (%)</th> </tr> </thead> <tbody> <tr><td>Feb-24</td><td>9.2%</td><td>15.5%</td><td>15.5%</td><td>15%</td></tr> <tr><td>Mar-24</td><td>8.6%</td><td>14.5%</td><td>15.5%</td><td>15%</td></tr> <tr><td>Apr-24</td><td>8.7%</td><td>13.5%</td><td>15.5%</td><td>15%</td></tr> <tr><td>May-24</td><td>9.1%</td><td>12.5%</td><td>15.5%</td><td>15%</td></tr> <tr><td>Jun-24</td><td>8.9%</td><td>11.5%</td><td>15.5%</td><td>15%</td></tr> <tr><td>Jul-24</td><td>9.4%</td><td>10.5%</td><td>15.5%</td><td>15%</td></tr> <tr><td>Aug-24</td><td>10.1%</td><td>10.1%</td><td>15.5%</td><td>15%</td></tr> <tr><td>Sep-24</td><td>9.4%</td><td>10.5%</td><td>15.5%</td><td>15%</td></tr> <tr><td>Oct-24</td><td>8.8%</td><td>10.5%</td><td>15.5%</td><td>15%</td></tr> <tr><td>Nov-24</td><td>8.2%</td><td>9.5%</td><td>15.5%</td><td>15%</td></tr> <tr><td>Dec-24</td><td>8.3%</td><td>8.5%</td><td>15.5%</td><td>15%</td></tr> </tbody> </table>	Month	Year to Month End (%)	1 Year Prior (%)	2 Years Prior (%)	National % (%)	Feb-24	9.2%	15.5%	15.5%	15%	Mar-24	8.6%	14.5%	15.5%	15%	Apr-24	8.7%	13.5%	15.5%	15%	May-24	9.1%	12.5%	15.5%	15%	Jun-24	8.9%	11.5%	15.5%	15%	Jul-24	9.4%	10.5%	15.5%	15%	Aug-24	10.1%	10.1%	15.5%	15%	Sep-24	9.4%	10.5%	15.5%	15%	Oct-24	8.8%	10.5%	15.5%	15%	Nov-24	8.2%	9.5%	15.5%	15%	Dec-24	8.3%	8.5%	15.5%	15%
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Comment:	Over the last quarter staff turnover has dropped slightly from 8.8% to 8.3% which is substantially below the National rate which currently stands at 15%. The Service areas with the highest levels of staff turnover over																																																												

REDDITCH BOROUGH COUNCIL

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	<p>the year to the end of December 2024 are Planning and Regeneration (14.5%) and Community and Housing Services (13.6%). The Service area with the lowest level of staff turnover is Legal, Democratic and Property Services with 3.1%.</p>																																																																											
<p>Measure:</p>	<p>No. of sickness days lost per FTE</p>																																																																											
<p>Performance:</p>	<table border="1"> <caption>Short term / long term sickness (Estimated Data)</caption> <thead> <tr> <th>Month</th> <th>Short Term</th> <th>Long Term</th> </tr> </thead> <tbody> <tr><td>Jan-23</td><td>250</td><td>150</td></tr> <tr><td>Feb-23</td><td>200</td><td>100</td></tr> <tr><td>Mar-23</td><td>250</td><td>150</td></tr> <tr><td>Apr-23</td><td>200</td><td>100</td></tr> <tr><td>May-23</td><td>150</td><td>200</td></tr> <tr><td>Jun-23</td><td>150</td><td>250</td></tr> <tr><td>Jul-23</td><td>150</td><td>250</td></tr> <tr><td>Aug-23</td><td>150</td><td>250</td></tr> <tr><td>Sep-23</td><td>200</td><td>350</td></tr> <tr><td>Oct-23</td><td>200</td><td>300</td></tr> <tr><td>Nov-23</td><td>100</td><td>200</td></tr> <tr><td>Dec-23</td><td>200</td><td>200</td></tr> <tr><td>Jan-24</td><td>250</td><td>300</td></tr> <tr><td>Feb-24</td><td>200</td><td>300</td></tr> <tr><td>Mar-24</td><td>200</td><td>250</td></tr> <tr><td>Apr-24</td><td>200</td><td>150</td></tr> <tr><td>May-24</td><td>150</td><td>150</td></tr> <tr><td>Jun-24</td><td>250</td><td>200</td></tr> <tr><td>Jul-24</td><td>150</td><td>250</td></tr> <tr><td>Aug-24</td><td>150</td><td>150</td></tr> <tr><td>Sep-24</td><td>150</td><td>100</td></tr> <tr><td>Oct-24</td><td>250</td><td>150</td></tr> <tr><td>Nov-24</td><td>300</td><td>150</td></tr> <tr><td>Dec-24</td><td>150</td><td>200</td></tr> </tbody> </table>	Month	Short Term	Long Term	Jan-23	250	150	Feb-23	200	100	Mar-23	250	150	Apr-23	200	100	May-23	150	200	Jun-23	150	250	Jul-23	150	250	Aug-23	150	250	Sep-23	200	350	Oct-23	200	300	Nov-23	100	200	Dec-23	200	200	Jan-24	250	300	Feb-24	200	300	Mar-24	200	250	Apr-24	200	150	May-24	150	150	Jun-24	250	200	Jul-24	150	250	Aug-24	150	150	Sep-24	150	100	Oct-24	250	150	Nov-24	300	150	Dec-24	150	200
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<p>Comment:</p>	<p>There was a slight increase in absences due to sickness for the first part of Q3, followed by a decline for the final part of the Q3; the authority is currently in line with public sector absence days lost per FTE (10.07 days per FTE as at end December 2024). The Wellbeing event held in November 2024, was led from data showing that stress/depression/anxiety continues to be in the top 5% of absence reasons. Work is being undertaken to review absence reasons and data.</p>																																																																											
<p>Measure:</p>	<p>% of FOIs & SARs responded to within timescale</p>																																																																											
<p>Performance:</p>	<p>This measure is currently under development as part of a information management dashboard. The new system will go live in Q2 25/26- data will be available from the Q3 25/26 quarterly report.</p>																																																																											

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Measure:	Participation- Rubicon																
Performance:																	
<p>Abbey Stadium</p> <p>Palace Theatre</p> <p>Forge Mill</p> <p>Pitcheroak Golf Course</p> <p>Arrow Valley Visitor Centre</p>	Total Health and Fitness Memberships	24/25	3743	Apr	3631	3699	3709	3704	3870	3858	3813	3782	Jan	3291	3362	3315	
		23/24	3416	3369	3384	3452	3499	3504	3473	3335	3244	3244	Feb	3291	3362	3315	
		Var.	10%	8%	9%	7%	6%	10%	11%	14%	17%		Mar				
	Total Swimming Lesson Enrollment	24/25	1311	1319	1344	1347	1223	1282	1392	1252	1367	1361	1336	Jan	1274	1277	1284
		23/24					11%	9%	9%	9%	8%	8%	Feb				
		Var.											Mar				
	No. of performances	24/25	16	21	23	20	2	21	26	21	41	41	Jan	15	16	20	
		23/24	18	19	23	16	2	13	19	24	46	46	Feb	15	16	20	
		Var.	-11%	11%	0%	25%	0%	62%	37%	-13%	-11%		Mar				
	Seats sold	24/25	3845	4702	5621	3886	576	5749	7252	6440	16360	6440	Jan	4429	5647	6331	
		23/24	5521	4735	5592	3925	326	3277	5217	7385	16469	7385	Feb	4429	5647	6331	
		Var.	-30%	-1%	1%	-1%	77%	75%	39%	-13%	-1%		Mar				
	No. of Museum Visits	24/25	447	481	382	564	831	534	566	349	0	349	Jan	0	266	383	
		23/24	536	380	331	431	608	476	397	301	0	301	Feb	0	266	383	
		Var.	-17%	27%	15%	31%	37%	12%	43%	16%		16%	Mar				
	Total Membership	24/25	103	115	114	118	128	136	116	113	97	113	Jan				
		23/24	£6.81	£7.02	£6.95	£7.06	£7.19	£6.77	6.75	6.34	6.32	6.34	Feb				
		Var.	£6.42	£6.67	£6.37	£6.32	£6.58	6.17	5.59	5.51	5.71	5.71	Mar				
	Average Transaction Value	24/25	6%	5%	9%	12%	9%	10%	21%	15%	11%	15%	Jan	£ 6.39	£ 6.73	£ 6.59	
		23/24											Feb	£ 6.39	£ 6.73	£ 6.59	
		Var.											Mar				

REDDITCH BOROUGH COUNCIL

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<p>Measure:</p>	<p>% of green flags awarded</p>																				
<p>Performance:</p>	<p>Q3- 25% (new measure for quarterly report)</p>																				
<p>Comment:</p>	<p>There are 4 sites that are part of the schedule for the Green Flag Awards:</p> <ul style="list-style-type: none"> - Morton Stanley- awarded green flag - Overdale- due to be judged in 2025 - Batchley Pool- due to be judged in 2025 - Arrow Valley- due to be judged in 2027 																				
<p>Measure:</p>	<p>% of property portfolio which is compliant</p>																				
<p>Performance:</p>	<p>This is a new measure for the quarterly report and is being developed for reporting in the Q4 report.</p>																				
<p>Measure:</p>	<p>% of Council Tax collection rates</p>																				
<p>Performance:</p>	<div style="text-align: center;"> <p>RBC Council Tax Current Year Collection</p> <table border="1" style="margin-left: auto; margin-right: auto;"> <caption>RBC Council Tax Current Year Collection Data</caption> <thead> <tr> <th>Month</th> <th>% Collected</th> </tr> </thead> <tbody> <tr> <td>Apr-24</td> <td>10</td> </tr> <tr> <td>May-24</td> <td>20</td> </tr> <tr> <td>Jun-24</td> <td>30</td> </tr> <tr> <td>Jul-24</td> <td>40</td> </tr> <tr> <td>Aug-24</td> <td>50</td> </tr> <tr> <td>Sep-24</td> <td>60</td> </tr> <tr> <td>Oct-24</td> <td>70</td> </tr> <tr> <td>Nov-24</td> <td>80</td> </tr> <tr> <td>Dec-24</td> <td>82</td> </tr> </tbody> </table> </div>	Month	% Collected	Apr-24	10	May-24	20	Jun-24	30	Jul-24	40	Aug-24	50	Sep-24	60	Oct-24	70	Nov-24	80	Dec-24	82
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11th March 2025

<p>Measure:</p>	<p>% of Business Rates collection rates</p>																																																																		
<p>Performance:</p>	<p style="text-align: center;">RBC Business Rates Current Year Collection</p> <table border="1"> <caption>RBC Business Rates Current Year Collection Data</caption> <thead> <tr> <th>Month</th> <th>% Collected</th> </tr> </thead> <tbody> <tr><td>Apr-24</td><td>10</td></tr> <tr><td>May-24</td><td>20</td></tr> <tr><td>Jun-24</td><td>30</td></tr> <tr><td>Jul-24</td><td>40</td></tr> <tr><td>Aug-24</td><td>50</td></tr> <tr><td>Sep-24</td><td>60</td></tr> <tr><td>Oct-24</td><td>70</td></tr> <tr><td>Nov-24</td><td>80</td></tr> <tr><td>Dec-24</td><td>80</td></tr> </tbody> </table>	Month	% Collected	Apr-24	10	May-24	20	Jun-24	30	Jul-24	40	Aug-24	50	Sep-24	60	Oct-24	70	Nov-24	80	Dec-24	80																																														
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REDDITCH BOROUGH COUNCIL

Executive

11th March 2025

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<p>Comment:</p>	<p>Our speed of processing figures for new claims and change of circumstances stay at a consistent level, on average 17 days for new claims and 8 days for change of circumstances. DWP averages across the country for Q2 were New Claims 21 and Change of Circumstances 8 (there is always a delay in published figures) we are therefore performing at a high level. The quarterly calls that we undertake with DWP are always of a complimentary nature and they express no concerns in any areas of our work.</p>																																																																												

REDDITCH BOROUGH COUNCIL

Executive

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<p>Comment:</p>	<p>The LA error levels are projected up to the end of the year, the levels for 24/25 are expected to be the lowest they have been over recent years. This is due to two main factors, increased quality checking on Housing Benefit claims, thus ensuring the correct benefit gets to the resident the first time. And the continuation of the DWP Housing Benefit Accuracy</p>																																																																																																																																																																																																																																														

REDDITCH BOROUGH COUNCIL

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	Award scheme (HBAA) where LA's are required to review percentages of their caseload each year, therefore cleansing the data and the caseload.
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REDDITCH BOROUGH COUNCIL**Executive 11th March 2025****Financial Recovery Plan**

Relevant Portfolio Holder	Councillor Ian Woodall, Finance Portfolio Holder
Portfolio Holder Consulted	Yes
Relevant Head of Service	Debra Goodall
Report Author	Job Title: Head of Finance & Customer Services email: Debra.Goodall@bromsgroveandredditch.gov.uk Contact Tel: 0152764252
Wards Affected	N/A
Ward Councillor(s) consulted	N/A
Relevant Strategic Purpose(s)	All
Non-Key Decision	
If you have any questions about this report, please contact the report author in advance of the meeting.	

1. SUMMARY

The purpose of this report is to set out the processes the Council has been following to rectify a deterioration in its financial position and processes due to the impact of the implementation of a new financial system in February 2021 during the C-19 pandemic period. This follows on from a report initially presented on the 14th September 2022 and also the discussions over the S24 Statutory Recommendations that took place in Audit, Governance and Standards Committee, Executive and Council in November and December 2022 and 2023.

2. RECOMMENDATIONS

Executive are asked to Resolve that:

- Progress made on the financial recovery be noted including:
 - Delivery of the Statutory Accounts
 - Delivery of Statutory Financial Returns
 - Improvements in the Control Environment
- The work still under way to move back to a best practice operation and the associated timetable for completion of this work, as contained in this Report, be noted.

3. KEY ISSUES**Financial Position**

- 3.1 The Council implemented a new financial system in February 2021. The existing financial system was at the end of its useful life and would not deliver process

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improvements required to move the Council forward. The implementation has not been smooth and has led to a deterioration of the Council's financial position. This has included:

- Non completion of the 2020/21, 2021/22, 2022/23 and 2023/24 Accounts to required timelines.
- Non delivery of monitoring information during the 2021/22 financial year.
- Non delivery of Government financial returns.
- Incomplete take-up of the new system by both Finance and Service Users.
- Loss of key financial staff.

- 3.2 A finance recovery programme was put in place from April 2022 to start to rectify the situation. This was reported through to Executive in September 2022.
- 3.3 These issues build on comments from the External Auditors relating to 2019/20 accounts, which were only approved in the fall of 2021 and the subsequent issuing of the S24 Recommendation on the 31st October 2022 due to non-delivery of the 2020/21 Statement of Accounts. Comments on the 2019/20 accounts highlighted issues on working papers as a significant issue.
- 3.4 The Interim 2021/22 and 2022/23 Auditors Annual Report was received and reviewed by the Audit, Governance and Standards Committee on the 23rd November and Council on the 5th December. These reports have now been finalised following the completion of the Statement of Accounts up to the 2023/24 financial year. The present state of the Council's accounts are:
- Closure 2020/21
 - Reported as per the 10th December Audit Committee and Disclaimer Opinion received and approved.
 - Closure 2021/22
 - Reported as per the 10th December Audit Committee and Disclaimer Opinion received and approved.
 - Closure 2022/23
 - Reported as per the 10th December Audit Committee and "Disclaimer Opinion" received and approved following the completion of the public consultation period on the 22nd January 2025.
 - Closure 2023/24
 - Reported as per the 30th January Audit Committee, draft accounts were produced and put out for public consultation on the 17th January. This was one day later than the "backstop" regulation date.
 - The Council's had to replace its allocated Auditors for 2023/24 onwards in November 2024 and the Council is still in the process of "onboarding its new External Auditors Ernst & Young. No opinion on the Accounts can be given until this process is completed.

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- MHCLG have been updated on this position.
 - Closure 2025/26
 - This will start in March 2025 and draft accounts will be ready for public consultation by the end of June 2025.
- 3.5 As per the requirement of the Draft External Auditors Report 21/22 and 22/23 on the 27th November 2023, the External Auditors made a further written recommendation of the Authority under section 24 of the Local Audit and Accountability Act 2014 in relation to its financial systems and governance arrangements. They recommended that the authority should produce “true and fair” draft accounts for 2020/21, 2021/22 and 2022/23 signed off by the S151 Officer and supported by high quality working papers. This has now been complied with although given the instigation by the Government of the backstop date and the requirement of “disclaimer opinion” audits across the Country it is not clear how the new Auditors will frame their 2023/4 External Audit Report in respect of this matter
- 3.6 As has been reported previously the combined 2021/21 & 2022/23 Draft External Audit Report set out that:
- The S24 Recommendation still in place and extended for 2021/2 and 2022/3 Accounts.
 - 5 of the 6 2020/21 Key Recommendations either delivered or now linked to Improvement Recommendations.
 - 9 of 13 2020/21 Improvement Recommendations either fully or partially delivered.
 - There was one new Key Recommendation – linked to Workforce Strategy.
 - There were ten updated Improvement Recommendations.
- 3.7 In terms of those Draft External Audit Reports the following progress has been made against recommendations (Key and Improvement):
- The Accounting Policies Report goes to every Audit Committee.
 - The key closure deliverables for each financial year are clearly set out. The owners of these deliverables are the S151 and Deputy S151 Officers.
 - Progress on key financial and compliance indicators are reported monthly to CMT and to both Audit Committees by the S151/Deputy 151 Officers. There is a requirement to report all finance deliverables as per the Recommendations of the Audit Task Group.
 - Delivery of Financial training detailed in this document will move staff to right level of skills.
 - TechOne has been upgraded to version 23A in July 2023. It will update to 24B in February 2025.
 - Quarterly combined financial and performance monitoring started in the 2022/23 financial year and has continued in 2024/5 with Q1 and Q2 delivered.
 - The 2024/5 MTFP process has been completed in both Councils and the 2025/6 process will be completed by the 24th February 2025.
 - Risk workshops are still to be run to assess Risk Appetite of Executive and Audit Committees. This will happen across both Council now the Redditch elections have been completed.
 - A Treasury Management strategy, half yearly report, and outturn report are now part of the work programme. 2024/5 Half Yearly Reports have been delivered.
 - To address staffing issues, additional posts have been recruited to as the team looks to start to move any from its reliance on external agency/consultants.

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3.8 In terms of more specific items:

- More Budget Consultation is being addressed in Tranche 1 of the budget through a targeted consultation process which finished in January 2025.
- Wider savings monitoring is being undertaken by this Committee quarterly.
- Capital and its deliverability will be reviewed as part of the 2025/6 Budget Tranche 2.
- Benchmarking is now incorporated into the budget process (using LG Futures data).
- The Internal Audit Service has been externally assessed in early 2024 and passed that assessment.
- The Council is seeking an independent Audit Committee member and ensures the Committee remains apolitical in nature.
- The whistleblowing policy has been updated.
- Procurement and contract rules will be updated by the end of the financial year (to reflect changes to legislation happening in February 2025).
- Performance Indicators are being reviewed and updated following the Strategic Priority setting sessions.

3.9 It was confirmed by the PSAA that Ernst and Young would become the Councils External Auditors on the 24th October, and that the onboarding process is now starting but there are still a number of Members who have not made returns. Members who still have returns outstanding were given returns at Council on the 27th January to complete at the meeting to speed up the process. We now have 2 outstanding.

3.10 In terms of the 2023/4 Closure position, discussions are still to be held with Ernst and Young on the actual programme, pending onboarding, but all parties are aware of the backstop date of the 28th February 2025 by what time public consultation will have to have been completed. Accounts were provided for Public Consultation the 17th January. This was one day later than the “backstop date” requirement. The new External Auditors have confirmed that, due to onboarding checks still not being complete, they will not be able to submit an Opinion before the 28th February “backstop date”.

Rectification Process

3.11 Financial Recovery reports to Executive and Financial Compliance Reports to Audit, Governance and Scrutiny Committee have kept Members apprised of the Recovery Process.

- In terms of Closure, the Council is now up to date in terms of the delivery of its accounts but have received “Disclaimer Opinions” up to the 2022/23 financial year. There are a significant number of Councils with “Disclaimer Opinions” and it is yet to be seen the implications of this for individual Councils and the English Local Government Sector in particular.
- With the Council having provided its accounts as per “backstop legislation” up to the 2023/24 financial year requirements, it is proposed to Audit, Governance and Standards Committee in January that the frequency of Audit Committee meetings reverts to quarterly. Their view was that with a change in S151 Officer, they would like to wait until the New 151 Officer is embedded before reducing the frequency.

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- It is important though that the processes that were put in place following the issuing of the Section 24 Statement are continued via this quarterly Financial Compliance Report.
3. Movement since the last finance recovery report in September 2024 has included:
- All Revenue Outturn and Capital Outturn Reports have been provided to the Ministry of Housing, Communities and Local Government (MHCLG).
 - The Quarters 1 and 2 2024/5 Finance and Performance Report have been provided and Q3 is on the same Agenda as this report for reviewing by Executive.
 - Since Q2 2023/4, all financial monitoring has been undertaken on TechOne.
 - Monthly Accounts Payable Training continues.
 - The Financial Compliance Report, setting out movement in the financial recovery plan, has been reviewed by Audit, Governance and Standards Committee in July, September and November 2023. Audit Governance and Standards Committee continues to meet 6 times a year until all the issues have been rectified, where it will then return to its quarterly cycle.

3.16 Progress on the following key financial and compliance indicators are reported monthly to CMT monthly and to both Audit Committees bi-monthly by the S151/Deputy 151 Officers. There is a requirement to report all finance deliverables as per the Recommendations of the Audit Task Group:

Form	Code	Description	Proposed Dispatch	Deadline	Proposed Publication	Position
Capital Payments & Receipts - Q3	CPR3	Cumulative capital expenditure and receipts for Q1, Q2 and Q3 2023-24	15-Dec-23	19-Jan-24	15-Feb-24	Delivered 26/1/24
Non-Domestic Rates Forecast	NNDR1	Billing authority forecasts of the amount of non-domestic rates to be collected in the 2024-25	15-Dec-23	31-Jan-24	21-Feb-24	Delivered 9/2/24 (Civica issue)
Council Tax & NDR Collection - Q3	QRC3	Quarterly return of how much council tax and non-domestic rates are collected in Q3 2023-24	15-Dec-23	12-Jan-24	14-Feb-24	Delivered 15/2/24 (Civica issue)
Quarterly Borrowing & Lending - Q3	QB3	Local authority borrowing and investments from all local authorities to the end of Q3 2023-24	15-Dec-23	08-Jan-24	15-Feb-24	Delivered 17/1/24
Quarterly Revenue Update - Quarters 3 & 4	QRU3	Quarter 1 to 3 2023-24 data and forecast end year local authority revenue expenditure update.	15-Dec-23	26-Jan-24	07-Mar-24	Delivered 19/2/24
Council Tax Requirement/ Parish Council Tax	CTR1/2/3/4	Information on council tax levels set by local authorities in 2024-25 and Council tax levels for 2024-25 set by parishes.	02/02/2024 (tbc)	11-Mar-24	21-Mar-24	Delivered 26/2/24

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of which: Parish council tax	-	-	-	11-Mar-24	08-May-24	Delivered 26/2/24
Revenue Account Budget	RA	Local authority revenue expenditure and financing for 2024-25 Budget	16-Feb-24	05-Apr-24	20-Jun-24	Draft completed. 8/4/24
Capital Estimates Return	CER	Capital forecast for 2024-25	23-Feb-24	22-Mar-24	13-Jun-24	Delivered 22/3/24
Non-Domestic Rates Outturn-unaudited	NNDR3	Collects information from all billing authority on the amount of non-domestic rates collected in 2023-24- provisional data	28-Mar-24	30-Apr-24	10-Jul-24	Draft delivered to Pool 14/4/24
Non-Domestic Rates Outturn-audited	NNDR3	Collects information from all billing authority on the amount of non-domestic rates collected in 2023-24- final data	n/a	30-Sep-24	15-Nov-24	Delivered 30/09/24
Quarterly Borrowing & Lending - Q4	QB4	Local authority borrowing and investments from all local authorities to the end of Q4 2023-24	22-Mar-24	05-Apr-24	13-Jun-24	Delivered 5/4/24
Capital payments & receipts Q4 and provisional outturn	CPR4	Cumulative capital expenditure and receipts for Q1, Q2, Q3, and Q4 2023-24. Expanded collection, used as provisional outturn.	22-Mar-24	19-Apr-24	13-Jun-24	Delivered 29/4/24
Council Tax & NDR Collection - Q4	QRC4	Annual data of levels of council tax and non-domestic rates collected by local authorities in 2023-24 and Q4 2023-24	12-Apr-24	03-May-24	19-Jun-24	Delivered 7/5/24
Capital Outturn Return	COR	Final capital outturn figures for 2023-24	26-Apr-24	26-Jul-24	10-Oct-24	Delivered 29/07/24
Revenue Outturn suite - provisional	RO	Local authority revenue expenditure and financing for 2023-24 Outturn (provisional)	26-Apr-24	28-Jun-24	29-Aug-24	Delivered 19/7/24
Revenue Outturn suite - certified	RO	Local authority revenue expenditure and financing for 2023-24 Outturn (final)	n/a	11-Oct-24	12-Dec-24	Delivered 10/02/24
Exit payments	-	Local authority exit payments 2023-24	03-May-24	07-Jun-24	18-Jul-24	Delivered 30/06/24
Quarterly Borrowing & Lending - Q1	QB1	Local authority borrowing and investments from all local authorities to the end of Q1 2024-25	24-Jun-24	05-Jul-24	08-Aug-24	Delivered 05/07/24
Quarterly Revenue Update - Q1	QRU1	Q1 2024-25 data and forecast end year local	28-Jun-24	02-Aug-24	12-Sep-24	Delivered 2/08/24

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		authority revenue expenditure update				
Capital Payments & Receipts - Q1	CPR1	Cumulative capital expenditure and receipts for Q1 2024-25	21-Jun-24	19-Jul-24	08-Aug-24	Delivered 19/07/24
Council Tax & NDR Collection - Q1	QRC1	Quarterly return of how much council tax and non-domestic rates are collected in Q1 2024-25	21-Jun-24	12-Jul-24	14-Aug-24	Delivered 01/07/24
Local Government Pension Funds	SF3	Collect information on income and expenditure on local government pension schemes for 2023-24	05-Jul-24	13-Sep-24	23-Oct-24	Delivered 21/06/24
Council Tax Base/ Supplementary	CTB	Information about the 2024 council tax base for each billing authority.	20-Sep-24	11-Oct-24	06-Nov-24	Delivered 11/10/24
Quarterly Borrowing & Lending - Q2	QB2	Local authority borrowing and investments from all local authorities to the end of Q2 2024-25	23-Sep-24	04-Oct-24	14-Nov-24	Delivered 02/10/24
Quarterly Revenue Update - Q2	QRU2	Quarter 1 & 2 2024-25 data and forecast end year local authority revenue expenditure update	20-Sep-24	25-Oct-24	05-Dec-24	Delivered 25/10/24
Capital Payments & Receipts - Q2	CPR2	Cumulative capital expenditure and receipts for Q1 and Q2 2024-25	20-Sep-24	20-Oct-24	14-Nov-24	Delivered 21/10/24
Council Tax & NDR Collection - Q2	QRC2	Quarterly return of how much council tax and non-domestic rates are collected in Q2 2024-25	20-Sep-24	04-Oct-24	20-Nov-24	Delivered 11/10/24
Capital Payments & Receipts - Q3	CPR3	Cumulative capital expenditure and receipts for Q1, Q2 and Q3 2024-25	13-Dec-24	24-Jan-25	13-Feb-25	Delivered 24/01/24
Non-Domestic Rates Forecast	NNDR1	Billing authority forecasts of the amount of non-domestic rates to be collected in the 2025-26	13-Dec-24	31-Jan-25	19-Feb-25	Delivered 31/1/26
Quarterly Revenue Update - Quarters 3 & 4	QRU3	Quarter 1 to 3 2024-25 data and forecast end year local authority revenue expenditure update.	13-Dec-24	24-Jan-25	06-Mar-25	Delivered 25/01/24
Quarterly Borrowing & Lending - Q3	QB3	Local authority borrowing and investments from all local authorities to the end of Q3 2024-25	13-Dec-24	06-Jan-25	13-Feb-25	Delivered 06/01/25

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Council Tax & NDR Collection - Q3	QRC3	Quarterly return of how much council tax and non-domestic rates are collected in Q3 2024-25	13-Dec-24	17-Jan-25	12-Feb-25	Delivered 02/01/24
Council Tax Requirement/ Parish Council Tax	CTR1/2/3/4	Information on council tax levels set by local authorities in 2025-26. Council tax levels for 2025-26 set by parishes	Early Feb 2025	12-Mar-25	20-Mar-25	
of which: Parish council tax	-	-	Early Feb 2025	12-Mar-25	07-May-25	
Revenue Account Budget	RA	Local authority revenue expenditure and financing for 2025-26 Budget	14-Feb-25	04-Apr-25	19-Jun-25	
Capital Estimates Return	CER	Capital forecast for 2025-26	21-Feb-25	21-Mar-25	12-Jun-25	
Monthly Borrowing & Lending	MB	Monthly sample used to provide an estimate of the level of net borrowing by local authorities to go into the ONS/HMT monthly publication Public Sector Finance Statistics	5 working days before 1st working day of the month	Day 5 of each month	for quarter months only, see QB1, QB2, QB3, QB4 dates	Delivered to date
Local Government Finance Statistics	LGFS33	Annual compilation of finance data collected from local authorities covering out-turn data for 2022-23	N/A	N/A	Spring 2024	

In wider sets of deliverables (outside the 2024/5 DLUHC/MHCLG listing) we have the following returns that have been delivered:

Pooling of Housing Capital Receipts – **23/4 Delivered**

In wider sets of deliverables (outside the 2024/5 DLUHC Listing) we have the following returns that have been delivered:

Budget

- Delivered by 11th March deadline in preceding financial year – **2025/6 Budget and MTFP delivered Feb 2025 in both Councils.**
- Council Tax Base – Yearly – **2025/26 delivered in January 2025**
- Council Tax Resolution – **Yearly 2024/5 delivered on 26th February 2024**
- Council Tax Billing – Yearly – **Bills distributed in March 2024**

Policies

- Treasury and Asset Management Strategies
 - 2023/4 Outturn Report **delivered in September 24.**
 - 2024/5 Strategy **Approved 26th Feb 2024.**

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- *2025/6 Strategy All will be approved as part of the MTFP by the 24th February 2025.*
- *24/25 Q1 and Q2 reports delivered Sept and Nov/Dec 2024.*
- Council Tax Support Scheme **25/6 Approved in January 2025.**
- Minimum Revenue Provision – yearly – **will be approved as part of the MTFP by the 24th February 2025.**
- Financial Monitoring – **Q1 24/5 in Sept 2024. Q2 in Nov 24.**
- Risk Management – **Q1 24/5 delivered July 24, Q2 delivered Dec 24**
- Savings Report – **Q1 24/5 delivered in September, Q2 delivered in December**
 - Financial Controls (still in development)
 - Clearance of suspense accounts – now part of the closure of accounts process.
 - Bank Reconciliation - **linked to above point although a separate stream assessing/clearing 2024/5 and prior year items.**
- Over £500 spending.
 - **Updated to January 2025.**

3.17 The key returns that have still not been delivered are the VAT Returns. Significant work has been undertaken by the Council's Tax advisors PS Tax in liaison with HMRC in order for the Council to return to normal VAT reporting and final version working papers have been provided to HMRC on the 19th December 2024. VAT returns going forward will be produced monthly and a return for December 2024 has been submitted.

3.18 There are a number of areas where compliance will be measured going forwards. Compliance to process and timetable is a key underlying theme of the Draft External Audit Reports 2020/21 through to 2022/23. These items are being measured to improve how we work and change behaviours. This will lead to an improved financial health/knowledge across both Councils. Not all these measures can be put in place instantly but there should be the full suite by the middle of the summer (Debt indicators depend on the clearing of suspense and the updating of the bank reconciliations).

3.19 Training:

- Closure Training took place in March with 83 attending.
- Mandatory Budget Manager Training (including the use of TechOne) took place in September 2023 – upskilling budget managers with the tools to input their forecasts directly onto TechOne.
- Mandatory Financial Awareness Training for managers took place in August and September.
- Payments Purchase Order Training takes place monthly.

3.20 Treasury Management

- The Half Yearly 2023/4 Treasury Management Report was presented to Executive on the 18th March.
- The 2024/5 Strategies were approved by Council in February.
- The 2025/6 Draft Strategies have been approved as part of the 2025/6 MTFP.

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- The Q1 and Q2 2024/5 positions have been reported in the Finance and Performance Reports.

3.21 Errors:

- Non delivery of GPC Card Data (monthly basis) – still to be started.
- Mis-coding on TechOne per month – by Service Area – work is ongoing to clear the mis-codings on a monthly basis in conjunction with work going on to reconcile previous years.

3.22 Procurement:

- The new 'No Compliance No Order' process has been live since April 2023.
- The number of contracts in place is growing regularly. We hope that eventually we get to the place where the number of orders coming to procurement for approval as contracts are not in place are minimal.
- Council approved an increase of the Key Decision Level from £50k to £200k. Finance and Performance Monitoring Reports now set out:
 - All contracts requiring renewal over the next year that are over the present £200k threshold and these are placed on the forward plan.
 - All contracts requiring renewal over the next year that are between £50k and £200k for reference.
 - All contracts that are being procured by each council on behalf of each other.

3.23 The issues with cash receipting Work is ongoing but the closure of 2020/21 through to 2023/4 has reallocated over £125m of income wrongly allocated to suspense accounts.

4. Legal Implications

4.1 No Legal implications have been identified.

5. Strategic Purpose Implications**Relevant Strategic Purpose**

5.1 The Strategic purposes are included in the Council's corporate plan and guides the Council's approach to budget making ensuring we focus on the issues and what are most important for the borough and our communities. Our Financial monitoring and strategies are integrated within all of our Strategic Purposes.

Climate Change Implications

5.2 The green thread runs through the Council plan. Every report has potential financial implications and these in turn can have implications on climate change. These will be addressed and reviewed through individual reports when relevant by climate change officers will ensure the correct procedures have been followed to ensure any impacts on climate change are fully understood.

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6.1 None as a direct result of this report.

Operational Implications

6.2 Managers meet with finance officers to consider the current financial position and to ensure actions are in place to mitigate any overspends.

7. RISK MANAGEMENT

7.1 The financial monitoring is included in the corporate risk register for the authority and the position with the Council's Accounts and its rectification is a specific Corporate Risk.

8. APPENDENCES

None

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