



BROMSGROVE DISTRICT COUNCIL

MEETING OF THE CABINET

WEDNESDAY 1ST JUNE 2022

AT 6.00 P.M.

PARKSIDE SUITE - PARKSIDE

MEMBERS: Councillors K.J. May (Leader), G. N. Denaro (Deputy Leader),
M. A. Sherrey, P.L. Thomas, M. Thompson and S. A. Webb

AGENDA

1. **To receive apologies for absence**
2. **Declarations of Interest**

To invite Councillors to declare any Disclosable Pecuniary Interests or Other Disclosable Interests they may have in items on the agenda, and to confirm the nature of those interests.
3. **To confirm the accuracy of the minutes of the meeting of the Cabinet held on 3rd May 2022 (Pages 1 - 6)**
4. **Minutes of the meeting of the Overview and Scrutiny Board held on 25th April 2022 (Pages 7 - 16)**
 - (a) To receive and note the minutes
 - (b) To consider any recommendations contained within the minutes (the recommendation detailed in the attached set of minutes was considered at the previous meeting of Cabinet)
5. **Levelling Up Funding Phase 1 (Pages 17 - 24)**
6. **Council Tax Support Scheme - Update (Pages 25 - 110)**
7. **Council Plan (Including Restoration and Recovery Plan) (Pages 111 - 162)**
8. **Digital Strategy (Pages 163 - 178)**

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

Parkside
Market Street
BROMSGROVE
Worcestershire
B61 8DA

24th May 2022

K. DICKS
Chief Executive

**If you have any queries on this Agenda please contact
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At the current time, seating at the meeting will be placed in such a way as to achieve as much space as possible for social distancing to help protect meeting participants.

Please note that this is a public meeting.

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

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Members of the public who still have access to lateral flow tests (LFTs) are encouraged to take a test on the day of the meeting. Meeting attendees who do not have access to LFTs are encouraged not to attend a Committee meeting if they have any of the following common symptoms of Covid-19 on the day of the meeting; a high temperature, a new and continuous cough or a loss of smell and / or taste.

Notes:

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BROMSGROVE DISTRICT COUNCIL

MEETING OF THE CABINET

TUESDAY 3RD MAY 2022, AT 6.00 P.M.

PRESENT: Councillors K.J. May (Leader), G. N. Denaro (Deputy Leader), M. A. Sherrey, P.L. Thomas, M. Thompson and S. A. Webb

Officers: Mr. K. Dicks (on Micorsoft Teams), Mrs. S. Hanley (on Micorsoft Teams), Mr J. Howse, Mrs. C. Felton (on Micorsoft Teams) and Mr P. Carpenter and Mrs. J. Gresham

71/21 **TO RECEIVE APOLOGIES FOR ABSENCE**

No apologies for absence were received.

72/21 **DECLARATIONS OF INTEREST**

There were no declarations of interest.

73/21 **TO CONFIRM THE ACCURACY OF THE MINUTES OF THE MEETING OF THE CABINET HELD ON 30TH MARCH 2022**

The minutes of the Cabinet meeting held on Wednesday 30th March 2022 were submitted.

RESOLVED that the minutes of the Cabinet meeting held on 30th March 2022 be approved as a true and correct record.

74/21 **MINUTES OF THE MEETING OF THE OVERVIEW AND SCRUTINY BOARD HELD ON 28TH MARCH 2022**

The Chairman of the Overview and Scrutiny Board, Councillor C. Hotham, presented the minutes of the meeting of the Board held on 28th March 2022, and in doing so the Cabinet was informed that since the meeting of the Board things had moved forward and that items had been discussed and agreed.

It was confirmed by the Chairman that the Land Drainage Maintenance report that was presented by officers at this meeting had been positively received by Members. In addition to this, it was reported that Members had been encouraged by the Equality Annual Update, which had

highlighted the huge amount of work being undertaken in this area. It was confirmed that during the Planning Determination Timescales item presented by the Head of Planning, Leisure and Regeneration, the Board were informed that determination timescales were on target.

The Chairman informed Cabinet that at the last meeting of the Board a Fuel Poverty Task Group had been initiated and the investigation would start in the new municipal year. Members queried the establishment of this task group, and it was confirmed by Councillor C. Hotham that it was hoped that the outcome of the investigation would provide information on provision and signposting for those residents in the District who were most in need of support in respect of fuel poverty.

During consideration of this item, it was also noted that there was one recommendation made by the Overview and Scrutiny Board at its meeting held on 25th April 2022 in respect of the Fireworks Motion. The recommendation was as follows:

The Overview and Scrutiny Board

RECOMMENDED to CABINET

'that Bromsgrove District Council encourages residents to attend professionally organised firework displays and, in private settings, encourages the use of low noise or visual fireworks only.'

The Chairman of the Overview and Scrutiny Board confirmed that this recommendation had been proposed in order to help mitigate the distressing and sometimes extreme effects of fireworks on animals and vulnerable people within the District. Although there was agreement that the effects on animals and vulnerable people were upsetting it was highlighted that there was already legislation in place to monitor the use of fireworks and to 'encourage' residents might prove difficult and further clarification was needed in order to understand what the Board's expectation would be in carrying out the recommendation.

Members discussed the possibility of running a social media campaign regarding the use of the fireworks and Cabinet were satisfied that this would be the best way forward. It was with this in mind that an amendment to the recommendation was proposed as follows:

'that Bromsgrove District Council, through its social media and other channels, encourages its residents to attend professionally organised

firework displays and, in private settings, encourages the use of low noise or visual fireworks only.'

On being put to the vote this was carried.

RESOLVED that

- (i) the minutes of the Overview and Scrutiny Board meeting held 28th March 2022, be noted;
- (ii) Bromsgrove District Council, through its social media and other channels, encourage its residents to attend professionally organised firework displays and, in private settings, encourages the use of low noise or visual fireworks only.

75/21

TREASURY MANAGEMENT STRATEGY

The Interim Head of Finance and Customer Services (Deputy S151) presented the Treasury Management Strategy for Cabinet's consideration.

It was reported to Members that it was a statutory requirement to set the Treasury Management Strategy each financial year and have at least a half yearly update and outturn report. The Council reports progress on a quarterly basis as part of the Quarterly Monitoring Report.

The Interim Head of Finance and Customer Services (Deputy S151) took Members through the report, which included the Capital Strategy 2022/23, Treasury Management Strategy 2022/23, Minimum Revenue Provision Statement 2022/23, Policy for the Flexible Use of Capital Receipts and the Investment Strategy and highlighted a number of areas in particular, including:

- Capital expenditure on regeneration schemes including Burcot Lane and the Levelling Up Funding which the Council successfully bid for in 2021.
- The Prudential Indicators in Table 6 of Appendix A which provided information on the projected levels of the Council's gross debt compared with the Capital Financing Requirement (CFR).
- The legal obligation to set an Authorised Limit for external debt each year in addition to an Operational Boundary which was set as a warning level should debt approach the limit.
- The Treasury Management Strategy at Appendix B which highlighted how the Authority would invest in the future.

- The Council's Treasury Management Advisor, Arlingclose, would assist in identifying the most cost effective way to manage borrowing and the Councils Minimum Revenue Provision going forward.

Following the presentation of the report it was noted that local authorities must follow a proper governance process in respect of investments and ensure that a robust risk strategy was in place to deliver investments that were affordable.

The Executive Director for Resources was invited to comment on the report and in doing so explained that this was a very technical and important report that would provide a framework on how the Council could manage their investments in the future.

RECOMMENDED that

- (i) the Capital Strategy as an appropriate overarching strategy for the Council be approved;
- (ii) the Treasury Management Strategy for 2022/23 and the associated MRP policy be approved;
- (iii) the policy for Flexible use of Capital Receipts be approved;
- (iv) the Investment Strategy be approved.

76/21

MONTH 11 FINANCIAL MONITORING

The Executive Director for Resources and the Interim Head of Finance and Customer Services (Deputy S151) presented the Month 11 Financial Monitoring report. Cabinet was informed that there had not been formal reporting over the previous municipal year as capacity within the Finance team had been diverted in order to process the business grants that had been distributed as part of the Covid-19 pandemic. However, it was stated that this report confirmed what officers had anticipated, that the Council was working within its budget. It was stated that the Final Outturn report would be submitted by the end of June 2022 in order to comply with the reporting timetable.

During consideration of this item the following was highlighted for Members' attention:

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- There was a projected revenue underspend of £367k based on the financial period April 2021 to February 2022.
- The Capital Budget programme for the financial year 21/22 was set at £15.6m. It was further explained that only £2.7m had been spent so far as part of the programme. Officers clarified that there were reasons for the variance including the work on the Burcot Lane project, which was due to be completed by the end of the calendar year and would result in the programmed £9.3m budget being spent as allocated. In addition to this, as reported to Cabinet and Council in the 2020/21 Outturn Report, due to a slippage of schemes in the capital Programme for 2020/21, £4.3m from that year had been approved to be transferred to the 2021/22 financial year.

Members were interested as to whether the £367k underspend was as a result of vacancies within the Council. Officers confirmed that although this was the case for some of the underspend there had been other associated factors including the impact of the Covid-19 pandemic on how people worked and also lack of access to raw materials that were due to be purchased in order to carry out works, which had resulted in the programme not being undertaken as planned.

Further discussion followed regarding the distribution of the remaining Covid-19 pandemic grants and whether there had been any restrictions placed on them. Officers confirmed that although there were no specific restrictions when the scheme was launched in March 2020 there were preferred areas of expenditure.

RESOLVED that

- (i) The forecast 2021/22 outturn position in relation to revenue budgets based on the financial period April 2021 – February 2022 is a projected revenue underspend of £367k.
- (i) Capital expenditure to date is £2.7m against a total an approved programme of £15.3m

The meeting closed at 6.35 p.m.

Chairman

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BROMSGROVE DISTRICT COUNCIL

MEETING OF THE OVERVIEW AND SCRUTINY BOARD

MONDAY 25TH APRIL 2022, AT 6.00 P.M.

PRESENT: Councillors C.A. Hotham (Chairman), S. J. Baxter, S. R. Colella, R. J. Deeming, M. Glass, R. J. Hunter, C. J. Spencer and P. J. Whittaker

Observers: Councillor M. Sherrey – Portfolio Holder for Environmental Services and Community Safety
Councillor M. Thompson – Portfolio Holder for Leisure, Culture and Climate Change

Officers: Mrs. S. Hanley, Ms J. Willis and Ms. B. Houghton, Ms. I. Karimi-Fini and Mrs. J. Gresham

86/21

APOLOGIES FOR ABSENCE AND NAMED SUBSTITUTES

Apologies for absence were received from Councillor J. Till and Councillor A. Kriss with Councillor P. Whittaker and Councillor M. Glass respectively in attendance as named substitutes. Apologies for absence were also received from Councillor A. Beaumont and Councillor P. McDonald with no named substitutes.

87/21

DECLARATIONS OF INTEREST AND WHIPPING ARRANGEMENTS

There were no Declarations of Interest nor of any Party Whip.

88/21

TO CONFIRM THE ACCURACY OF THE MINUTES OF THE MEETING OF THE OVERVIEW AND SCRUTINY BOARD HELD ON 28TH MARCH 2022

The minutes of the meeting of the Overview and Scrutiny Board held on 28th March 2022 were submitted for Members' consideration.

It was requested that additional wording, as detailed and underlined below, be included in respect of Minute Number 77/21.

'Members felt that this would be a very useful exercise and would provide the most up to date information of the demographic within Bromsgrove which would then enable targeted support to those who needed it most and compare to Bromsgrove District Council's own data.'

The Senior Democratic Services Officer agreed to make the change as requested.

RESOLVED that the minutes of the meeting of the Overview and Scrutiny Board held on 28th March 2022 be approved as a true and correct record.

89/21

SCRUTINY OF THE NORTH WORCESTERSHIRE COMMUNITY SAFETY PARTNERSHIP

The Chairman welcomed the Community Safety Manager to the meeting and explained to Members that the North Worcestershire Community Safety Partnership (NWCSP) report was presented to the Board annually and that the Board had a statutory duty to scrutinise the work of the Partnership on an annual basis.

During consideration of this item the following was highlighted for Members' attention:

- The background to the NWCSP including the Local Authority representation on the NWCSP and the statutory scrutiny arrangements for the Community Safety Partnership under Section 19 of the Police and Justice Act 2006.
- This was the second year of the three year rolling Partnership Plan however key crime and community safety priorities were picked up through an annual strategic assessment. This annual strategic assessment was designed to provide guidance to resource community safety initiatives among partner agencies on key issues and help direct across North Worcestershire.
- The Police and Crime Commissioner (PCC) had a duty to cooperate with all CSPs in their geographical area. This duty was reciprocated by all CSPs to also collaborate with the PCC.
- The PCC's Capital Fund had allocated £65k towards NWCSP CCTV in 2021-22 and in September 2021 £100k was released from the PCC's Fly Tipping Fund in order to help address the issues of fly-tipping on private land in North Worcestershire. It was highlighted that there had been an underspend of the funding allocated from the CSP core grant funding for 2020-21 due to the disruptions of the Covid-19 pandemic. However, the same

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amount of funding (£139,250) was available in 2021-2022 in order to support community safety projects.

- Bromsgrove Community Safety Project Officers worked on behalf of the Council and the CSP and they provided support and guidance to local communities and external partners on a variety of crime prevention and community safety concerns.
- Data was recorded in respect of Anti-Social Behaviour (ASB) and a comparison was provided to the Board with information on years 2018/19, 2019/20 and 2020/21, as detailed in the report. This data helped to highlight the effect that the Covid-19 pandemic had on the instances of recorded ASB.
- There were a variety of tools and powers in place in order to address unacceptable behaviour. These tools included Community Protection Warnings (CPWs) and Community Trigger/ASB Case Reviews. Officers informed the Board that there had been 2 Community Triggers received in 2021-22.
- The use of communications and social media campaigns were highlighted as a particularly useful way to promote key safety messages and the work of the NWCSP. Some of these campaigns over the previous year had included the Nominated Neighbour Scheme, the Respect Programme and Hate Crime Awareness Week.

Following the presentation of the report Officers further detailed the work of the NWCSP and provided a presentation for Members. A number of priorities of the NWCSP, further information on the allocation of additional PCC funding and NWCSP Core Funding and the projects that had been undertaken over the previous year were presented in detail for Members' consideration:

- Key Priorities agreed by partners for 2021-22:
 - Violence and Abuse
 - Theft and Acquisitive Crime
 - ASB, Damage and Nuisance
 - Protecting Vulnerable Communities
- Community Safety Project Updates for 2021-22 were detailed as follows:

The Respect Programme – this was a flagship youth project that had been running for 9 plus years and there was no other project like it in the West Mercia area. The youth work programme focussed on recognising and reporting hate crime, understanding healthy relationships/domestic abuse, the

dangers of substance misuse and promoting respect and community responsibility. The Community Safety Team had seen an increase in referrals from schools for this programme over the years and support was provided for young people who were at a high level of need and were at risk in becoming involved in criminality as either victims or perpetrators.

The Empowering Young People Programme – This programme included a focus on ASB, County Lines, Mental Health, Drug and Alcohol Misuse and Hate Crime Awareness.

The Youth Hub – this was an independent Community Interest Company (CIC) that provided support and activities for young people, offering a space to socialise safely. It was reported that this was an excellent facility that supported drop-in and outreach work for young people within the District. The Board was informed that this had proved to be a fantastic initiative with a previous service user now providing youth worker support as a staff member after gaining a youth worker qualification.

Asda Car Park Project – This project was carried out alongside the Leisure team and provided multi-sport sessions in the location. It was a successful project which helped to build ongoing relationships with young people who reported that they were taking better care of themselves after taking part in the project.

Friday Night Diversionary Sessions – This project took place in the Youth Hub with a cohort of 50 young people and was particularly involved in continuing to divert a high risk group of young people off the streets. Issues that were raised during these sessions included the amount of food and fuel poverty experienced by their families.

Youth Outreach – The Youth Hub and Outreach Bromsgrove worked with Community Safety Youth Workers, to engage with gatherings of young people in the local areas. It was reported that between 600-800 young people were engaged with during the height of the summer. This project was seen as a best practice model across the County.

Bromsgrove Listening Service – This was a volunteer Listening Service for young people who needed lower level support and interventions. It was highlighted to Members that this service was looking to expand in 2022 and that new listeners were currently being recruited.

Young Citizen's Challenge – An interactive online package made available to all Year 6 students in North Worcestershire

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middle schools. It was reported that this project would go back to face-to-face sessions in May 2022.

Virtual Decisions Knife Crime Project – This was a Virtual Reality (VR) experience delivered by a Birmingham based theatre company. It provided the opportunity for each participant to use a VR headset and be placed in a real world scenario where they were faced with multiple dilemmas in which they must make a choice. Each choice resulted in various outcomes, showing that every action has a consequence.

Several other projects were discussed including the Nominated Neighbour Scheme and the Tibberton Court project. At a national level further information on Hate Crime Awareness Week and the White Ribbon Domestic Abuse Awareness national campaign was provided to Members. In addition to this, the Board were informed of the work that the Community Safety Officer undertook as part of Planning consultations with a view to making appropriate crime prevention and security recommendations as part of a planning application.

Following the detailed presentation, the Chairman welcomed the Portfolio Holder for Environmental Services and Community Safety to the meeting. Councillor M. Sherrey thanked the Community Safety Manager for providing an excellent background to the NWCSPP and all of the projects undertaken by Officers and explained that she was very proud of all of the staff that undertook this important work.

Members were pleased with all of the work that was in place within Bromsgrove. However, there were some queries regarding whether there were plans in place to work further afield within the District. It was explained that there were some plans in place to bid for external funding to provide services in some of the other areas within the District e.g., Charford and Rubery. It was recognised that there was a need, particularly in light of the Covid-19 pandemic, to ensure that as many young people as possible had access to these kinds of projects across all of the District considering the particular experiences of some groups of young people and their needs.

The Board expressed their great thanks and appreciation to the team and stated that it was humbling to see all of the work that had taken place in this area.

RESOLVED that the Scrutiny of the North Worcestershire Community Safety Partnership be noted.

90/21

CCTV UPDATE

The Head of Community and Housing Services presented the CCTV update to Members and in doing so explained that the CCTV Monitoring Centre had dual roles of monitoring Lifeline and CCTV and covered North Worcestershire which included Bromsgrove, Redditch and Wyre Forest.

The following was also highlighted for Members' attention:

- A review of the CCTV scheme was carried out in 2018 which coincided with a Task Group that had looked at possible improvements of the scheme. The outcomes of the reviews included a digital upgrade and a replacement scheme to replace analogue cameras with high definition cameras.
- CCTV cameras were a tool to reduce the fear of crime, as well as detect crime. The impact of this had been particularly seen in the decrease of incidents at Sanders Park since the installation of a camera. It was reported that there had been 13 incidents in 2020-21 (during the Covid – 19 pandemic lockdown) and 3 incidents in 2021-22.
- Redeployable cameras had been implemented in hotspot areas throughout the District. There was an application process in order to utilise the redeployable cameras and that redeployment would be for 12 weeks which helped to act as a deterrent within the hotspot area. The Board were also informed that these were redeployable cameras and not covert and were subject to the requirements of the Camera Commissioner.

Some Members queried whether all of the recommendations from the CCTV Task group investigation had been implemented. Officers explained that the majority of the recommendations had been undertaken however delays had been experienced due to the Covid-19 pandemic. As a result, some of the cameras remained as analogue rather than being upgraded to the higher definition cameras. It was questioned as to when the outstanding cameras would be replaced. The Head of Community and Housing Services stated that plans were underway but that inevitably there was a cost to making these changes. Officers undertook to look at the cost implications and agreed to report back to the Board later in the municipal year.

RESOLVED that the CCTV Update be noted.

91/21

FIREWORKS MOTION

The Cultural Services and Parks Manager presented the briefing note in respect of the Fireworks Motion that had previously been considered by the Board. Members were informed that, although enquiries had been made regarding holding a quieter display in order to consider animals and vulnerable residents, that a decision had been made and that a fireworks display would not take place this year in Sanders Park. Instead, a light show would be organised as it had been for the previous year.

Councillor S. Douglas was invited to address the Board as the proposer of the question at Full Council on 26th January 2022 and explained that the use of fireworks was particularly distressing to animals and vulnerable residents within the District and that the use of fireworks, particularly in a private setting, were problematic.

During detailed consideration of this item Members discussed the effects that they had personally experienced in respect of fireworks. Councillor M. Thompson, who was in attendance in his role as Portfolio Holder for Leisure and Climate Change, was invited to speak and had been in attendance earlier in the meeting. However, Councillor M. Thompson had had to leave during consideration of this item.

Following the discussion the following recommendation was made:

'that Bromsgrove District Council encourages residents to attend professionally organised firework displays and, in private settings, encourages the use of low noise or visual fireworks only.'

On being put to the vote the recommendation was carried.

RECOMMENDED that Bromsgrove District Council encourages residents to attend professionally organised firework displays and, in private settings, encourages the use of low noise or visual fireworks only.

92/21

OVERVIEW AND SCRUTINY BOARD ANNUAL REPORT 2021-22

The Chairman presented the Overview and Scrutiny Board Annual Report for the Board's consideration. It was noted that this had been a very busy year and he thanked Members of the main Board and Officers for all of their hard work. In addition to this he thanked the Chairmen and

Members who had taken part in the task groups throughout the last municipal year.

RESOLVED that the Overview and Scrutiny Board Annual Report 2021-22 be noted.

93/21

OVERVIEW AND SCRUTINY BOARD - RECOMMENDATION TRACKER

The Chairman presented the Overview and Scrutiny Board Recommendation Tracker and in doing so, had indicated the recommendations that could now be removed from the tracker.

Some Members were keen to include the recommendations that had not been approved by Cabinet in future iterations of the tracker. The Chairman indicated that he would work with Officers to investigate the potential for this.

RESOLVED that Overview and Scrutiny Board - Recommendation Tracker be noted.

94/21

FINANCE AND BUDGET WORKING GROUP - UPDATE

The Chairman informed Members that there had not been a meeting of the Finance and Budget Working Group since the last meeting of the Board. It was reported that the next meeting was due to take place on 28th April 2022 and that an update would be provided to Members at the next meeting in the new municipal year.

RESOLVED that the Finance and Budget Working Group Update be noted.

95/21

TASK GROUP UPDATES

The Senior Democratic Services Officer explained that an email had been sent out to Members requesting volunteers for the Fuel Poverty Task Group however, so far, not many responses had been received. Councillor R. Hunter, Chairman of the Task Group requested that a reminder email be sent to gather further interest. Officers undertook to do this prior to the next meeting of the Board.

RESOLVED that the Task Group Updates be noted.

96/21

WORCESTERSHIRE HEALTH OVERVIEW AND SCRUTINY COMMITTEE - UPDATE

Councillor S. Baxter informed Members that there had not been a meeting of the Worcestershire Health Overview and Scrutiny Committee since the last meeting of the Board.

RESOLVED that Worcestershire Health Overview and Scrutiny Committee Update be noted.

97/21

CABINET WORK PROGRAMME

The Cabinet Work Programme was presented for Members consideration.

RESOLVED that the contents of the Cabinet Work Programme be noted.

98/21

OVERVIEW AND SCRUTINY BOARD WORK PROGRAMME

This item was considered as part of the previous item.

RESOLVED that the Overview and Scrutiny Board Work Programme be noted.

The meeting closed at 8.01 p.m.

Chairman

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BROMSGROVE DISTRICT COUNCIL

Cabinet 1 June 2022

Levelling Up Funding – Spending Approval

Relevant Portfolio Holder	Cllr Karen May, Leader of the Council and Portfolio Holder for Economic Development, Town Centre and Strategic Partnerships
Portfolio Holder Consulted	Yes
Relevant Head of Service	Peter Carpenter
Wards Affected	All Wards
Non-Key Decision	

1. SUMMARY

This report updates Members on the progress made since reporting in January with the Levelling Up fund and, due to the tight timescales, asks for approval to be delegated to the Head of Planning, Regeneration and Leisure and the Executive Director of Resources to move forward, in accordance with the project plan, to the design and site clearance work for the two schemes. It also sets out the high-level timetable for future approvals and Member considerations.

2. RECOMMENDATIONS

Cabinet is asked to RESOLVE that:

- 1) **progress made to date on the Levelling Up schemes be noted;**
- 2) **authority be delegated to the Head of Planning, Regeneration and Leisure and the Executive Director of Resources to proceed to spend the Levelling Up Fund allocation totalling £2.266m on the required demolition and remediation works at the Windsor Street site and to engage a design and build contractor on the Market Hall site;**
- 3) **the timetable, where further approvals for the Market Hall project will be needed once options have been appraised and schemes designed via the Invitation to Tender, be noted.**

3. Background

- 3.1 In November 2021, the government approved a £14,492,000 grant for Bromsgrove District Council from the Levelling Up Fund (LUF). The grant will support the redevelopment of the former Market Hall site and pre-development works (demolition and remediation) on the Windsor Street site to enable a future site redevelopment. The Windsor Street site was previously owned by the Herefordshire and Worcestershire Fire and Rescue Service (HWFRS) and Worcestershire County Council (WCC) but is now

BROMSGROVE DISTRICT COUNCIL

Cabinet 1 June 2022

owned by the District Council. In addition, Bromsgrove District Council committed £1.610m in match funding, as required by the LUF programme.

- 3.2 The memorandum of understanding signed on the 18th February 2022 between the Council and the Department of Levelling Up Housing and Communities (DLUHC) set out that DLUHC considered the application submitted by the Council for the LUF proposal Old Market Hall Site and Windsor Street Site and agreed to allocate funding up to £14,492,401 across FY2021-22, FY2022-23, FY2023-24 and FY2024-25. The indicative allocation for each year is set out in the following table:

Financial Year	Total (£)
2021-22	1,600,000
2022-23	5,329,041
2023-24	7,563,360
2024-25	0
Total 2020-21 – 2024-25	14,492,401

- 3.3 The funding is provided to form part of the necessary capital investment required for delivery of the LUF proposal for the Old Market Hall Site and the Windsor Street Site. DLUHC expects the Council to use the funding provided for the purposes outlined in the application approved by DLUHC, Department for Transport ('DfT') and HM Treasury ('HMT'), and that evidence will be provided to demonstrate this. Grant funding will be paid in six monthly tranches and based on agreed delivery targets having been met. Assurance on project progress is through formal monitoring and assurance process to DLUHC.
- 3.4 In January 2022, the Cabinet approved the acquisition of the HWFRS site. In March 2022, the WCC site became available for purchase. Its acquisition gave the council 100% control over the site and the future development options. Approval was given in March to move £306,000 of LUF funding being provided by the Council from 2022/23 to 2021/22 in order for the full Windsor Street site to be purchased. The site was purchased before the end of the 2021/22 financial year at a cost of £1.806 million. This has been reflected in the 2021/22 project return that was returned to the Government on the 13th May as part of the DLUHC assurance process.
- 3.5 This paper seeks to update Members on the progress that has been made on the project plan and delivery and advises Members of very specific and tight timescales in which the budget needs to be spent. As a result of that, delegated authority is needed by officers to spend a portion of the levelling up funding on demolition and remediation works at the Windsor Street site. In addition, delegated authority is required to allocate levelling up funding to engage a contractor to design and build the scheme at the Market Hall site.

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Project Plan and Funding Allocation

- 3.6 Members will be aware that the preferred procurement route for the Market Hall site is through a two-stage design & build contract i.e. contractor appointment, not design team appointment. Member will also be aware that the Project Plan for the Market Hall site has the following indicative milestones:
- Project start and finish dates – October 2021 to March 2024
 - Full business case approval – January 2022 to March 2022
 - Concept Design – January 2022 to March 2022
 - Initial building design - March 2022 to May 2022
 - Planning permission secured – May 2022 to September 2022
 - Technical Design – June 2022 to December 2022
 - Publication of the ITT – September 2022 to November 2022
 - Evaluation of tenders – November 2022 to December 2022
 - Awarding of the Construction Contract December 2022
 - Signing of construction contract December 2022 to January 2023
- 3.7 Initially LUF funding was required to be spent by the 31st March 2024 hence the above timetable being indicative and no spending being planned for in 2024/25. However, the timescales for spending the funding have since been extended to 31st March 2025 and will result therefore in the need to reprofile the project plan in due course. All government funding must be spent by the 31st of March 2025.
- 3.8 The LUF funding for works at the Windsor Street site include site acquisition, demolition and remediation. The design of a scheme following demolition and remediation is outside the scope of the LUF scheme.
- 3.9 As set out above, funding has been allocated by DLUHC over the 2021/22 to 2023/24 period and formal monitoring is required in order for 6 monthly release of these funds based on progress by the Council. The following table sets out the funding being made by source. In January 2022 members agreed the overall project proposals for the Levelling Up Scheme in Bromsgrove and the finances associated have been agreed as part of the Councils budget setting process in February 2022. Members are now being asked to consider and approve the allocation of the approved finances.

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Name of Funding Source (organisation)	Financial Year 2021/22	Financial Year 2022/23	Financial Year 2023/24	Total
	TOTAL	TOTAL	TOTAL	
DLUHC	£1,600,000.00	£5,329,040.00	£7,653,360.00	£14,582,400.00
Bromsgrove District Council	£0.00	£805,133.00	£805,133.00	£1,610,266.00
Bromsgrove District Council	£308,000.00	-£308,000.00	£0.00	£0.00
Total	£1,908,000.00	£5,826,173.00	£8,458,493.00	£16,192,666.00

- 3.10 The total estimated costs for each project are presently (exclusive of VAT)
- Market Hall Site – The total project cost is £12,302,818
 - Windsor Street Site – The total project cost is £3,799,850

4. **Legal Implications**

- 4.1 Specific legal advice is being commissioned for each project and is budgeted for as set out in project plan.

5. **Strategic Purpose Implications**

- 5.1 The site clearance ant Windsor Street will contribute to “keep my place safe and looking good” and the LUF funding for the Former Market Hall site will additionally contribute to “provide good things for me to see, do and visit”.

Relevant Strategic Purpose

- 5.2 Levelling Up initiatives seeks to support the UK government’s wider commitment to level up all parts of the UK by delivering on the Governments Levelling Up objectives.

Climate Change Implications

- 5.3 Implications of individual schemes on climate change 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. However, individual schemes will need to be assessed.

Operational Implications

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6.2 A Governance Structure, including a Project Board, has been set up and appropriate budgets have been apportioned for the management of the two projects.

7. RISK MANAGEMENT

7.1 The financial monitoring is included in the monitoring regime for this project and is a requirement in the returns to Government.

8. APPENDENCES

Appendix A – Governance Structure

AUTHOR OF REPORT

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Item 2a

BROMSGROVE LEVELLING UP FUND PROGRAMME GOVERNANCE

PROGRAMME BOARD
 Chair – Cllr Karen May, Leader of the Council and Portfolio Holder for Economic Development, Town Centre and Strategic Partnerships
 Cllr G Denaro, Deputy Leader and Portfolio Holder for Finance and Governance
 Cllr P Thomas, Portfolio Holder for Planning and Regulatory Services
 Kevin Dicks, BDC CEO
 James Howse, BDC Executive Director Resources
 Ruth Bamford, BDC Head of Planning and Regeneration
 Claire Felton, BDC Head of Legal and Property
 Ian Smith, Area Lead, BEIS/CLGU
 Greater Birmingham and Solihull LEP rep
 Gary Woodman, Worcestershire LEP CEO
 Penny Unwin, Worcestershire CC rep
 Ostap Paparega, Head of NWedR, SRO

KEY
 — direct reporting
 - - - - - engaging / informing

Bromsgrove DC Cabinet

Cllr Karen May
 Leader of the Council and Portfolio Holder for Economic Development, Town Centre and Strategic Partnerships

Corporate Management Team
 Chair - Kevin Dicks, CEO

PROGRAMME DELIVERY TEAM
 Ostap Paparega, Head of NWedR, SRO
 Programme Delivery Manager NWedR

DLUHC
 Delivery Manager

One Public Estate (OPE)
 Programme Manager

STAKEHOLDER FORUM
 High Street businesses
 Independent 'Indie' Club
 Resident associations / groups
 Other stakeholders

LUF DELIVERY
 Development management consultancy

Windsor St Feasibility - OPE
 One Creative Ltd team
 Feasibility study, ground investigations report, remediation strategy, RIBA 2 designs, viability appraisals

Windsor Street – LUF
 Site acquisition
 Planning consultant
 Land remediation contractor
 Demolition & site clearance contractor

Former Market Hall - LUF
 Design & Build Contractor
 New development management model consultant
 New Development operator

Windsor Street Development (post March 2024)
 Delivery model
 Design team / planning application
 Contractor / developer

School Drive Development (former Dolphin Centre site)
 Design team / planning application
 Contractor / developer

Input from BDC services (to attend project meetings if and when required):
 Planning Legal Finance Property Procurement Comms

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BROMSGROVE DISTRICT COUNCIL

Cabinet 1st June 2022

Council Tax Reduction Scheme Update

Relevant Portfolio Holder	Councillor Geoff Denaro Portfolio Holder for Finance and Governance
Portfolio Holder Consulted	Yes
Relevant Head of Service	Peter Carpenter
Wards Affected	All Wards
Non-Key Decision	

1. SUMMARY

This report sets out the present scheme and the proposed consultation process for the 2023/24 Scheme.

2. RECOMMENDATIONS

Cabinet are asked to note:

- The present scheme.
- The proposed consultation process for the 2023/24 scheme.

3. KEY ISSUES

- 3.1 Council Tax Reduction (CTR) was introduced from 1 April 2013 when it replaced the central government funded Council Tax Benefit regime. From its inception, the funding available to the council from government has reduced year on year.
- 3.2 Every local authority has their own Council Tax support scheme to help residents on low incomes pay their Council Tax bill. The amount that can be claimed will depend on household income, savings, entitlement for certain benefits and who lives with in the property. If someone is eligible for CTS, the amount of support they are entitled to is used to reduce their overall Council Tax bill
- 3.3 As with the majority of authorities within England, the council has changed its scheme each year to for a number of reasons including:
- Adjust the level of support in line with the funding available from central government; and
 - To aid administration.
- 3.4 The Council introduced a new income banded / grid scheme for working age applicants with effect from 1st April 2021 to implement a modern, future proofed scheme and reduce the administrative burden placed on the council by the introduction of Universal Credit.

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Cabinet 1st June 2022

This scheme was presented to Cabinet for approval, following consultation, on the 24th February 2021.

- 3.5 The present scheme, is set out in Appendix A. Each year the council is required to review its Council Tax Reduction Scheme in accordance with the requirements of the schedule 1A of the Local Government Finance Act 1992 and to either maintain the scheme or replace it. This scheme is in use for the 2022/23 financial year.
- 3.6 The Scheme operates for both pension credit age and working age applicants and in accordance with S13A of the Local Government Finance Act 1992 specifies the classes of person who are entitled to a reduction under the scheme and is effective from the 1st April 2021 for the period of one financial year. The guidance on the scheme runs to over 70 pages.
- 3.7 Whilst the expected costs of the scheme for 2021/22 are slightly higher, the overall level of Council Tax Reduction as a proportion to Council Tax Base has reduced significantly year on year since 2013 as shown below. The overall proposed costs level for 2021/22 is considerably lower in terms of the percentage of the taxbase than when Council Tax Reduction was introduced in 2013. The current Council Tax Reduction scheme costs was estimated to cost £4.731m in 2021/22.

Tax Year	Maximum % Reduction	Gross Council Tax £000s	Total CTR awarded £000s	CTR as % Gross CTax
2013/14	100	56,471	4,564	8.08
2014/15	100	58,103	4,441	7.64
2015/16	80	59,662	3,896	6.53
2016/17	80	62,371	3,878	6.22
2017/18	80	64,566	3,808	5.90
2018/19	80	68,110	3,831	5.62
2019/20	85	71,847	4,035	5.62
2020/21	85	74,910	4,469	5.97

- 3.8 The present number of recipients of Council Tax Support at the Council at year end was
Pension Age - 1893
Working Age - 2397
The actual cost of the 2021/22 scheme was £4,703,152
- 3.9 The 2021/22 scheme had a number of features as follows:
- More support is given to those households on the lowest of incomes than in the previous scheme;
 - Changes can only be made to the working age schemes as the current schemes for pensioners is prescribed by Central Government;
 - The existing means - tested schemes have been replaced by a simple income grid model as shown below:

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Discount Band	Discount	Single Person	Single person with one child	Single person with two or more children	Couple	Couple with one child	Couple with two or more children
Income Ranges							
Band 1	100%	£0 to £95.00	£0 to £150.00	£0 to £210.00	£0 to £140.00	£0 to £195.00	£0 to £255.00
Band 2	75%	£95.01 to £115.00	£150.01 to £180.00	£210.01 to £240.00	£140.01 to £160.00	£195.01 to £225.00	£255.01 to £285.00
Band 3	50%	£115.01 to £135.00	£180.01 to £210.00	£240.01 – £270.00	£160.01 to £180.00	£225.01 – £255.00	£285.01 to £315.00
Band 4	25%	£135.01 to £155.00	£210.01 to £240.00	£270.01 – £300.00	£180.01 to £200.00	£255.01 to £285.00	£315.01 to £345.00
	0%	Over £155.00	Over £240.00	Over £300.00	Over £200.00	Over £285.00	Over £345.00

3.9 The Council must now review the existing scheme, assess possible different options, and then consult on a proposed 2023/24 scheme. The review will take place over the summer with a report coming to Members in September with a number of Options which can then be approved to go out for wider consultation.

3.8 **Consultation and Communication**

As required by the legislation, the Council will consult with both major preceptors and also the public on the 2023/24 scheme.

4. **Legal Implications**

4.1 Schedule 1A (3) of the Local Government Finance Act 1992, states: Before making a scheme, the authority must: (a) consult any major precepting authority which has power to issue a precept to it, (b) publish a draft scheme in such manner as it thinks fit, and (c) consult such other persons as it considers are likely to have an interest in the operation of the scheme.

4.2 In addition, in order to set a new scheme, the Council is obliged to make a resolution by 11th March of the year prior to the scheme coming into place.

4.3 The purpose of this report is to set out the process for the 2023/34 scheme to be implemented with effect from 1st April 2023

5. **Other Implications**

Customer / Equalities and Diversity Implications

BROMSGROVE DISTRICT COUNCIL

Cabinet 1st June 2022

5.1 A stage one Equality Impact Assessment will be undertaken as part of this process.

6. RISK MANAGEMENT

6.1 A full risk assessment will be undertaken of the options going out for consultation.

7. APPENDENCES

Appendix A – 2021 Approved Scheme

AUTHOR OF REPORT

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**Bromsgrove District Council
Council Tax Reduction Scheme
S13A and Schedule 1a of the Local Government Finance Act 1992**

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1.0 Introduction to the Council Tax Reduction Scheme

1.1 The following has been adopted by the Council and details the Council Tax Reduction scheme for the period from 1st April 2021.

1.2 This document details how the scheme will operate for both pension credit age and working age applicants and in accordance with Section 13A of the Local Government Finance Act 1992 specifies the classes of person who are to be entitled to a reduction under the scheme and is effective from 1st April 2021 for a period of one financial year.

1.3 The scheme in respect of pension age applicants is defined by Central Government within the following:

- Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012;
- Council Tax Reduction Schemes (Prescribed Requirements and Default Scheme) (England) (Amendment) Regulations 2012;
- Council Tax Reduction Schemes (Transitional Provision) (England) Regulations 2013;
- Council Tax Reduction Schemes (Detection of Fraud and Enforcement) (England) Regulations 2013;
- Council Tax Reduction Schemes (Prescribed Requirements) (England) (Amendment) Regulations 2013;
- The Council Tax Reduction Schemes (Prescribed Requirements) (England) (Amendment) (No. 2) Regulations 2014;
- The Council Tax Reduction Schemes (Prescribed Requirements) (England) (Amendment) Regulations 2015;
- The Council Tax Reduction Schemes (Prescribed Requirements) (England) (Amendment) Regulations 2016;
- The Council Tax Reduction Schemes (England) (Amendment) Regulations 2017;
- The Council Tax Reduction Schemes (Prescribed Requirements) (England) (Amendment) Regulations 2018;
- The Council Tax Reduction Schemes (Prescribed Requirements) (England) (Amendment) Regulations 2020;
- The Council Tax Reduction Schemes (Prescribed Requirements) (England) (Amendment) Regulations 2021: and
- Local Government Finance Act 1992 (as amended by the Local Government Finance Act 2012).

The scheme for pension age applicants – Central Government’s scheme as defined by the Council Tax Reduction Scheme (Prescribed Requirements) (England) Regulations 2012

1.4 There are three main classes under the prescribed pension credit age scheme, for each of which there are a number of qualifying criteria. In all cases individuals must not be of a prescribed class exempted from reduction, such as a person subject to immigration control with limited leave to remain. The definition of a pension credit age person is a person who;

- (a) has attained the qualifying age for state pension credit; and
- (b) is not, or, if he has a partner, his partner is not;
 - i. a person on income support, on an income-based jobseeker’s allowance or on an income-related employment and support allowance; or
 - ii. a person with an award of universal credit

The three prescribed classes are as follows;

Class A: pensioners whose income is less than the applicable amount.

On any day Class A consists of any person who is a pensioner:

- (a) who is for that day liable to pay council tax in respect of a dwelling of which he is a resident;
- (b) who, subject to paragraph 5 of Schedule 1 of the Council Tax Reduction Schemes

(Prescribed Requirements) (England) Regulations 2012, is not absent from the dwelling throughout the day; in respect of whom a maximum Council Tax Reduction amount can be calculated;

- (c) who does not fall within a class of persons prescribed for the purposes of paragraph 2(9) of Schedule 1A to the Local Government Finance Act 1992 and excluded from the authority's scheme;
- (d) whose income (if any) for the relevant week does not exceed his applicable amount calculated in accordance with paragraph 9 and Schedule 2 of the Local Government Finance Act 1992;
- (e) not have capital savings above £16,000; and
- (f) who has made an application for a reduction under the authority's scheme.

Class B: pensioners whose income is greater than the applicable amount.

On any day class B consists of any person who is a pensioner:

- (a) who is for that day liable to pay council tax in respect of a dwelling of which he is a resident;
- (b) who, subject to paragraph 5 of Schedule 1 of the Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012, is not absent from the dwelling throughout the day; in respect of whom a maximum Council Tax Reduction amount can be calculated;
- (c) who does not fall within a class of person prescribed for the purposes of paragraph 2(9) of Schedule 1A to the Local Government Finance Act 1992 and excluded from the authority's scheme;
- (d) whose income for the relevant week is greater than his applicable amount calculated in accordance with paragraph 9 and Schedule 2 to the Local Government Finance Act 1992;
- (e) in respect of whom amount A exceeds amount B where;
 - (i) amount A is the maximum Council Tax Reduction in respect of the day in the applicant's case; and
 - (ii) amount B is 2 6/7 per cent of the difference between his income for the relevant week and his applicable amount;
- (f) not have capital savings above £16,000; and
- (g) who has made an application for a reduction under the authority's scheme.

Class C: alternative maximum Council Tax Reduction

On any day class C consists of any person who is a pensioner:

- (a) who is for that day liable to pay council tax in respect of a dwelling of which he is a resident;
- (b) who, subject to paragraph 5 of Schedule 1 of the Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012, is not absent from the dwelling throughout the day;
- (c) in respect of whom a maximum Council Tax Reduction amount can be calculated;
- (d) who does not fall within a class of person prescribed for the purposes of paragraph 2(9) of Schedule 1A to the 1992 Act and excluded from the authority's scheme;
- (e) who has made an application for a reduction under the authority's scheme; and
- (f) in relation to whom the condition below is met.

The condition referred to in sub-paragraph (f) is that no other resident of the dwelling is liable to pay rent to the applicant in respect of the dwelling and there is an alternative maximum Council Tax Reduction in respect of the day in the case of that person which is derived from the income, or aggregate income, of one or more residents to whom this sub-paragraph applies.

The above applies to any other resident of the dwelling who:

- (a) is not a person who, in accordance with Schedule 1 to the 1992 Act, falls to be disregarded for the purposes of discount;
- (b) is not a person who is liable for council tax solely in consequence of the provisions of section 9 of the 1992 Act (spouse's or civil partner's joint and several liability for tax);
- (c) is not a person who is residing with a couple or with the members of a polygamous marriage where the applicant is a member of that couple or of that marriage and—

- (i) in the case of a couple, neither member of that couple is a person who, in accordance with Schedule 1 to the 1992 Act, falls to be disregarded for the purposes of discount; or
- (ii) in the case of a polygamous marriage, two or more members of that marriage are not persons who, in accordance with Schedule 1 to the 1992 Act, fall to be disregarded for the purposes of discount;
- (d) is not a person who, jointly with the applicant, falls within the same paragraph of section 6(2)(a) to (e) of the 1992 Act (persons liable to pay council tax) as applies in the case of the applicant; or
- (e) is not a person who is residing with two or more persons both or all of whom fall within the same paragraph of section 6(2)(a) to (e) of the 1992 Act where two or more of those persons are not persons who, in accordance with Schedule 1 to the 1992 Act, fall to be disregarded for the purposes of discount.

Disregard of certain incomes

- 1.5 For those who have reached the qualifying age for state pension credit, the Council has resolved to enhance the government scheme (as defined by the Council Tax Reduction Scheme (Prescribed Requirements) (England) Regulations 2012 to disregard in full the following:
- (a) a war disablement pension;
 - (b) a war widow's pension or war widower's pension;
 - (c) a pension payable to a person as a widow, widower or surviving civil partner under any power of Her Majesty otherwise than under an enactment to make provision about pensions for or in respect of persons who have been disabled or have died in consequence of service as members of the armed forces of the Crown;
 - (d) a guaranteed income payment;
 - (e) a payment made to compensate for the non-payment of such a pension or payment as is mentioned in any of the preceding sub-paragraphs;
 - (f) a pension paid by the government of a country outside Great Britain which is analogous to any of the pensions or payments mentioned in sub-paragraphs (a) to (d) above;
 - (g) pension paid to victims of National Socialist persecution under any special provision made by the law of the Federal Republic of Germany, or any part of it, or of the Republic of Austria.

The provisions outlined above, enhance the Central Government's scheme.

THE SCHEME FOR WORKING AGE APPLICANTS – THE COUNCIL'S LOCAL SCHEME

- 1.6 The adopted scheme for working age applicants is an income band scheme means test, which compares income against a range of discounts available. Full details of the working age scheme of the authority are contained within this document from section 2 onwards. The authority is required to specify a scheme for working age and therefore this scheme only applies to a person who;
- (a) has not attained the qualifying age for state pension credit; or
 - (b) has attained the qualifying age for state pension credit if he, and his partner, is a person on income support, on an income-based jobseeker's allowance, on an income-related employment and support allowance or on universal credit.
- 1.7 The Council has resolved that there will be **one** class of persons who will receive a reduction in line with adopted scheme. The scheme has qualifying criteria. In all cases individuals must not be of a prescribed class exempted from reduction as specified within section 7 of this scheme.

Class D

To obtain reduction the individual (or partner) must:

- (a) have not attained the qualifying age for state pension credit; or
- (b) he has attained the qualifying age for state pension credit and he, or if he has a partner, his partner, is a person on income support, on income-based jobseeker's allowance or an

income-related employment and support allowance; or a person with an award of universal credit.

- (c) be liable to pay council tax in respect of a dwelling in which he is solely or mainly resident;
- (d) is not deemed to be absent from the dwelling;
- (e) not fall within a class of person prescribed for the purposes of paragraph 2(9) of Schedule 1A to the Local Government Finance Act 1992 and excluded from the authority's scheme;
- (f) be somebody in respect of whom a maximum Council Tax Reduction amount can be calculated;
- (g) not have capital savings above £6,000;
- (h) not have income above the levels specified within the scheme;
- (i) be a person in respect of whom a day in which s/he is liable to pay council tax falls within a week in respect of which the person's *income* is within a range of incomes specified within Schedule 1; and
- (j) has made a valid application for reduction.

Council Tax Reduction Scheme

Details of reduction to be given for working age applicants for the financial year 2021/22

2.0 Interpretation – an explanation of the terms used within this policy

2.1 In this policy–

‘the 1992 Act’ means the Local Government Finance Act 1992;

‘the 2000 Act’ means the Electronic Communications Act 2000;

‘Abbeyfield Home’ means an establishment run by the Abbeyfield Society including all bodies corporate or incorporate which are affiliated to that Society;

‘adoption leave’ means a period of absence from work on ordinary or additional adoption leave by virtue of section 75A or 75B of the Employment Rights Act 1996;

‘an AFIP’ means an armed forces independence payment payable in accordance with an armed and reserve forces compensation scheme established under section 1(2) of the Armed Forces (Pensions and Compensation) Act 2004

‘applicant’ means a person who the authority designates as able to claim Council tax reduction – for the purposes of this policy all references are in the masculine gender but apply equally to male and female;

‘application’ means an application for a reduction under this scheme:

‘attendance allowance’ means–

(a) an attendance allowance under Part 3 of the Act;

(b) an increase of disablement pension under section 104 or 105 of the Act;

(c) a payment under regulations made in exercise of the power conferred by paragraph 7(2)(b) of Part 2 of Schedule 8 to the Act;

(d) an increase of an allowance which is payable in respect of constant attendance under paragraph 4 of Part 1 of Schedule 8 to the Act;

(e) a payment by virtue of article 14, 15, 16, 43 or 44 of the Personal Injuries (Civilians) Scheme 1983 or any analogous payment; or

(f) any payment based on need for attendance which is paid as part of a war disablement pension;

‘the authority’ means a billing authority in relation to whose area this scheme has effect by virtue of paragraph 4(6) of Schedule 1A to the 1992 Act;

‘basic rate’, where it relates to the rate of tax, has the same meaning as in the Income Tax Act 2007 (see section 989 of that Act).

‘board and lodging accommodation’ means accommodation provided to a family, for a charge which is inclusive of the provision of that accommodation and at least some cooked or prepared meals which both are cooked or prepared (by a person other than the person to whom the accommodation is provided or a member of his family) and are consumed in that accommodation or associated premises;

‘care home’ has the meaning given by section 3 of the Care Standards Act 2000 and in Scotland means a care home service within the meaning given by section 2(3) of the Regulation of Care (Scotland) Act 2001 and in Northern Ireland means a nursing home within the meaning of Article 11 of the Health and Personal Social Services Quality Improvement and Regulation (Northern Ireland) Order 2003 or a residential care home, within the meaning of Article 10 of that Order;

‘the Caxton Foundation’ means the charitable trust of that name established on 28th March 2011 out of funds provided by the Secretary of State for the benefit of certain persons suffering from hepatitis C and other persons eligible for payment in accordance with its provisions;

‘child’ means a person under the age of 16;

‘child benefit’ has the meaning given by section 141 of the SSCBA as amended by The Child Benefit (General), Child Tax Credit (Amendment) Regulations 2014 and The Child Benefit (General) (Amendment) Regulations 2015;

‘child tax credit’ means a child tax credit under section 8 of the Tax Credits Act 2002;

‘the Children Order’ means the Children (Northern Ireland) Order 1995;

‘claim’ means a claim for council tax reduction;

‘close relative’ means a parent, parent-in-law, son, son-in-law, daughter, daughter-in-law, step-parent, step-son, step-daughter, brother, sister, or if any of the preceding persons is one member of a couple, the other member of that couple;

‘contributory employment and support allowance’ means an allowance under Part 1 of the Welfare Reform Act 2007 as amended by the provisions of Schedule 3, and Part 1 of Schedule 14, to the Welfare Reform Act 2012 that remove references to an income-related allowance

and a contributory allowance under Part 1 of the Welfare Reform Act 2007 as that Part has effect apart from those provisions;

‘converted employment and support allowance’ means an employment and support allowance which is not income-related and to which a person is entitled as a result of a conversion decision within the meaning of the Employment and Support Allowance (Existing Awards) Regulations;

‘council tax reduction scheme’ has the same meaning as ‘council tax reduction or reduction’

‘council tax reduction (or reduction)’ means council tax reduction as defined by S13a Local Government Finance Act 1992 (as amended);

‘couple’ means;

(a) two people who are married to, or civil partners of, each other and are members of the same household; or

(b) a man and a woman who are not married to each other but are living together as if they were a married couple or civil partners;

‘date of claim’ means the date on which the claim is made, or treated as made, for the purposes of this policy

‘designated authority’ means any of the following;

the local authority; or a person providing services to, or authorised to exercise any function of, any such authority;

‘designated office’ means the office designated by the authority for the receipt of claims for council tax reduction;

(a) by notice upon or with a form approved by it for the purpose of claiming council tax reduction; or

(b) by reference upon or with such a form to some other document available from it and sent by electronic means or otherwise on application; or

(c) by any combination of the provisions set out in sub-paragraphs (a) and (b) above;

‘disability living allowance’ means a disability living allowance under section 71 of the Act;

‘dwelling’ has the same meaning in section 3 or 72 of the 1992 Act;

‘earnings’ has the meaning prescribed in section 25 or, as the case may be, 27;

‘the Eileen Trust’ means the charitable trust of that name established on 29th March 1993 out of funds provided by the Secretary of State for the benefit of persons eligible for payment in accordance with its provisions;

‘electronic communication’ has the same meaning as in section 15(1) of the 2000 Act;

‘employed earner’ is to be construed in accordance with section 2(1)(a) of the Act and also includes a person who is in receipt of a payment which is payable under any enactment having effect in Northern Ireland and which corresponds to statutory sick pay or statutory maternity pay;

‘Employment and Support Allowance Regulations’ means the Employment and Support Allowance Regulations 2008 and the Employment and Support Regulations 2013 as appropriate;

‘Employment and Support Allowance (Existing Awards) Regulations’ means the Employment and Support Allowance (Transitional Provisions, Housing Benefit and Council Tax Benefit) (Existing Awards) Regulations 2010;

‘family’ has the meaning assigned to it by section 137(1) of the Act and Section 9 of this scheme;

‘the Fund’ means moneys made available from time to time by the Secretary of State for the benefit of persons eligible for payment in accordance with the provisions of a scheme established by him on 24th April 1992 or, in Scotland, on 10th April 1992;

‘a guaranteed income payment’ means a payment made under article 14(1)(b) or article 21(1)(a) of the Armed Forces and Reserve Forces (Compensation Scheme) Order 2005(b);

‘he, him, his’ also refers to the feminine within this policy

‘housing benefit’ means housing benefit under Part 7 of the Act; ‘the Housing Benefit Regulations’ means the Housing Benefit Regulations 2006;

‘Immigration and Asylum Act’ means the Immigration and Asylum Act 1999;

‘an income-based jobseeker’s allowance’ and ‘a joint-claim jobseeker’s allowance’ have the same meaning as they have in the Jobseekers Act by virtue of section 1(4) of that Act;

‘income-related employment and support allowance’ means an income-related allowance under Part 1 of the Welfare Reform Act 2007;

‘Income Support Regulations’ means the Income Support (General) Regulations 1987(a);

‘independent hospital’–

- (a) in England, means a hospital as defined by section 275 of the National Health Service Act 2006 that is not a health service hospital as defined by that section;
- (b) in Wales, has the meaning assigned to it by section 2 of the Care Standards Act 2000; and
- (c) in Scotland, means an independent health care service as defined in section 2(5)(a) and (b) of the Regulation of Care (Scotland) Act 2001;

‘the Independent Living Fund (2006)’ means the Trust of that name established by a deed dated 10th April 2006 and made between the Secretary of State for Work and Pensions of the one part and Margaret Rosemary Cooper, Michael Beresford Boyall and Marie Theresa Martin of the other part;

‘invalid carriage or other vehicle’ means a vehicle propelled by a petrol engine or by electric power supplied for use on the road and to be controlled by the occupant;

‘Jobseekers Act’ means the Jobseekers Act 1995; ‘Jobseeker’s Allowance Regulations’ means the Jobseeker’s Allowance Regulations 1996 and Jobseeker’s Allowance Regulations 2013 as appropriate; ‘limited capability for work’ has the meaning given in section 1(4) of the Welfare Reform Act;

‘limited capability for work-related activity’ has the meaning given in section 2(5) of the Welfare Reform Act 2007;

‘the London Bombing Relief Charitable Fund’ means the company limited by guarantee (number 5505072), and registered charity of that name established on 11th July 2005 for the purpose of (amongst other things) relieving sickness, disability or financial need of victims (including families or dependants of victims) of the terrorist attacks carried out in London on 7th July 2005;

‘lone parent’ means a person who has no partner and who is responsible for and a member of the same household as a child or young person;

‘the Macfarlane (Special Payments) Trust’ means the trust of that name, established on 29th January 1990 partly out of funds provided by the Secretary of State, for the benefit of certain persons suffering from haemophilia;

‘the Macfarlane (Special Payments) (No.2) Trust’ means the trust of that name, established on 3rd May 1991 partly out of funds provided by the Secretary of State, for the benefit of certain persons suffering from haemophilia and other beneficiaries;

‘the Macfarlane Trust’ means the charitable trust, established partly out of funds provided by the Secretary of State to the Haemophilia Society, for the relief of poverty or distress among those suffering from haemophilia;

‘main phase employment and support allowance’ means an employment and support allowance where the calculation of the amount payable in respect of the applicant includes a component under section 2(1)(b) or 4(2)(b) of the Welfare Reform Act 2007 except in Part 1 of Schedule 1;

‘maternity leave’ means a period during which a woman is absent from work because she is pregnant or has given birth to a child, and at the end of which she has a right to return to work either under the terms of her contract of employment or under Part 8 of the Employment Rights Act 1996;

‘member of a couple’ means a member of a married or unmarried couple;

‘member of the work-related activity group’ means a claimant who has or is treated as having limited capability for work;

‘MFET Limited’ means the company limited by guarantee (number 7121661) of that name, established for the purpose in particular of making payments in accordance with arrangements made with the Secretary of State to persons who have acquired HIV as a result of treatment by the NHS with blood or blood products;

‘net earnings’ means such earnings as are calculated in accordance with this scheme;

‘net profit’ means such profit as is calculated in accordance with this scheme;

‘the New Deal options’ means the employment programmes specified in regulation 75(1)(a)(ii) of the Jobseeker’s Allowance Regulations and the training scheme specified in regulation 75(1)(b)(ii) of those Regulations;

‘new dwelling’ means, for the purposes of the definition of ‘second authority’ and sections 60C, and 61C the dwelling to which a applicant has moved, or is about to move, in which the

applicant is or will be resident;

‘occupational pension’ means any pension or other periodical payment under an occupational pension scheme but does not include any discretionary payment out of a fund established for relieving hardship in particular cases;

‘ordinary clothing or footwear’ means clothing or footwear for normal daily use, but does not include school uniforms, or clothing or footwear used solely for sporting activities;

‘partner’ means–

- (a) where an applicant is a member of a couple, the other member of that couple; or
- (b) where an applicant is polygamously married to two or more members of his household, any such member to whom he is married;

‘paternity leave’ means a period of absence from work on leave by virtue of section 80A or 80B of the Employment Rights Act 1996;

‘payment’ includes part of a payment;

‘pensionable age’ has the meaning given by the rules in paragraph 1 of Schedule 4 to the Pensions Act 1995 as amended by the Public Services Pension Act 2013 and Pensions Act 2014;

‘pension fund holder’ means with respect to a personal pension scheme or an occupational pension scheme, the trustees, managers or scheme administrators, as the case may be, of the scheme concerned;

‘pensioner’ a person who has attained the age at which pension credit can be claimed;

‘person affected’ shall be construed as a person to whom the authority decides is affected by any decision made by the council;

‘personal independence payment’ has the meaning given by Part 4 of the Welfare Reform Act 2012 and the Social Security (Personal Independence Payments) 2013;

‘person treated as not being in Great Britain’ has the meaning given by section 7;

‘personal pension scheme’ means–

- (a) a personal pension scheme as defined by section 1 of the Pension Schemes Act 1993 as amended by the Public Service Pension Act 2013;
- (b) an annuity contractor trust scheme approved under section 20 or 21 of the Income and Corporation Taxes Act 1988 or a substituted contract within the meaning of section 622(3) or that Act which is treated as having become a registered pension scheme by virtue of paragraph 1(1)(f) of Schedule 36 of the Finance Act 2004;
- (c) a personal pension scheme approved under Chapter 4 of Part 14 of the Income and Corporation Taxes Act 1988 which is treated as having become a registered pension scheme by virtue of paragraph 1(1)(g) of Schedule 36 to the Finance Act 2004;

‘policy of life insurance’ means any instrument by which the payment of money is assured on death (except death by accident only) or the happening of any contingency dependent on human life, or any instrument evidencing a contract which is subject to payment of premiums for a term dependent on human life;

‘polygamous marriage’ means a marriage to which section 133(1) of the Act refers namely;

- (a) a person is a husband or wife by virtue of a marriage entered into under law which permits polygamy; and
- (b) either party to the marriage has for the time being any spouse additional to the other party.

‘public authority’ includes any person certain of whose functions are functions of a public nature;

‘qualifying age for state pension credit’ means (in accordance with section 1(2)(b) and (6) of the State Pension Credit Act 2002)–

- (a) in the case of a woman, pensionable age; or
- (b) in the case of a man, the age which is pensionable age in the case of a woman born on the same day as the man;

‘qualifying contributory benefit’ means;

- (a) severe disablement allowance;
- (b) incapacity benefit;
- (c) contributory employment and support allowance;

‘qualifying course’ means a qualifying course as defined for the purposes of Parts 2 and 4 of the Job Seeker’s Allowance Regulations 1996

‘qualifying income-related benefit’ means

- (a) income support;
- (b) income-based jobseeker’s allowance;
- (c) income-related employment and support allowance;

‘qualifying person’ means a person in respect of whom payment has been made from the Fund, the Eileen Trust, MFET Limited, the Skipton Fund, the Caxton Foundation or the London Bombings Relief Charitable Fund;

‘reduction week’ means a period of seven consecutive days beginning with a Monday and ending with a Sunday;

‘relative’ means a close relative, grandparent, grandchild, uncle, aunt, nephew or niece;

‘relevant authority’ means an authority administering council tax reduction;

‘relevant week’ In relation to any particular day, means the week within which the day in question falls;

‘resident’ has the meaning it has in Part 1 or 2 of the 1992 Act;

‘self-employed earner’ is to be construed in accordance with section 2(1)(b) of the Act;

‘self-employment route’ means assistance in pursuing self-employed earner’s employment whilst participating in–

- (a) an employment zone programme;
- (b) a programme provided or other arrangements made pursuant to section 2 of the 1973 Act (functions of the Secretary of State) or section 2 of the Enterprise and New Towns (Scotland) Act 1990 (functions in relation to training for employment, etc.);
- (c) the Employment, Skills and Enterprise Scheme;
- (d) a scheme prescribed in regulation 3 of the Jobseeker’s Allowance (Schemes for Assisting Persons to Obtain Employment) Regulations 2013;
- (e) Back to Work scheme.

‘single applicant’ means an applicant who neither has a partner nor is a lone parent;

‘the Skipton Fund’ means the ex-gratia payment scheme administered by the Skipton Fund Limited, incorporated on 25th March 2004, for the benefit of certain persons suffering from hepatitis C and other persons eligible for payment in accordance with the scheme’s provisions.

‘special account’ means an account as defined for the purposes of Chapter 4A of Part 8 of the Jobseeker’s Allowance Regulations or Chapter 5 of Part 10 of the Employment and Support Allowance Regulations;

‘sports award’ means an award made by one of the Sports Councils named in section 23(2) of the National Lottery etc. Act 1993 out of sums allocated to it for distribution under that section;

‘the SSCBA’ means the Social Security Contributions and Benefits Act 1992

‘State Pension Credit Act’ means the State Pension Credit Act 2002;

‘student’ has the meaning prescribed in section 43;

‘subsistence allowance’ means an allowance which an employment zone contractor has agreed to pay to a person who is participating in an employment zone programme;

‘reduction week’ means a period of 7 consecutive days commencing upon a Monday and ending on a Sunday;

‘the Tax Credits Act’ means the Tax Credits Act 2002;

‘tax year’ means a period beginning with 6th April in one year and ending with 5th April in the next;

‘training allowance’ means an allowance (whether by way of periodical grants or otherwise) payable–

- (a) out of public funds by a Government department or by or on behalf of the Secretary of State, Skills Development Scotland, Scottish Enterprise or Highlands and Islands Enterprise, the Young People’s Learning Agency for England, the Chief Executive of Skills Funding or Welsh Ministers;
- (b) to a person for his maintenance or in respect of a member of his family; and
- (c) for the period, or part of the period, during which he is following a course of training or instruction provided by, or in pursuance of arrangements made with, the department or approved by the department in relation to him or so provided or approved by or on behalf of the Secretary of State, Skills Development Scotland Scottish Enterprise or Highlands and Islands Enterprise or the Welsh Ministers.

It does not include an allowance paid by any Government department to or in respect of a person by reason of the fact that he is following a course of full-time education, other than under arrangements made under section 2 of the 1973 Act or is training as a teacher;

‘the Trusts’ means the Macfarlane Trust, the Macfarlane (Special Payments) Trust and the Macfarlane (Special Payments) (No. 2) Trust;

‘Universal Credit’ means any payment of Universal Credit payable under the Welfare Reform Act 2012, the Universal Credit Regulations 2013, The Universal Credit (Consequential, Supplementary, Incidental and Miscellaneous Provisions) Regulations 2013, Universal Credit (Miscellaneous Amendments) Regulations 2013 and the Universal Credit (Transitional Provisions) Regulations 2014;

‘Uprating Act’ means the Welfare Benefit Up-rating Act 2013, the Welfare Benefits Up-rating Order 2014 and the Welfare Benefits Up-rating Order 2015;

‘voluntary organisation’ means a body, other than a public or local authority, the activities of which are carried on otherwise than for profit;

‘war disablement pension’ means any retired pay or pension or allowance payable in respect of disablement under an instrument specified in section 639(2) of the Income Tax (Earnings and Pensions) Act 2003;

‘war pension’ means a war disablement pension, a war widow’s pension or a war widower’s pension;

‘war widow’s pension’ means any pension or allowance payable to a woman as a widow under an instrument specified in section 639(2) of the Income Tax (Earnings and Pensions) Act 2003 in respect of the death or disablement of any person;

‘war widower’s pension’ means any pension or allowance payable to a man as a widower or to a surviving civil partner under an instrument specified in section 639(2) of the Income Tax (Earnings and Pensions) Act 2003 in respect of the death or disablement of any person;

‘water charges’ means;

(a) as respects England and Wales, any water and sewerage charges under Chapter 1 of Part 5 of the Water Industry Act 1991,

(b) as respects Scotland, any water and sewerage charges established by Scottish Water under a charges scheme made under section 29A of the Water Industry (Scotland) Act 2002, in so far as such charges are in respect of the dwelling which a person occupies as his home;

‘week’ means a period of seven days beginning with a Monday;

‘Welfare Reform Act’ means the Welfare Reform Act 2007;

‘Working Tax Credit Regulations’ means the Working Tax Credit (Entitlement and Maximum Rate) Regulations 2002 as amended.

2.2 In this policy, where an amount is to be rounded to the nearest penny, a fraction of a penny shall be disregarded if it is less than half a penny and shall otherwise be treated as a whole penny.

2.3 For the purpose of this policy, a person is on an income-based jobseeker’s allowance on any day in respect of which an income-based jobseeker’s allowance is payable to him and on any day;

(a) in respect of which he satisfies the conditions for entitlement to an income-based jobseeker’s allowance but where the allowance is not paid in accordance with regulation 27A of the Jobseeker’s Allowance Regulations or section 19 or 20A or regulations made under section 17A of the Jobseekers Act (circumstances in which a jobseeker’s allowance is not payable); or

(b) which is a waiting day for the purposes of paragraph 4 of Schedule 1 to that Act and which falls immediately before a day in respect of which an income-based jobseeker’s allowance is payable to him or would be payable to him but for regulation 27A of the Jobseeker’s Allowance Regulations or section 19 or 20A or regulations made under section 17A of that Act;

(c) in respect of which he is a member of a joint-claim couple for the purposes of the Jobseekers Act and no joint-claim jobseeker’s allowance is payable in respect of that couple as a consequence of either member of that couple being subject to sanctions for the purposes of section 20A of that Act;

(d) in respect of which an income-based jobseeker’s allowance or a joint-claim jobseeker’s

allowance would be payable but for a restriction imposed pursuant to section 6B, 7, 8 or 9 of the Social Security Fraud Act 2001 (loss of benefit provisions).

- 2.4 For the purposes of this policy, a person is on an income-related employment and support allowance on any day in respect of which an income-related employment and support allowance is payable to him and on any day;
- (a) in respect of which he satisfies the conditions for entitlement to an income-related employment and support allowance but where the allowance is not paid in accordance with section 18 of the Welfare Reform Act disqualification; or
 - (b) which is a waiting day for the purposes of paragraph 2 of Schedule 2 to that Act and which falls immediately before a day in respect of which an income-related employment and support allowance is payable to him or would be payable to him but for section 18 of that Act.

2.5 For the purposes of this policy, two persons shall be taken to be estranged only if their estrangement constitutes a breakdown of the relationship between them.

2.6 In this policy, references to any person in receipt of state pension credit includes a person who would be in receipt of state pension credit but for regulation 13 of the State Pension Credit Regulations 2002 (small amounts of state pension credit).

3.0 Requirement to provide a National Insurance Number

3.1 No person shall be entitled to reduction unless the criteria below in 3.2 is satisfied in relation both to the person making the claim and to any other person in respect of whom he is claiming reduction.

- 3.2 This subsection is satisfied in relation to a person if–
- (a) the claim for reduction is accompanied by;
 - i. a statement of the person’s national insurance number and information or evidence establishing that that number has been allocated to the person; or
 - ii. information or evidence enabling the national insurance number that has been allocated to the person to be ascertained; or
 - (b) the person makes an application for a national insurance number to be allocated to him which is accompanied by information or evidence enabling such a number to be so allocated and the application for reduction is accompanied by evidence of the application and information to enable it to be allocated.

- 3.3 Paragraph 3.2 shall not apply–
- (a) in the case of a child or young person in respect of whom council tax reduction is claimed;
 - (b) to a person who;
 - i. is a person in respect of whom a claim for council tax reduction is made;
 - ii. is subject to immigration control within the meaning of section 115(9)(a) of the Immigration and Asylum Act;
 - iii. is a person from abroad for the purposes of this scheme; and
 - iv. has not previously been allocated a national insurance number.

4.0 Persons who have attained the qualifying age for state pension credit

- 4.1 This scheme applies to a person if:
- (i) he has not attained the qualifying age for state pension credit; or
 - (ii) he has attained the qualifying age for state pension credit and he, or if he has a partner, his partner, is;
 - (a) a person on income support, on income-based jobseeker’s allowance or an income-related employment and support allowance; or
 - (b) a person with an award of universal credit.

5.0 Persons treated as not being in Great Britain and Persons Subject to Immigration Control

Persons treated as not being in Great Britain

- 5.1 Persons treated as not being in Great Britain are a class of person prescribed for the purposes of paragraph 2(9)(b) of Schedule 1A to the 1992 Act and which must not be included in an authority's scheme.
- 5.2 Except where a person falls within paragraph (5) or (6), a person is to be treated as not being in Great Britain if the person is not habitually resident in the United Kingdom, the Channel Islands, the Isle of Man or the Republic of Ireland.
- 5.3 A person must not be treated as habitually resident in the United Kingdom, the Channel Islands, the Isle of Man or the Republic of Ireland unless the person has a right to reside in one of those places.
- 5.4 For the purposes of paragraph (3), a right to reside does not include a right, which exists by virtue of, or in accordance with—
- (a) regulation 13 of the EEA Regulations;
 - (aa) regulation 14 of the EEA Regulations, but only in a case where the right exists under that regulation because the person is—
 - (i) a jobseeker for the purpose of the definition of “qualified person” in regulation 6(1) of those Regulations, or
 - (ii) a family member (within the meaning of regulation 7 of those Regulations) of such a jobseeker;
 - (b) regulation 15A(1) of the EEA Regulations, but only in a case where the right exists under that regulation because the applicant satisfies the criteria in paragraph (5) of that regulation of the Treaty on the Functioning of the European Union (in a case where the right to reside arises because a British citizen would otherwise be deprived of the genuine enjoyment of their rights as a European Union citizen).
- 5.4A For the purposes of paragraph (3), a right to reside does not include a right which exists by virtue of a person having been granted limited leave to enter, or remain in, the United Kingdom under the Immigration Act 1971 by virtue of—
- (a) (Removed by the Council Tax Reduction Schemes (Prescribed Requirements) (England) (Amendment) Regulations 2021
 - (b) Appendix EU to the immigration rules made under section 3(2) of that Act;
 - (c) being a person with a Zambrano right to reside as defined in Annex 1 of Appendix EU to the immigration rules made under section 3(2) of that Act; or
 - (d) having arrived in the United Kingdom with an entry clearance that was granted under Appendix EU (Family Permit) to the immigration rules made under section 3(2) of that Act.
- 5.4B Paragraph (4A)(b) does not apply to a person who—
- (a) has a right to reside granted by virtue of being a family member of a relevant person of Northern Ireland; and
- would have a right to reside under the EEA Regulations if the relevant person of Northern Ireland were an EEA national, provided that the right to reside does not fall within paragraph (4)(a) or (b)
- 5.5 A person falls within this paragraph if the person is—
- (a) a qualified person for the purposes of regulation 6 of the EEA Regulations as a worker or a self-employed person;
 - (b) a family member of a person referred to in sub-paragraph (a);
 - (c) a person who has a right to reside permanently in the United Kingdom by virtue of regulation 15(1)(c), (d) or (e) of the EEA Regulations;

- (ca) a family member of a relevant person of Northern Ireland, with a right to reside which falls within paragraph (4A)(b), provided that the relevant person of Northern Ireland falls within paragraph (5)(a), or would do so but for the fact that they are not an EEA national;
- (cb) a frontier worker within the meaning of regulation 3 of the Citizens' Rights (Frontier Workers) (EU Exit) Regulations 2020;
- (cc) a family member of a person referred to in sub-paragraph (cb), who has been granted limited leave to enter, or remain in, the United Kingdom by virtue of Appendix EU to the immigration rules made under section 3(2) of the Immigration Act 1971
- (d) a person recorded by the Secretary of State as a refugee within the definition in Article 1 of the Convention relating to the Status of Refugees done at Geneva on 28th July 1951, as extended by Article 1(2) of the Protocol relating to the Status of Refugees done at New York on 31st January 1967;
- (e) a person who has been granted, or who is deemed to have been granted, leave outside the rules made under section 3(2) of the Immigration Act 1971¹ where that leave is—
 - (i) discretionary leave to enter or remain in the United Kingdom,
 - (ii) leave to remain under the Destitution Domestic Violence concession which came into effect on 1st April 2012, or
 - (iii) leave deemed to have been granted by virtue of regulation 3 of the Displaced Persons (Temporary Protection) Regulations 2005.
- (f) a person who has humanitarian protection granted under those rules;
- (g) a person who is not a person subject to immigration control within the meaning of section 115(9) of the Immigration and Asylum Act 1999 and who is in the United Kingdom as a result of his deportation, expulsion or other removal by compulsion of law from another country to the United Kingdom;
- (h) in receipt of income support or on an income-related employment and support allowance; or
- (ha) in receipt of an income-based jobseeker's allowance and has a right to reside other than a right to reside falling within paragraph (4).

5.6 A person falls within this paragraph if the person is a Crown servant or member of Her Majesty's forces posted overseas.

5.7 A person mentioned in sub-paragraph (6) is posted overseas if the person is performing overseas the duties of a Crown servant or member of Her Majesty's forces and was, immediately before the posting or the first of consecutive postings, habitually resident in the United Kingdom.

5.8 In this regulation—
"claim for asylum" has the same meaning as in section 94(1) of the Immigration and Asylum Act 1999;
"Crown servant" means a person holding an office or employment under the Crown;
"EEA Regulations" means the Immigration (European Economic Area) Regulations 2006; and the Immigration (European Economic Area) (Amendment) (No. 2) Regulations 2014 and references to the EEA Regulations are to be read with Schedule 4 to the Immigration and Social Security Co-ordination (EU Withdrawal) Act 2020 (Consequential, Saving, Transitional and Transitory Provisions) Regulations 2020
"EEA national" has the meaning given in regulation 2(1) of the EEA Regulations;
"family member" has the meaning given in regulation 7(1)(a), (b) or (c) of the EEA Regulations, except that regulation 7(4) of the EEA Regulations does not apply for the purposes of paragraphs (4B) and (5)(ca);
"relevant person of Northern Ireland" has the meaning given in Annex 1 of Appendix EU to the immigration rules made under section 3(2) of the Immigration Act 1971; and

¹ As amended by the Immigration Act 2014 and the Immigration Act 2014 (Commencement No. 2) Order 2014

“Her Majesty’s forces” has the same meaning as in the Armed Forces Act 2006.

Persons subject to immigration control

- 5.9 Persons subject to immigration control are a class of person prescribed for the purposes of paragraph 2(9)(b) of Schedule 1A to the 1992 Act and which must not be included in an authority’s scheme.
- 5.10 A person who is a national of a state which has ratified the European Convention on Social and Medical Assistance (done in Paris on 11th December 1953) or a state which has ratified the Council of Europe Social Charter (signed in Turin on 18th October 1961) and who is lawfully present in the United Kingdom is not a person subject to immigration control for the purpose of paragraph 5.9
- 5.11 “Person subject to immigration control” has the same meaning as in section 115(9) of the Immigration and Asylum Act 1999.

6.0 Transitional provision

- 6.1 The above does not apply to a person who, on 31st March 2015—
- (a) is liable to pay council tax at a reduced rate by virtue of a council tax reduction under an authority’s scheme established under section 13A (2) of the Act; and
 - (b) is entitled to an income-based jobseeker’s allowance, until the first of the events in paragraph 7A.2 occurs.
- 6.2 The events are—
- (a) the person makes a new application for a reduction under an authority’s scheme established under section 13A (2) of the Act; or
 - (b) the person ceases to be entitled to an income-based jobseeker’s allowance.
- 6.3 In this section “the Act” means the Local Government Finance Act 1992.

7.0 Temporary Absence (period of absence)

- 7.1 Where a person is absent from the dwelling throughout any day then no reduction shall be payable
- 7.2 A person shall not, in relation to any day, which falls within a period of temporary absence from that dwelling, be a prescribed person under paragraph 7.1.
- 7.3 In paragraph 7.2, a ‘period of temporary absence’ means—
- (a) a period of absence not exceeding 13 weeks, beginning with the first whole day on which a person resides in residential accommodation where and for so long as;
 - i. the person resides in that accommodation;
 - ii. the part of the dwelling in which he usually resided is not let or sub-let; and
 - iii. that period of absence does not form part of a longer period of absence from the dwelling of more than 52 weeks,where he has entered the accommodation for the purpose of ascertaining whether it suits his needs and with the intention of returning to the dwelling if it proves not to suit his needs;
 - (b) a period of absence not exceeding 13 weeks, beginning with the first whole day of absence from the dwelling, where and for so long as;
 - i. the person intends to return to the dwelling;
 - ii. the part of the dwelling in which he usually resided is not let or sub-let; and
 - iii. that period is unlikely to exceed 13 weeks; and
 - (c) a period of absence not exceeding 52 weeks, beginning with the first whole day of absence, where and for so long as

- i. the person intends to return to the dwelling;
- ii. the part of the dwelling in which he usually resided is not let or sub-let;
- iii. the person is a person to whom paragraph 7.4 applies; and
- iv. the period of absence is unlikely to exceed 52 weeks or, in exceptional circumstances, is unlikely substantially to exceed that period.

7.4 This paragraph applies to a person who is;

- (a) detained in custody on remand pending trial or required, as a condition of bail, to reside;
 - i. in a dwelling, other than the dwelling referred to in paragraph 7.1, or
 - ii. in premises approved under section 13 of the Offender Management Act 2007 as amended by the Offender Rehabilitation Act 2014, or, detained in custody pending sentence upon conviction;
- (b) resident in a hospital or similar institution as a patient;
- (c) undergoing, or his partner or his dependent child is undergoing, in the United Kingdom or elsewhere, medical treatment, or medically approved convalescence, in accommodation other than residential accommodation;
- (d) following, in the United Kingdom or elsewhere, a training course;
- (e) undertaking medically approved care of a person residing in the United Kingdom or elsewhere;
- (f) undertaking the care of a child whose parent or guardian is temporarily absent from the dwelling normally occupied by that parent or guardian for the purpose of receiving medically approved care of medical treatment;
- (g) in the United Kingdom or elsewhere, receiving medically approved care provided in accommodation other than residential accommodation;
- (h) a student;
- (i) receiving care provided in residential accommodation other than a person to whom paragraph 7.3a) applies; or
- (j) has left the dwelling he resides in through fear of violence, in that dwelling, or by a person who was formerly a member of the family of the person first mentioned.

7.5 This paragraph applies to a person who is:

- (a) detained in custody pending sentence upon conviction or under a sentence imposed by a court (other than a person who is detained in hospital under the provisions of the Mental Health Act 1983 (as amended by the Mental Health (Discrimination) Act 2013); and
- (b) on temporary release from detention in accordance with Rules made under the provisions of the Prison Act 1952.

7.6 Where paragraph 7.5 applies to a person, then, for any day when he is on temporary release—

- (a) if such temporary release was immediately preceded by a period of temporary absence under paragraph 7.3 b) or c), he shall be treated, for the purposes of paragraph 7.1, as if he continues to be absent from the dwelling, despite any return to the dwelling;
- (b) for the purposes of paragraph 7.4 a), he shall be treated as if he remains in detention;
- (c) If he does not fall within sub-paragraph a), he is not considered to be a person who is liable to pay Council Tax in respect of a dwelling of which he is resident

7.7 In this section;

- ‘medically approved’ means certified by a medical practitioner;
- ‘patient’ means a person who is undergoing medical or other treatment as an in-patient in any hospital or similar institution; ‘residential accommodation’ means accommodation which is provided;
 - (a) in a care home;
 - (b) in an independent hospital;
 - (c) in an Abbeyfield Home; or
 - (d) in an establishment managed or provided by a body incorporated by Royal Charter or constituted by Act of Parliament other than a local social services authority;
- ‘training course’ means a course of training or instruction provided wholly or partly by or

on behalf of or in pursuance of arrangements made with, or approved by or on behalf of, Skills Development Scotland, Scottish Enterprise, Highlands and Islands Enterprise, a government department or the Secretary of State.

8.0 Membership of a family

- 8.1 Within the reduction scheme adopted by the Council 'family' means;
- (a) a married or unmarried couple;
 - (b) married or unmarried couple and a member of the same household for whom one of them is or both are responsible and who is a child or a young person;
 - (c) two people of the same sex who are civil partners of each other and are members of the same household (with or without children);
 - (d) two people of the same sex who are not civil partners of each other but are living together as if they were civil partners (with or without children),
 - (e) and for the purposes of sub-paragraph (d) two people of the same sex are to be regarded as living together as if they were civil partners if, but only if, they would be regarded as living together as husband and wife were they instead two people of the opposite sex;
 - (f) except in prescribed circumstances, a person who is not a member of a married or unmarried couple and a member of the same household for whom that person is responsible and who is a child or a young person;

For the purposes of the scheme a child is further defined as a 'child or young person'
A 'child' means a person under the age of 16 and a 'Young Person' is someone aged 16 or over but under 20 and who satisfies other conditions. These conditions are:

- they are aged 16, have left 'relevant education' or training, and 31 August following the sixteenth birthday has not yet been passed;
- they are aged 16 or 17, have left education or training, are registered for work, education or training, are not in remunerative work and are still within their 'extension period';
- they are on a course of full-time non-advanced education, or are doing 'approved training', and they began that education or training before reaching the age of 19;
- they have finished a course of full-time non-advanced education, but are enrolled on another such course (other than one provided as a result of their employment);
- they have left 'relevant education' or 'approved training' but have not yet passed their 'terminal date'.

- 8.2 Paragraph 8.1 the definition of child or young person shall not apply to a person who is;
- (a) on income support;
 - (b) an income-based jobseeker's allowance or an income related employment and support allowance; or be entitled to an award of Universal Credit; or
 - (c) a person to whom section 6 of the Children (Leaving Care) Act 2000 applies

- 8.3 The definition also includes a child or young person in respect of whom there is an entitlement to child benefit but only for the period that Child Benefit is payable

9.0 Circumstances in which a person is to be treated as responsible (or not responsible) for a child or young person.

- 9.1 Subject to the following paragraphs a person shall be treated as responsible for a child or young person who is normally living with him and this includes a child or young person.

- 9.2 Where a child or young person spends equal amounts of time in different households, or where there is a question as to which household he is living in, the child or young person shall be treated for the purposes of paragraph 9.1 as normally living with;
- a. the person who is receiving child benefit in respect of him; or

	<p>b. if there is no such person;</p> <ul style="list-style-type: none">i. where only one claim for child benefit has been made in respect of him, the person who made that claim; orii. in any other case the person who has the primary responsibility for him.
9.3	<p>For the purposes of this scheme a child or young person shall be the responsibility of only one person in any reduction week and any person other than the one treated as responsible for the child or young person under this section shall be treated as not so responsible.</p>
10.0	Circumstances in which a child or young person is to be treated as being or not being a member of the household
10.1	<p>Subject to paragraphs 10.2 and 10.3, the applicant and any partner and, where the applicant or his partner is treated as responsible for a child or young person, that child or young person and any child of that child or young person, shall be treated as members of the same household notwithstanding that any of them is temporarily absent from that household.</p>
10.2	<p>A child or young person shall not be treated as a member of the applicant's household where he is;</p> <ul style="list-style-type: none">(a) placed with the applicant or his partner by a local authority under section 23(2)(a) of the Children Act 1989 or by a voluntary organisation under section 59(1)(a) of that Act, or in Scotland boarded out with the applicant or his partner under a relevant enactment; or(b) placed with the applicant or his partner prior to adoption; or(c) placed for adoption with the applicant or his partner in accordance with the Adoption and Children Act 2002.
10.3	<p>Subject to paragraph (4), paragraph (1) shall not apply to a child or young person who is not living with the applicant and he—</p> <ul style="list-style-type: none">(a) is being looked after by, or in Scotland is in the care of, a local authority under a relevant enactment; or(b) has been placed, or in Scotland boarded out, with a person other than the applicant prior to adoption; or(c) has been placed for adoption in accordance with the Adoption and Children Act 2002 or the Adoption Agencies (Scotland) Regulations 2009; or in accordance with an adoption allowance scheme made under section 71 of the Adoption and Children (Scotland) Act 2007 (adoption allowances schemes).
10.4	<p>The authority shall treat a child or young person to whom paragraph (3a) applies as being a member of the applicant's household in any reduction week where;</p> <ul style="list-style-type: none">(a) that child or young person lives with the applicant for part or all of that reduction week; and(b) the authority considers that it is responsible to do so taking into account the nature and frequency of that child's or young person's visits.
10.5	<p>In this paragraph 'relevant enactment' means the Army Act 1955, the Air Force Act 1955, the Naval Discipline Act 1957, the Matrimonial Proceedings (Children) Act 1958, the Social Work (Scotland) Act 1968, the Family Law Reform Act 1969, the Children and Young Persons Act 1969, the Matrimonial Causes Act 1973, the Children Act 1975, the Domestic Proceedings and Magistrates' Courts Act 1978, the Adoption and Children (Scotland) Act 1978, the Family Law Act 1986, the Children Act 1989, the Children (Scotland) Act 1995 and the Legal Aid, Sentencing and Punishment of Offenders Act 2012 as amended.</p>
11.0	Calculation of income and capital of members of applicant's family and of a polygamous marriage
11.1	<p>The income and capital of an applicant's partner within this scheme and for the purposes of</p>

claiming council tax reduction is to be treated as income and capital of the applicant and shall be calculated or estimated in accordance with the following provisions in like manner as for the applicant; and any reference to the 'applicant' shall, except where the context otherwise requires be construed for the purposes of this scheme as if it were a reference to his partner.

11.2 Where an applicant or the partner of is married polygamously to two or more members of his household–

- (a) the applicant shall be treated as possessing capital and income belonging to each such member; and
- (b) the income and capital of that member shall be calculated in accordance with the following provisions of this scheme in like manner as for the applicant.

11.3 The income and capital of a child or young person shall not be treated as the income and capital of the applicant.

12.0 Calculation of income and capital: persons who have an award of universal credit

12.1 Any universal credit data or notification received by the authority may be used as a claim for reduction or in the assessment of council tax reduction including data received from the Secretary of State where the applicant no longer qualifies for a universal credit award

12.2 In determining the income of an applicant

- (a) who has, or
- (b) who (jointly with his partner) has,

an award of universal credit the authority may use the calculation or estimate of the income of the applicant, or the applicant and his partner jointly (as the case may be), made by the Secretary of State for the purpose of determining the award of universal credit. The authority may use any other assessment based on the information provided by the Secretary of State.

12.3 The authority may adjust the amount referred to in sub-paragraph (2) to take account of

- (a) income consisting of the award of universal credit;
- (b) any sum to be disregarded in the calculation of earnings;
- (c) any sum to be disregarded in the calculation of income other than earnings; and
- (d) any sum which may be disregarded as housing costs;

12.4 The amount for the award of universal credit is to be determined by multiplying the amount of the award by 12 and dividing the product by 52.

12.5 In determining the capital of an applicant;

- (a) who has, or
- (b) who (jointly with his partner) has,

an award of universal credit, the authority must use the calculation or estimate of the capital of the applicant, or the applicant and his partner jointly (as the case may be), made by the Secretary of State for the purpose of determining that award

13.0 Calculation of income on a weekly basis

13.1 For the purposes of this scheme the income of an applicant shall be calculated on a weekly basis by estimating the amount which is likely to be his average weekly income.

14.0 Average weekly earnings of employed earners

14.1 Where an applicant's income consists of earnings from employment as an employed earner his average weekly earnings shall be estimated by the authority by reference to his actual earnings over a period determined by the authority as reasonable.

14.2 Where the applicant is recently employed and cannot furnish the appropriate evidence, the

authority may require the applicant's employer to furnish an estimate of the applicant's likely weekly earnings over such period as the authority may require and the applicant's average weekly earnings shall be estimated by reference to that estimate.

- 14.3 Where the amount of an applicant's earnings changes during an award the authority shall estimate his average weekly earnings by reference to his likely earnings from the employment over such period as is appropriate in order that his average weekly earnings may be estimated accurately.

15.0 Average weekly earnings of self-employed earners

- 15.1 Where an applicant's income consists of earnings from employment as a self-employed earner his average weekly earnings shall be estimated by reference to his earnings from that employment over such period as is appropriate in order that his average weekly earnings may be estimated accurately.

16.0 Average weekly income other than earnings

- 16.1 An applicant's income which does not consist of earnings shall be estimated over such period as is appropriate in order that his average weekly income may be estimated accurately.

17.0 Calculation of average weekly income from tax credits

- 17.1 Where this section applies, the period over which a tax credit is to be taken into account shall be the period set out in paragraph (2)

- 17.2 Where the instalment in respect of which payment of a tax credit is made is;
- (a) a daily instalment, the period is 1 day, being the day in respect of which the instalment is paid;
 - (b) a weekly instalment, the period is 7 days, ending on the day on which the instalment is due to be paid;
 - (c) a two-weekly instalment, the period is 14 days, commencing 6 days before the day on which the instalment is due to be paid;
 - (d) a four-weekly instalment, the period is 28 days, ending on the day on which the instalment is due to be paid.

- 17.3 For the purposes of this section 'tax credit' means child tax credit or working tax credit.

18.0 Calculation of weekly income

- 18.1 For the purposes of this scheme where the period in respect of which a payment is made;
- (a) does not exceed a week, the weekly amount shall be the amount of that payment;
 - (b) exceeds a week, the weekly amount shall be determined—
 - i. in a case where that period is a month, by multiplying the amount of the payment by 12 and dividing the product by 52;
 - ii. in any other case, by dividing the amount of the payment by the number equal to the number of days in the period to which it relates and multiplying the quotient by 7.

- 18.2 The weekly amount of earnings of an applicant shall be determined by dividing his earnings over the assessment period by the number equal to the number of days in that period and multiplying the quotient by 7.

19.0 Earnings of employed earners

- 19.1 Earnings means in the case of employment as an employed earner, any remuneration or profit derived from that employment and includes—

- (a) any bonus or commission;
- (b) any payment in lieu of remuneration except any periodic sum paid to an applicant on account of the termination of his employment by reason of redundancy;
- (c) any payment in lieu of notice or any lump sum payment intended as compensation for the loss of employment but only in so far as it represents loss of income;
- (d) any holiday pay except any payable more than 4 weeks after termination or interruption of the employment;
- (e) any payment by way of a retainer;
- (f) any payment made by the applicant's employer in respect of expenses not wholly, exclusively and necessarily incurred in the performance of the duties of the employment, including any payment made by the applicant's employer in respect of—
- (g) (i) travelling expenses incurred by the applicant between his home and his place of employment;
- (ii) expenses incurred by the applicant under arrangements made for the care of a member of his family owing to the applicant's absence from home;
- (h) any award of compensation made under section 112(4) or 117(3)(a) of the Employment Rights Act 1996 (remedies and compensation for unfair dismissal);
- (i) any payment or remuneration made under section 28, 34, 64, 68 or 70 of the Employment Rights Act 1996 (right to guarantee payments, remuneration on suspension on medical or maternity grounds, complaints to employment tribunals);
- (j) any such sum as is referred to in section 112 of the Act (certain sums to be earnings for social security purposes);
- (k) any statutory sick pay, statutory maternity pay, statutory paternity pay or statutory adoption pay, or a corresponding payment under any enactment having effect in Northern Ireland;
- (l) any remuneration paid by or on behalf of an employer to the applicant who for the time being is on maternity leave, paternity leave or adoption leave or is absent from work because he is ill;
- (m) the amount of any payment by way of a non-cash voucher which has been taken into account in the computation of a person's earnings in accordance with Part 5 of Schedule 3 to the Social Security (Contributions) Regulations 2001 as amended.

19.2 Earnings shall not include—

- (a) any payment in kind;
- (b) any payment in respect of expenses wholly, exclusively and necessarily incurred in the performance of the duties of employment;
- (c) any occupational pension

20.0 Calculation of net earnings of employed earners

20.1 For the purposes of this scheme, the earnings of an applicant derived or likely to be derived from employment as an employed earner to be taken into account shall be his net earnings.

20.2 There shall be disregarded from an applicant's (or their partner's) net earnings, £25 per week. This shall apply irrespective of the applicant's household and only one disregard shall be applied per claim.

20.3 Net earnings shall be calculated by taking into account the gross earnings of the applicant from that employment over the assessment period, less;

- (a) any amount deducted from those earnings by way of
 - i) income tax;
 - ii) primary Class 1 National Insurance contributions
- (b) one-half of any sum paid by the applicant by way of a contribution towards an occupational pension scheme;
- (c) one-half of the amount calculated in accordance with paragraph 26.5 in respect of any qualifying contribution payable by the applicant; and

20.4 In this section ‘qualifying contribution’ means any sum which is payable periodically as a contribution towards a personal pension scheme.

20.5 The amount in respect of any qualifying contribution shall be calculated by multiplying the daily amount of the qualifying contribution by the number equal to the number of days in the assessment period; and for the purposes of this section the daily amount of the qualifying contribution shall be determined–

- (a) where the qualifying contribution is payable monthly, by multiplying the amount of the qualifying contribution by 12 and dividing the product by 365;
- (b) in any other case, by dividing the amount of the qualifying contribution by the number equal to the number of days in the period to which the qualifying contribution relates.

20.6 Where the earnings of an applicant are estimated an appropriate estimate of net earnings shall be determined in line with paragraph (3) above.

21.0 Earnings of self-employed earners

21.1 ‘Earnings’, in the case of employment as a self- employed earner, means the gross income of the employment

21.2 ‘Earnings’ shall not include any payment in respect of a person accommodated with the applicant under arrangements made by a local authority or voluntary organisation and payments made to the applicant by a health authority, local authority or voluntary organisation in respect of persons temporarily in the applicant’s care nor shall it include any sports award.

21.3 This paragraph applies to–

- (a) royalties or other sums paid as a consideration for the use of, or the right to use, any copyright, design, patent or trademark; or
- (b) any payment in respect of any–
 - (i) book registered under the Public Lending Right Scheme 1982; or
 - (ii) work made under any international public lending right scheme that is analogous to the Public Lending Right Scheme 1982, where the applicant is the first owner of the copyright, design, patent or trademark, or an original contributor to the book of work concerned.

22.0 Calculation of net profit of self-employed earners

22.1 For the purposes of this scheme the earnings of an applicant to be taken into account shall be

- (a) in the case of a self-employed earner who is engaged in employment on his own account, the net profit derived from that employment;

- (b) in the case of a self-employed earner whose employment is carried on in partnership or is that of a share fisherman within the meaning of the Social Security (Mariners’ Benefits) Regulations 1975, his share of the net profit derived from that employment, less–
 - i. an amount in respect of income tax and of national insurance contributions payable under this scheme; and
 - ii. one-half of the amount calculated in accordance with paragraph (11) in respect of any qualifying premium.

22.2 There shall be disregarded from an applicant’s (or their partner’s) net earnings, £35 per week for a single applicant. £70 per week where the applicant is:

- one of a couple; or
- is responsible for a dependant child or young person; or
- is a carer; or
- is any of the following:

- (a) a part-time fire-fighter employed by a fire and rescue authority constituted by a scheme under section 2 of the Fire and Rescue Services Act 2004(1) or a scheme to which section 4 of that Act applies;
- (b) a part-time fire-fighter employed by a fire and rescue authority (as defined in section 1 of the Fire (Scotland) Act 2005 or a joint fire and rescue board constituted by an amalgamation scheme made under section 2(1) of that Act;
- (c) an auxiliary coastguard in respect of coast rescue activities;
- (d) a person engaged part-time in the manning or launching of a life boat;
- (e) a member of any territorial or reserve force prescribed in Part 1 of Schedule 6 to the Social Security (Contributions) Regulations 2001;

This shall apply irrespective of the applicant's household and only one disregard shall be applied per claim.

- 22.3 The net profit of the employment must be calculated by taking into account the earnings for the employment over the assessment period less
- (a) any expenses wholly and exclusively incurred in that period for the purposes of that employment;
 - (b) an amount in respect of;
 - i. income tax, and
 - ii. national insurance contributions payable calculated in accordance with section 22; and
 - iii. one-half of the amount calculated in accordance with paragraph (11) in respect of any qualifying premium.
- 22.4 For the purposes of paragraph (1b) the net profit of the employment shall be calculated by taking into account the earnings of the employment over the assessment period less, any expenses wholly and exclusively incurred in that period for the purposes of the employment.
- 22.5 No deduction shall be made under paragraph (3 a) or (4), in respect of–
- (a) any capital expenditure;
 - (b) the depreciation of any capital asset;
 - (c) any sum employed or intended to be employed in the setting up or expansion of the employment;
 - (d) any loss incurred before the beginning of the assessment period;
 - (e) the repayment of capital on any loan taken out for the purposes of the employment;
 - (f) any expenses incurred in providing business entertainment, and
 - (g) any debts, except bad debts proved to be such, but this sub-paragraph shall not apply to any expenses incurred in the recovery of a debt.
- 22.6 A deduction shall be made under paragraph (3 a) or (4) in respect of the repayment of capital on any loan used for–
- (a) the replacement in the course of business of equipment or machinery; and
 - (b) the repair of an existing business asset except to the extent that any sum is payable under an insurance policy for its repair.
- 22.7 The authority shall refuse to make deduction in respect of any expenses where it is not satisfied given the nature and the amount of the expense that it has been reasonably incurred.
- 22.8 For the avoidance of doubt–
- (a) deduction shall not be made in respect of any sum unless it has been expended for the purposes of the business;
 - (b) a deduction shall be made thereunder in respect of–
 - i. the excess of any value added tax paid over value added tax received in the assessment period;
 - ii. any income expended in the repair of an existing business asset except to the extent that any sum is payable under an insurance policy for its repair;
 - iii. any payment of interest on a loan taken out for the purposes of the employment

22.9 Where an applicant is engaged in employment, as a child minder the net profit of the employment shall be one-third of the earnings of that employment, less an amount in respect of

- (a) income tax; and
- (b) national insurance contributions calculated in accordance with section 22 (and
- (c) one-half of the amount any qualifying pension contribution in accordance with (11).

22.10 For the avoidance of doubt where an applicant is engaged in employment as a self-employed earner and he is also engaged in one or more other employments as a self-employed or employed earner any loss incurred in any one of his employments shall not be offset against his earnings in any other of his employments.

22.11 The amount in respect of any qualifying premium shall be calculated by multiplying the daily amount of the qualifying premium by the number equal to the number of days in the assessment period; and for the purposes of this section the daily amount of the qualifying premium shall be determined

- (a) where the qualifying premium is payable monthly, by multiplying the amount of the qualifying premium by 12 and divided the product by 365;
- (b) in any other case, by dividing the amount of the qualifying premium by the number equal to the number of days in the period to which the qualifying premium relates.

22.12 In this section, 'qualifying premium' means any premium which is payable periodically in respect of a personal pension scheme and is so payable on or after the date of claim.

23.0 Deduction of tax and contributions of self-employed earners

23.1 The amount to be deducted in respect of income tax under section 28 shall be calculated on the basis of the amount of chargeable income and as if that income were assessable to income tax at the basic rate of tax applicable to the assessment period less only the personal relief to which the applicant is entitled under section 257(1) of the Income and Corporation Taxes Act 1988 (personal allowances) as is appropriate to his circumstances; but, if the assessment period is less than a year, the earnings to which the basic rate is to be applied and the amount of the personal reliefs deductible under this paragraph shall be calculated on a pro rata basis.

23.2 The amount to be deducted in respect of national insurance contributions under section shall be the total of—

- (a) the amount of Class 2 National Insurance contributions payable at the rate applicable to the assessment period except where the applicant's chargeable income is less than the amount specified in section 11(4) of the Act (small profits threshold) for the tax year applicable to the assessment period; but if the assessment period is less than a year, the amount specified for that tax year shall be reduced pro rata; and
- (b) the amount of Class 4 contributions (if any) which would be payable under section 15 of the Act (Class 4 contributions recoverable under the Income Tax Acts) at the percentage rate applicable to the assessment period on so much of the chargeable income as exceeds the lower limit but does not exceed the upper limit of profits and gains applicable for the tax year applicable to the assessment period; but if the assessment period is less than a year, those limits shall be reduced pro rata.

23.3 In this section 'chargeable income' means—

- (a) the earnings derived from the employment less any expenses deducted under section 22;
- (b) in the case of employment as a child minder, one-third of the earnings of that employment.

24.0 Calculation of income other than earnings

- 24.1 For the purposes of this scheme, the income of an applicant which does not consist of earnings to be taken into account shall be his gross income and any capital treated as income under section 25.
- 24.2 There shall be disregarded from the calculation of an applicant's gross income any sum, where applicable, specified in Schedule 2.
- 24.3 Where the payment of any benefit under the benefit Acts is subject to any deduction by way of recovery the amount to be taken into account shall be the gross amount payable.
- 24.4 Where the applicant or, where he is a member of a couple, his partner is receiving a contributory employment and support allowance and that benefit has been reduced under regulation 63 of the Employment and Support Allowance Regulations, the amount of that benefit to be taken into account is the amount as if it had not been reduced.
- 24.5 Where an award of any working tax credit or child tax credit under the Tax Credits Act is subject to a deduction by way of recovery of an overpayment of working tax credit or child tax credit which arose in a previous tax year the amount to be taken into account shall be the amount of working tax credit or child tax credit awarded less the amount of that deduction.
- 24.6 'Tax year' means a period beginning with 6th April in one year and ending with 5th April in the next.
- 24.7 Paragraphs (7),(8), (9) and (10) apply to any applicant who is a student. Paragraph (8) and (9) apply where a relevant payment has been made to a person in an academic year; and that person abandons, or is dismissed from, his course of study before the payment to him of the final instalment of the relevant payment.
- 24.8 Where a relevant payment is made quarterly, the amount of a relevant payment to be taken into account for the assessment period for the purposes of paragraph (1) in respect of a person to whom paragraph (7) applies, shall be calculated by applying the formula–
$$\frac{A - (B \times C)}{D}$$
Where
A = the total amount of the relevant payment which that person would have received had he remained a student until he last day of the academic term in which he abandoned, or was dismissed from, his course;
B = the number of reduction weeks from the reduction week immediately following that which includes the first day of that academic year to the reduction week which includes the day on which the person abandoned, or was dismissed from, his course;
C = the weekly amount of the relevant payment, before the application of the £10 disregard, which would have been taken into account as income had the person not abandoned or been dismissed from, his course and, in the case of a person who was not entitled to council tax reduction immediately before he abandoned or was dismissed from his course, had that person, at that time, been entitled to housing benefit;
D = the number of reduction weeks in the assessment period.
- 24.9 Where a relevant payment is made by two or more instalments in a quarter, the amount of a relevant payment to be taken into account for the assessment period for the purposes of paragraph (1) in respect of a person to whom paragraph (8) applies, shall be calculated by applying the formula in paragraph (8) but as if–
A = the total amount of relevant payments which that person received, or would have received, from the first day of the academic year to the day the person abandoned the course or was dismissed from it.

24.10 In this section– ‘academic year’ and ‘student loan’ shall have the same meanings as for the purposes of this scheme, ‘assessment period’ means–

- (a) in a case where a relevant payment is made quarterly, the period beginning with the reduction week which includes the day on which the person abandoned, or was dismissed from, his course and ending with the reduction week which includes the last day of the last quarter for which an instalment of the relevant payment was payable to that person;
- (b) in a case where the relevant payment is made by two or more instalments in a quarter, the period beginning with the reduction week which includes the day on which the person abandoned, or was dismissed from, his course and ending with the reduction week which includes–
 - i. the day immediately before the day on which the next instalment of the relevant payment would have been due had the payments continued; or
 - ii. the last day of the last quarter for which an instalment of the relevant payment was payable to that person.

whichever of those date is earlier

‘quarter’ in relation to an assessment period means a period in that year beginning on;

- (a) 1st January and ending on 31st March;
- (b) 1st April and ending on 30th June;
- (c) 1st July and ending on 31st August; or
- (d) 1st September and ending on 31st December;

‘relevant payment’ means either a student loan or an amount intended for the maintenance of dependants.

25.0 Capital treated as income and Notional Income

25.1 Any payment received under an annuity shall be treated as income.

25.2 Any earnings to the extent that they are not a payment of income shall be treated as income.

25.3 Any Career Development Loan paid pursuant to section 2 of the 1973 Act shall be treated as income

25.4 Where an agreement or court order provides that payments shall be made to the applicant in consequence of any personal injury to the applicant and that such payments are to be made, wholly or partly, by way of periodic payments, any such periodic payments received by the applicant (but not a payment which is treated as capital), shall be treated as income.

25.6 An applicant shall be treated as possessing income of which he has deprived himself for the purpose of securing entitlement of reduction or increasing the amount of that reduction.

25.7 Except in the case of–

- (a) a discretionary trust;
- (b) a trust derived from a payment made in consequence of a personal injury;
- (c) a personal pension scheme, occupational pension scheme or a payment made by the Board of the Pension Protection Fund where the applicant has not attained the qualifying age for state pension credit;
- (d) rehabilitation allowance made under section 2 of the 1973 Act;
- (e) child tax credit; or
- (f) working tax credit,

any income which would become available to the applicant upon application being made, but which has not been acquired by him, shall be treated as possessed by the applicant but only from the date on which it could be expected to be acquired were an application made.

25.8 Any payment of income made–

- (a) to a third party in respect of a single applicant or a member of the family (but not a member of the third party's family) shall, where that payment is a payment of an occupational pension, a pension or other periodical payment made under or by a personal pension scheme or a payment made by the Board of the Pension Protection Fund, be treated as possessed by that single applicant or, as the case may be, by that member;
- (b) to a third party in respect of a single applicant or in respect of a member of the family (but not a member of the third party's family) shall, where it is not a payment referred to in sub-paragraph a), be treated as possessed by that single applicant or by that member to the extent that it is used for the food, ordinary clothing or footwear, household fuel or rent of that single applicant or, as the case may be, of any member of that family or is used for any council tax or water charges for which that applicant or member is liable;
- (c) to a single applicant or a member of the family in respect of a third party (but not in respect of another member of that family) shall be treated as possessed by that single applicant or, as the case may be, that member of the family to the extent that it is kept or used by him or used by or on behalf of any member of the family.

25.9 This section shall not apply in respect of a payment of income made—

- (a) under the Macfarlane Trust, the Macfarlane (Special Payments) Trust, the Macfarlane (Special Payments) (No. 2) Trust, the Fund, the Eileen Trust, MFET Limited, the Skipton Fund, the Caxton Foundation or the Independent Living Fund (2006);
- (b) pursuant to section 19(1)(a) of the Coal Industry Act 1994 (concessionary coal);
- (c) pursuant to section 2 of the 1973 Act in respect of a person's participation—
 - (i) in an employment programme specified in regulation 75(1)(a)(ii) of the Jobseeker's Allowance Regulations;
 - (ii) in a training scheme specified in regulation 75(1)(b)(ii) of those Regulations;
 - (iii) in the Intense Activity Period specified in regulation 75(1)(a)(iv) of those Regulations;
 - (iv) in a qualifying course within the meaning specified in regulation 17A(7) of those Regulations or;
 - (v) in the Flexible New Deal specified in regulation 75(1)(a)(v) of those Regulations;
- (d) in respect of a previous participation in the Mandatory Work Activity Scheme;
- (e) under an occupational pension scheme, in respect of a pension or other periodical payment made under a personal pension scheme or a payment made by the Board of the Pension Protection Fund where—
 - (i) a bankruptcy order has been made in respect of the person in respect of whom the payment has been made or, in Scotland, the estate of that person is subject to sequestration or a judicial factor has been appointed on that person's estate under section 41 of the Solicitors (Scotland) Act 1980;
 - (ii) the payment is made to the trustee in bankruptcy or any other person acting on behalf of the creditors; and
 - (iii) the person referred to in (i) and any member of his family does not possess, or is not treated as possessing, any other income apart from that payment.

25.10 Where an applicant is in receipt of any benefit (other than council tax reduction) under the benefit Acts and the rate of that benefit is altered with effect from a date on or after 1st April in any year but not more than 14 days thereafter, the authority shall treat the applicant as possessing such benefit at the altered rate from 1st April in that year..

25.11 Where—

- (a) applicant performs a service for another person; and
- (b) that person makes no payment of earnings or pays less than that paid for a comparable employment in the area, the authority shall treat the applicant as possessing such earnings (if any) as is reasonable for that employment unless the applicant satisfies the authority that the means of that person are insufficient for him to pay or to pay more for the service.

25.12 Paragraph (11) shall not apply–

- (a) to an applicant who is engaged by a charitable or voluntary organisation or who is a volunteer if the authority is satisfied in any of those cases that it is reasonable for him to provide those services free of charge; or
- (b) in a case where the service is performed in connection with–
 - (i) the applicant’s participation in an employment or training programme in accordance with regulation 19(1)(q) of the Jobseeker’s Allowance Regulations, other than where the service is performed in connection with the applicant’s participation in the Intense Activity Period specified in regulation 75(1)(a)(iv) of those Regulations or
 - (ii) the applicant’s or the applicant’s partner’s participation in an employment or training programme as defined in regulation 19(3) of those Regulations for which a training allowance is not payable or, where such an allowance is payable, it is payable for the sole purpose of reimbursement of travelling or meal expenses to the person participating in that programme ; or
- (c) to an applicant who is participating in a work placement approved by the Secretary of State (or a person providing services to the Secretary of State) before the placement starts.

25.13 ‘Work placement’ means practical work experience which is not undertaken in expectation of payment.

25.14 Where an applicant is treated as possessing any income under this section, the foregoing provisions of this scheme shall apply for the purposes of calculating the amount of that income as if a payment has actually been made and as if it were actual income which he does possess.

25.15 Where an applicant is treated as possessing any earnings under this section his net earnings shall be calculated by taking into account those earnings which he is treated as possessing, less;

- (a) an amount in respect of income tax equivalent to an amount calculated by applying to those earnings the starting rate or, as the case may be, the starting rate and the basic rate of tax applicable to the assessment period less only the personal relief to which the applicant is entitled under sections 257(1) of the Income and Corporation Taxes Act 1988 (personal allowances) as is appropriate to his circumstances; but, if the assessment period is less than a year, the earnings to which the starting rate of tax is to be applied and the amount of the personal relief deductible under this subparagraph shall be calculated on a pro rate basis;
- (b) an amount equivalent to the amount of the primary Class 1 National Insurance contributions that would be payable by him in respect of those earnings if such contributions were payable; and
- (c) one-half of any sum payable by the applicant by way of a contribution towards an occupational or personal pension scheme.

26.0 Capital limit

26.1 For the purposes of this scheme, the prescribed amount is £6,000 and no reduction shall be granted when the applicant has an amount greater than this level.

27.0 Calculation of capital

27.1 For the purposes of this scheme, the capital of an applicant to be taken into account shall, subject to paragraph (2), be the whole of his capital calculated in accordance with this scheme and any income treated as capital under this scheme

27.2 There shall be disregarded from the calculation of an applicant’s capital under paragraph (1), any capital, where applicable, specified in Schedule 3.

28.0 Disregard of capital of child and young person

28.1 The capital of a child or young person who is a member of the applicant's family shall not be treated as capital of the applicant.

29.0 Income treated as capital

29.1 Any bounty derived from employment and paid at intervals of at least one year shall be treated as capital.

29.2 Any amount by way of a refund of income tax deducted from profits or emoluments chargeable to income tax under Schedule D or E shall be treated as capital.

29.3 Any holiday pay which is not earnings shall be treated as capital.

29.4 Any income derived from capital shall be treated as capital but only from the date it is normally due to be credited to the applicant's account.

29.5 In the case of employment as an employed earner, any advance of earnings or any loan made by the applicant's employer shall be treated as capital.

29.6 Any charitable or voluntary payment which is not made or due to be made at regular intervals, other than a payment which is made under or by the Trusts, the Fund, the Eileen Trust, MFET Limited, the Skipton Fund, the Caxton Foundation, the Independent Living Fund (2006) or the London Bombings Charitable Relief Fund, shall be treated as capital.

29.7 There shall be treated as capital the gross receipts of any commercial activity carried on by a person in respect of which assistance is received under the self-employment route, but only in so far as those receipts were payable into a special account during the period in which that person was receiving such assistance.

29.8 Any arrears of subsistence allowance which are paid to an applicant as a lump sum shall be treated as capital.

29.9 Any arrears of working tax credit or child tax credit shall be treated as capital.

30.0 Calculation of capital in the United Kingdom

30.1 Capital which an applicant possesses in the United Kingdom shall be calculated at its current market or surrender value less—

- a. where there would be expenses attributable to the sale, 10 per cent.; and
- b. the amount of any encumbrance secured on it;

31.0 Calculation of capital outside the United Kingdom

31.1 Capital which an applicant possesses in a country outside the United Kingdom shall be calculated

(a) in a case where there is no prohibition in that country against the transfer to the United Kingdom of an amount equal to its current market or surrender value in that country, at that value.

(b) in a case where there is such a prohibition, at the price which it would realise if sold in the United Kingdom to a willing buyer,

less, where there would be expenses attributable to sale, 10 per cent. and the amount of any encumbrances secured on it.

32.0 Notional capital

32.1 An applicant shall be treated as possessing capital of which he has deprived himself for the purpose of securing entitlement to council tax reduction or increasing the amount of that reduction except to the extent that that capital is reduced in accordance with section 33.

32.2 Except in the case of

- (a) a discretionary trust; or
- (b) a trust derived from a payment made in consequence of a personal injury; or
- (c) any loan which would be obtained only if secured against capital disregarded under Schedule 3; or
- (d) a personal pension scheme, occupational pension scheme or a payment made by the Board of the Pension Protection Fund; or
- (e) any sum to Schedule 3 refers; or
- (f) child tax credit; or
- (g) working tax credit,

any capital which would become available to the applicant upon application being made, but which has not been acquired by him, shall be treated as possessed by him but only from the date on which it could be expected to be acquired were an application made.

32.3 Any payment of capital, other than a payment of capital specified in paragraph (4), made

- (a) to a third party in respect of a single applicant or a member of the family (but not a member of the third party's family) shall, where that payment is a payment of an occupational pension, a pension or other periodical payment made under a personal pension scheme or a payment made by the Board of the Pension Protection Fund, be treated as possessed by that single applicant or, as the case may be, by that member;
- (b) to a third party in respect of a single applicant or in respect of a member of the family (but not a member of the third party's family) shall, where it is not a payment referred to in subparagraph (a), be treated as possessed by that single applicant or by that member to the extent that it is used for the food, ordinary clothing or footwear, household fuel or rent of that single applicant or, as the case may be, of any member of that family or is used for any council tax or water charges for which that applicant or member is liable;
- (c) to a single applicant or a member of the family in respect of a third party (but not in respect of another member of that family) shall be treated as possessed by that single applicant or, as the case may be, that member of the family to the extent that it is kept or used by him or used by or on behalf of any member of the family.

32.4 Paragraph 32.3 shall not apply in respect of a payment of capital made:

- (a) under or by any of the Trusts, the Fund, the Eileen Trust, MFET Limited, the Independent Living Fund (2006), the Skipton Fund, the Caxton Foundation or the London Bombings Relief Charitable Fund;
- (b) pursuant to section 2 of the 1973 Act in respect of a person's participation:
 - i. in an employment programme specified in regulation 75(1)(a)(ii) of the Jobseeker's Allowance Regulations;
 - ii. in a training scheme specified in regulation 75(1)(b)(ii) of those Regulations;
 - iii. in the Intense Activity Period specified in regulation 75(1)(a)(iv) of those Regulations;
 - iv. in a qualifying course within the meaning specified in regulation 17A(7) of those Regulations; or
 - v. in the Flexible New Deal specified in regulation 75(1)(a)(v) of those Regulations;
- (c) in respect of a person's participation in the Mandatory Work Activity Scheme;
- (d) Enterprise Scheme;
- (e) in respect of an applicant's participation in the Employment, Skills and Enterprise Scheme or Back to Work Scheme;
- (f) under an occupational pension scheme, in respect of a pension or other periodical payment made under a personal pension scheme or a payment made by the Board of the Pension

Protection Fund where—

- vi. a bankruptcy order has been made in respect of the person in respect of whom the payment has been made or, in Scotland, the estate of that person is subject to sequestration or a judicial factor has been appointed on that person's estate under section 41 of the Solicitors (Scotland) Act 1980;
- vii. the payment is made to the trustee in bankruptcy or any other person acting on behalf of the creditors; and
- viii. the person referred to in (i) and any member of his family does not possess, or is not treated as possessing, any other income apart from that payment.

32.5 Where an applicant stands in relation to a company in a position analogous to that of a sole owner or partner in the business of that company, he may be treated as if he were such sole owner or partner and in such a case

- (a) the value of his holding in that company shall be disregarded; and
- (b) he shall be treated as possessing an amount of capital equal to the value or, as the case may be, his share of the value of the capital of that company and the foregoing provisions of this Section shall apply for the purposes of calculating that amount as if it were actual capital which he does possess.

32.6 For so long as the applicant undertakes activities in the course of the business of the company, the amount which, he is treated as possessing under paragraph (5) shall be disregarded.

32.7 Where an applicant is treated as possessing capital under any of paragraphs (1) and (2) the foregoing provisions of this Section shall apply for the purposes of calculating its amount as if it were actual capital, which he does possess.

33.0 Diminishing notional capital rule

33.1 Where an applicant is treated as possessing notional capital the amount which he is treated as possessing shall be reduced by the amount calculated by the authority as the weekly amount of council tax reduction lost due to the inclusion of the notional capital within the calculation.

33.1 The authority shall determine the frequency by which the notional capital is reduced.

34.0 Capital jointly held

34.1 Where an applicant and one or more persons are beneficially entitled in possession to any capital asset they shall be treated as if each of them were entitled in possession to the whole beneficial interest therein in an equal share and the foregoing provisions of this Section shall apply for the purposes of calculating the amount of capital which the applicant is treated as possessing as if it were actual capital which the applicant does possess

35.0 Students - Student related definitions

35.1 In this scheme the following definitions apply;

'academic year' means the period of twelve months beginning on 1st January, 1st April, 1st July or 1st September according to whether the course in question begins in the winter, the spring, the summer or the autumn respectively but if students are required to begin attending the course during August or September and to continue attending through the autumn, the academic year of the course shall be considered to begin in the autumn rather than the summer;

'access funds' means;

- (a) grants made under section 68 of the Further and Higher Education Act 1992 for the purpose of providing funds on a discretionary basis to be paid to students;
- (b) grants made under section 73(a) and (c) and 74(1) of the Education (Scotland) Act 1980;
- (c) grants made under Article 30 of the Education and Libraries (Northern Ireland) Order 1993 or grants, loans or other payments made under Article 5 of the Further Education (Northern Ireland) Order 1997 in each case being grants, or grants, loans or other payments as the

- case may be, for the purpose of assisting students in financial difficulties;
- (d) discretionary payments, known as “learner support funds”, which are made available to students in further education by institutions out of funds provided by the Secretary of State under section 14 of the Education Act 2002 or the Chief Executive of Skills Funding under sections 100 and 101 of the Apprenticeships, Skills, Children and Learning Act 2009; or
 - (e) Financial Contingency Funds made available by the Welsh Ministers;

‘college of further education’ means a college of further education within the meaning of Part 1 of the Further and Higher Education (Scotland) Act 1992;

‘contribution’ means;

- (a) any contribution in respect of the income of a student or any person which the Secretary of State, the Scottish Ministers or an education authority takes into account in ascertaining the amount of a student’s grant or student loan; or
- (b) any sums, which in determining the amount of a student’s allowance or bursary in Scotland under the Education (Scotland) Act 1980, the Scottish Ministers or education authority takes into account being sums which the Scottish Ministers or education authority consider that it is reasonable for the following person to contribute towards the holder’s expenses;
 - (i) the holder of the allowance or bursary;
 - (ii) the holder’s parents;
 - (iii) the holders parent’s spouse, civil partner or a person ordinarily living with the holder’s parent as if he or she were the spouse or civil partner of that parent; or
 - (iv) the holder’s spouse or civil partner;

‘course of study’ means any course of study, whether or not it is a sandwich course and whether or not a grant is made for attending or undertaking it;

‘covenant income’ means the gross income payable to a full-time student under a Deed of Covenant by his parent;

‘education authority’ means a government department, a local education authority as defined in section 12 of the Education Act 1996 (interpretation), a local education authority as defined in section 123 of the Local Government (Scotland) Act 1973 an education and library board established under Article 3 of the Education and Libraries (Northern Ireland) Order 1986, any body which is a research council for the purposes of the Science and Technology Act 1965 or any analogous government department, authority, board or body of the Channel Island, Isle of Man or any other country outside Great Britain;

‘full-time course of study’ means a full time course of study which;

- (a) is not funded in whole or in part by the Secretary of State under section 14 of the Education Act 2002, the Chief Executive of Skills Funding or by the Welsh Ministers or a full-time course of study which is not funded in whole or in part by the Scottish Ministers at a college of further education or a full-time course of study which is a course of higher education and is funded in whole or in part by the Scottish Ministers;;
- (b) is funded in whole or in part by the Secretary of State under section 14 of the Education Act 2002, the Chief Executive of Skills Funding or by the Welsh Ministers if it involves more than 16 guided learning hours per week for the student in question, according to the number of guided learning hours per week for that student set out—
 - (i) in the case of a course funded by the Secretary of State under section 14 of the Education Act 2002 or the Chief Executive of Skills Funding, in the student’s learning agreement signed on behalf of the establishment which is funded by either of those persons for the delivery of that course; or
 - (ii) in the case of a course funded by the Welsh Ministers, in a document signed on behalf of the establishment which is funded by that Council for the delivery of that course; or
- (c) is not higher education and is funded in whole or in part by the Scottish Ministers at a college of further education and involves—
 - (i) more than 16 hours per week of classroom-based or workshop-based programmed learning under the direct guidance of teaching staff according to the number of hours set out in a document signed on behalf of the college; or
 - (ii) 16 hours or less per week of classroom-based or workshop-based programmed

learning under the direct guidance of teaching staff and additional hours using structured learning packages supported by the teaching staff where the combined total of hours exceeds 21 hours per week, according to the number of hours set out in a document signed on behalf of the college;

'full-time student' means a person attending or undertaking a full-time course of study and includes a student on a sandwich course;

'grant' means any kind of educational grant or award and includes any scholarship, studentship, exhibition allowance or bursary;

'grant income' means

- (a) any income by way of a grant;
- (b) any contribution whether or not it is paid;

'higher education' means higher education within the meaning of Part 2 of the Further and Higher Education (Scotland) Act 1992; **'last day of the course'** means;

- (a) in the case of a qualifying course, the date on which the last day of that course falls or the date on which the final examination relating to that course is completed, whichever is the later;
- (b) in any other case, the date on which the last day of the final academic term falls in respect of the course in which the student is enrolled;

'period of study' means–

- (a) in the case of a course of study for one year or less, the period beginning with the start of the course and ending with the last day of the course;
- (b) in the case of a course of study for more than one year, in the first or, as the case may be, any subsequent year of the course, other than the final year of the course, the period beginning with the start of the course or, as the case may be, the year's start and ending with either–
 - (i) the day before the start of the next year of the course in a case where the student's grant or loan is assessed at a rate appropriate to his studying throughout the year, or, if he does not have a grant or loan, where a loan would have been assessed at such a rate had he had one; or
 - (ii) in any other case, the day before the start of the normal summer vacation appropriate to his course;
- (c) in the final year of a course of study of more than one year, the period beginning with that year's start and ending with the last day of the course;

'periods of experience' means periods of work experience which form part of a sandwich course;

'qualifying course' means a qualifying course as defined for the purposes of Parts 2 and 4 of the Jobseeker's Allowance Regulations;

'modular course' means a course of study which consists of two or more modules, the successful completion of a specified number of which is required before a person is considered by the educational establishment to have completed the course.

'sandwich course' has the meaning prescribed in regulation 2(9) of the Education (Student Support) Regulations 2008, regulation 4(2) of the Education (Student Loans), (Scotland), Regulations 2007 or regulation 2(8) of the Education (Student Support) Regulations (Northern Ireland) 2007, as the case may be;

'standard maintenance grant' means–

- (a) except where paragraph (b) or (c) applies, in the case of a student attending or undertaking a course of study at the University of London or an establishment within the area comprising the City of London and the Metropolitan Police District, the amount specified for the time being in paragraph 2(2)(a) of Schedule 2 to the Education (Mandatory Awards) Regulations 2003 ('the 2003 Regulations') for such a student;
- (b) except where paragraph (c) applies, in the case of a student residing at his parent's home, the amount specified in paragraph 3 thereof;
- (c) in the case of a student receiving an allowance or bursary under the Education (Scotland) Act 1980, the amount of money specified as 'standard maintenance allowance' for the relevant year appropriate for the student set out in the Student Support in Scotland Guide issued by the student Awards Agency for Scotland, or its nearest equivalent in the case of a bursary provided by a college of further education or a local education authority;

(d) in any other case, the amount specified in paragraph 2(2) of Schedule 2 to the 2003 Regulations other than in sub-paragraph (a) or (b) thereof;

'student' means a person, other than a person in receipt of a training allowance, who is attending or undertaking—

- (a) a course of study at an educational establishment; or
- (b) a qualifying course;

'student loan' means a loan towards a student's maintenance pursuant to any regulations made under section 22 of the Teaching and Higher Education Act 1998, section 73 of the Education (Scotland) Act 1980 or Article 3 of the Education (Student Support) (Northern Ireland) Order 1998 and shall include, in Scotland, a young student's bursary paid under regulation 4(1)(c) of the Student's Allowances (Scotland) Regulations 2007

35.2 For the purposes of the definition of 'full-time student', a person shall be regarded as attending or, as the case may be, undertaking a full-time course of study or as being on a sandwich course

- (a) in the case of a person attending or undertaking a part of a modular course which would be a full-time course of study for the purposes of this Part, for the period beginning on the day on which that part of the course starts and ending;
 - (i) on the last day on which he is registered with the educational establishment as attending or undertaking that part as a full-time course of study; or
 - (ii) on such earlier date (if any) as he finally abandons the course or is dismissed from it;
- (b) in any other case, throughout the period beginning on the date on which he starts attending or undertaking the course and ending on the last day of the course or on such earlier date (if any) as he finally abandons it or is dismissed from it.

35.3 For the purposes of sub-paragraph (a) of paragraph 43.2, the period referred to in that sub-paragraph shall include;

- a. where a person has failed examinations or has failed to successfully complete a module relating to a period when he was attending or undertaking a part of the course as a full-time course of study, any period in respect of which he attends or undertakes the course for the purpose of retaking those examinations or that module;
- b. any period of vacation within the period specified in that paragraph or immediately following that period except where the person has registered with the educational establishment to attend or undertake the final module in the course and the vacation immediately follows the last day on which he is required to attend or undertake the course.

36.0 Students who are excluded from entitlement to council tax reduction

36.1 Students except those define in paragraph (3) are not able to claim Council tax reduction under Classes D of the authority's reduction scheme.

36.2 To be eligible for reduction, the student must be liable for Council Tax under Section 6 of the Local Government Finance Act 1992 and they must not be deemed to be a full-time student or a person from abroad within the meaning of section 7 of this scheme (persons from aboard).

36.3 Paragraph 36.2 shall not apply to a student

- (a) who is a person on income support, an income-based jobseeker's allowance or an income-related employment and support allowance;
- (b) who is a lone parent;
- (c) who is in receipt of a Personal Independence Payment;
- (d) who has a partner who is also a full-time student, if he or that partner is treated as responsible for a child or young person;
- (e) (who is a single applicant with whom a child is placed by a local authority or voluntary organisation within the meaning of the Children Act 1989,
- (f) who is;
 - (i) aged under 21 and whose course of study is not a course of higher education, or

- (ii) a qualifying young person or child within the meaning of section 142 of the Act (child and qualifying young person);
- (g) in respect of whom
 - i) a supplementary requirement has been determined under paragraph 9 of Part 2 of Schedule 2 to the Education (Mandatory Awards) Regulations 2003;
 - (ii) an allowance, or as the case may be, bursary has been granted which includes a sum under paragraph (1)(d) or regulation 4 of the Students' Allowances (Scotland) Regulations 1999 or, as the case may be, under paragraph (1)(d) of regulation 4 of the Education Authority (Bursaries) (Scotland) Regulations 1995, in respect of expenses incurred;
 - (iii) a payment has been made under section 2 of the Education Act 1962 or under or by virtue of regulations made under the Teaching and Higher Education Act 1998;
 - (iv) a grant has been made under regulation 13 of the Education (Student Support) Regulations 2005 or under regulation 13 of the Education (Student Support) Regulations (Northern Ireland) 2000; or
 - (v) a supplementary requirement has been determined under paragraph 9 of Schedule 6 to the Students Awards Regulations (Northern Ireland) 1999 or a payment has been made under Article 50(3) of the Education and Libraries (Northern Ireland) Order 1986,

on account of his disability by reason of deafness.

- 36.4 For the purposes of paragraph (3(f)(i)) the student must have begun, or been enrolled or accepted onto the course before attaining the age of 19
- 36.5 The reference to a course of higher education is a reference to a course of any description mentioned in Schedule 6 to the Education Reform Act 1988.
- 36.6 An intercalating student may be eligible for a reduction if the following circumstances are met:
- (a) at any time during an academic year, with the consent of the relevant educational establishment, he ceases to attend or undertake a course because he is;
 - (i) engaged in caring for another person; or
 - (ii) ill;
 - (b) he has subsequently ceased to be engaged in engaging in caring for that person or, as the case may be, he has subsequently recovered from that illness; and
 - (c) he is not eligible for a grant or a student loan in respect of the period specified in paragraph (7).
- 36.7 The period specified for the purposes of paragraph (6) is the period, not exceeding one year, beginning on the day on which he ceased to be engaged in caring for that person or, as the case may be, the day on which he recovered from that illness and ending on the day before;
- (a) the day on which he resumes attending or undertaking the course; or
 - (b) the day from which the relevant educational establishment has agreed that he may resume attending or undertaking the course,
- which shall first occur.

37.0 Students - Calculation of grant income

- 37.1 The amount of a student's grant income to be taken into account shall, subject to paragraphs (2) and (3), be the whole of his grant income.
- 37.2 There shall be excluded from a student's grant income any payment;
- (a) intended to meet tuition fees or examination fees;
 - (b) in respect of the student's disability;

- (c) intended to meet additional expenditure connected with term time residential study away from the student's educational establishment;
- (d) on account of the student maintaining a home at a place other than that at which he resides during his course;
- (e) on account of any other person but only if that person is residing outside of the United Kingdom and there is no applicable amount in respect of him;
- (f) intended to meet the cost of books and equipment;
- (g) intended to meet travel expenses incurred as a result of his attendance on the course;
- (h) intended for the childcare costs of a child dependant.
- (i) of higher education bursary for care leavers made under Part III of the Children Act 1989.

37.3 Where a student does not have a student loan and is not treated as possessing such a loan, there shall be excluded from the student's grant income;

- (a) the sum of £303 per academic year in respect of travel costs; and
- (b) the sum of £390 per academic year towards the costs of books and equipment, whether or not any such costs are incurred.

37.4 There shall also be excluded from a student's grant income the grant for dependants known as the parents' learning allowance paid pursuant to regulations made under Article 3 of the Education (Student Support) (Northern Ireland) Order 1998 or section 22 of the Teaching and Higher Education Act 1998.

37.5 Subject to paragraphs (6) and (7), a student's grant income shall be apportioned;

- (a) subject to paragraph (8), in a case where it is attributable to the period of study, equally between the weeks in that period beginning with the reduction week, the first day of which coincides with, or immediately follows the first day of the period of study and ending with the reduction week, the last day of which coincides with, or immediately precedes, the last day of the period of study;
- (b) in any other case, equally between the weeks in the period beginning with the reduction week, the first day of which coincides with, or immediately follows, the first day of the period for which it is payable and ending with the reduction week, the last day of which coincides with, or immediately precedes, the last day of the period for which it is payable.

37.6 Any grant in respect of dependants paid under section 63(6) of the Health Services and Public Health Act 1968 (grants in respect of the provision of instruction to officers of hospital authorities) and any amount intended for the maintenance of dependants under Part 3 of Schedule 2 to the Education (Mandatory Awards) Regulations 2004 shall be apportioned equally over the period of 52 weeks or, if there are 53 reduction weeks (including part-weeks) in the year, 53.

37.7 In a case where a student is in receipt of a student loan or where he could have acquired a student loan by taking reasonable steps but had not done so, any amount intended for the maintenance of dependants shall be apportioned over the same period as the student's loan is apportioned or, as the case may be, would have been apportioned.

37.8 In the case if a student on a sandwich course, any periods of experience within the period of study shall be excluded and the student's grant income shall be apportioned equally between the weeks in the period beginning with the reduction week, the first day of which immediately follows the last day of the period of experience and ending with the reduction week, the last day of which coincides with, or immediately precedes, the last day of the period of study.

38.0 Students- Calculation of covenant income where a contribution is assessed

38.1 Where a student is in receipt of income by way of a grant during a period of study and a contribution has been assessed, the amount of his covenant income to be taken into account

for that period and any summer vacation immediately following shall be the whole amount of the covenant income less, subject to paragraph (3), the amount of the contribution.

- 38.2 The weekly amount of the student's covenant shall be determined—
- (a) by dividing the amount of income which falls to be taken into account under paragraph (1) by 52 or 53, whichever is reasonable in the circumstances; and
 - (b) by disregarding from the resulting amount, £5.

39.0 Students - Covenant income where no grant income or no contribution is assessed

39.1 Where a student is not in receipt of income by way of a grant the amount of his covenant income shall be calculated as follows;

- (a) any sums intended for any expenditure specified in the calculation of grant income necessary as a result of his attendance on the course shall be disregarded;
- (b) any covenant income, up to the amount of the standard maintenance grant, which is not so disregarded, shall be apportioned equally between the weeks of the period of study;
- (c) there shall be disregarded from the amount so apportioned the amount which would have been disregarded in the calculation of grant income had the student been in receipt of the standard maintenance grant; and
- (d) the balance, if any, shall be divided by 52 or 53 whichever is reasonable in the circumstances and treated as weekly income of which £5 shall be disregarded.

39.2 Where a student is in receipt of income by way of a grant and no contribution has been assessed, the amount of his covenanted income shall be calculated in accordance with sub-paragraphs (a) to (d) of paragraph (1).

40.0 Students - Covenant Income and Grant income – non-disregard

40.1 No part of a student's covenant income or grant income shall be disregarded under this scheme

41.0 Treatment of student loans

41.1 A student loan shall be treated as income.

41.2 In calculating the weekly amount of the loan to be taken into account as income

- (a) in respect of a course that is of a single academic year's duration or less, a loan which is payable in respect of that period shall be apportioned equally between the weeks in the period beginning with;
 - (i) except in a case where (ii) applies, the reduction week, the first day of which coincides with, or immediately follows, the first day of the single academic year;
 - (ii) where the student is required to start attending the course in August or where the course is less than an academic year's duration, the reduction week, the first day of which coincides with, or immediately follows, the first day of the course, and ending with the reduction week, the last day of which coincides with, or immediately precedes with last day of the course,
- (b) in respect of an academic year of a course which starts other than on 1st September, a loan which is payable in respect of that academic year shall be apportioned equally between the weeks in the period beginning with the reduction week, the first day of which coincides with or immediately follows, the first day of that academic year and ending with the reduction week, the last day of which coincides with or immediately precedes, the last day of that academic year but excluding any reduction weeks falling entirely within the quarter during which, in the opinion of the Secretary of State, the longest of any vacation is taken and for the purposes of this sub-paragraph, 'quarter' shall have the same meaning as for the purposes of the Education (Student Support) Regulations 2005;

- (c) in respect of the final academic year of a course (not being a course of a single year's duration), a loan which is payable in respect of that final academic year shall be apportioned equally between the weeks in the period beginning with;
 - (i) except in a case where (ii) applies, the reduction week, the first day of which coincides with or immediately follows, the first day of that academic year;
 - (ii) where the final academic year starts on 1st September, the reduction week, the first day of which coincide with, or immediately follows, the earlier of 1st September or the first day of the autumn term, and ending with the reduction week, the last day of which coincides with, or immediately precedes, the last day of the course;
- (d) in any other case, the loan shall be apportioned equally between the weeks in the period beginning with the earlier of;
 - (i) the first day of the first reduction week in September; or
 - (ii) the reduction week, the first day of which coincides with, or immediately follows the first day of the autumn term, and ending with the reduction week, the last day of which coincides with, or immediately precedes, the last day of the course;

and, in all cases, from the weekly amount so apportioned there shall be disregarded £10.

- 41.3 A student shall be treated as possessing a student loan in respect of an academic year where;
- (a) a student loan has been made to him in respect of that year; or
 - (b) he could acquire such a loan in respect of that year by taking reasonable steps to do so.
- 41.4 Where a student is treated as possessing a student loan under paragraph (3), the amount of the student loan to be taken into account as income shall be, subject to paragraph (5).
- (a) in the case of a student to whom a student loan is made in respect of an academic year, a sum equal to
 - (i) the maximum student loan he is able to acquire in respect of that year by taking reasonable steps to do so; and
 - (ii) any contribution whether or not it has been paid to him;
 - (b) in the case of a student to whom a student loan is not made in respect of an academic year, the maximum student loan that would be made to the student if;
 - (i) he took all reasonable steps to obtain the maximum student loan he is able to acquire in respect of that year; and
 - (ii) no deduction in that loan was made by virtue of the application of a means test.
- 41.5 There shall be deducted from the amount of income taken into account under paragraph (4)
- (a) the sum of £303 per academic year in respect of travel costs; and
 - (b) the sum of £390 per academic year towards the cost of books and equipment, whether or not any such costs are incurred.

42.0 Students - Treatment of fee loans

42.1 A loan for fees, known as a fee loan or a fee contribution loan, made pursuant to regulations made under Article 3 of the Education (Student Support) (Northern Ireland) Order 1998, section 22 of the Teaching and Higher Education Act 1998 or section 73(f) of the Education (Scotland) Act 1980, shall be disregarded as income.

43.0 Students - Treatment of payments from access funds

43.1 A payment from access funds, other than a payment to which paragraph 43.2 applies, shall be disregarded as income.

43.2 a) any payments from access funds which are intended and used for an item of food, ordinary clothing or footwear, household fuel, or rent of a single applicant or, as the case may be, of the applicant or any other member of his family and
b) any payments from access funds which are used for any council tax or water charges for which that applicant or member is liable, shall be disregarded as income to the extent of £20 per week.

43.3 Where a payment from access funds is made—
(a) on or after 1st September or the first day of the course, whichever first occurs, but before receipt of any student loan in respect of that year and that payment is intended for the purpose of bridging the period until receipt of the student loan; or
(b) before the first day of the course to a person in anticipation of that person becoming a student,
that payment shall be disregarded as income.

44.0 Students - Disregard of contribution

44.1 Where the applicant or his partner is a student and for the purposes of assessing a contribution to the student's grant or student loan, the other partner's income has been taken into account, an amount equal to that contribution shall be disregarded for the purposes of assessing that other partner's income.

45.0 Further disregard of student's income

45.1 Where any part of a student's income has already been taken into account for the purpose of assessing his entitlement to a grant or student loan, the amount taken into account shall be disregarded in assessing that student's income.

46.0 Students - Income treated as capital

46.1 Any amount by way of a refund of tax deducted from a student's covenant income shall be treated as capital.

46.2 Any amount paid from access funds as a single lump sum shall be treated as capital.

46.3 An amount paid from access fund as a single lump sum which is intended and used for an item other than food, ordinary clothing or footwear, household fuel or rent, or which is used for an item other than any council tax or water charges for which that applicant or member is liable, shall be disregarded as capital but only for a period of 52 weeks from the date of the payment.

47.0 Students - Disregard of changes occurring during summer vacation

47.1 In calculating a student's income the authority shall disregard any change in the standard maintenance grant, occurring in the recognised summer vacation appropriate to the student's

course, if that vacation does not form part of his period of study from the date on which the change occurred to the end of that vacation.

48.0 Maximum Council Tax Reduction

48.1 Subject to paragraphs (2) to (4), the amount of a person's maximum Council Tax Reduction in respect of a day for which he is liable to pay council tax, shall be 100 per cent, of the amount A divided by B where;

- (a) A is the amount set by the appropriate authority as the council tax for the relevant financial year in respect of the dwelling in which he is a resident and for which he is liable, subject to any discount which may be appropriate to that dwelling under the 1992 Act; and
- (b) B is the number of days in that financial year,

In this paragraph "relevant financial year" means, in relation to any particular day, financial year within which the day in question falls.

48.2 In calculating a person's maximum Council Tax Reduction any reduction in the amount that person is liable to pay in respect of council tax, which is made in consequence of any enactment in, or made under, the 1992 Act, shall be taken into account.

48.3 Subject to paragraph (4), where an applicant is jointly and severally liable for council tax in respect of a dwelling in which he is resident with one or more other persons but excepting any person so residing with the applicant who is a student who is excluded from entitlement to Council Tax Reduction applies, in determining the maximum Council Tax Reduction in his case in accordance with paragraph (1), the amount A shall be divided by the number of persons who are jointly and severally liable for that tax.

48.4 Where an applicant is jointly and severally liable for council tax in respect of a dwelling with only his partner, paragraph (3) shall not apply in his case

49.0 Date on which entitlement is to begin

49.1 Subject to paragraph (2), any person to whom or in respect of whom a claim for council tax reduction is made and who is otherwise entitled to that reduction shall be so entitled from the date on which that claim is made or is treated as made.

49.2 Where a person is otherwise entitled to council tax reduction and becomes liable for the first time for the authority's council tax in respect of a dwelling of which he is a resident in the reduction week in which his claim is made or is treated as made, he shall be so entitled from the date of claim

50.0 Date on which change of circumstances is to take effect

50.1 A change of circumstances which affects entitlement to, or the amount of, a reduction under the authority's scheme ("change of circumstances"), takes effect from date on which the change actually occurs.

50.2 Subject to paragraph (3), where the change of circumstances is a change in the amount of council tax payable, it takes effect from the day on which it actually occurs.

50.3 Where the change of circumstances is that income, or an increase in the amount of income, is paid in respect of a past period and there was no entitlement to income of that amount during that period, the change of circumstances shall take effect from the first day on which such income, had it been paid in that period at intervals appropriate to that income, would have fallen to be taken into account for the purposes of this scheme.

51.0 Making an application

- 51.1 In the case of a couple or members of a polygamous marriage an application is to be made by whichever one of them they agree should so apply or, in default of agreement, by such one of them as the authority determines.
- 51.2 Where a person who is liable to pay council tax in respect of a dwelling is unable for the time being to act, and;
- (a) a deputy has been appointed by the Court of Protection with power to claim, or as the case may be, receive benefit on his behalf; or
 - (b) in Scotland, his estate is being administered by a judicial factor or any guardian acting or appointed under the Adults with Incapacity (Scotland) Act 2000 who has power to apply or, as the case may be, receive benefit on his behalf; or
 - (c) an attorney with a general power or a power to apply or, as the case may be, receive benefit, has been appointed by that person under the Powers of Attorney Act 1971, the Enduring Powers of Attorney Act 1985 or the Mental Capacity Act 2005 or otherwise,
- that deputy, judicial factor, guardian or attorney, as the case may be, may make an application on behalf of that person.
- 51.3 Where a person who is liable to pay council tax in respect of a dwelling is unable for the time being to act and sub-paragraph (2) does not apply to him, the authority may, upon written application made to them by a person who, if a natural person, is over the age of 18, appoint that person to exercise on behalf of the person who is unable to act, any right to which that person might be entitled under the authority's scheme and to receive and deal on his behalf with any sums payable to him.
- 51.4 Where a person who is liable to pay council tax in respect of a dwelling is for the time being unable to act and the Secretary of State has appointed a person to act on his behalf under regulation 33 of the Social Security (Claims and Payments) Regulations 1987 (persons unable to act), the authority may if that person agrees, treat him as if he had been appointed by them under sub-paragraph (3).
- 51.5 Where the authority has made an appointment under sub-paragraph (3) or treated a person as an appointee under sub-paragraph (4);
- (a) it may at any time revoke the appointment;
 - (b) the person appointed may resign his office after having given 4 week's notice in writing to the authority of his intention to do so;
 - (c) any such appointment terminates when the authority is notified of the appointment of a person mentioned in sub-paragraph (2).
- 51.6 Anything required by the authority's scheme to be done by or to any person who is for the time being unable to act may be done by or to the persons mentioned in sub-paragraph (2) above or by or to the person appointed or treated as appointed under this paragraph and the receipt of any such person so appointed shall be a good discharge to the authority for any sum paid.
- 51.7 The authority must;
- (a) inform any person making an application of the duty imposed on them
 - (b) explain the possible consequences (including prosecution) of failing to comply with that duty; and
 - (c) set out the circumstances a change in which might affect entitlement to the reduction or its amount.

52.0 Procedure by which a person may apply for a reduction under the authority's scheme²

52.1. Paragraphs 2 to 7 apply to an application made under the authority's scheme.

52.2. An application may be made;

- (a) in writing,
- (b) by means of an electronic communication in accordance with Part 4 of this Schedule, or
- (c) where the authority has published a telephone number for the purpose of receiving such applications, by telephone.
- (d) a notification of Universal Credit or any legacy benefit from DWP, may be treated by the authority as a claim for reduction.

52.3 An application which is made in writing must be made to the designated office on a properly completed form. The form must be provided free of charge by the authority for the purpose.

52.4 here an application made in writing is defective because—

- (a) it was made on the form supplied for the purpose but that form is not accepted by the authority as being properly completed; or
- (b) it was made in writing but not on the form approved for the purpose and the authority does not accept the application as being in a written form which is sufficient in the circumstances of the case having regard to the sufficiency of the written information and evidence,

the authority may, in a case to which sub-paragraph (a) applies, request the applicant to complete the defective application or, in the case to which sub-paragraph (b) applies, supply the applicant with the approved form or request further information and evidence.

52.5 An application made on a form provided by the authority is properly completed if it is completed in accordance with the instructions on the form, including any instructions to provide information and evidence in connection with the application.

52.6 If an application made by electronic communication is defective the authority must provide the person making the application with an opportunity to correct the defect. An application made by electronic communication is defective if the applicant does not provide all the information the authority requires.

52.7 In a particular case the authority may determine that an application made by telephone is only valid if the person making the application approves a written statement of his circumstances provided by the authority.

52.8 If an application made by telephone is defective the authority must provide the person making the application with an opportunity to correct the defect. An application made by telephone is defective if the applicant does not provide all the information the authority requests during the telephone call.

52.9 Notwithstanding other paragraphs within this section, the authority will determine the method by which claims are to be made as well as where claims should be sent or delivered.

52.10 Where an applicant ('C') makes a claim which includes (or which C subsequently requests should include) a period before the claim is made, the authority may, at its discretion, treat the claim as made on an earlier date up to the first date of the financial year in which the request is received by the authority.

² Inserted by Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012

53.0 Date on which an application is made³

53.1 Subject to sub-paragraph (7), the date on which an application is made is;

(a) in a case where;

(i) an award of state pension credit which comprises a guarantee credit has been made to the applicant or his partner, and

(ii) the application for a reduction is made within one month of the date on which the claim for that state pension credit which comprises a guarantee credit was received at the appropriate DWP office,

the first day of entitlement to state pension credit which comprises a guarantee credit arising from that claim;

(b) in a case where

(i) an applicant or his partner is a person in receipt of a guarantee credit,

(ii) the applicant becomes liable for the first time to pay council tax in respect of the dwelling he occupies as his home, and

(iii) the application is received at the designated office within one month of the date of the change,

the date on which the change takes place;

(c) in a case where;

(i) an award of income support, an income-based jobseeker's allowance or an income-related employment and support allowance or an award of universal credit has been made to the applicant or his partner, and

(ii) the application is made within one month of the date on which the claim for that income support, jobseeker's allowance, employment and support allowance or universal credit was received,

the first day of entitlement to income support, an income-based jobseeker's allowance, an income-related employment and support allowance or universal credit arising from that claim;

(d) in a case where;

(i) an applicant or his partner is a person on income support, an income-based jobseeker's allowance or an income-related employment and support allowance or has an award of universal credit,

(ii) the applicant becomes liable for the first time to pay council tax in respect of the dwelling which he occupies as his home, and

(iii) the application is received at the designated office within one month of the date of the change,

the date on which the change takes place;

(e) in a case where;

(i) an applicant is the former partner of a person who was, at the date of his death or their separation, entitled to a reduction under the authority's scheme, and

(ii) the applicant makes an application for a reduction under that scheme within one month of the date of the death or the separation,

the date of the death or separation;

(f) except where paragraph (a), (b) or (e) is satisfied, in a case where a properly completed application is received within one month (or such longer period as the authority considers reasonable) of the date on which an application form was issued to an applicant following the applicant first notifying, by whatever means, the authority of an intention to make an application, the date of first notification;

(g) in any other case, the date on which an application is received at the designated office.

53.2 For the purposes only of sub-paragraph (1)(c) a person who has been awarded an income-based jobseeker's allowance or an income-related employment and support allowance is to be treated as entitled to that allowance for any days which immediately precede the first day in that award and on which he would, but for regulations made under;

³ Inserted by Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012

(a) in the case of income-based jobseeker's allowance, paragraph 4 of Schedule 1 to the Jobseekers Act 1995 (waiting days); or
(b) in the case of income-related employment and support allowance, paragraph 2 of Schedule 2 to the Welfare Reform Act 2007 (waiting days),
have been entitled to that allowance.

53.3 Where there is a defect in an application by telephone;
(a) is corrected within one month (or such longer period as the authority considers reasonable) of the date the authority last drew attention to it, the authority must treat the application as if it had been duly made in the first instance;
(b) is not corrected within one month (or such longer period as the authority considers reasonable) of the date the authority last drew attention to it, the authority must treat the application as if it had been duly made in the first instance where it considers it has sufficient information to decide the application.

53.4 The authority is to treat a defective application as if it had been validly made in the first instance if, in any particular case, the conditions specified in sub-paragraph (5)(a), (b) or (c) are satisfied.

53.5 The conditions are that—
(a) where the authority receives the properly completed application or the information requested to complete it or the evidence within one month of the request, or such longer period as the authority may consider reasonable; or
(b) where an application is not on approved form or further information requested by authority applies;
(i) the approved form sent to the applicant is received at the offices of the authority properly completed within one month of it having been sent to him; or, as the case may be;
(ii) the applicant supplies whatever information or evidence was requested within one month of the request; or,
in either case, within such longer period as the authority may consider reasonable; or
(c) where the authority has requested further information, the authority receives at its offices the properly completed application or the information requested to complete it within one month of the request or within such longer period as the authority considers reasonable.

53.6 Except in the case of an application made by a person treated as not being in Great Britain, where a person has not become liable for council tax to the authority but it is anticipated that he will become so liable within the period of 8 weeks (the relevant period), he may apply for a reduction under that authority's scheme at any time in that period in respect of that tax and, provided that liability arises within the relevant period, the authority must treat the application as having been made on the day on which the liability for the tax arises.

53.7 Except in the case of an application made by a person treated as not being in Great Britain, where the applicant is not entitled to a reduction under the authority's scheme in the reduction week immediately following the date of his application but the authority is of the opinion that unless there is a change of circumstances he will be entitled to a reduction under its scheme for a period beginning not later than;
(a) in the case of an application made by;
(i) a pensioner, or
(ii) a person who has attained, or whose partner has attained, the age which is 17 weeks younger than the qualifying age for state pension credit,
the seventeenth reduction week following the date on which the application is made, or
(b) in the case of an application made by a person who is not a pensioner, the thirteenth reduction week following the date on which the application is made,
the authority may treat the application as made on a date in the reduction week immediately preceding the first reduction week of that period of entitlement and award a reduction accordingly.

53.8 In this paragraph “appropriate DWP office” means an office of the Department for Work and Pensions dealing with state pension credit or an office which is normally open to the public for the receipt of claims of income support, a job seekers allowance or an employment and support allowance.

54.0 Submission of evidence electronically

54.1 The authority may accept such evidence, documents and certificates to support the claim electronically where it feels that this would be acceptable given the nature of the claim

55.0 Use of telephone provided evidence

55.1 The authority may accept such evidence to support the claim by telephone where it feels that this would be acceptable given the nature of the claim

56.0 Information and evidence⁴

56.1 Subject to sub-paragraph (3), a person who makes an application for a reduction under an authority’s scheme must satisfy sub-paragraph (2) in relation both to himself and to any other person in respect of whom he is making the application.

56.2 This sub-paragraph is satisfied in relation to a person if—

- (a) the application is accompanied by;
 - (i) a statement of the person’s national insurance number and information or evidence establishing that that number has been allocated to the person; or
 - (ii) information or evidence enabling the authority to ascertain the national insurance number that has been allocated to the person; or
- (b) the person has made an application for a national insurance number to be allocated to him and the application for the reduction is accompanied by;
 - (i) evidence of the application for a national insurance number to be so allocated; and
 - (ii) the information or evidence enabling it to be so allocated.

56.3 Sub-paragraph (2) does not apply;

- (a) in the case of a child or young person in respect of whom an application for a reduction is made;
- (b) to a person who;
 - (i) is a person treated as not being in Great Britain for the purposes of this scheme;
 - (ii) is subject to immigration control within the meaning of section 115(9)(a) of the Immigration and Asylum Act 1999; and
 - (iii) has not previously been allocated a national insurance number.

56.4 Subject to sub-paragraph (5), a person who makes an application, or a person to whom a reduction under the authority’s scheme has been awarded, must furnish such certificates, documents, information and evidence in connection with the application or the award, or any question arising out of the application or the award, as may reasonably be required by that authority in order to determine that person’s entitlement to, or continuing entitlement to a reduction under its scheme and must do so within one month of the authority requiring him to do so or such longer period as the authority may consider reasonable.

56.5 Nothing in this paragraph requires a person who is a pensioner to furnish any certificates, documents, information or evidence relating to a payment to which sub-paragraph (7) applies.

⁴ Inserted by Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012

- 56.6 Where the authority makes a request under sub-paragraph (4), it must;
- (a) inform the applicant or the person to whom a reduction under its scheme has been awarded of his duty under paragraph 9 (duty to notify change of circumstances) to notify the authority of any change of circumstances; and
 - (b) without prejudice to the extent of the duty owed under paragraph 9, indicate to him either orally or by notice or by reference to some other document available to him on application and without charge, the kind of change of circumstances which must be notified.
- 56.7 This sub-paragraph applies to any of the following payments;
- (a) a payment which is made under or by the Trusts, the Fund, the Eileen Trust, MFET Limited, the Skipton Fund, the Caxton Foundation or the London Bombings Relief Charitable Fund; and
 - (b) a payment which is disregarded under paragraph 24 of Schedule 5, other than a payment under the Independent Living Fund (2006);
- 56.8 Where an applicant or a person to whom a reduction under the authority's scheme has been awarded or any partner has attained the qualifying age for state pension credit and is a member of, or a person deriving entitlement to a pension under, a personal pension scheme, he must where the authority so requires furnish the following information;
- (a) the name and address of the pension fund holder;
 - (b) such other information including any reference or policy number as is needed to enable the personal pension scheme to be identified.
- 57.0 Amendment and withdrawal of application⁵**
- 57.1 A person who has made an application may amend it at any time before a decision has been made on it by a notice in writing delivered or sent to the designated office.
- 57.2 Where the application was made by telephone the amendment may also be made by telephone.
- 57.3 Any application amended is to be treated as if it had been amended in the first instance.
- 57.4 A person who has made an application may withdraw it by notice to the designated office at any time before a decision has been made on it.
- 57.5 Where the application was made by telephone, the withdrawal may also be made by telephone.
- 57.6 Any notice of withdrawal given in accordance with sub-paragraph (4) or (5) has effect when it is received.
- 57.7 Where a person, by telephone, amends or withdraws an application the person must (if required to do so by the authority) confirm the amendment or withdrawal by a notice in writing delivered or sent to the designated office.
- 58.0 Duty to notify changes of circumstances⁶**
- 58.1 Subject to sub-paragraphs (3), (6) and (7), an applicant (or any person acting on his behalf) must comply with sub-paragraph (2) if there is a relevant change of circumstances at any time;
- (a) between the making of an application and a decision being made on it, or
 - (b) after the decision is made (where the decision is that the applicant is entitled to a

⁵ Inserted by Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012

⁶ Inserted by Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012

reduction under the authority's scheme) including at any time while the applicant is in receipt of such a reduction.

58.2 The applicant (or any person acting on his behalf) must notify any change of circumstances which the applicant (or that person) might reasonably be expected to know might affect his entitlement to, or the amount of, a reduction under the authority's scheme (a "relevant change of circumstances") by giving notice to the authority;

(a) in writing; or

(b) by telephone—

(i) where the authority has published a telephone number for that purpose unless the authority determines that in any particular case or class of case notification may not be given by telephone; or

(ii) in any case or class of case where the authority determines that notice may be given by telephone; or

(c) by any other means which the authority agrees to accept in any particular case, within a period of 21 days beginning with the day on which the change occurs, or as soon as reasonably practicable after the change occurs, whichever is later.

58.3 The duty imposed on a person by sub-paragraph (1) does not extend to notifying

(a) changes in the amount of council tax payable to the authority;

(b) changes in the age of the applicant or that of any member of his family;

(c) in the case of an applicant in receipt of a relevant benefit, changes in circumstances which affect the amount of the benefit but not the amount of the reduction under the authority's scheme to which he is entitled, other than the cessation of that entitlement to the benefit.

58.4 For the purposes of sub-paragraph (3)(c) "relevant benefit" means income support, an income-based jobseeker's allowance or an income-related employment and support allowance or universal credit.

58.5 Notwithstanding sub-paragraph (3)(b) or (c) an applicant is required by sub-paragraph (1) to notify the authority of any change in the composition of his family arising from the fact that a person who was a member of his family is now no longer such a person because he has ceased to be a child or young person.

58.6 The duty imposed on a person by sub-paragraph (1) includes in the case of a person falling within alternative maximum council tax reduction, giving written notice to the authority of changes which occur in the number of adults in the dwelling or in their total gross incomes and, where any such adult ceases to be in receipt of state pension credit, the date when this occurs.

58.7 All changes in circumstances should be notified to the authority in writing (or by whatever format agreed by the authority) within one calendar month of the happening of the event or change in circumstance. This timescale may be extended at the discretion of the authority. Where such a change is not received within that timescale and where the change would increase the level of reduction payable, the authority may use a date later than the actual change of circumstances

59.0 Decisions by the authority⁷

59.1 The authority must make a decision on an application under its scheme within 14 days or as soon as reasonably practicable thereafter.

⁷ Inserted by Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012

60.0 Notification of decision⁸

- 60.1 The authority must notify in writing any person affected by a decision made by it under its scheme;
- (a) in the case of a decision on an application, forthwith or as soon as reasonably practicable thereafter;
 - (b) in any other case, within 14 days of that decision or as soon as reasonably practicable thereafter.
- 60.2 Where the decision is to award a reduction, the notification under sub-paragraph (1) must include a statement;
- (a) informing the person affected of the duty imposed by paragraph 9(1);
 - (b) explaining the possible consequences (including prosecution) of failing to comply with that duty; and
 - (c) setting out the circumstances a change in which might affect entitlement to the reduction or its amount.
- 60.3 Where the decision is to award a reduction, the notification under sub-paragraph (1) must include a statement as to how that entitlement is to be discharged.
- 60.4 In any case, the notification under sub-paragraph (1) must inform the person affected of the procedure by which an appeal may be made and must refer the person to the provisions in the authority's scheme relating to the procedure for making an appeal.
- 60.5 A person affected to whom the authority sends or delivers a notification of decision may, within one month of the date of the notification of that decision request in writing the authority to provide a written statement setting out the reasons for its decision on any matter set out in the notice.
- 60.6 The written statement referred to in sub-paragraph (5) must be sent to the person requesting it within 14 days or as soon as reasonably practicable thereafter.
- 60.7 For the purposes of this paragraph a person is to be treated as a person affected by a decision of the authority under its scheme where the rights, duties or obligations of that person are affected by that decision and the person falls within sub-paragraph (8).
- 60.8 This sub-paragraph applies to—
- (a) the applicant;
 - (b) in the case of a person who is liable to pay council tax in respect of a dwelling and is unable for the time being to act;
 - (i) a deputy appointed by the Court of Protection with power to claim, or as the case may be, receive benefit on his behalf; or
 - (ii) in Scotland, a judicial factor or any guardian acting or appointed under the Adults with Incapacity (Scotland) Act 2000(3) who has power to apply or, as the case may be, receive benefit on the person's behalf; or
 - (iii) an attorney with a general power or a power to apply or, as the case may be, receive benefit, has been appointed by that person under the Powers of Attorney Act 1971, the Enduring Powers of Attorney Act 1985 or the Mental Capacity Act 2005 or otherwise,
 - (c) a person appointed by the authority to act for a person unable to act.

⁸ Inserted by Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012

61.0 Time and manner of granting council tax reduction⁹

61.1 Where a person is entitled to a reduction under this authority's scheme in respect of his liability for the authority's council tax as it has effect in respect of a chargeable financial year ("the chargeable year"), the authority must discharge his entitlement;

- (a) by reducing, so far as possible, the amount of his liability to which regulation 20(2) of the Council Tax (Administration and Enforcement) Regulations 1992 refers; or
- (b) where;
 - (i) such a reduction is not possible; or
 - (ii) such a reduction would be insufficient to discharge the entitlement to a reduction under the authority's scheme; or
 - (iii) the person entitled to the reduction is jointly and severally liable for the council tax and the authority determines that such a reduction would be inappropriate, by making payment to him of the amount of reduction to which he is entitled, rounded where necessary to the nearest penny.

61.2 The authority must notify the person entitled to a reduction under this scheme of the amount of that reduction and how his entitlement is to be discharged in pursuance of paragraph (1).

61.3 In a case to which paragraph (1)(b) refers;

- (a) if the amount of the council tax for which he remains liable in respect of the chargeable year, after any reduction to which sub-paragraph (1)(a) refers has been made, is insufficient to enable his entitlement to a reduction under the authority's scheme in respect thereof to be discharged, upon the final instalment of that tax becoming due any outstanding reduction;
 - (i) must be paid to that person if he so requires; or
 - (ii) in any other case must (as the authority determines) either be repaid or credited against any subsequent liability of the person to make a payment in respect of the authority's council tax as it has effect for any subsequent year;
- (b) if that person has ceased to be liable for the authority's council tax and has discharged the liability for that tax, the outstanding balance (if any) of the reduction under the authority's scheme in respect thereof must be paid within 14 days or, if that is not reasonably practicable, as soon as practicable thereafter
- (c) in any other case, the reduction under the authority's scheme must be paid within 14 days of the receipt of the application at the offices of the authority or, if that is not reasonably practicable, as soon as practicable thereafter.

61.4 For the purposes of this paragraph "instalment" means any instalment of the authority's council tax to which regulation 19 of the Council Tax (Administration and Enforcement) Regulations 1992 refers (council tax payments).

62.0 Persons to whom reduction is to be paid¹⁰

62.1 Subject to paragraph (2), any payment of the amount of a reduction must be made to that person.

62.2 Where a person other than a person who is entitled to a reduction under this authority's scheme made the application for the reduction and that first person is a person acting pursuant to an appointment or is treated as having been so appointed, the amount of the reduction may be paid to that person.

63.0 Shortfall in reduction¹¹

63.1 Where, on the revision of a decision allowing a reduction under the authority's scheme to a

⁹ Inserted by Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012

¹⁰ Inserted by Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012

¹¹ Inserted by Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012

person, it is determined that the amount allowed was less than the amount to which that person was entitled, the authority must either;

- (a) make good any shortfall in reduction which is due to that person, by reducing so far as possible the next and any subsequent payments he is liable to make in respect of the council tax of the authority as it has effect for the chargeable financial year until that shortfall is made good; or
- (b) where this is not possible or the person concerned so requests, pay the amount of any shortfall in reduction due to that person within 14 days of the revision of the decision being made or if that is not reasonably practicable, as soon as possible afterwards.

64.0 Payment on the death of the person entitled¹²

64.1 Where the person entitled to any reduction under this scheme has died and it is not possible to award the reduction which is due in the form of a reduction of the council tax for which he was liable, the authority must make payment of the amount of the reduction to his executor or administrator in accordance with regulation 58(4) of the Council Tax (Administration and Enforcement) Regulations 1992.

65.0 Offsetting

65.1 Where a person has been allowed or paid a sum of council tax reduction under a decision which is subsequently revised or further revised, any sum allowed or paid in respect of a period covered by the subsequent decision shall be offset against arrears of entitlement under the subsequent decision except to the extent that the sum exceeds the arrears and shall be treated as properly awarded or paid on account of them.

66.0 Payment where there is joint and several liability¹³

66.1 Where;

- (a) a person is entitled to a reduction under the authority's scheme in respect of his liability for the authority's council tax as it has effect in respect of a chargeable financial year;
- (b) the person entitled to the reduction is jointly and severally liable for the council tax; and
- (c) the authority determines that discharging his entitlement by reducing the amount of his liability to which regulation 20(2) of the Council Tax (Administration and Enforcement) Regulations 1992(7) refers would be inappropriate,

it may make a payment to him of the amount of the reduction to which he is entitled, rounded where necessary to the nearest penny.

66.2 Subject to sub-paragraph (3) any payment made under sub-paragraph (1) must be made to the person who is entitled to the reduction.

66.3 Where a person other than a person who is entitled to a reduction under the authority's scheme made the application and that first person is a person acting pursuant to an appointment this scheme or is treated as having been so appointed, the amount of the reduction may be paid to that person.

67.0 Use of information from and to the Department of Work and Pensions (DWP) and Her Majesty's Revenues and Customs (HMRC)

67.1 The authority will use information provided by the DWP and HMRC for the purposes of Council Tax Reduction, council tax liability, billing, administration and enforcement as outlined within Schedule 2 of the Local Government Finance Act 1992 as amended by the Local Government Finance Act 2012 and the Social Security (Information-sharing in relation to Welfare Services etc.) (Amendment) Regulations 2013

¹² Inserted by Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012

¹³ Inserted by Schedule 8 of the Council Tax Reductions Scheme (Prescribed Requirements) (England) Regulations 2012

67.2 Where required by the relevant department and where required by law, the authority will share information obtained for Council Tax Reduction with the DWP or HMRC as appropriate and in accordance with Data Protections requirements¹⁴..

68.0 Collection of information

68.1 The authority may receive and obtain information and evidence relating to claims for council tax reduction, the council may receive or obtain the information or evidence from–

- (a) persons making claims for council tax reduction;
- (b) other persons in connection with such claims;
- (c) other local authorities; or
- (d) central government departments including the DWP and HMRC

68.2 The authority may verify relevant information supplied to, or obtained.

69.0 Recording and holding information

69.1 The authority may

- (a) may make a record of such information; and
- (b) may hold that information, whether as supplied or obtained or recorded, for the purpose of forwarding it to the person or authority for the time being administering council tax reduction.

70.0 Forwarding of information

70.1 The authority may forward it to the person or authority for the time being administering claims to or awards of council tax reduction to which the relevant information relates, being

- (i) a local authority;
- (ii) a person providing services to a local authority; or
- (iii) a person authorised to exercise any function of a local authority relating to council tax reduction.

71.0 Persons affected by Decisions

71.1 A person is to be treated as a person affected by a relevant decision of the authority where that person is;

- (a) an applicant;
- (b) in the case of a person who is liable to make payments in respect of a dwelling and is unable for the time being to act
 - (i) a Deputy appointed by the Court of Protection with power to claim, or as the case may be, receive benefit or reduction on his behalf,
 - (ii) in Scotland, a tutor, curator, judicial factor or other guardian acting or appointed in terms of law administering that person's estate, or
 - (iii) an attorney with a general power or a power to receive benefit or reduction appointed by the person liable to make those payments under the Powers of Attorney Act 1971, the Enduring Powers of Attorney Act 1985 or the Mental Capacity Act 2005 or otherwise;
- (c) a person appointed by the authority under this scheme;

72.0 Terminations

72.1 The authority may terminate reduction in whole or in part the Council tax reduction where it appears to the authority that an issue arises whether;

- (a) the conditions for entitlement to Council tax reduction are or were fulfilled; or
- (b) a decision as to an award of such a reduction should be revised or superseded.

¹⁴ Data Retention and Investigatory Powers Act 2014 and Data Retention Regulations 2014

72.2 The authority may terminate, in whole or in part the Council tax reduction where it appears to the authority that an issue arises whether;

- (a) the conditions for entitlement to Council tax reduction are or were fulfilled; or
- (b) a decision as to an award of such a reduction should be revised or superseded.

Where the person fails to provide information to the authority as requested in relation to any matter relating to their liability for Council Tax

73.0 Procedure by which a person may make an appeal against certain decisions of the authority¹⁵

73.1 A person who is aggrieved by a decision of the authority, which affects;

- (a) the person's entitlement to a reduction under its scheme, or
- (b) the amount of any reduction to which that person is entitled,

may serve a written notice on the authority stating the matter by which, and the grounds on which, he is aggrieved.

73.2 The authority must

- (a) consider the matter to which the notice relates;
- (b) notify the aggrieved person in writing;
 - (i) that the ground is not well founded, giving reasons for that belief; or
 - (ii) that steps have been taken to deal with the grievance, stating the steps taken.

73.3 Where, following notification under sub-paragraph (2)(b)(i) or (ii), the person is still aggrieved, or if the authority fails to notify the person aggrieved in accordance with sub-paragraph (2)(b) within two months of the service of his notice, he may appeal to the valuation tribunal under section 16 of the 1992 Act¹⁶.

74.0 Procedure for an application to the authority for a reduction under section 13A(1)(c) of the 1992 Act¹⁷

74.1 An application to the authority for a reduction under section 13A(1)(c) of the 1992 Act may be made;

- (a) in writing,
- (b) by means of an electronic communication in accordance this scheme or
- (c) where the authority has published a telephone number for the purpose of receiving such applications, by telephone.

74.2 Where;

- (a) the authority has made a determination under section 13A(1)(c) in relation to a class of case in which liability is to be reduced; and
- (b) a person in that class would otherwise be entitled to a reduction under its scheme, that person's application for a reduction under the authority's scheme may also be treated as an application for a reduction under section 13A(1)(c).

¹⁵ Inserted by Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012

¹⁶ As amended by the Tribunal Procedure (Amendment No 3) Rules 2014

¹⁷ Inserted by Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012

75.0 Exceptional Hardship Scheme

75.1 The authority may provide additional help to an applicant who is entitled to reduction under its Exceptional Hardship Scheme.

75.2 Such payments shall be deemed to be made under S13A (1)(a) of the 1992 Act.

76.0 Interpretation for the use of electronic communication

76.1 In this Part;
“information” includes an application, a certificate, notice or other evidence; and
“official computer system” means a computer system maintained by or on behalf of an authority for sending, receiving, processing or storing of any information.

77.0 Conditions for the use of electronic communication

77.1 The authority may use an electronic communication in connection with applications for, and awards of, reductions under its scheme.

77.2 A person other than the authority may use an electronic communication in connection with the matters referred to in sub-paragraph (1) if the conditions specified in sub-paragraphs (3) to (6) are satisfied.

77.3 The first condition is that the person is for the time being permitted to use an electronic communication by an authorisation given by means of a direction of the Chief Executive of the authority.

77.4 The second condition is that the person uses an approved method of;

- (a) authenticating the identity of the sender of the communication;
- (b) electronic communication;
- (c) authenticating any application or notice delivered by means of an electronic communication; and
- (d) subject to sub-paragraph (7), submitting to the authority any information.

77.5 The third condition is that any information sent by means of an electronic communication is in a form approved for the purposes.

77.6 The fourth condition is that the person maintains such records in written or electronic form as may be specified in a direction given by the Chief Executive of the authority.

77.7 Where the person uses any method other than the method approved of submitting any information, that information is to be treated as not having been submitted.

77.8 In this paragraph “approved” means approved by means of a direction given by the Chief Executive of the authority for the purposes of this section.

78.0 Use of intermediaries

78.1 The authority may use intermediaries in connection with;

- (a) the delivery of any information by means of an electronic communication; and
- (b) the authentication or security of anything transmitted by such means,

and may require other persons to use intermediaries in connection with those matters.

79.0 Effect of delivering information by means of electronic communication

- 79.1 Any information which is delivered by means of an electronic communication is to be treated as having been delivered in the manner or form required by any provision of an authority's scheme on the day the conditions imposed;
- (a) by this section; and
 - (b) by or under an enactment,
- are satisfied.
- 79.2 The authority may determine that any information is to be treated as delivered on a different day (whether earlier or later) from the day provided for in sub-paragraph (1).
- 79.3 Information may not be taken to have been delivered to an official computer system by means of an electronic communication unless it is accepted by the system to which it is delivered.

80.0 Proof of identity of sender or recipient of information

- 80.1 If it is necessary to prove, for the purpose of any legal proceedings, the identity of—
- (a) the sender of any information delivered by means of an electronic communication to an official computer system; or
 - (b) the recipient of any such information delivered by means of an electronic communication from an official computer system,
- the sender or recipient, as the case may be, is to be presumed to be the person whose name is recorded as such on that official computer system.

81.0 Proof of delivery of information

- 81.1 If it is necessary to prove, for the purpose of any legal proceedings, that the use of an electronic communication has resulted in the delivery of any information this is presumed to have been the case where;
- (a) any such information has been delivered to the relevant authority, if the delivery of that information has been recorded on an official computer system; or
 - (b) any such information has been delivered by the relevant authority, if the delivery of that information has been recorded on an official computer system.
- 81.2 If it is necessary to prove, for the purpose of any legal proceedings, that the use of an electronic communication has resulted in the delivery of any such information, this is presumed not to be the case, if that information delivered to the relevant authority has not been recorded on an official computer system.
- 81.3 If it is necessary to prove, for the purpose of any legal proceedings, when any such information sent by means of an electronic communication has been received, the time and date of receipt is presumed to be that recorded on an official computer system.

82.0 Proof of content of information

- 82.1 If it is necessary to prove, for the purpose of any legal proceedings, the content of any information sent by means of an electronic communication, the content is presumed to be that recorded on an official computer system.

83.0 Counter Fraud and compliance

- 83.1 In order to protect the finances of the authority and also in the interests of all council taxpayers, the authority will undertake such actions as allowed by law to;
- (a) Prevent and detect fraudulent claims and actions in respect of Council tax reduction;
 - (b) Carry out investigations fairly, professionally and in accordance with the law; and

(c) Ensure that sanctions are applied in appropriate cases

83.2 The authority believes that it is important to minimise the opportunity for fraud and;

- (a) will implement rigorous procedures for the verification of claims for council tax reduction;
- (b) will employ sufficient Officers to fulfil the authority's commitment to combat fraud;
- (c) will actively tackle fraud where it occurs in accordance with this scheme;
- (d) will co-operate with the Department for Work and Pensions (DWP), Her Majesty's Revenues and Customs and take part in joint working including prosecutions; and
- (e) will in all cases seek to recover all outstanding council tax.

83.3 The authority shall put into place such administrative policies, procedures and processes as are necessary to ensure that the actions outlined within paragraph (1) and (2) can be carried out successfully. In particular the authority shall undertake actions provided by the Council Tax Reduction Schemes (Detection of Fraud and Enforcement) (England) Regulations 2013.

Schedule 1
Calculation of the amount of Council Tax Reduction in accordance with the Discount Scheme.

- 1 The authority's Council Tax Reduction scheme from 2021/22 shall be calculated on the basis of the following Banded Discount Scheme:

Discount Band	Discount	Single Person	Single person with one child	Single person with two or more children	Couple	Couple with one child	Couple with two or more children
Weekly income ranges							
Band 1*	100%	£0 - £95.00	£0 - £150.00	£0 - £210.00	£0 - £140.00	£0 - £195.00	£0 - £255.00
Band 2	75%	£95.01 - £115.00	£150.01 - £180.00	£210.01 - £240.00	£140.01 - £160.00	£195.01 - £225.00	£255.01 - £285.00
Band 3	50%	£115.01 - £135.00	£180.01 - £210.00	£240.01 - £270.00	£160.01 - £180.00	£225.01 - £255.00	£285.01 - £315.00
Band 4	25%	£135.01 - £155.00	£210.01 - £240.00	£270.01 - £300.00	£180.01 - £200.00	£255.01 - £285.00	£315.01 - £345.00
	0%	Over £155.00	Over £240.00	Over £300.00	Over £200.00	Over £285.00	Over £345.00

- 2 The amount of discount to be granted is to be based on the following factors:
- a. The maximum Council Tax Reduction as defined within this scheme;
 - b. The Council Tax family as defined within this scheme
 - c. The income of the applicant and partner as defined within this scheme;
 - d. The capital of the applicant and partner as defined within this scheme.
- 4 For the sake of clarity all incomes shown within the table above are weekly in accordance with the scheme requirements and definitions.
- 5 Discount bands vary depending on both weekly income and the household (family as defined within this scheme). For the sake of clarity, it should be noted that in any application for reduction is limited to a maximum of two dependant children or young persons.
- 6 Any applicant who capital is greater than £6,000 shall not be entitled to any Council Tax Reductions whatsoever.
7. The authority **may** increase the level of incomes within the grid specified in paragraph 1 on an annual basis by the appropriate level of inflation decided by the Council.
8. *Where an applicant or partner is in receipt of Income Support, Income Related Employment and Support Allowance or Income Based Jobseeker's Allowance, discount will be awarded at Band 1 level.

Schedule 2

Sums to be disregarded in the calculation of income other than earnings

1. Any amount paid by way of tax on income,
2. Any payment made to the claim and in respect of any travel or other expenses incurred, or to be incurred, by him in respect of his participation in the Mandatory Work Activity Scheme.
3. Any payment made to the applicant in respect of any travel or other expenses incurred, or to be incurred, by him in respect of his participation in the Employment, Skills and Enterprise Scheme or Back to Work Scheme, but only for 52 weeks beginning with the date of receipt of the payment.
3. Any payment in respect of any expenses incurred or to be incurred by an applicant who is–
 - (a) engaged by a charitable or voluntary organisation, or
 - (b) volunteer,if he otherwise derives no remuneration or profit from the employment and is not to be treated as possessing any earnings under section 32.0 (notional income).
4. Any payment in respect of expenses arising out of the applicant's participation in a service user group.
5. In the case of employment as an employed earner, any payment in respect of expenses wholly, exclusively and necessarily incurred in the performance of the duties of the employment.
6. Where an applicant is on income support, an income-based jobseeker's allowance or an income-related employment and support allowance the whole of his income.
7. Where the applicant is a member of a joint-claim couple for the purposes of the Jobseekers Act and his partner is on an income-based jobseeker's allowance, the whole of the applicant's income.
8. Where the applicant, or the person who was the partner of the applicant on 31st March 2003, was entitled on that date to income support or an income-based jobseeker's allowance but ceased to be so entitled on or before 5th April 2003 by virtue only of regulation 13 of the Housing Benefit (General) Amendment (No. 3) Regulations 1999 as in force at that date, the whole of his income.
9. Any disability living allowance or personal independence payment or AFIP
10. Any concessionary payment made to compensate for the non-payment of;
 - (a) income support;
 - (b) an income-based jobseeker's allowance.
 - (c) an income-related employment and support allowance.
11. Any mobility supplement under article 20 of the Naval, Military and Air Forces Etc. (Disablement and Death) Service Pensions Order 2006 (including such a supplement by virtue of any other scheme or order) or under article 25A of the Personal Injuries (Civilians) Scheme 1983 or any payment intended to compensate for the non-payment of such a supplement.
12. Any attendance allowance.
13. Any payment to the applicant as holder of the Victoria Cross or of the George Cross or any analogous payment.
14. (1) Any payment–
 - (a) by way of an education maintenance allowance made pursuant to;
 - (i) regulations made under section 518 of the Education Act 1996 (payment of school expenses; grant of scholarships etc);
 - (ii) regulations made under section 49 or 73(f) of the Education (Scotland) Act

- 1980 (power to assist persons to take advantage of educational facilities);
(iii) directions made under section 73ZA of the Education (Scotland) Act 1980 and paid under section 12(2)(c) of the Further and Higher Education (Scotland) Act 1992
- (b) corresponding to such an education maintenance allowance, made pursuant to;
(i) section 14 or section 181 of the Education Act 2002 (power of Secretary of State and National Assembly for Wales to give financial assistance for purposes related to education or childcare, and allowances in respect of education or training); or
(ii) regulations made under section 181 of that Act; or
- (iii) in England, by way of financial assistance made pursuant to section 14 of the Education Act 2002.
- (2) Any payment, other than a payment to which sub-paragraph (1) applies, made pursuant to;
(a) regulations made under section 518 of the Education Act 1996;
(b) regulations made under section 49 of the Education (Scotland) Act 1980; or
(c) directions made under section 73ZA of the Education (Scotland) Act 1980 and paid under section 12(2)(c) of the Further and Higher Education (Scotland) Act 1992, in respect of a course of study attended by a child or a young person or a person who is in receipt of an education maintenance allowance or other payment made pursuant to any provision specified in sub-paragraph (1).
15. Any payment made to the applicant by way of a repayment under regulation 11(2) of the Education (Teacher Student Loans) (Repayment etc.) Regulations 2002.
- 16 (1) Any payment made pursuant to section 2 of the 1973 Act or section 2 of the Enterprise and New Towns (Scotland) Act 1990 except a payment;
(a) made as a substitute for income support, a jobseeker's allowance, incapacity benefit, severe disablement allowance or an employment and support allowance;
(b) of an allowance referred to in section 2(3) of the 1973 Act or section 2(5) of the Enterprise and New Towns (Scotland) Act 1990; or
(c) intended to meet the cost of living expenses which relate to any one or more of the items specified in sub-paragraph (2) whilst an applicant is participating in an education, training or other scheme to help him enhance his employment prospects unless the payment is a Career Development Loan paid pursuant to section 2 of the 1973 Act and the period of education or training or the scheme, which is supported by that loan, has been completed.
- (2) The items specified in this sub-paragraph for the purposes of sub-paragraph (1)(c) are food, ordinary clothing or footwear, household fuel or rent of the applicant or, where the applicant is a member of a family, any other member of his family, or any council tax or water charges for which that applicant or member is liable.
- 17 (1) Subject to sub-paragraph (2), any of the following payments;
(a) a charitable payment;
(b) a voluntary payment;
(c) a payment (not falling within sub-paragraph (a) or (b) above) from a trust whose funds are derived from a payment made in consequence of any personal injury to the applicant;
(d) a payment under an annuity purchased;
(i) pursuant to any agreement or court order to make payments to the applicant; or
(ii) from funds derived from a payment made, in consequence of any personal injury to the applicant; or
(e) a payment (not falling within sub-paragraphs (a) to (d) received by virtue of any agreement or court order to make payments to the applicant in consequence of any personal injury to the applicant.

- (2) Sub-paragraph (1) shall not apply to a payment, which is made or due to be made by–
 - (a) a former partner of the applicant, or a former partner of any member of the applicant’s family; or
 - (b) the parent of a child or young person where that child or young person is a member of the applicant’s family.
- 18. 100% of any of the following, namely
 - (a) a war disablement pension (except insofar as such a pension falls to be disregarded under paragraph 9 or 10);
 - (b) a war widow’s pension or war widower’s pension;
 - (c) a pension payable to a person as a widow, widower or surviving civil partner under any power of Her Majesty otherwise than under an enactment to make provision about pensions for or in respect of persons who have been disabled or have died in consequence of service as members of the armed forces of the Crown;
 - (d) a guaranteed income payment;
 - (e) a payment made to compensate for the non-payment of such a pension or payment as is mentioned in any of the preceding sub-paragraphs;
 - (f) a pension paid by the government of a country outside Great Britain which is analogous to any of the pensions or payments mentioned in sub-paragraphs (a) to (d) above;
 - (g) pension paid to victims of National Socialist persecution under any special provision made by the law of the Federal Republic of Germany, or any part of it, or of the Republic of Austria.
- 19. £15 of any;
 - (a) widowed mother’s allowance paid pursuant to section 37 of the Act;
 - (b) widowed parent’s allowance paid pursuant to section 39A of the Act.
- 20. (1) Any income derived from capital to which the applicant is or is treated as beneficially entitled.
- 21. Where the applicant makes a parental contribution in respect of a student attending a course at an establishment in the United Kingdom or undergoing education in the United Kingdom, which contribution has been assessed for the purposes of calculating–
 - (a) under, or pursuant to regulations made under powers conferred by, sections 1 or 2 of the Education Act 1962 or section 22 of the Teaching and Higher Education Act 1998, that student’s award;
 - (b) under regulations made in exercise of the powers conferred by section 49 of the Education (Scotland) Act 1980, that student’s bursary, scholarship, or other allowance under that section or under regulations made in exercise of the powers conferred by section 73 of that Act of 1980, any payment to that student under that section; or
 - (c) the student’s student loan,an amount equal to the weekly amount of that parental contribution, but only in respect of the period for which that contribution is assessed as being payable.
- 22. (1) Where the applicant is the parent of a student aged under 25 in advanced education who either;
 - (a) is not in receipt of any award, grant or student loan in respect of that education; or
 - (b) is in receipt of an award under section 2 of the Education Act 1962 (discretionary awards) or an award bestowed by virtue of the Teaching and Higher Education Act 1998, or regulations made thereunder, or a bursary, scholarship or other allowance under section 49(1) of the Education (Scotland) Act 1980, or a payment under section 73 of that Act of 1980,and the applicant makes payments by way of a contribution towards the student’s maintenance, other than a parental contribution defined within this scheme.
 - (2) For the purposes of sub-paragraph (1), the amount shall be equal to–
 - (a) the weekly amount of the payments; or

- (b) the amount by way of a personal allowance for a single applicant under 25 less the weekly amount of any award, bursary, scholarship, allowance or payment referred to in sub-paragraph (1)(b), whichever is less.
23. Any payment made to the applicant by a child or young person or a non- dependant.
24. Where the applicant occupies a dwelling as his home and the dwelling is also occupied by a person and there is a contractual liability to make payments to the applicant in respect of the occupation of the dwelling by that person or a member of his family–
- (a) where the aggregate of any payments made in respect of any one week in respect of the occupation of the dwelling by that person or a member of his family, or by that person and a member of his family, is less than £20, the whole of that amount; or
 - (b) where the aggregate of any such payments is £20 or more per week, £20.
25. (1) Where the applicant occupies a dwelling as his home and he provides in that dwelling board and lodging accommodation, an amount, in respect of each person for which such accommodation is provided for the whole or any part of a week, equal to–
- (a) where the aggregate of any payments made in respect of any one week in respect of such accommodation provided to such person does not exceed £20.00, 100 per cent. of such payments;
 - (b) where the aggregate of any such payments exceeds £20.00, £20.00 and 50 per cent. of the excess over £20.00.
- (2) In this paragraph, ‘board and lodging accommodation’ means accommodation provided to a person or, if he is a member of a family, to him or any other member of his family, for a charge which is inclusive of the provision of that accommodation and at least some cooked or prepared meals which both are cooked or prepared (by a person other than the person to whom the accommodation is provided or a member of his family) and are consumed in that accommodation or associated premises.
26. (1) Any income in kind, except where regulation 30(11)(b) (provision of support under section 95 or 98 of the Immigration and Asylum Act in the calculation of income other than earnings) applies.
- (2) The reference in sub-paragraph (1) to ‘income in kind’ does not include a payment to a third party made in respect of the applicant which is used by the third party to provide benefits in kind to the applicant.
27. Any income which is payable in a country outside the United Kingdom for such period during which there is a prohibition against the transfer to the United Kingdom of that income.
28. (1) Any payment made to the applicant in respect of a person who is a member of his family–
- (a) pursuant to regulations under section 2(6)(b), 3 or 4 of the Adoption and Children Act 2002 or in accordance or with a scheme approved by the Scottish Ministers under section 51A of the Adoption (Scotland) Act 1978(b) (schemes for payments of allowances to adopters); or in accordance with an Adoption Allowance Scheme made under section 71 of the Adoption and Children (Scotland) Act 2007 (Adoption Allowances Schemes)
 - (b) which is a payment made by a local authority in pursuance of section 15(1) of, and paragraph 15 of Schedule 1 to, the Children Act 1989 (local authority contribution to a child’s maintenance where the child is living with a person as a result of a residence order) or in Scotland section 50 of the Children Act 1975 (payments towards maintenance of children);
 - (c) which is a payment made by an authority, as defined in Article 2 of the Children Order, in pursuance of Article 15 of, and paragraph 17 of Schedule 1 to, that Order (contribution by an authority to child’s maintenance);

- (a) in accordance with regulations made pursuant to section 14F of the Children Act 1989(c) (special guardianship support services);
- (2) Any payment, other than a payment to which sub-paragraph (1)(a) applies, made to the applicant pursuant to regulations under section 2(6)(b), 3 or 4 of the Adoption and Children Act 2002.
29. Any payment made to the applicant with whom a person is accommodated by virtue of arrangements made
- (a) by a local authority under–
- (i) section 23(2)(a) of the Children Act 1989 (provision of accommodation and maintenance for a child whom they are looking after),
- (ii) section 26 of the Children (Scotland) Act 1995 (manner of provision of accommodation to child looked after by local authority), or
- (iii) regulations 33 or 51 of the Looked After Children (Scotland) Regulations 2009 (fostering and kinship care allowances and fostering allowances); or
- (b) by a voluntary organisation under section 59(1)(a) of the Children Act 1989 (provision of accommodation by voluntary organisations).
30. Any payment made to the applicant or his partner for a person ('the person concerned'), who is not normally a member of the applicant's household but is temporarily in his care, by–
- (a) a health authority;
- (b) a local authority but excluding payments of housing benefit made in respect of the person concerned;
- (c) a voluntary organisation;
- (d) the person concerned pursuant to section 26(3A) of the National Assistance Act 1948;
- (e) a primary care trust established under section 16A of the National Health Service Act 1977 or established by an order made under section 18(2)(c) of the National Health Service Act 2006; or
- (f) a Local Health Board established under section 16BA of the National Health Service Act 1977 or established by an order made under section 11 of the National Health Service (Wales) Act 2006
31. Any payment made by a local authority in accordance with section 17, 23B, 23C or 24A of the Children Act 1989 or, as the case may be, section 12 of the Social Work (Scotland) Act 1968 or section 22, 29 or 30 of the Children (Scotland) Act 1995 (provision of services for children and their families and advice and assistance to certain children).
32. (1) Subject to sub-paragraph (2), any payment (or part of a payment) made by a local authority in accordance with section 23C of the Children Act 1989(e) or section 29 of the Children (Scotland) Act 1995 (local authorities' duty to promote welfare of children and powers to grant financial assistance to persons in, or formerly in, their care) to a person ('A') which A passes on to the applicant.
- (2) Sub-paragraph (1) applies only where A;
- (a) was formerly in the applicant's care, and
- (b) is aged 18 or over, and
- (c) continues to live with the applicant.
33. (1) Subject to sub-paragraph (2), any payment received under an insurance policy taken out to insure against the risk of being unable to maintain repayments;
- (a) on a loan which is secured on the dwelling which the applicant occupies as his home; or
- (b) under a regulated agreement as defined for the purposes of the Consumer Credit Act 1974 or under a hire-purchase agreement or a conditional sale agreement as defined for the purposes of Part 3 of the Hire-Purchase Act 1964.
- (2) A payment referred to in sub-paragraph (1) shall only be disregarded to the extent that the payment received under that policy does not exceed the amounts, calculated on a weekly basis, which are used to–

- (a) maintain the repayments referred to in sub-paragraph (1)(a) or, as the case may be, (b); and
 - (b) meet any amount due by way of premiums on—
 - (i) that policy; or
 - (ii) in a case to which sub-paragraph(1)(a) applies, an insurance policy taken out to insure against loss or damage to any building or part of a building which is occupied by the applicant as his home and which is required as a condition of the loan referred to in sub-paragraph (1)(a).
34. Any payment of income which is to be treated as capital.
35. Any social fund payment made pursuant to Part 8 of the Act (the Social Fund) or any local welfare provision as defined by the Social Security (Miscellaneous Amendments) Regulations 2013
36. Any payment under Part 10 of the Act (Christmas bonus for pensioners).
37. Where a payment of income is made in a currency other than sterling, any banking charge or commission payable in converting that payment into sterling.
38. (1) Any payment made under or by any of the Trusts, the Fund, the Eileen Trust, MFET Limited, the Skipton Fund, the Caxton Foundation or the Independent Living Fund (2006).
(2) Any payment by or on behalf of a person who is suffering or who suffered from haemophilia or who is or was a qualifying person, which derives from a payment made under or by any of the Trusts to which sub-paragraph (1) refers and which is made to or for the benefit of—
 - (a) that person's partner or former partner from whom he is not, or where that person has died was not, estranged or divorced or with whom he has formed a civil partnership that has not been dissolved or, where that person has died, had not been dissolved at the time of that person's death;
 - (b) any child who is a member of that person's family or who was such a member and who is a member of the applicant's family; or
 - (c) any young person who is a member of that person's family or who was such a member and who is a member of the applicant's family.
- (3) Any payment by or on behalf of the partner or former partner of a person who is suffering or who suffered from haemophilia or who is or was a qualifying person provided that the partner or former partner and that person are not, or if either of them has died were not, estranged or divorced or, where the partner or former partner and that person have formed a civil partnership, the civil partnership has not been dissolved or, if either of them has died, had not been dissolved at the time of the death, which derives from a payment made under or by any of the Trusts to which sub-paragraph (1) refers and which is made to or for the benefit of;
 - (a) the person who is suffering from haemophilia or who is a qualifying person;
 - (b) any child who is a member of that person's family or who was such a member and who is a member of the applicant's family; or
 - (c) any young person who is a member of that person's family or who was such a member and who is a member of the applicant's family.
- (4) Any payment by a person who is suffering from haemophilia or who is a qualifying person, which derives from a payment under or by any of the Trusts to which sub-paragraph (1) refers, where;
 - (a) that person has no partner or former partner from whom he is not estranged or divorced or with whom he has formed a civil partnership that has not been dissolved, nor any child or young person who is or had been a member of that person's family; and
 - (b) the payment is made either;
 - (i) to that person's parent or step-parent, or
 - (ii) where that person at the date of the payment is a child, a young person or a

- student who has not completed his full-time education and has no parent or step-parent, to his guardian,
but only for a period from the date of the payment until the end of two years from that person's death.
- (5) Any payment out of the estate of a person who suffered from haemophilia or who was a qualifying person, which derives from a payment under or by any of the Trusts to which sub-paragraph (1) refers, where;
- (a) that person at the date of his death (the relevant date) had no partner or former partner from whom he was not estranged or divorced or with whom he has formed a civil partnership that has not been dissolved, nor any child or young person who was or had been a member of his family; and
 - (b) the payment is made either
 - (i) to that person's parent or step-parent, or
 - (ii) where that person at the relevant date was a child, a young person or a student who had not completed his full-time education and had no parent or step-parent, to his guardian,
but only for a period of two years from the relevant date.
- (6) In the case of a person to whom or for whose support payment referred to in this paragraph is made, any income which derives from any payment of income or capital made under or deriving from any of the Trusts.
- (7) For the purposes of sub-paragraphs (2) to (6), any reference to the Trusts shall be construed as including a reference to the Fund, the Eileen Trust, MFET Limited, the Skipton Fund, the Caxton Foundation and the London Bombings Relief Charitable Fund.
39. Any Housing Benefit or where the applicant is entitled to an award of Universal Credit which includes a housing element, an amount of Universal Credit equal to the housing element used in that award, up to a maximum of the Universal Credit award.
40. Any payment made by the Secretary of State to compensate for the loss (in whole or in part) of entitlement to housing benefit.
41. Any payment to a juror or witness in respect of attendance at a court other than compensation for loss of earnings or for the loss of a benefit payable under the benefit Acts.
42. Any payment in consequence of a reduction of council tax under section 13 or section 80 of the 1992 Act (reduction of liability for council tax).
43. (1) Any payment or repayment made—
 - (a) as respects England, under regulation 5, 6 or 12 of the National Health Service (Travel Expenses and Remission of Charges) Regulations 2003 (travelling expenses and health service supplies);
 - (b) as respects Wales, under regulation 5, 6 or 11 of the National Health Service (Travelling Expenses and Remission of Charges) (Wales) Regulations 2007 (travelling expenses and health service supplies);
 - (c) as respects Scotland, under regulation 3, 5 or 11 of the National Health Service (Travelling Expenses and Remission of Charges) (Scotland) (No. 2) Regulations 2003 (travelling expenses and health service supplies).(2) Any payment or repayment made by the Secretary of State for Health, the Scottish Ministers or the Welsh Ministers, which is analogous to a payment or repayment, mentioned in sub-paragraph (1).
44. Any payment made to such persons entitled to receive benefits as may be determined by or under a scheme made pursuant to section 13 of the Social Security Act 1988 in lieu of vouchers or similar arrangements in connection with the provision of those benefits (including payments made in place of healthy start vouchers, milk tokens or the supply of vitamins).

45. Any payment made by either the Secretary of State for Justice or by the Scottish Ministers under a scheme established to assist relatives and other persons to visit persons in custody.
46. (1) Where an applicant's family includes at least one child or young person, £15 of any payment of maintenance, other than child maintenance, whether under a court order or not, which is made or due to be made by the applicant's former partner, or the applicant's partner's former partner.
(2) For the purpose of sub-paragraph (1) where more than one maintenance payment falls to be taken into account in any week, all such payments such be aggregated and treated as if they were a single payment.
(3) A payment made by the Secretary of State in lieu of maintenance shall, for the purpose of sub-paragraph (1), be treated as a payment of maintenance made by a person specified in sub-paragraph (1).
47. (1) Any payment of child maintenance made or derived from a liable relative where the child or young person in respect of whom the payment is made is a member of the applicant's family, except where the person making the payment is the applicant or the applicant's partner.
(2) In paragraph (1)
'child maintenance' means any payment towards the maintenance of a child or young person, including any payment made voluntarily and payments made under;
(a) the Child Support Act 1991;
(b) the Child Support (Northern Ireland) Order 1991;
(c) a court order;
(d) a consent order;
(e) a maintenance agreement registered for execution in the Books of Council and Session or the sheriff court books;
'liable relative' means a person listed in regulation 54 (interpretation) of the Income Support (General) Regulations 1987, other than a person falling within sub-paragraph (d) of that definition.
48. Any payment (other than a training allowance) made, whether by the Secretary of State or any other person, under the Disabled Persons (Employment) Act 1944 to assist disabled persons to obtain or retain employment despite their disability.
49. Any guardian's allowance.
50. (1) If the applicant is in receipt of any benefit under Parts 2, 3 or 5 of the Act, any increase in the rate of that benefit arising under Part 4 (increases for dependants) or section 106(a) (unemployability supplement) of the Act, where the dependant in respect of whom the increase is paid is not a member of the applicant's family.
(2) If the applicant is in receipt of any pension or allowance under Part 2 or 3 of the Naval, Military and Air Forces Etc. (Disablement and Death) Service Pensions Order 2006, any increase in the rate of that pension or allowance under that Order, where the dependant in respect of whom the increase is paid is not a member of the applicant's family.
51. Any supplementary pension under article 23(2) of the Naval, Military and Air Forces Etc. (Disablement and Death) Service Pensions Order 2006 (pensions to surviving spouses and surviving civil partners) and any analogous payment made by the Secretary of State for Defence to any person who is not a person entitled under that Order.
52. In the case of a pension awarded at the supplementary rate under article 27(3) of the Personal Injuries (Civilians) Scheme 1983(a) (pensions to widows, widowers or surviving civil partners), the sum specified in paragraph 1(c) of Schedule 4 to that Scheme.
53. (1) Any payment which is
(a) made under any of the Dispensing Instruments to a widow, widower or

- (b) surviving civil partner of a person;
 - (i) whose death was attributable to service in a capacity analogous to service as a member of the armed forces of the Crown; and
 - (ii) whose service in such capacity terminated before 31st March 1973; and equal to the amount specified in article 23(2) of the Naval, Military and Air Forces Etc. (Disablement and Death) Service Pensions Order 2006.

(2) In this paragraph 'the Dispensing Instruments' means the Order in Council of 19th December 1881, the Royal Warrant of 27th October 1884 and the Order by His Majesty of 14th January 1922 (exceptional grants of pay, non-effective pay and allowances).

- 54. Any council tax reduction or council tax benefit to which the applicant is entitled.
- 55. Any payment made under section 12B of the Social Work (Scotland) Act 1968, or under sections 12A to 12D of the National Health Service Act 2006 (direct payments for health care) or under regulations made under section 57 of the Health and Social Care Act 2001 (direct payments).
- 56. (1) Subject to sub-paragraph (2), in respect of a person who is receiving, or who has received, assistance under the self-employment route, any payment to that person—
 - (a) to meet expenses wholly and necessarily incurred whilst carrying on the commercial activity;
 - (b) which is used or intended to be used to maintain repayments on a loan taken out by that person for the purpose of establishing or carrying on the commercial activity, in respect of which such assistance is or was received.(2) Sub-paragraph (1) shall apply only in respect of payments, which are paid to that person from the special account
- 57. (1) Any payment of a sports award except to the extent that it has been made in respect of any one or more of the items specified in sub-paragraph (2).
(2) The items specified for the purposes of sub-paragraph (1) are food, ordinary clothing or footwear, household fuel or rent of the applicant or where the applicant is a member of a family, any other member of his family, or any council tax or water charges for which that applicant or member is liable.
(3) For the purposes of sub-paragraph (2) 'food' does not include vitamins, minerals or other special dietary supplements intended to enhance the performance of the person in the sport in respect of which the award was made.
- 58. Where the amount of subsistence allowance paid to a person in a reduction week exceeds the amount of income-based jobseeker's allowance that person would have received in that reduction week had it been payable to him, less 50p, that excess amount.
- 59. In the case of an applicant participating in an employment zone programme, any discretionary payment made by an employment zone contractor to the applicant, being a fee, grant, loan or otherwise.
- 60. Any discretionary housing payment paid pursuant to regulation 2(1) of the Discretionary Financial Assistance Regulations 2001 as amended by the Welfare Reform Act 2012 (Consequential Amendments) Regulations 2013.
- 61. (1) Any payment made by a local authority or by the Welsh Ministers to or on behalf of the applicant or his partner relating to a service which is provided to develop or sustain the capacity of the applicant or his partner to live independently in his accommodation.
(2) For the purposes of sub-paragraph (1) 'local authority' includes, in England, a county council.
- 62. Any payments to a claimant made under section 49 of the Children and Families Act 2014 (personal budgets and direct payments)
- 63. Any payment of child benefit.

64. Any Windrush compensation payment.
65. Any payment made under the We Love Manchester Emergency Fund.
66. Any payment made under the London Emergency Trust.
67. Carer's Allowance.
68. The support component of Employment and Support Allowance or its equivalent within Universal Credit.
69. Where, **but for this scheme**, the applicant would be entitled to either a Disability Premium, Enhanced Disability Premium, Severe Disability Premium or a Disabled Child Premium, a Limited Capability for work element or support component a further disregard of £40 shall be made from their income.

Schedule 3
Capital to be disregarded

1. The dwelling together with any garage, garden and outbuildings, normally occupied by the applicant as his home including any premises not so occupied which it is impracticable or unreasonable to sell separately, in particular 5, in Scotland, any croft land on which the dwelling is situated; but, notwithstanding section 15 (calculation of income and capital of members of applicant's family and of polygamous marriage), only one dwelling shall be disregarded under this paragraph.
2. Any payment made to the applicant in respect of any travel or other expenses incurred, or to be incurred, by him in respect of his participation in the Mandatory Work Activity Scheme but only for 52 weeks beginning with the date of receipt of the payment.
3. Any payment made to the applicant in respect of any travel or other expenses incurred or to be incurred, by him in respect of his participation in the Employment, Skills and Enterprise Scheme or Back to Work Scheme but only for 52 weeks beginning with the date of receipt of the payment but only for 52 weeks beginning with the date of receipt of payment.
4. Any premises acquired for occupation by the applicant, which he intends to occupy as his home within 26 weeks of the date of acquisition or such longer period as is reasonable in the circumstances to enable the applicant to obtain possession and commence occupation of the premises.
5. Any sum directly attributable to the proceeds of sale of any premises formerly occupied by the applicant as his home which is to be used for the purchase of other premises intended for such occupation within 26 weeks of the date of sale or such longer period as is reasonable in the circumstances to enable the applicant to complete the purchase.
6. Any premises occupied in whole or in part—
 - (a) by a partner or relative of a single applicant or any member of the family as his home where that person has attained the qualifying age for state pension credit or is incapacitated;
 - (b) by the former partner of the applicant as his home; but this provision shall not apply where the former partner is a person from whom the applicant is estranged or divorced or with whom he had formed a civil partnership that has been dissolved.
7. Where an applicant is on income support, an income-based jobseeker's allowance or an income-related employment and support allowance, the whole of his capital provided that it is no more than £16,000.
8. Where the applicant is a member of a joint-claim couple for the purposes of the Jobseekers Act 1995 and his partner is on income-based jobseeker's allowance, the whole of the applicant's capital.
9. Any future interest in property of any kind, other than land or premises in respect of which the applicant has granted a subsisting lease or tenancy, including sub- leases or sub-tenancies.
10. (1) The assets of any business owned in whole or in part by the applicant and for the purposes of which he is engaged as a self-employed earner, or if he has ceased to be so engaged, for such period as may be reasonable in the circumstances to allow for disposal of any such asset.
(2) The assets of any business owned in whole or in part by the applicant where—
 - (a) he is not engaged as a self-employed earner in that business by reason of some disease or bodily or mental disablement; but
 - (b) he intends to become engaged or, as the case may be, re-engaged as a self-employed earner in that business as soon as he recovers or is able to become engaged or re-engaged in that business;

for a period of 26 weeks from the date on which the claim for council tax reduction is

made, or is treated as made, or, if it is unreasonable to expect him to become engaged or re-engaged in that business within that period, for such longer period as is reasonable in the circumstances to enable him to become so engaged or re-engaged.

(3) In the case of a person who is receiving assistance under the self-employment route, the assets acquired by that person for the purpose of establishing or carrying on the commercial activity in respect of which such assistance is being received.

(3) In the case of a person who has ceased carrying on the commercial activity in respect of which assistance was received as specified in sub-paragraph (3), the assets relating to that activity for such period as may be reasonable in the circumstances to allow for disposal of any such asset.

11. (1) Subject to sub-paragraph (2), any arrears of, or any concessionary payment made to compensate for arrears due to the non-payment of;
- (a) an income-related benefit;
 - (b) an income-based jobseeker's allowance;
 - (c) any discretionary housing payment paid pursuant to regulation 2(1) of the Discretionary Financial Assistance Regulations 2001;
 - (d) working tax credit and child tax credit
 - (e) an income-related employment and reduction allowance

but only for a period of 52 weeks from the date of the receipt of arrears or of the concessionary payment.

12. Any sum
- (a) paid to the applicant in consequence of damage to, or loss of the home or any personal possession and intended for its repair or replacement; or
 - (b) acquired by the applicant (whether as a loan or otherwise) on the express condition that it is to be used for effecting essential repairs or improvement to the home, which is to be used for the intended purpose, for a period of 26 weeks from the date on which it was so paid or acquired or such longer period as is reasonable in the circumstances to effect the repairs, replacement or improvement.

12. Any sum—
- (a) deposited with a housing association as defined in section 1(1) of the Housing Associations Act 1985 or section 338(1) of the Housing (Scotland) Act 1987 as a condition of occupying the home;
 - (b) which was so deposited and which is to be used for the purchase of another home, for the period of 26 weeks or such longer period as may be reasonable in the circumstances to enable the applicant to complete the purchase.

13. Any personal possessions except those which have been acquired by the applicant with the intention of reducing his capital in order to secure entitlement to council tax reduction or to increase the amount of that reduction.

14. The value of the right to receive any income under an annuity or the surrender value (if any) of such an annuity.

15. Where the funds of a trust are derived from a payment made in consequence of any personal injury to the applicant or applicant's partner, the value of the trust fund and the value of the right to receive any payment under that trust.

16. (1) Any payment made to the applicant or the applicant's partner in consequence of any personal injury to the applicant or, as the case may be, the applicant's partner.

(2) But sub-paragraph (1)

- (a) applies only for the period of 52 weeks beginning with the day on which the applicant first receives any payment in consequence of that personal injury;
 - (b) does not apply to any subsequent payment made to him in consequence of that injury (whether it is made by the same person or another);
 - (c) ceases to apply to the payment or any part of the payment from the day on which the applicant no longer possesses it;
 - (d) does not apply to any payment from a trust where the funds of the trust are derived from a payment made in consequence of any personal injury to the applicant.
- (3) For the purposes of sub-paragraph (2)(c), the circumstances in which an applicant no longer possesses a payment or a part of it include where the applicant has used a payment or part of it to purchase an asset.
- (4) References in sub-paragraphs (2) and (3) to the applicant are to be construed as including references to his partner (where applicable).
17. The value of the right to receive any income under a life interest or from a life rent.
18. The surrender value of any policy of life insurance.
19. Where any payment of capital falls to be made by instalments, the value of the right to receive any outstanding instalments.
20. Any payment made by a local authority in accordance with section 17, 23B, 23C or 24A of the Children Act 1989 or, as the case may be, section 12 of the Social Work (Scotland) Act 1968 or sections 22, 29 or 30 of the Children (Scotland) Act 1995 (provision of services for children and their families and advice and assistance to certain children).
21. (1) Subject to sub-paragraph (2), any payment (or part of a payment) made by a local authority in accordance with section 23C of the Children Act 1989 or section 29 of the Children (Scotland) Act 1995 (local authorities' duty to promote welfare of children and powers to grant financial assistance to persons in, or formerly in, their care) to a person ('A') which A passes on to the applicant.
- (2) Sub-paragraph (1) applies only where A;
- (a) was formerly in the applicant's care, and
 - (b) is aged 18 or over, and
 - (c) continues to live with the applicant.
22. Any social fund payment.
23. Any refund of tax which falls to be deducted under section 369 of the Income and Corporation Taxes Act 1988 (deduction of tax from certain loan interest) on a payment of relevant loan interest for the purpose of acquiring an interest in the home or carrying out repairs or improvements to the home.
24. Any capital which, by virtue of sections 31 or 51 (capital treated as income, treatment of student loans) is to be treated as income.
25. Where any payment of capital is made in a currency other than sterling, any banking charge or commission payable in converting that payment into sterling.
27. Any payment made under or by the Trusts, the Fund, the Eileen Trust, MFET Limited, the Independent Living Fund (2006), the Skipton Fund, the Caxton Foundation or the Charitable Fund.
28. Any payment by or on behalf of a person who is suffering or who suffered from haemophilia or who is or was a qualifying person, which derives from a payment made under or by any of the

Trusts to which sub-paragraph (1) refers and which is made to or for the benefit of–

- (a) that person's partner or former partner from whom he is not, or where that person has died was not, estranged or divorced or with whom he has formed a civil partnership that has not been dissolved or, where that person has died, had not been dissolved at the time of that person's death;
- (b) any child who is a member of that person's family or who was such a member and who is a member of the applicant's family; or
- (c) any young person who is a member of that person's family or who was such a member and who is a member of the applicant's family.

(3) Any payment by or on behalf of the partner or former partner of a person who is suffering or who suffered from haemophilia or who is or was a qualifying person provided that the partner or former partner and that person are not, or if either of them has died were not, estranged or divorced or, where the partner or former partner and that person have formed a civil partnership, the civil partnership has not been dissolved or, if either of them has died, had not been dissolved at the time of the death, which derives from a payment made under or by any of the Trusts and which is made to or for the benefit of–

- (a) the person who is suffering from haemophilia or who is a qualifying person;
- (b) any child who is a member of that person's family or who was such a member and who is a member of the applicant's family; or
- (c) any young person who is a member of that person's family or who was such a member and who is a member of the applicant's family.

(4) Any payment by a person who is suffering from haemophilia or who is a qualifying person, which derives from a payment under or by any of the Trusts where–

- (a) that person has no partner or former partner from whom he is not estranged or divorced or with whom he has formed a civil partnership that has not been dissolved, nor any child or young person who is or had been a member of that person's family; and
- (b) the payment is made either;
 - (i) to that person's parent or step-parent; or
 - (ii) where that person at the date of the payment is a child, a young person or a student who has not completed his full-time education and has no parent or step-parent, to his guardian, but only for a period from the date of the payment until the end of two years from that person's death.

(5) Any payment out of the estate of a person who suffered from haemophilia or who was a qualifying person, which derives from a payment under or any of the Trusts where

- (a) that person at the date of his death (the relevant date) had no partner or former partner from whom he was not estranged or divorced or with whom he had formed a civil partnership that had not been dissolved, nor any child or young person who was or had been a member of his family; and
- (b) the payment is made either;
 - (i) to that person's parent or step-parent; or
 - (ii) where that person at the relevant date was a child, a young person or a student who had not completed his full-time education and had no parent or step-parent, to his guardian, but only for a period of two years from the relevant date.

(6) In the case of a person to whom or for whose support payment referred to in this paragraph is made, any capital resource which derives from any payment of income or capital made under or deriving from any of the Trusts.

(7) Any reference to the Trusts shall be construed as including a reference to the Fund, the Eileen Trust, MFET Limited the Skipton Fund, the Caxton Foundation, and the London Bombings Relief Charitable Fund.

28. (1) Where an applicant has ceased to occupy what was formerly the dwelling occupied as the home following his estrangement or divorce from, or dissolution of his civil partnership with, his former partner, that dwelling for a period of 26 weeks from the date on which he ceased to occupy that dwelling or, where the dwelling is occupied as the home by the former partner who is a lone parent, for so long as it is so occupied.

(2) In this paragraph 'dwelling' includes any garage, garden and outbuildings, which were formerly occupied by the applicant as his home and any premises not so occupied which it is impracticable or unreasonable to sell separately, in particular, in Scotland, any croft land on which the dwelling is situated.
29. Any premises where the applicant is taking reasonable steps to dispose of those premises, for a period of 26 weeks from the date on which he first took such steps, or such longer period as is reasonable in the circumstances to enable him to dispose of those premises.
30. Any premises which the applicant intends to occupy as his home, and in respect of which he is taking steps to obtain possession and has sought legal advice, or has commenced legal proceedings, with a view to obtaining possession, for a period of 26 weeks from the date on which he first sought such advice or first commenced such proceedings whichever is the earlier, or such longer period as is reasonable in the circumstances to enable him to obtain possession and commence occupation of those premises.
31. Any premises which the applicant intends to occupy as his home to which essential repairs or alterations are required in order to render them fit for such occupation, for a period of 26 weeks from the date on which the applicant first takes steps to effect those repairs or alterations, or such longer period as is necessary to enable those repairs or alterations to be carried out.
32. Any payment made by the Secretary of State to compensate for the loss (in whole or in part) of entitlement to housing benefit.
33. The value of the right to receive an occupational or personal pension.
34. The value of any funds held under a personal pension scheme
35. The value of the right to receive any rent except where the applicant has a reversionary interest in the property in respect of which rent is due.
36. Any payment in kind made by a charity or under or by the Trusts, the Fund, MFET Limited, the Skipton Fund, the Caxton Foundation or the Independent Living Fund (2006).
37. Any payment made pursuant to section 2 of the 1973 Act or section 2 of the Enterprise and New Towns (Scotland) Act 1990, but only for the period of 52 weeks beginning on the date of receipt of the payment.
38. Any payment in consequence of a reduction of council tax under section 13 or, as the case may be, section 80 of the Local Government Finance Act 1992 (reduction of liability for council tax), but only for a period of 52 weeks from the date of the receipt of the payment.
39. Any grant made in accordance with a scheme made under section 129 of the Housing Act 1988 or section 66 of the Housing (Scotland) Act 1988 (schemes for payments to assist local housing authority and local authority tenants to obtain other accommodation) which is to be used—
 - (a) to purchase premises intended for occupation as his home; or
 - (b) to carry out repairs or alterations which are required to render premises fit for occupation as his home,for a period of 26 weeks from the date on which he received such a grant or such longer period as is reasonable in the circumstances to enable the purchase, repairs or alterations to be

- completed and the applicant to commence occupation of those premises as his home.
40. Any arrears of supplementary pension which is disregarded under this scheme but only for a period of 52 weeks from the date of receipt of the arrears.
41. (1) Any payment or repayment made—
(a) as respects England, under regulation 5, 6 or 12 of the National Health Service (Travel Expenses and Remission of Charges) Regulations 2003 (travelling expenses and health service supplies);
(b) as respects Wales, under regulation 5, 6 or 11 of the National Health Service (Travelling Expenses and Remission of Charges) (Wales) Regulations 2007 (travelling expenses and health service supplies);
(c) as respects Scotland, under regulation 3, 5 or 11 of the National Health Service (Travelling Expenses and Remission of Charges) (Scotland) (No. 2) Regulations 2003 (travelling expenses and health service supplies),
but only for a period of 52 weeks from the date of receipt of the payment or repayment.
(2) Any payment or repayment made by the Secretary of State for Health, the Scottish Ministers or the Welsh Ministers, which is analogous to a payment, or repayment mentioned in sub-paragraph (1), but only for a period of 52 weeks from the date of the receipt of the payment or repayment.
42. Any payment made to such persons entitled to receive benefits as may be determined by or under a scheme made pursuant to section 13 of the Social Security Act 1988 in lieu of vouchers or similar arrangements in connection with the provision of those benefits (including payments made in place of healthy start vouchers, milk tokens or the supply of vitamins), but only for a period of 52 weeks from the date of receipt of the payment.
43. Any payment made under Part 8A of the Act (entitlement to health in pregnancy grant).
44. Any payment made either by the Secretary of State for Justice or by Scottish Ministers under a scheme established to assist relatives and other persons to visit persons in custody, but only for a period of 52 weeks from the date of the receipt of the payment.
45. Any payment (other than a training allowance) made, whether by the Secretary of State or any other person, under the Disabled Persons (Employment) Act 1944 to assist disabled persons to obtain or retain employment despite their disability.
46. Any payment made by a local authority under section 3 of the Disabled Persons (Employment) Act 1958 to homeworkers assisted under the Blind Homeworkers' Scheme.
47. (1) Subject to sub-paragraph (2), where an applicant satisfies the conditions in section 131(3) and (6) of the Act (entitlement to alternative maximum council tax reduction), the whole of his capital.
(2) Where in addition to satisfying the conditions in section 131(3) and (6) of the Act the applicant also satisfies the conditions in section 131(4) and (5) of the Act (entitlement to the maximum council tax reduction), sub-paragraph (1) shall not have effect.
48. (1) Any sum of capital to which sub-paragraph (2) applies and
(a) which is administered on behalf of a person by the High Court or the County Court under Rule 21.11(1) of the Civil Procedure Rules 1998 or by the Court of Protection;
(b) which can only be disposed of by order or direction of any such court; or
(c) where the person concerned is under the age of 18, which can only be disposed of by order or direction prior to that person attaining age 18.
(2) This sub-paragraph applies to a sum of capital which is derived from;
(a) an award of damages for a personal injury to that person; or
(b) compensation for the death of one or both parents where the person concerned is under the age of 18.

49. Any sum of capital administered on behalf of a person in accordance with an order made under section 13 of the Children (Scotland) Act 1995, or under Rule 36.14 of the Ordinary Cause Rules 1993 or under Rule 128 of those Rules, where such sum derives from
- (a) award of damages for a personal injury to that person; or
 - (b) compensation for the death of one or both parents where the person concerned is under the age of 18.
50. Any payment to the applicant as holder of the Victoria Cross or George Cross.
51. In the case of a person who is receiving, or who has received, assistance under the self-employment route, any sum of capital which is acquired by that person for the purpose of establishing or carrying on the commercial activity in respect of which such assistance is or was received but only for a period of 52 weeks from the date on which that sum was acquired.
52. (1) Any payment of a sports award for a period of 26 weeks from the date of receipt of that payment except to the extent that it has been made in respect of any one or more of the items specified in sub-paragraph (2).
- (2) The items specified for the purposes of sub-paragraph (1) are food, ordinary clothing or footwear, household fuel or rent of the applicant or, where the applicant is a member of a family, any other member of his family, or any council tax or water charges for which that applicant or member is liable.
- (3) For the purposes of sub-paragraph (2) 'food' does not include vitamins, minerals or other special dietary supplements intended to enhance the performance of the person in the sport in respect of which the award was made.
53. (1) Any payment;
- (a) by way of an education maintenance allowance made pursuant to—
 - (i) regulations made under section 518 of the Education Act 1996;
 - (ii) regulations made under section 49 or 73(f) of the Education (Scotland) Act 1980;
 - (iii) directions made under section 73ZA of the Education (Scotland) Act 1980 and paid under section 12(2)(c) of the Further and Higher Education (Scotland) Act 1992;
 - (b) corresponding to such an education maintenance allowance, made pursuant to;
 - (i) section 14 or section 181 of the Education Act 2002 (power of Secretary of State and National Assembly for Wales to give financial assistance for purposes related to education or childcare, and allowances in respect of education or training); or
 - (ii) regulations made under section 181 of that Act ;
- or in England, by way of financial assistance made pursuant to section 14 of the Education Act 2002.
- (2) Any payment, other than a payment to which sub-paragraph (1) applies, made pursuant to;
- (a) regulations made under section 518 of the Education Act 1996;
 - (b) regulations made under section 49 of the Education (Scotland) Act 1980; or
 - (c) directions made under section 73ZA of the Education (Scotland) Act 1980 and paid under section 12(2)(c) of the Further and Higher Education (Scotland) Act 1992, in respect of a course of study attended by a child or a young person or a person who is in receipt of an education maintenance allowance or other payment made pursuant to any provision specified in sub-paragraph (1).
54. In the case of an applicant participating in an employment zone programme, any discretionary payment made by an employment zone contractor to the applicant, being a fee, grant, loan or otherwise, but only for the period of 52 weeks from the date of receipt of the payment.
55. Any arrears of subsistence allowance paid as a lump sum but only for the period of 52 weeks from the date of receipt of the payment.

56. Where an ex-gratia payment of £10,000 has been made by the Secretary of State on or after 1st February 2001 in consequence of the imprisonment or interment of–
- (a) the applicant;
 - (b) the applicant's partner;
 - (c) the applicant's deceased spouse or deceased civil partner; or
 - (d) the applicant's partner's deceased spouse or deceased civil partner,
- by the Japanese during the Second World War, £10,000.
57. (1) Subject to sub-paragraph (2), the amount of any trust payment made to an applicant or a member of an applicant's family who is
- (a) a diagnosed person;
 - (b) the diagnosed person's partner or the person who was the diagnosed person's partner at the date of the diagnosed person's death;
 - (c) a parent of a diagnosed person, a person acting in place of the diagnosed person's parents or a person who was so acting at the date of the diagnosed person's death; or
 - (d) a member of the diagnosed person's family (other than his partner) or a person who was a member of the diagnosed person's family (other than his partner) at the date of the diagnosed person's death.
- (2) Where a trust payment is made to;
- (a) a person referred to in sub-paragraph (1)(a) or (b), that sub-paragraph shall apply for the period beginning on the date on which the trust payment is made and ending on the date on which that person dies;
 - (b) a person referred to in sub-paragraph (1)(c), that sub-paragraph shall apply for the period beginning on the date on which the trust payment is made and ending two years after that date;
 - (c) a person referred to in sub-paragraph (1)(d), that sub-paragraph shall apply for the period beginning on the date on which the trust payment is made and ending–
 - (i) two years after that date; or
 - (ii) on the day before the day on which that person–
 - (aa) ceases receiving full-time education; or
 - (bb) attains the age of 20,whichever is the latest.
- (3) Subject to sub-paragraph (4), the amount of any payment by a person to whom a trust payment has been made or of any payment out of the estate of a person to whom a trust payment has been made, which is made to an applicant or a member of an applicant's family who is–
- (a) the diagnosed person's partner or the person who was the diagnosed person's partner at the date of the diagnosed person's death;
 - (b) a parent of a diagnosed person, a person acting in place of the diagnosed person's parents or a person who was so acting at the date of the diagnosed person's death; or
 - (c) a member of the diagnosed person's family (other than his partner) or a person who was a member of the diagnosed person's family (other than his partner) at the date of the diagnosed person's death, but only to the extent that such payments do not exceed the total amount of any trust payments made to that person.
- (4) Where a payment as referred to in sub-paragraph (3) is made to–
- (a) a person referred to in sub-paragraph (3)(a), that sub-paragraph shall apply for the period beginning on the date on which that payment is made and ending on the date on which that person dies;
 - (b) a person referred to in sub-paragraph (3)(b), that sub-paragraph shall apply for the period beginning on the date on which that payment is made and ending two years after that date; or
 - (c) person referred to in sub-paragraph (3)(c), that sub-paragraph shall apply

- for the period beginning on the date on which that payment is made and ending–
- (i) two years after that date; or
 - (ii) on the day before the day on which that person
 - (aa) ceases receiving full-time education; or
 - (bb) attains the age of 20,whichever is the latest.
- (5) In this paragraph, a reference to a person–
- (a) being the diagnosed person’s partner;
 - (b) being a member of a diagnosed person’s family;
 - (c) acting in place of the diagnosed person’s parents,
- at the date of the diagnosed person’s death shall include a person who would have been such a person or a person who would have been so acting, but for the diagnosed person residing in a care home, an Abbeyfield Home or an independent hospital on that date.
- (6) In this paragraph– ‘diagnosed person’ means a person who has been diagnosed as suffering from, or who, after his death, has been diagnosed as having suffered from, variant Creutzfeld- Jakob disease;
‘relevant trust’ means a trust established out of funds provided by the Secretary of State in respect of persons who suffered, or who are suffering, from variant Creutzfeld-Jakob disease for the benefit of persons eligible for payments in accordance with its provisions;
‘trust payment’ means a payment under a relevant trust.
58. The amount of any payment, other than a war pension, to compensate for the fact that the applicant, the applicant’s partner, the applicant’s deceased spouse or deceased civil partner or the applicant’s partner’s deceased spouse or deceased civil partner
- (a) was a slave labourer or a forced labourer;
 - (b) had suffered property loss or had suffered personal injury; or
 - (c) was a parent of a child who had died,
- during the Second World War.
59. (1) Any payment made by a local authority, or by the Welsh Ministers, to or on behalf of the applicant or his partner relating to a service, which is provided to develop or sustain the capacity of the applicant or his partner to live independently in his accommodation.
- (2) For the purposes of sub-paragraph (1) ‘local authority’ includes in England a county council.
60. Any payment made under regulations made under section 57 of the Health and Social Care Act 2001 or under section 12B of the Social Work (Scotland) Act 1968, or under section 12A to 12D of the National Health Service Act 2006 (direct payments for health care).
61. Any payment made to the applicant pursuant to regulations under section 2(6)(b), 3 or 4 of the Adoption and Children Act 2002.
62. Any payment made to the applicant in accordance with regulations made pursuant to section 14F of the Children Act 1989 (special guardianship support services).
63. Any payments to a claimant made under section 49 of the Children and Families Act 2014 (personal budgets and direct payments),
64. Any Windrush compensation payment.
65. Any payment made under the We Love Manchester Emergency Fund.
66. Any payment made under the London Emergency Trust.

**Council Plan Addendum 2022/23
Recovery & Restoration Plan 2020/21**

Relevant Portfolio Holder	Councillor Karen May
Portfolio Holder Consulted	Yes
Relevant Head of Service	Kevin Dicks – Chief Executive Officer Deb Poole – Head of Transformation, OD & Digital Services
Report Author	Job Title: Head of Transformation, OD & Digital Services Contact email: d.poole@bromsgroveandredditch.gov.uk Contact Tel: 01527 881256
Wards Affected	N/A
Ward Councillor(s) consulted	N/A
Relevant Strategic Purpose(s)	
Non-Key Decision	
If you have any questions about this report, please contact the report author in advance of the meeting.	

1. RECOMMENDATIONS

The Cabinet RECOMMEND that:-

- 1.1 The Council Plan Addendum 2022/23, as set out in Appendix 1, be approved and included alongside the current BDC Council Plan 2019/23 at Appendix 3;
- 1.2 The Recovery and Restoration Plan 2020/21, as set out in Appendix 2, be agreed and closed.

2. BACKGROUND

- 2.1 The Covid-19 pandemic has required an unprecedented response from the Council. Even though the requirement to respond to the pandemic is reducing in 2022, the impact of Covid will likely be felt for many years. As a consequence of this ongoing impact, a review of the Council Plan 2019/23, attached at Appendix 3, was undertaken in 2021. A workshop was held with the Corporate Management Team and the Cabinet to ensure the Council's strategic purposes and priorities remained relevant in a post Covid world and to consider any new areas of focus brought about by the pandemic.

The findings from the review have been used to form a Council Plan Addendum for the period 2022/23. The attached Council Plan Addendum, at Appendix 1, takes the impact of changes brought about by the pandemic into consideration and is designed to work alongside the already approved BDC Council Plan 2019/23. This report asks Members to approve the Addendum document and to agree to it being included alongside the existing Council Plan.

- 2.2 The current Council Plan 2019/23 was built around five long term strategic purposes which are underpinned by a set of key priorities. These strategic purposes have not changed as a result of the addition of the Addendum document. The strategic purposes in the Council Plan 2019/23 are:

- Run and Grow a Successful Business
- Affordable & Sustainable Homes
- Work & Financial Independence
- Living Independent, Active & Healthy Lives
- Communities which are Safe, Well Maintained & Green

The priorities set out in the Council Plan 2019/23 are:

- Economic Development and Regeneration
- Skills for the Future
- Improving Health and Wellbeing
- A Balanced Housing Market
- Reducing Crime and Disorder
- Financial Stability
- High Quality Services
- Sustainability

2.3 As the Council Plan 2019/23 was developed prior to the Covid pandemic it is appropriate to have reviewed the previous priorities to determine if any have changed as a result of the crisis. By considering what matters to our residents and the impacts of the pandemic, it became clear that the existing priorities underpinned by a set of revised focal points and milestones would continue to be fit for purpose. It is envisaged that the Addendum document will sit alongside the approved Council Plan to provide an enhanced framework for delivery. The Council Plan Addendum priorities are:

- Economic Development and Regeneration
- Housing Growth
- Work and Financial Independence
- Improved Health and Wellbeing
- Community Safety and Anti-Social Behaviour
- Green Thread
- Financial Stability
- Organisational Sustainability
- High Quality Services

Whilst the majority of these priorities can already be found, in a similar form, in the current Council Plan, there is one noticeable change around the Green Thread. Whilst the Green Thread is present throughout the current Council Plan it is now more prominent with its own set of focal points.

The Community Survey, conducted during October 2021, has also provided some more current insight into the things our residents regard as a priority. The data from this survey indicates that residents top five priorities are:

- Waste and Recycling
- Community Safety
- Transport, Travel and Congestion
- Healthy Lifestyles and Wellbeing, inc Mental Health
- Maintenance of the Landscape and Environment

The Council Plan Addendum is designed to provide an intermediary position ahead of a full review of the Councils long term priorities in 2023.

- 2.4 The Recovery and Restoration Plan 2020/21, attached at Appendix 2, was put in place as a response to the pandemic when it began in early 2020. Over the course of the last two years the actions in the plan have been delivered and completed. The details of the completed actions undertaken to deliver the Recovery and Restoration Plan have been included in the attached document. However, it should be noted that the updates to the actions were completed in late 2021 and have not been updated again since. The plan, therefore, provides details of activity up to that point in time.

3.0 FINANCIAL IMPLICATIONS

- 3.1 None

4.0 LEGAL IMPLICATIONS

- 4.1 None.

5. STRATEGIC PURPOSES - IMPLICATIONS

Relevant Strategic Purpose

- 5.1 The Council Plan and Council Plan Addendum define the councils strategic purposes and key priorities for the years ahead. It impacts on all aspects of the business of the council and the services provided to our residents.

Climate Change Implications

- 5.2 The green thread has been highlighted as a priority in the Council Plan Addendum and is included throughout the entire Council Plan 2019/23.

6. OTHER IMPLICATIONS

Equalities and Diversity Implications

- 6.1 None

Operational Implications

- 6.2 Whilst the continuation of services to our community remains the focus of the councils activities, it is anticipated that service areas will begin to implement the focal points outlined in the attached Council Plan Addendum 2022/23.

7. RISK MANAGEMENT

- 7.1 None

8. APPENDICES and BACKGROUND PAPERS

Appendix 1 – Council Plan Addendum 2022-2023

Appendix 2 – Completed Recovery and Restoration Plan 2020-2021

Appendix 3 – BDC Council Plan 2019-2023

9. REPORT SIGN OFF

Department	Name and Job Title	Date
Portfolio Holder	Cllr K. May, Leader of the Council Cllr G. Denaro	April 2022
Lead Director / Head of Service	Kevin Dicks – Chief Executive Officer	May 2022
Financial Services	N/A	
Legal Services	N/A	
Policy Team (if equalities implications apply)	N/A	
Climate Change Officer (if climate change implications apply)	N/A	

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Bromsgrove District Council Council Plan Addendum – Priorities 2022/23

Introduction

Bromsgrove District Council is committed to providing residents with effective and efficient services that meet their needs. Since March 2020 and the onset of the Covid19 pandemic, Bromsgrove District Council has worked closely with a wide network of partner agencies to help limit the impact of the virus and to support our residents in all of our communities.

The development of our Covid-19 Recovery and Restoration Plan, approved in 2020, provided a focus on actions to improve for the future beyond Covid19. This plan outlined the major initiatives that the Council would deliver both during the crisis and after it, as our communities begin to recover.

The Covid-19 pandemic has required an unprecedented response from the Council. Even though the requirement to respond to the pandemic may well be ongoing for some time, it is important to look towards recovery and to the long term return to business as usual. Whilst the Council has an approved Council Plan in place it is worth noting that this was completed before the Covid-19 outbreak. This Council Plan addendum takes the potential shift in priorities brought about by the pandemic into consideration and sits alongside the current Council Plan.

By considering what really matters to our residents and the impacts of the pandemic, we have developed nine priorities underpinned by a set of key milestones. This document outlines the Council's plan for the next twelve months. It is designed to provide an intermediary position ahead of a full review of the Council's long term priorities in 2023. This document sits alongside the Bromsgrove District Council Plan 2019 – 2023. The key priorities are:

1. Economic Development and Regeneration
2. Housing Growth
3. Work and Financial Independence
4. Improved Health and Wellbeing
5. Community Safety and Anti-Social Behaviour
6. Green Thread
7. Financial Stability
8. Organisational Sustainability
9. High Quality Services

This high level strategic document recognises that Bromsgrove District Council cannot deliver all of these priorities on its own. It will need considerable support and input from partner organisations if these priorities are to be successfully achieved. It is for this reason that the Council has determined its role in some of these far reaching projects to be categorised as either:

- **Lead** – to be the lead organisation in the delivery of the activity/project that delivers the priority.
- **Participate** – to be involved with partner agencies who will be leading the activity/project that delivers the priority.
- **Influence** – to work collaboratively with other partner agencies to persuade them to take a particular course of action/undertake a particular project.

Bromsgrove District Council Council Plan Addendum – Priorities 2022/23

1. Economic Development and Regeneration

We see the opportunities in digital technology and green industries as key to the future of Bromsgrove. We will use this year to build the basis for future support for, and innovation in, these sectors, and for strengthening our town and digital infrastructure.

1.1 Supporting businesses to start and grow

Progress and learning:

Our businesses have demonstrated resilience and flexibility in Covid-19. We will support businesses started during the pandemic and existing businesses that have identified growth opportunities. We will do this via existing business support packages and including sectoral support and helping business access new business grants where available.

Focal point:

- Start-up of creative and digital businesses

Key milestones:

- Continue with grant programme for start-up businesses
- Deliver the recovery through creativity grants programme (April 22-July 22)

Success measures:

- Take-up of start-up business grants and creativity grants programme

1.2 Regenerating our Town and Local Centres

Progress and learning:

The past two years have emphasised the economic and wellbeing importance of **local** centres. Funding has been secured to support the development of sites in Bromsgrove Town Centre and a strategy will be prepared to ensure all of centres in Bromsgrove District will be vibrant and viable.

Focal point:

Progression towards the redevelopment of the former Market Hall site, Windsor Street site and former Dolphin Centre site. Preparation of a Bromsgrove Centres Strategy.

Key milestones:

- Submit a planning application for the former market hall site (Lead)
- Procure a contractor for the former market hall site redevelopment (Lead)
- Investigate the possibility of remediation and demolition works at Windsor Street (Lead)
- Start the remediation works on Windsor Street (Lead)
- Working with partners in all centres to agree future improvements (Lead)

Bromsgrove District Council Council Plan Addendum – Priorities 2022/23

Success measures:

- Planning application submitted for market hall site by March 2023
- Contractor procured for the former market hall site
- Commencement of remediation works on the Windsor Street site.
- Bromsgrove Centres Strategy agreed by March 2023

1.3 Improved Integrated Transport (Bromsgrove)

Progress and learning:

We know that new innovations can help provide new and more sustainable methods of getting around, helping to provide better satisfaction and efficiency whilst helping to reduce our impact on the environment

Focal point:

Working with Worcestershire County Council and other partners on enabling new, better integrated and more sustainable modes of transport across the district

Key milestones:

- Work with Worcestershire County Council in developing and agreeing a specification for an improved integrated transport network (participate)

Success measures:

- Increased number of sustainable transport projects being progressed or implemented across the district.

Bromsgrove District Council Council Plan Addendum – Priorities 2022/23

2. Housing Growth

During 2022/23 we will accelerate the pace of affordable housing development. Where possible, we will enable the building of market value housing and the creation of additional income for the Council.

Progress and learning:

The Covid-19 experience has shown that the Council is an important player in the local housing sector, but best results happen when we partner with others. It has also shown us that there are solutions for homelessness.

Focal point:

We will develop a clear partnership structure and delivery plan for creative land use and affordable housing. We will find win-win solutions to the tension between housing demand and green belt concerns.

Key milestones:

- Agree a financial and partnership model for housing development (lead)
- Release land for residential development, in line with the Local Plan (lead)
- Produce new draft housing policies as part of the Bromsgrove Plan Review (lead)

Success measures:

- Number of new homes built - total and affordable.
- Increases in Council Tax income.
- Local housing affordability rate.
- Number of homeless approaches.
- Number of threatened with homelessness preventions.
- Number of homeless applicants housed.

Bromsgrove District Council Council Plan Addendum – Priorities 2022/23

3. Work and Financial Independence

In 2022/23, we will find ways to further support, engage and empower our residents to maintain / achieve financial independence.

Progress and learning:

Our Financial Independence Team will continue to help residents to gain financial independence both through short and long-term solutions. This includes advising our residents on how to manage fuel and utility costs, maximise their income, manage their personal finances, and access other specialist agency support.

The Financial Independence Team also provides access to a range of support measures for our residents (including Housing Benefit, Council Tax Support, Discretionary Housing Payments, Council Tax Hardship Payments, the Council's Essential Living Fund and Council Tax Support Scheme).

The Council will procure an energy advice service providing residents with information and advice to support them in managing and reducing their energy costs.

Our Starting Well Service will provide parents and prospective parents with comprehensive information about childcare and early years education and support eligible parents in accessing free childcare to support school readiness and to enable parents to work or return to work.

We also work with our partners to support and increase the financial independence of our residents. We will work with Citizens Advice, ensuring that our residents are advised on how to deal with their financial and other related problems. We will work with Community Safety Partners in the provision of youth support interventions, focusing on the impact of Covid, building confidence, raising aspirations, and improving the life chances of young people at risk from crime and anti-social behaviour.

Focal point:

We will provide quality services that help to empower residents through good financial advice, the effective coordination and signposting of services, and partnership working.

Success measures:

- Number of Financial Independence Team client contacts.
- Number of clients accessing Starting Well service.
- Number of young people with positive outcomes as a result of Enhanced Youth Support intervention.
- Number of eligible children accessing nursery funding across the district.
- Number of households provided with energy advice.
- Number of energy rebate payments.

Bromsgrove District Council Council Plan Addendum – Priorities 2022/23

4. Improved Health and Wellbeing

In 2022/23 we will work with communities to help them identify and develop their strengths. We will look at ways to encourage physical movement into part of people's normal routines. We will look to catalyse an integrated approach to care.

Progress and learning:

Covid-19 helped us see the health and wellbeing importance of community, of activity, and of the health and care system.

Focal points:

- **Community Development:** we will embed an Asset Based Community Development (ABCD) model that builds on the assets that are found in local communities and mobilises individuals, associations, and institutions to come together to realise and develop their strengths. Through grant funding, Community Builders within the voluntary sector will be working with local residents and existing organisations to uncover the key community assets and skills of local residents. They will assess how to build a more cohesive community that will ultimately lead to a less isolated, healthier, and more connected community, particularly as we move towards Covid recovery.
A 'Small Sparks' fund is available to facilitate the recruitment of two Community Connectors, employed through New Starts, to build capacity within the initial areas of Catshill and Rubery, to support local delivery in line with the project aims and objectives.
- **Active travel:** we will work with local people and experts to explore how we might establish a local transport infrastructure that encourages physical movement.
- **Integrated care:** we will work with local public service partners to establish an integrated care model, using a blend of professional and community led support to ensure those who most need support are properly cared for.
- **Leisure Strategy:** we will develop a Leisure Strategy for the district.

Key milestones:

- Work with Worcestershire County Council to explore possible initiatives and funding streams for active travel (participate)
- Progress the district collaborative work around community assets and skills alongside other themes which emerge for Bromsgrove (participate)
- Implement new technology opportunities within the Lifeline service (lead)

Success measures:

- Deliver improved outcomes from the actions in the Leisure Strategy (lead)
- Number of Community Builders in post.

Bromsgrove District Council Council Plan Addendum – Priorities 2022/23

5. Community Safety and Anti-Social Behaviour

Working with Community Safety partners we will implement crime prevention projects and promote community safety services to reduce the hazards and threats that result from the crime, violence and anti-social behaviour. We will also promote and support victim services that are in place to help and encourage recovery from the effects of crime.

Progress and learning:

We know that prevention is better than cure; that the stronger the bonds within and across communities, the lower the crime and nuisance. We also know that the more perspectives that can be brought to a difficult issue like safety the better will be the solutions.

In 2022/23 the outcomes of the trials of CCTV redeployable cameras and the investment from the PCC office to upgrade other cameras should begin to be seen. The redeployable cameras will be embedded into the service with the ability to respond to hot spots of concern and be a tool in reducing crime and disorder across the District.

Covid impacted disproportionately on adolescents. Grant funding was secured to support this cohort in the aftermath of the pandemic through the provision of youth work across the District.

Focal point:

- **Relationships:** we will work to enable stronger networks of relationships within and across communities.
- **Young People:** we will strengthen our youth offer, to prioritise outreach and mentoring approaches, targeting provision directly to young people at risk of perpetrating or becoming a victim of crime alongside supporting mental well-being and personal resilience.

Key milestones:

- Develop a clear and agreed ABCD model (participate)
- Fully deployed youth support model (lead)

Success measures:

- Number of young people engaged through Detached/Outreach youth work
- Levels of crime
- Number of crime risk surveys carried out

Bromsgrove District Council Council Plan Addendum – Priorities 2022/23

6. Green Thread

There will be a renewed focus on innovation as we play our part in the response to climate change and biodiversity challenges. Working with partners across the region, including the LEPs and the Waste Partnership, we will explore the possibilities of new technologies to our fleet but also how new technology can help us deliver greener and more efficient systems internally. We also need to maintain work around waste minimisation and maximising recycling, particularly around recycling quality and the implications of the new Environment Bill.

Progress and learning:

We were able to achieve radical change in response to a pandemic; we can do the same in response to global warming and biodiversity collapse.

Focal point:

- Innovation (lower carbon solutions)
- Travel (less and more sustainable)
- Reducing waste and increasing recycling.

Key milestones:

- To identify alternative fuel requirements for fleet and revise the capital replacement programme for the Council's fleet subject to any budget constraints (lead)
- Respond to Government consultation on secondary legislation on changes for Resources and Waste services (participate)
- Work with the Strategic Waste Partnership to develop a plan to respond to the new requirements of the national Resources and Waste Strategy and Environment Act (participate)
- Development of a Bromsgrove Plan review with revised environmental protection policies (lead)
- Commit to the development of a Climate Change Strategy (lead)

Success measures:

- Have an agreed and funded plan and capital replacement programme for the Council's fleet subject to any budget constraints.
- Have an agreed plan in place to deliver new requirements of national Resources and Waste Strategy and Environment Act
- Introduce vegetable derived diesel into the councils vehicles to reduce carbon emissions subject to any budget constraints.
- Households supported by the Council's energy advice service.

Bromsgrove District Council Council Plan Addendum – Priorities 2022/23

7. Financial Stability

Council resources will continue to be constrained. We will continue to work on ensuring our people, assets and financial resources are focused on the priorities and activities that most effectively deliver wellbeing and progress for our population.

Progress and learning:

When Covid-19 hit, we moved quickly and successfully to reprioritise and redeploy in support of the crisis. We learned that we could change how we do things, and that priorities do change. We also learned that we can be better at understanding how we, and our partners, currently manage and exploit our assets.

Focal point:

We will work to ensure closer alignment between what we should be doing and the resources made available to do it. We will have a better sense of the assets we have and that we need, and how we can best contain unnecessary costs so that resources can be deployed where needed.

Key milestones:

- Robust Budget and Medium Term Financial Plan (lead)
- Asset Management Strategy and Plan (lead)
- Maintained levels of General Fund Balances over medium term.

Success measures:

- Financial performance – actuals consistent with budget.
- Levelling Up Fund Project delivered within budget.

Bromsgrove District Council Council Plan Addendum – Priorities 2022/23

8. Organisational Sustainability

The Council will work to maximise the use of digital infrastructures, including cloud technologies, to enhance its support for customers. We will encourage residents and businesses to access high speed fibre and wireless technologies to deliver growth in the local economy. Ensuring the Council's infrastructure can securely process the increased demand placed on it by the expanding use of Internet of Things devices will be key to its digital success. Any new delivery models, utilising technology, must deliver improved customer service at a lower cost.

Progress and learning:

Covid-19 helped us to see that new delivery models are possible, delivering better customer service at lower cost.

Focal point:

- **Digital First:** we will ensure that all Council services are designed to exploit digital access and delivery
- **Evidence-based design:** we will ensure all service improvement will be driven by good quality customer insight and data
- **Hybrid working:** we will adopt a hybrid working model, to include agile working and bookable office spaces

Key milestones:

- Development of corporate information management system e.g. performance dashboard (lead)
- Corporate wide use of data and information to design improved services (lead)
- Repurpose unnecessary office space (lead)
- Increase remote/mobile working in services through utilisation of new IT (lead)

Success measures:

- Number of customer transactions processed online.
- Number of corporate measures accessible through the dashboard.
- % of staff able to work in an agile way.

Bromsgrove District Council Council Plan Addendum – Priorities 2022/23

9. High Quality Services

Council people are key to its success. We need to recruit, retain and motivate the right employees, with the right knowledge, skills and attitude to deliver excellent services and customer care.

Progress and learning:

During Covid-19, we saw how good quality, flexible and responsive people make all the difference in work and society.

We also saw how personal and community resilience, or the lack of it, can lead to an escalation of public issues.

Focal point:

- **Recruitment:** ensure that our recruitment processes enable us to attract, engage and retain a talented and motivated workforce that is responsive to change.
- **Development:** support our employees to fulfil their potential and ensure that they possess the right skills to meet future needs through access to effective learning and development.
- **Progression:** Undertake succession and workforce planning to predict potential skills gaps, develop and improve the way we work and identify the right people, at the right cost with the right skills both for now and the future.
- **Prevention:** develop a proactive approach to the prevention of vulnerability in the population through improved service delivery.

Key milestones:

- Agree talent and performance plan (lead)
- Achieve minimum level of core management skills in all managers (lead)

Success measures:

- % of Personal Development Reviews undertaken each year.
- % of employees who undertake management training.
- Staff turnover rates in relation to national rates.
- Customer satisfaction with service delivery, measured through the Community Survey.

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**Bromsgrove District Council COVID-19 Recovery & Restoration
Plan**

2020 – 2021

Version 1.5

Run and Grow a Successful Business

Original Council Plan Commitments	Recovery & Restoration Issues and Actions	New or Modified Actions (what we will do...who with/partners)	By When	Owner	Update
<p>Supporting businesses to start and grow within the District</p>	<p>Consult businesses to understand current needs, recovery, and growth plans, working with partners to support business recovery and growth</p> <p>For many strategic purposes, the planning system can play a key role in contributing to recovery and restoration. For all strategic purposes, where relevant, there will be support through the timely determination of planning applications and the implementation, evidence gathering and review of the Local Plan</p>	<p>Arrange discussions with businesses via BEIS to understand position and future needs</p> <p>Further schemes available and due to be launched which will be promoted alongside partners</p>	Ongoing	NWEDR	<p>Demand for support from businesses has mainly been for Covid Business Support Grants (administered by the Business Rates Team). Businesses are beginning to focus on recovery with increasing demand for funding for skills and capital investment.</p>
	<p>Ensure businesses access Government Coronavirus Support Grants</p>	<p>Ensure all appeals are responded to robustly</p>	Completed	DR	<p>Both completed, comms has been consistently sent out each time the scheme has changed and eligibility has changed to support and provide guidance. All appeals are responded to robustly and recorded</p>
	<p>Provide businesses entering Recovery Cycle for Non-Domestic Rates with information relating to support mechanisms</p>	<p>Advise businesses of support available via comms</p>	Ongoing	DR	<p>Both completed, comms has been consistently sent out each time the scheme has changed and eligibility has changed to support and provide guidance. All appeals are responded to robustly and recorded</p>
	<p>Provide businesses with information on recovery support available internally and nationally.</p>	<p>Advise businesses of support available via comms</p>	Weekly/Ongoing	NWEDR	<p>Weekly newsletter sent from NWEDR to local businesses informing of support available throughout the pandemic</p>

	Revisions made to letters that are going out to businesses to explain debt recovery processes.	Work with recovery teams to ensure all businesses are provided with support and advice on debt management.	Aug – Dec 2020	DR	Completed with advice and support provided as appropriate.
	Liaise with internal partners to provide information in relation to business in arrears and delaying payments of liabilities.	Work with other recovery officers across the councils to ensure debt is managed holistically to provide the customer with the correct level of support.	Ongoing	CFor	Implementation of the Tech1 system is ongoing with bedding in. Once it is in place intend to work with Civica housing and Revs and Bens to pull together into dashboard
	Look to provide incubator units or the like through the investment programme to give businesses spaces to open and operate.	Continue to circulate the weekly Business Bulletin and provide further updates from partners as appropriate.	Nov 2020	NWEDR	Weekly newsletter sent from NWedR to local businesses informing of support available throughout the pandemic
		Prepare Master planning / feasibility study for key sites	Aug – March 2021	NWEDR	Design and feasibility work completed for the former Dolphin Centre Site and the former Market Hall Site. The latter forms part of the Councils bid to the Levelling Up Fund
Regenerating our Town Centre	Continue with the regeneration of the Town Centre	Utilise Bird Box as additional space to support local businesses	Ongoing	NWEDR	The Birdbox site continues to be offered as an events/ promotional space for local businesses coordinated through the BDC events team and BDC Centres Manager.

	Provide low cost loans to businesses to encourage growth and attract them to the area	Develop loan policy to enable this option to be available for Businesses	Dec 2020	CFor	<p>A successful Welcome Back event was undertaken on 22nd May</p> <p>Following consideration by the Exec Director of Resources, the risk profile of this policy is not considered to be acceptable for the Council currently.</p>
<p>Economic development & regeneration</p> <p>Page 132</p>	Engage with businesses to understand current needs, recovery & growth plans, working with partners to support business growth.	North Worcestershire Business Advisor appointed by GBSLEP to engage with businesses in North Worcestershire	Ongoing	NWEDR	<p>Demand for support from businesses has mainly been for Covid Business Support Grants (administered by the Business Rates Team). Businesses are beginning to focus on recovery with increasing demand for funding for skills and capital investment. At the end of May 2021 a new Bromsgrove Business Advisor was appointed whose role includes business engagement.</p>
<p>Undertake a comprehensive review of all Council owned assets and assess all opportunities for investment privately</p>	Investigate alternate sources of funding to PWLB to ensure best value borrowing can be achieved to maximise the range of investment opportunities and returns to the council	Ensure that the council is compliant with guidance when accessing these funds.	Ongoing	CFor	<p>Preliminary investigations confirmed that (improved) PWLB terms remain best option currently.</p>

<p>in land and premises within the District with a particular focus on business centre and industrial estates</p>	<p>Identify partners to invest with</p>	<p>Revise the treasury management policy to enable all options to be made available to the council</p>	<p>Mar 2021</p>	<p>CFor</p>	<p>Treasury Management Strategy due an update in 2022/23.</p>
	<p>Review of the councils asset base</p>	<p>Review the property structure to enable an asset review to be undertaken</p>	<p>Mar 2021</p>	<p>CFe</p>	<p>Work is progressing with external advisors and the Director of Resources to develop a clear understanding of the resources required. Work to identify all properties on a comprehensive asset list continues.</p>
	<p>Identify opportunities for strategic investments</p>	<p>Develop an asset management strategy</p>	<p>Mar 2021</p>	<p>CFe</p>	<p>All departments to review and sent over assets list. External advisor assisting with cross matching exercise in readiness for the final accounts.</p>
		<p>Review the property structure to ensure there is the resource to enable strategic investment opportunities to be identified and pursued</p>	<p>Mar 2021</p>	<p>CFe</p>	
<p>Develop an economic development strategy, to include stimulating the growth of low carbon industries</p>	<p>Develop a Local Economic Recovery Framework</p>	<p>Work with the Worcestershire Economic Recovery Group to ensure Bromsgrove's economic recovery needs are addressed in the county wide economic recovery plan.</p>	<p>Nov 2020</p>	<p>NWEDR</p>	<p>Work completed and County Wide Plan produced in September 2020</p>
		<p>Develop and deliver a Bromsgrove Economic Recovery Plan</p>	<p>Nov 2020 and ongoing</p>	<p>NWEDR</p>	<p>Plan produced and agreed at Cabinet in November 2020</p>
	<p>Work up an approach for the council to make investments in the locality to contribute towards economic recovery/implement its Economic Recovery Framework</p>	<p>There are a number of disparate programmes of support to help businesses diversify into the low carbon sector. Propose to work with colleagues to pull these together and promote as a cohesive whole</p>	<p>Oct 2020</p>	<p>NWEDR KM</p>	<p>The ERDF funded programmes are being managed by WCC and are promoted as a suite of support</p>

		Consider holding a local jobs fair, focusing on reskilling, including carbon friendly skills	Dec 2020	NWEDR	<p>There is an annual jobs fair event organised by the local MP Sajid Javid. In 2019, more than 1,000 people and over 70 local, national and international employers attended the event.</p> <p>The newly appointed Bromsgrove Employment and Skills Advisor and the Bromsgrove Business Advisor will work with the local MP's office and key public and private partners to support the next event in spring 2022.</p>
Work with partners to improve digital & physical connectivity (to include broadband, 5G & transport infrastructure)	Ensure that adequate digital infrastructure is in place to support the accelerated adoption of digital technologies by local businesses as a result of Covid-19	<p>Work with the West Midlands 5G Company and the GBSLEP and WLEP on exploring the potential of a 5G testbed in Bromsgrove</p> <p>Work with Superfast Worcestershire on delivering superfast broadband to Bromsgrove homes and businesses</p>	Summer 2021	NWEDR	The national rollout of 5G is underway with large cities being completed first.
Support local businesses to embrace new technologies in order to maximise business growth, particularly in the knowledge & creative industries	Identify local businesses that plan an accelerated adoption of digital technologies	Work with Betaden Tech Accelerator to promote opportunities to learn about innovative technologies being developed in the county	Ongoing	NWEDR	<p>Opportunities are promoted through NWedR's business newsletter, the Growth Hubs advisors and Bromsgrove Business Advisor through direct engagement with local businesses.</p>

<p style="writing-mode: vertical-rl; transform: rotate(180deg);">Page 33</p>		<p>Promote the new Business Recovery Grant, being administered by the Growth Hubs, which is designed to support businesses affected by Covid-19 to access new technology. Grants from £1k-£5k, available for a limited time</p> <p>Promote learning and training opportunities for businesses - courses and workshops delivered by GBSLEP Growth Hub and Worcestershire Business Central</p>	<p>Due to be launched late Sept</p> <p>Ongoing</p>	<p>NWEDR</p> <p>NWEDR</p>	<p>An email / telephone campaign was undertaken to raise awareness and encourage the local businesses to apply for the grant. The fund was significantly oversubscribed.</p> <p>On-going – the Growth Hubs have been delivering peer 2 peer training clubs which NWEDR have promoted through usual channels and when engaging with businesses</p>
	<p>Look to stimulate adequate supply of land & premises to enable existing & new businesses to grow</p>	<p>Identify brownfield sites and long term empty premises that could be redeveloped</p>	<p>Continue to work with the Worcestershire LEP Land supply group and private landowners and landlords to identify development opportunities in the district</p>	<p>Ongoing</p>	<p>NWEDR</p>
<p>Strengthen the vibrancy & viability of our towns & district centres</p>	<p>Make the town centre a more attractive place/space to do business</p>	<p>Prepare Master planning and Feasibility Study for key town centre sites</p>	<p>Oct 2020</p>	<p>NWEDR</p>	<p>Design and feasibility work completed for the former Dolphin Centre Site and the former Market Hall Site.</p> <p>Work on Bromsgrove 2040 Vision underway which includes the preparation of a</p>

<p>Make the town centre a more attractive place to spend free time (leisure, arts & culture, well-being)</p>	<p>Develop a programming strategy for the Birdbox within the restrictions of Covid-19 regulations and guidance</p>	<p>Oct 2020</p>	<p>NWEDR</p>	<p>masterplan for key town centre sites.</p> <p>Continued restrictions meant this was delayed but will now form part of the Welcome Back Fund</p>
	<p>Prepare the Bromsgrove Town Centre 2040 vision</p>	<p>Feb 2021</p>	<p>NWEDR</p>	<p>Work underway on the Bromsgrove 2040 vision. led by consultants Burrell Foley Fisher with final report to be completed Nov 21. Initial work utilised to support a submission to the Levelling Up Fund bid to MHCLG</p>
	<p>Undertake a refresh of the Centres Strategy, covering the identified town and local Centres in Bromsgrove</p>	<p>Dec 2020</p>	<p>NWEDR</p>	<p>A 1-year strategy has been produced and a further full review of the strategy will be undertaken by the replacement Centres Manager, once in post</p>
	<p>Commission a further car parking review of the Town Centre, linked to work on the vision and Local Plan development</p>	<p>Mar 2021</p>	<p>NWEDR</p>	<p>This is being undertaken by consultants commissioned by NWEDR</p>
	<p>Implement the 5 year Car Park capital infrastructure programme as detailed in the Business Case</p>	<p>From Dec 2020</p>	<p>GR/KH</p>	<p>Agreed by Council Nov 20 and the programme is ongoing</p>

Affordable & Sustainable Housing

Original Council Plan Commitments	Recovery & Restoration Issues and Actions	New or Modified Actions (what we will do...who with/partners)	By When	Owner	Update
Rough Sleepers To continue the legacy of having no rough sleepers in the District Page 137	To review and adapt work to the Housing First Model in partnership with the voluntary sector, the Police and mental health services.	To identify funding from MHCLG grants and complete claims for those helped.	Dec 2020	DA	Housing First model in place with St Pauls Hostel provided for through Rough Sleeper Initiative 3 funding.
	To work with WCC and other District colleagues on the County Next Accommodation Programme Bid.	To implement the programme of activities outlined in the bid	Ongoing	MB	Following discussions with BDHT it was established that there was insufficient need for this type of accommodation for Bromsgrove over and above what could be managed with BDHT and through our Ending Rough Sleeping plan 21/22
	To identify suitable accommodation from within BDHT's housing stock and ensure no-one helped in crisis returns to the streets	To identify funding from MHCLG grants.	Dec 2020	MB	
	Capacity around support of all providers – financial health check to ensure continued support available	To write to agencies concerned to contact the Council with any issues	Oct 2020	MB	Those applicants homeless and at risk of rough sleeping have been provided temp accommodation and Housing Options Officers continue to work with them to obtain suitable housing. Discussions held in partnership meetings.

A balanced housing market	Develop & implement a District Housing Strategy giving consideration to the impact of Covid 19 and how the impact of crisis on the economy will impact on housing supply and demand	<p>To work with new government guidance /legislation issued in response to Covid 19</p> <p>To include the impact of Covid in the strategy and associated actions over the next 12/18 months.</p> <p>Contribute to the countywide housing delivery strategy.</p>	<p>Oct 2020</p> <p>Dec 2020</p> <p>Mar 2021</p>	<p>MB</p> <p>DA</p> <p>DA</p>	<p>Included in the Strategy presented to Cabinet.</p> <p>As above</p> <p>Multi-disciplinary Officer input via workshops</p>
Work with developers to deliver more affordable homes Page 138	Continue work with developers on the impact from the crisis on the economy and consequently housing supply and demand	<p>Continuously monitor and review the impact of Covid 19 and provide influence and support to developers</p> <p>Review impacts of the new planning guidance Building Control will continue to support developers with consistent and timely advice</p>	<p>Sept 2020 & Ongoing</p> <p>Dec 2020 & ongoing Ongoing</p>	<p>MB</p> <p>MB AW</p>	<p>Monitoring is ongoing, however, no contacts or requests for support have been received from developers</p> <p>Timely advice has been provided by Building Control and the feedback from the Agents' Forum was very positive.</p>
Develop a plan for the Burcot Lane site	Include consideration of Covid 19 in Cabinet report	<p>Undertake a revision of financial remodelling.</p> <p>To continuously monitor the milestones that have been reviewed with Homes England.</p>	<p>Ongoing</p>	<p>MB SH CFor</p>	<p>Officers regularly meet with Baily Garner to review ongoing development. Increased costs have occurred due to a lack of materials and workforce. Regularly review development programme, costs and HE milestones. Officers have undertaken a value engineering exercise with Baily Garner and our contractors to reduce costs of the development.</p>

					<p>Officers have also discussed with HE possibility of further grant funding.</p> <p>Financial modelling completed. Review if variations require further remodelling. Delivery programme and milestones agreed with Homes England. Anticipated build by August 2022. Exercise to secure an RP for the affordable units in preparation.</p>
<p>Improve outcomes for tenants in the private rented sector</p> <p>Page 139</p>	<p>To continue to work with private landlords and tenants to support the impact of Covid 19 and work with any new government guidance/legislation.</p>	<p>Develop and implement an action plan for helping private renters avoid eviction, including maximising the use of Discretionary Housing Payments and other financial means available to incentivise landlords to refrain from evictions.</p>	<p>Ongoing</p>	<p>MB SS</p>	<p>A free county wide landlords and lettings agents event was held in June offering expert advice on the latest changes to legislation and explain all the options open to landlords to get the best outcomes for them and their tenants The PSHT continuing to encourage landlords to retain tenancies.</p>
<p>Support people to live & remain in appropriate homes</p>	<p>Work with Worcestershire Partnership Groups, County pathways and other bids to support this priority</p>	<p>Work with the Worcestershire Strategic Housing Partnership to develop and implement actions.</p>	<p>Ongoing</p>	<p>MB</p>	<p>Ongoing via County Wide partnerships</p>
<p>Engage with leaseholders, such as park home residents, to</p>	<p>To pause progression of this in light of other service priorities following Covid 19</p>	<p>Monitor and review capacity to undertake this commitment in future years</p>	<p>April 2021</p>	<p>SS</p>	<p>Work has recommenced with Park Homes including supporting the</p>

understand their needs					grant funding for energy efficiency.
<p>Work with developers to deliver more energy efficient homes</p> <p>Page 140</p>	To continue to work with developers to promote upfront investment for long term savings and acknowledging that developers may focus on must-haves and reduce spend on energy efficiency	Monitor post Covid 19 development proposals for new build and influence to achieve this priority	Ongoing	MB	Meeting to be arranged with local developers to understand issues they have with increasing energy efficiency measures.
	Government guidance on improved green credentials	Implement a £610k funding bid submitted to the Getting Building Fund programme for low carbon housing at the Burcot Lane site.	Dec 2020	MB	Grant agreement signed with WLEP
		Consider and bid for new energy grant schemes as they are announced including the Green Homes Grant	Sept 2020 & ongoing	MB	LADS1a currently progressing well but there are issues regarding lack of materials to labour to undertake works increasing costs and making it difficult to reach projections. Regular update provided to BEIS Application for LADS 2 funding has been submitted to carry on with this work.
		Implemented by Building Control and advised upon wherever possible	Ongoing	AW	Building Regulations are subject to change nationally and all changes have been implemented at the local level.

Work & Financial Independence

Original Council Plan Commitments	Recovery & Restoration Issues and Actions	New or Modified Actions (what we will do...who with/partners)	By When	Owner	Update
Page 141	Undertake a skills audit with partners & work together with them to address any gaps	Work with partners to see what the needs are in terms of skills	Nov 2020	NWEDR	<p>Worcestershire LEP Local Skills report published in April 2021 Link: Worcestershire Local Skills Report - Worcestershire LEP (wleplep.co.uk)</p> <p>In addition, WCC are in the process of commissioning a digital skills strategy for Worcestershire</p> <p>Proposal to undertake a county wide skills audit to assess employers' needs post-pandemic (short-term and longer term) discussed with WLEP and WCC. Decision on whether to undertake the audit on a county wide basis or North Worcestershire basis to be made in November.</p>
		Work with WCC who are leading on the "Creating our Future Workforce" campaign including the skills show and Careers & Enterprise Company	Nov 2020	NWEDR	
Support schools & HOW College to link students to local employers	A number of schemes have been launched to help address the effect of the economic downturn on Young People – apprenticeship grants, traineeship grants and kick-start (6 month placements)	Work to promote the availability of schemes and, in addition, continue to deliver the 'Opening Doors to Business' initiative with partners.	Nov 2020	NWEDR	Kick-start will be delivered locally by Serco. NWedR have engaged with them and agreed a referral process.

	Understand the partnerships that are already in place	Arrange meetings with high schools and HOW to establish their current links with schools	Nov 2020	NWEDR	<p>'Opening Doors to Business' programme stopped during the pandemic.</p> <p>A pilot project exploring how the programme could be delivered virtually is underway.</p> <p>Most of this activity was paused during the pandemic. The annual skills show was cancelled (March 2021) and whilst schemes such as Opening Doors to Business is still live, schools and businesses are not undertaking visits. 'Virtual visits' are being considered as an alternative approach</p>
Work with businesses to utilise the apprenticeship levy & increase the number of apprenticeships	Ensure that the council maximises the levy by taking on the full cohort of apprentices which can be funded through the levy the council pays. In addition, review if the council wants to utilise other organisations levy payments to further increase this number	<p>Fourth tier managers and HOS to undertake a session to identify how training can be funded from the levy in the future</p> <p>Work with GBSLEP apprenticeships triage service and Worcestershire Apprenticeships to promote apprenticeships opportunities and support available to businesses</p>	<p>Dec 2020</p> <p>Ongoing</p>	<p>BT PSmith</p> <p>NWEDR</p>	<p>The levy is now being used to support training to improve managerial skills across the organisation.</p> <p>Apprenticeships are being promoted through the Growth Hub Advisors, Bromsgrove Business Advisor and through NWedR business newsletter.</p>

Provide support to people to enable them to access employment opportunities in digital & low carbon industries	Promote the support available through the Worcestershire Jobs Match programme and GBSLEP Employment triage programme	Promote the GBSLEP skills hub when launched.	Ongoing	NWEDR	On-going – promotion of support via NWedR Newsletter and social media posts
Support residents to manage their finances, including working with schools on money management	<p>Promote the work that the FIT team do, as part of this create stronger partnership working with CAB/BDHT.</p> <p>Improve website to include budgeting tips and tools. Get greater awareness to residents.</p> <p>Provide Taxpayers in arrears and failing to maintain CT payments with information in relation to support available</p>	<p>Undertake full service review to ensure posts are in place to deliver support</p> <p>Utilise accessibility project to improve website and improve information available online.</p> <p>Liaise with partners (e.g. CAB) to identify the support and signposting that they can give</p> <p>Develop script of support advice to customer service teams</p>	<p>Dec 2020</p> <p>Ongoing</p> <p>Ongoing</p> <p>Ongoing</p>	<p>LD</p> <p>LD</p> <p>DR</p> <p>DR</p>	<p>Review completed restructure pending</p> <p>Updating documents to meet the accessibility standards is underway and due for completion at the end of 2021.</p> <p>Completed</p> <p>Completed</p>
Ensure people get the benefits they need	<p>Ensure support for prison leavers / ex-offenders to access the benefits they need as one of the key drivers to reducing re-offending</p> <p>Work with DWP to identify support to jobseekers/ advice re benefits</p>	<p>Liaise with prison to ensure advice and support given to leavers and ex-offenders</p> <p>Arrange quarterly meetings with DWP to understand impact of Covid on benefit take up and unemployment</p>	<p>Ongoing</p> <p>Ongoing</p>	<p>Benefits Team / Comm. Safety Team</p> <p>LD</p>	<p>RBC officer attendance at multi-agency offender management meetings and regular liaison with Prison and Probation Services</p> <p>Ongoing</p>

	<p>Be prepared for potential spike with regards to furloughed workers – unemployment, UC claims, and HB/CTR claims.</p> <p>Optimise spending of DHP budgets to those in need.</p> <p>Liaise with foodbanks on their capacities and demand and investigate whether we can we assist through ELF and Food Vouchers</p> <p>Simplify CTR scheme for 2021/22</p>	<p>Restructure to be implemented to ensure staff resource is sufficient to meet demand</p> <p>Regular meetings with Housing Officers to monitor level of spend</p> <p>Work through County funding support model</p> <p>FIT team to continue to support and provide data of demand</p> <p>CTR scheme to be presented to Cabinet, O&S and Council. Consultation with the community to be undertaken</p>	<p>Oct 2020</p> <p>Ongoing</p> <p>Ongoing</p> <p>March 20201</p>	<p>LD</p> <p>LD</p> <p>LD</p> <p>LD</p>	<p>Review completed, restructure pending</p> <p>Ongoing</p> <p>Ongoing</p> <p>Completed</p> <p>Completed</p>
<p>Supporting young people to gain the skills they need</p>	<p>Support schools & HOW College to link students to local employers</p>	<p>Liaise with high schools and HOW to understand what links are currently in place. Discuss with BEIS as to future link</p>	<p>Dec 2020</p>	<p>NWEDR</p>	<p>Most of this activity was paused during the pandemic. The annual skills show was cancelled (March 2021) and whilst schemes such as Opening Doors to Business is still live, schools and businesses are not undertaking visits. However, 'virtual visits' are now being considered as an alternative approach</p>
<p>Working with businesses to develop skills for the future</p>	<p>Undertake a skills audit with partners & work together with them to address any gaps</p>	<p>Work with North Worcestershire Employment and Skills Board, Skills4Worcestershire, GBSLEP and Worcestershire LEP to commission a skills audit</p>	<p>Feb 2021</p>	<p>NWEDR</p>	<p>Worcestershire LEP Local Skills report published in April 2021 Link: Worcestershire Local Skills Report -</p>

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	Develop a single Bromsgrove Business Leaders Group that can focus on skills development within the broader context of other key issues of importance to local businesses.	Work with the various business groups in North Worcestershire e.g. Worcestershire ESB, North Worcestershire ESB etc to establish a Business Leaders Group that will focus on skills development in the district alongside other key business issues.	Oct 2021	NWEDR	<p><u>Worcestershire LEP (wlep.co.uk)</u> In addition, WCC are in the process of commissioning a digital skills strategy for Worcestershire</p> <p>Proposal to undertake a county wide skills audit to assess employers' needs post-pandemic (short-term and longer term) with WLEP and WCC. Decision on whether the undertake the audit on a county wide basis or North Worcestershire basis to be made in November</p> <p>On-going</p>
	Encourage the sharing and placement of staff in businesses for fixed durations to share and learn new skills	As previous column	Oct 2021	NWEDR	<p>On-going. New Bromsgrove Business Advisor now in post to support</p>

Living Independent, Active & Healthy Lives

Original Council Plan Commitments	Recovery & Restoration Issues and Actions	New or Modified Actions (what we will do...who with/partners)	By When	Owner	Update
Page 146	Support targeted activities for healthy lifestyles	Discuss with Partnership officer the demand / need for activities. Liaise with Sports Development and Everyone Active to enable community activities to take place	End Sept 20 and ongoing	JC	
	To deliver on the Bromsgrove Social Prescribing contract	To consider new funding opportunities from the Govt's proposal to expand the army of social prescribing link workers to support mental wellbeing.	Oct 2020	TD	Social Prescribing referrals commenced May 2021. Work is being delivered in partnership with Onside who also deliver social prescribing within the District arising from funding from an Additional Roles Reimbursement Scheme
	To promote the Lifeline wellbeing checks	To work with communications to promote the benefits of the Lifeline Well Being Checks.	Nov 2020	RN	Social media promotion of the service in each area
	To support targeted virtual activity and creativity sessions for healthy lifestyles	1) long term health condition interventions (respiratory illness COPD, MS, postural stability), 2) disability sessions in partnership with Aztec Upton Warren & Sailing Club, BSLC, 3) Fit for Free guided sessions with outdoor fitness equipment in Bromsgrove, Clent & Alvechurch,	Aug & ongoing	Dev Service	Targeted sessions continue with an on-going switch away from virtual sessions. Active Kitchen holiday hunger projects have rolled out district wide and

		4) Active Kitchen holiday hunger projects			utilised external funds from DFE
Continue to support the Redditch & Bromsgrove Dementia Friendly Communities initiative	Continue to support this work		Ongoing	JW	Support continues via the Bromsgrove Partnership's Ageing Well Group, with the following initiatives taking place: specialised Tia Chi sessions, the development of a Dementia Toolkit by Act on Energy to prevent fuel debt, Age UK H&W Dementia Wellbeing Service and Chandler Court online Dementia Friends Sessions open to all.
Provide targeted activities for older people & support the emerging Bromsgrove Age Friendly Community	Working with Active Herefordshire and Worcestershire Virtual Strong and Steady classes have replaced the face to face delivery.	Funding from the Health Innovation Network has allowed an online Escape Pain class to start for people suffering with Osteoarthritis	Sept 2020	Dev Services	Strong and steady is now live face to face. Escape Pain was run online (two daytime sessions) run over 6 weeks. This ran in Autumn 2020. Walking for Health at Lickey Recreation ground has got started since April 2021
With partners, enable targeted activities & initiatives to support mental well-being	Work with WCC on the legacy of Here2Help to support vulnerable residents post Covid	To promote and support that local communities access the legacy of Here2 Help and link this with the work	Nov 2021	JW	Here2Help is to be retained and developed as an ongoing resource.

		<p>of the Bromsgrove Partnership around the 'Deal Approach'</p> <p>To support the work of Support Bromsgrove and BARN's volunteer Bureau to increase the number of volunteers working with VCS mental wellbeing services.</p>	Ongoing	JW	<p>The Bromsgrove Partnership will use an Asset Based Community Development Approach with funding secured from Public Health.</p> <p>Public Health COMF funding will support the provision of future wellbeing services for those residents affected by Covid</p>
<p>Support improved access to services that reduce social isolation (including Lifeline)</p>	<p>Promote the Lifeline Service locally and through partner agencies including self-installation during the pandemic.</p> <p>Develop and promote a new range of digital equipment and sensors to enhance the service user experience, including devices that will work outside of the home, encouraging independence and peace of mind when going out.</p> <p>Continue to work with WCC and Amica24 installing complex technology enabled care solutions on their behalf in Bromsgrove . Expand the 6 week free scheme to all health and care professionals.</p>	<p>To develop a communications/ marketing plan</p> <p>Monitor conversion rates to establish how many of those, that have the service for free, choose to retain the service and pay for it ongoing. Target is 50% conversion</p> <p>Review opportunities with County and Health colleagues new tele health technologies post Covid</p>	<p>Nov 2020</p> <p>Ongoing</p> <p>June 2021</p>	<p>RN</p> <p>RN</p> <p>RN</p>	<p>Self-installation video created and widely shared.</p> <p>Digital catalogue completed. 6 weeks free scheme conversion in year 20/21 there were 84 units fitted and 80 retained.</p> <p>Ongoing promotion with partner organisation by attending regular meetings i.e. social prescribers, frailty, etc and other regular communications.</p>

	<p>To continue with the Bromsgrove BURT bus and Shopmobility with new Covid safety measures</p> <p>Work with WCC on the legacy of Here2Help to support vulnerable residents post Covid</p>	<p>To review with Members both of these services and whether further funding is available or income generation through charging to invest and develop them as a Council priority Work with Support Bromsgrove to achieve a legacy for the VCS</p>	<p>Dec 2020</p> <p>Dec 2020</p>	<p>JW TD</p> <p>JW</p>	<p>which saw an initial increase in the take up this service, whilst some customers then withdrew from the service once lockdown eased.</p> <p>BARN secured the new BURT contract in May 2021 – both BURT and Shopmobility are still in recovery and plans to complete a Shopmobility survey are underway to review the need in Bromsgrove and whether further investment is required</p> <p>Here2Help is to be retained and developed as an ongoing resource.</p>
<p>Develop a Parks & Open Spaces Strategy (including increased physical activity & cycling)</p>	<p>Provide a clear brief on what the detail of the strategy will be</p>	<p>Develop a phased approach to the work to fine tune the technical documents that would feed into the overall strategy</p>	<p>Mar 2021 (Consultants commissioned)</p>	<p>RB IKF JC</p>	<p>The consultants are soon to meet with members for a consultation workshop The Strategy is progressing with key analysis of data. Consultation with various stakeholders</p>

					is currently taking place. Completion is anticipated March 2022
Enhance sport & cultural opportunities offered by the Council	Work with partners to ensure that provision is accessible and safe for all participants, particularly those from minority and marginalised communities.	Liaise with partnership group to understand what is needed within the District for minority and marginalised communities.	Ongoing	JC	
	Deliver the “Tell me what you want” action plan, the consequence of a 2 year £90,000 action research piece that identified projects designed to break down barriers to engagement with arts culture and heritage.	Working with all instructors and venues to provide COVID-19 Secure measures ready for a phased return to face to face delivery from mid Sept 2020 Work with Bromsgrove Arts and Culture Consortium partners to deliver the plan.	End of March 2021	Dev Services Dev Services	All classes are now held again in person and are appropriately COVID secure Two objectives of the Action Plan have been delivered. 1) a new CIO (Charitable incorporated Organisation) has been set up to formally constitute the organisation delivering the Action Plan. 2) External funds £15k secured from GBSLEP and Elmley Foundation to produce the Calling Card and Development Plan for a Heritage Corridor for North Worcestershire (a flag ship action within the TMWYW Plan

Communities which are Safe, Well Maintained & Green

Original Council Plan Commitments	Recovery & Restoration Issues and Actions	New or Modified Actions (what we will do...who with/partners)	By when	Owner	Update
Reducing crime & disorder	To consider the impact on society of Covid 19 and work with partners and service areas to ensure the Community Safety Partnership action plan reflects this.	To review and update the Community Safety Partnership action plan to contribute to the recovery of consequences from Covid 19	March 2021	BH	NW Community Safety Partnership Plan 2021-24 produced and agreed by partners on 9 th June 2021
Work with partners, schools & communities to reduce crime & the fear of crime	<p>Ensure effective Parking Enforcement, via the SLA with Wychavon, covering both on and off street contraventions.</p> <p>Through the Community Safety Respect Schools Programme, continue to work with partners and provide additional support for young people affected by the impact of Covid 19</p>	<p>Currently working with County Highways, Police & Schools. Recruit to post (additional hours) to assist with enforcement around schools.</p> <p>Identify funding opportunities to sustain and continue to deliver the Respect Programme</p>	<p>Ongoing</p> <p>Ongoing</p>	<p>KH</p> <p>NWCSP</p>	<p>Schools Enforcement Officer is in place, evening enforcement agreed with Wychavon DC. Regular meetings held to review requirements.</p> <p>£33k Additional Containment Outbreak Management Fund (COMF) allocation secured to expand Respect programme and other enhanced youth support projects in Bromsgrove</p>
Review services to understand how we can adapt to address the implications of climate change	Currently working with the Energy Savings Trust who are undertaking an initial high level fleet review followed by a more detailed vehicle specific review with Cenex to identify the best low carbon emission vehicles to purchase in the future.	Review the priorities for Climate Change across the district	12 months	GR KH PW	Final report from the E has now been received Findings from this will be presented to the Climate change panel and we are now working with the other Worcestershire Councils to procure consultants who will do a further piece of detailed

					<p>work regarding vehicle and fuel type for each replacement vehicle. Report to go to members later this financial year.</p> <p>Formal inclusion of aims and actions being built into the review of the Council Plan. Heads of Service working with Lead Members and Working Groups to develop priority action plans. Training and awareness raising sessions ongoing for officers and Members.</p>
	<p>Review fleet usage for Waste Collection, Cleansing and Grounds Maintenance to consider opportunities to further reduce our carbon footprint through technology.</p> <p>Service review of domestic waste service to support upcoming legislative changes to services aimed at reducing waste and increasing recycling as part of the circular economy.</p>	<p>Review of technologies and innovation and funding</p> <p>As previous column</p>	<p>Ongoing</p> <p>Ongoing</p>	<p>MA KH PW</p> <p>MA GR</p>	<p>See above. In addition, we undertook a trial of an electric RCV in the early autumn this was not a great success due to breakdown issues. We are working with the other Worcestershire LAs to establish the best vehicle and fuel types moving forward and on the co-ordination of trials.</p> <p>Environment Bill expected to gain Royal Assent in October 21 and Government Consultation response expected late 21/ early 22, and regulations to implement legislation by</p>

	<p>Campaign to increase recycling quality and quantities with residents (domestic waste service) and businesses via our Commercial Waste service.</p>	<p>As previous column</p>	<p>Ongoing</p>	<p>MA GR</p>	<p>autumn 22. Due to these significant changes the review of the service will be delayed until the outcome of the Environment Bill and Regs are known. In addition, we will also be looking closely at opportunities for partnership or shared working.</p> <p>Commercial Recycling growing through combination of PR and proactive selling. Domestic recycling campaign waiting on greater security of staffing as Covid still high risk to service delivery. There will be a Countywide campaign and joint approach to this starting later this financial year.</p>
<p>Improve targeted environmental enforcement</p>	<p>Define Council priorities regarding environmental enforcement, and then review existing arrangements and alternative models available either through partnership with adjacent LA's, or Private Sector as a commercial arrangement.</p> <p>Identify effective responses to environmental crime activity to identify perpetrators and take</p>	<p>Review of council enforcement arrangements, across priority areas.</p> <p>Review environmental enforcement with regard to increased commercial fly</p>	<p>April 2021</p> <p>Oct 2020</p>	<p>MA GR</p> <p>MA GR</p>	<p>Possible alternative for delivery of Env Enforcement is currently being explored with WR</p> <p>New Cameras purchased for policing,</p>

<p>appropriate enforcement action to reduce/prevent further offences, utilising available ASB tools and powers</p>	<p>tipping in the urban fringe of the district since lockdown was eased</p> <p>Review enforcement arrangements and impact of Covid 19, e.g. on fly tipping, and new resources/new model of working may be required</p>	<p>April 2021</p>	<p>SH GR JW RB</p>	<p>and increased use of signage and dummy cameras. Reduction in incidents seen March – July 2021 across locations covered. Bid for additional cameras to be submitted later this year.</p> <p>Further resource has been allocated to the Planning Services Enforcement function and WRS has been engaged to assist with monitoring as required. Although there is a heavy case load there are currently no environmental crime cases within Planning Services.</p> <p>Internal review undertaken. Ongoing dialogue with Worcestershire Regulatory Services. Support and expertise sourced from Wyre Forest Enforcement Team.</p> <p>Training, support and advice around the use the 2014 ASB Tools & Powers is available via</p>
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					Community Safety and their membership of a national ASB consultancy network which is open to all service area with enforcement responsibilities. Through PCC funding new redeployable CCTV cameras have been purchased and will be a new tool to support the detection of crime.
Understand the different needs of our local areas in order to keep them clean & tidy	Review IT systems in place to help manage demand data and introduce mobile working more effectively to support maintenance operations.	To procure and implement new Environmental Services IT system	Sept 2021	GR KH MG	Procured ABAVUS system now in the process of implementation
Explore the options to reduce residual waste, increase recycling & maximise the efficiency of waste collection services	<p>Campaign to increase recycling quality and quantities with residents (domestic waste service) and businesses via our Commercial Waste service.</p> <p>Provide opportunities around better management of waste and introducing recycling projects including an introduction of recycling options within parks</p>	<p>Restart recycling quality project from Sept 2020 with direct mail to households in targeted areas</p> <p>Work with other Councils across Herefordshire and Worcestershire to develop a programme of work for the shared strategic waste officer and ensure that programme of work meets needs of the district</p>	<p>Ongoing</p> <p>April 2021</p>	<p>MA AM AW</p> <p>GR</p>	<p>See above</p> <p>Work programme developed to respond to Environment Bill consultations, deliver changes required to Waste collection and improve the quality of recycling.</p>

Corporate Priorities

Original Council Plan Commitments	Recovery & Restoration Issues and Actions	New or Modified Actions (what we will do...who with/partners)	By when	Owner	Update
Page 156	Produce & deliver sustainable financial plans	Development of General Fund 4 year plan to ensure financial impact of Covid assessed.	Feb 2021	CFor	This was done in terms of the MTFP being set at both councils and will be updated as part of the 22/23 Budget setting. 'Project Finance and Resources' includes plans to strengthen the Finance Team and financial management arrangements. Restructure of team completed and first phase of recruitment completed (Dec 2021).
		<ul style="list-style-type: none"> • Clarify impact of Covid • Assess prior year underspends • Review Capital Programme • Identify savings plans • Review fees and charges 	Oct 2020		
		Recruit additional technical capacity	Sept 2020		
	Improved commerciality: maximising every opportunity to generate income, including review of fees & charges	Work with managers to better understand budget implications	Sept 2020	CFor	The new ERP system provides the opportunity to analyse financial data more effectively to improve financial management. Fees and charges reviewed each year Have been undertaken. Further training will be delivered in the new year
		Restructure of financial services team	Dec 2020		
		Implementation of new system to better understand income and financial management	Nov 2020		
		Review of fees and charges	Dec 2020	CFor	
		Workshops with budget holders	Sept 2020		
	Undertake effective contract management	Continue to work through corporate training and development programme.	Mar 2021	JS	A skills audit of posts and people has been completed to develop a

		Work internally to maximise efficiency and economy of scale.	Mar 2021	CFe	<p>training programme for the teams.</p> <p>Work continues to align contracts with new tech one system and actual spend. Final plea to HOS to ensure all spend is identified within the context of a contract and that the contracts are logged and registered with Carmen. Slow progress to date.</p> <p>We have completed the first part of this process and work closely with local suppliers to ensure that they understand the way to engage with frameworks and tendering process. Carmen working on updating the website to provide clear enabling instructions to businesses. The longer term objective to support a social responsibility policy will require investment and resources.</p>
		Develop comprehensive contracts register and effective contacts management through new finance system	Mar 2021	CFe	
		Targeted and bespoke departmental training and development	Mar 2021	CFe	
		Social responsibility policy with focus on local suppliers			
	Manage our assets to get the best outcomes for our residents	Review use of buildings, facilities and assets	Mar 2021	CMT	Ongoing process to assess the use of assets
		Develop comprehensive assets management strategy in line with the Council Plan	Mar 2021	CFe	Asset register work continues. HoS are to supply a list of managed assets.

	Make financially viable strategic acquisitions & investments	Review the property structure to ensure there is the resource to enable strategic investment opportunities to be identified and pursued	Ongoing	CFor CFe	The 2022/23 Capital Programme has provisionally been updated to reflect the updated focus on delivering the Levelling Up Fund project (as opposed to progressing other acquisitions / projects in the short term).
	Undertake a self-assessment against CIPFA's new Financial Management Code (CPC)	Undertake the self-assessment online	Feb 2021	CFor	To be completed once new team in place.
	Encourage all levels of the organisation to articulate their role clearly and succinctly in delivering financial sustainability (CPC) Review services currently delivered to determine if they offer VFM, and if not and not legally required then consider discontinuing.	Workshops and training on the new ERP system Restructure in the financial services team Work with members to understand priority services and assess those that are not as a priority against benchmarking to fully understand value for money and associated costs	Sept 2020 Dec 2020 Nov 2020	CFor CFor CFor	Workshops completed, however identified that refreshers are needed. Currently planning content. Restructure completed. Undertaken as part of MTFP setting
Sustainability	Review alternative delivery models. The production of Service Business Plans will begin to outline what a Future Operating Model may look like.	Service Business Plans will be assessed in order to establish an overall council operating model	Nov 2020	SMT CMT	Completed. Business service plans considered and endorsed for all areas by CMT including FOM proposals. Programmed review and updates quarterly to CMT. Corporate FOM debated and endorsed.

	Exploit digital technologies, enabling more automation of services through the implementation of the Digital and Customer Strategy to ensure both technology and process change. (CPC)	Develop a delivery action plan for the Digital Strategy and digital developments outlined in the Service Business Plans Encourage customer use of website for payment and alternative methods of payment	Sept 2020 Ongoing	DP MH PS	This has been delayed due to the additional work needed to ensure the council could work remotely during the pandemic. The change to remote working fulfils part of the new way of working outlined in the strategy. The completion date will now be Jan 2022.
	Invest in leadership development to reinforce culture change and lay foundations for the future. (CPC)	Start the ILM programme later in 2020	Oct 2020	DP BT	Completed. Program is underway.
		Ensure the Apprenticeship Levy is used to cover training costs Ensure the first cohort focuses on 5 th tier level employees.	Ongoing Ongoing	 BT	Completed Completed
	Be consistent in internal communications and explore opportunities for two-way internal communications (CPC)	Implement the learnings from remote working and Covid 19 staff surveys	Oct 2020	DP BT	Surveys undertaken and findings being used to develop an Agile Working Policy.
	Strengthen financial forecasting to underpin the refreshed approach to financial management (CPC)	Workshops and training on the new ERP system Restructure in the financial services team	Dec 2020	CFor	Workshops completed, however identified that refreshers are needed. Currently planning content. Restructure completed.
	Utilise external commercial expertise to ensure delivery of agreed priorities (CPC)	Ongoing support via remote working/virtual meeting	Ongoing	GR DP	Completed
	Review key risks on the Corporate Risk Register	Regular review of the added Covid risk – financial and service	Oct 2020	CFor	Completed. Currently undertaking another review with support from Nicola parry and Zurich.
Review services to understand how we can adapt to climate change	To identify opportunities through departments service plans and develop an action plan	Jan 2021	CMT JW	All Service Plans included future plans to support the Council's green thread. A	

Review Resources and Services

					corporate action plan is in the process of being Developed
Prioritise clearly and resource accordingly (CPC)	Review priorities post Covid	Feb 2021	SMT CMT		Cabinet Session undertaken and review of Council Plan in progress.
Ensure that budget manager engagement and ownership is invested in to make self-service a success (CPC)	Workshops and training on the new ERP system Restructure in the financial services team	Oct 20 – Feb 21	CFor		Workshops completed, however identified that refreshers are needed. Currently planning content. Restructure completed.
Workforce planning – employee skills, gap analysis, workforce profile, succession planning etc	Create a workforce strategy in light of the ‘new normal’ after the Covid crisis. To consider the impact of remote/agile working on employee numbers/skills.	Dec 2020	DP BT		Data analysis for the current workforce profile has been completed. The skills matrix continues to be used across the organisation to identify employee skills and gaps.
	Develop improved management information for services through a renewed corporate dashboard.	Apr 2021	DP BG		Development is ongoing. Demo’s of the beta site have been carried out to CMT. A data gathering exercise has been completed with Heads of Service/SMT to establish data needs. The new date for completion is November 2022.
Support workforce recovery and transition to ‘new normal’	Determine what ‘new normal’ means and understand what policy changes will be needed to support new ways of working.	Dec 2020	DP BT		Working from home surveys have been carried out with employees and managers to determine how services can work more flexibly in future.

		<ul style="list-style-type: none"> • Deliver a remote working policy • Arrange management training to develop skills for remote working and performance management. • Review working arrangements of whole organisation. • Explore flexible work arrangement. 	May 2021	DP BT	A first draft Agile Working Policy has been developed.
	Capture lessons learned/details from surveys in order to assess impact of remote working.	Analyse data and pass this out to service areas.	Sept 2020	DP BT	Completed
	Review appetite for agile working post-crisis	Services to use the data to determine what their service reviews may look like. To include future operating model, agile working etc	Feb 2021	SMT CMT	Completed
	Review HR&OD Strategy to ensure recognition and reward are encompassed within it.	Link the strategy to business planning cycle, development of 'new normal' and workforce planning	Dec 2020	DP BT	The strategy will be reviewed after the Agile Working Policy is in place as this will impact on the organisations future HR needs. Jan 22
Review the Council Plan	Review the delivery of priorities in light of the impact of the pandemic.	Review during 2021 for the next 3 years to link in with the MTFP	Apr 2021	CMT	Review undertaken with Corporate Plan review in process incorporating Recovery & Restoration actions.
Community Leadership	Explore the development of "Deal" approaches (based on the concepts / principles of the Wigan Deal).	Consider the legacy of the Covid volunteers and how they and the VCS organisations can support the 'Deal' approach in terms of community assets.	Aug/Sept 2020	HoS 4th Tier Managers LSP Managers Policy Team	The Deal Approach has been replaced with Asset Based Community Development (ABCD) approach which will continue through the Bromsgrove Partnership help address growing health inequalities and ensure community leadership.
	Continue to work with the support networks (Support Bromsgrove) and partnerships to	Undertake / co-ordinate work across Council departments and with partner	Nov 2021		The ABCD approach has been strengthened by

	<p>underpin future economic and community recovery (CPC)</p>	<p>organisations to create a better understanding of our most vulnerable and in need residents.</p> <p>Bring together data and information the Council and partners hold about vulnerable residents which can be utilised to target future resources, support, and opportunities to those most in need in our communities. This data to also be used for future planning and response in emergencies e.g. any future waves of the Covid-19 pandemic</p>	<p>Review Nov 2021</p>	<p>4th Tier Managers LSP Managers Policy Team DS</p> <p>JW/DP</p>	<p>working with partners to: (a) appoint community builders who can in turn create and support a network of street connectors; and (b) embed the approach by supporting the delivery of ABCD training.</p> <p>Data relating to vulnerable people is being collated to better understand what services we offer to this group of people in our communities.</p>
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Customer & Digital Strategy

Relevant Portfolio Holder	Councillor G. Denaro
Portfolio Holder Consulted	Yes
Relevant Head of Service	Deb Poole
Report Author	Job Title: Head of Transformation, OD & Digital Email: d.poole@bromsgroveandredditch.gov.uk Contact Tel: 1256
Wards Affected	None
Ward Councillor(s) consulted	NA
Relevant Strategic Purpose(s)	Enabling
Non-Key Decision	
If you have any questions about this report, please contact the report author in advance of the meeting.	
This report contains exempt information as defined in Paragraph(s) of Part I of Schedule 12A to the Local Government Act 1972, as amended	

1. RECOMMENDATIONS

The Cabinet **RECOMMEND** that:-

- 1) The Customer & Digital Strategy be agreed and adopted

2. BACKGROUND

Many technological changes have taken place in society over the last few years. To continue to successfully deliver services and engage with digitally connected customers, the council must embrace and exploit the opportunities presented by this continuing technological advancement.

Through the Customer & Digital Strategy the council will adopt a 'digital first' approach. Looking to identify opportunities to improve access to services, change working practices and improve service delivery by increasing the digital offer to our customers. The vision of a 'digital first' approach is supported, in the strategy, by the use of four strategic themes:

- **Digital Customer** – Supporting our customers to get the services and information they need online.
- **Digital Workforce** - Ensuring our workforce have the digital systems and skills needed to deliver services online.
- **Digital Leadership** - Providing the technology and support required to meet Councillors needs in a modern council.

- **Digital Infrastructure** - Working to maximise the use of digital infrastructures.

Focusing on these four strategic themes will enable the council to further exploit the changes that have taken place in the public sector landscape, particularly during the pandemic. This changed landscape is likely to continue for the foreseeable future, requiring the council to become more adaptable and agile in its approach.

Embracing and exploiting new ways of working and delivering services will require the shape and size of the council to change, whilst the need to provide high levels of service to our customers will remain. These new challenges will present new opportunities for the council to achieve efficiencies whilst keeping pace with customers changing needs and expectations.

These opportunities will also provide ways to reduce costs whilst offering more choice of access to our services. The strategy provides a clear direction of travel for a digital future and a clear focus on how we will use technology and digital access to help address some of the challenges faced by our organisation and our communities. The strategy is designed to ensure that our customers' needs are at the heart of our approach to greater digitisation.

3. FINANCIAL IMPLICATIONS

- 3.1 The strategic objectives outlined in the strategy will require investment to be made in digital platforms, as the council seeks to exploit the opportunities digital access offers. The financial implications of this activity will be outlined in business cases for individual projects as they are developed.

4. LEGAL IMPLICATIONS

- 4.1 None

5. STRATEGIC PURPOSES - IMPLICATIONS

Relevant Strategic Purpose

- 5.1 The Customer & Digital Strategy supports the delivery of all of the councils services. Whilst the strategy itself forms part of the Enabling Services strategic purpose it is particularly focused on the elements of sustainability and high quality services as outlined in the Council Plan 2019 – 2023.

Climate Change Implications

- 5.2 The green thread has been highlighted as running through the entire Council Plan 2019 – 2023. By expanding the councils digital offer it is hoped that online service delivery will impact positively on the councils green agenda. In particular, in relation to the use of resources and the requirement for some of our customers to travel to access services.

6. OTHER IMPLICATIONS

Equalities and Diversity Implications

- 6.1 Any equality implications of changing access to services will be considered on a project by project basis through the use of Equality Assessments, if required.

Operational Implications

- 6.2 It is likely that expanding the digital offer to our customers will require the implementation of new or enhanced technologies. Any operational changes brought about as a consequence of the use of technology will be considered in the business case for each project and as part of any project planning.

7. RISK MANAGEMENT

- 7.1 The use of technology to deliver our services needs to be balanced with the technological abilities of some of our customers and communities. Whilst many people have embraced the use of new technology, particularly during the pandemic, there are some members of our communities who have not. The strategy is clear that technology should be used to enhance access for our customers not to exclude those who do not wish or are not able to use digital services.

8. APPENDICES and BACKGROUND PAPERS

Appendix 1 – Customer & Digital Strategy 2022 - 2026

Cabinet
2022

1st June

9. REPORT SIGN OFF

Department	Name and Job Title	Date
Portfolio Holder	Cllr G Denaro	18/03/2021
Lead Director / Head of Service	K. Dicks	03/03/2021
Financial Services	N/A	
Legal Services	N/A	
Policy Team (if equalities implications apply)	N/A	
Climate Change Officer (if climate change implications apply)	N/A	

Customer & Digital Strategy 2022 - 2026

Bromsgrove District Council



Date of Issue: June 2022
Review Date: March 2026



Bromsgrove
District Council

www.bromsgrove.gov.uk

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Statement of Intent

Whilst we must increase our digital services to keep up with the pace of change in society, we must also ensure we do this in an inclusive way. Supporting our customers to exploit additional ways of accessing our services, whilst providing other access channels where needed.

1. Foreword

The council recognises the huge technological changes that have taken place over the last few years and believes that to be successful it must embrace and exploit the opportunities presented by continuing technological advancement.

Through this strategy the council will focus on a 'digital first' approach. Working to identify opportunities to improve access to services, change working practices and improve service delivery by increasing the digital offer to our customers.

The public sector has seen significant changes in recent years, particularly during the 2020 Covid-19 pandemic. This changed landscape is likely to continue for the foreseeable future, requiring the council to become more adaptable and agile in its approach. Embracing and exploiting new ways of working and delivery of services will require the shape and size of the council to change but the need to provide high levels of service to our citizens will remain. These new challenges will present new opportunities for technology to enable the council to achieve efficiencies whilst keeping pace with citizens' changing needs and expectations.

These opportunities will also provide ways to reduce costs whilst offering more choice of access to our services. This strategy provides a clear direction of travel for a digital future and a clear focus on how we will use technology and digital access to help address some of the challenges faced by our organisation and our communities. This strategy is designed to ensure that our customers' needs are at the heart of our approach to greater digitisation.

2. Management Summary

The government's digital strategy aims to 'provide digital services which are so straightforward and convenient that all those who can use digital services will choose to do so, while those who can't are not excluded'. Bromsgrove District Council's Customer & Digital Strategy seeks to build upon this aim by providing a framework for the council's future service delivery and engagement with customers using digital technologies. In addition, technology and digital services will underpin and support the delivery of the council's vision and five strategic purposes, as set out in the Council Plan 2020 - 2024:

- Run and Grow a Successful Business
- Finding Somewhere to Live
- Aspiration, Work and Financial Independence
- Living independent, active, and healthy lives
- Communities which are safe, well maintained, and green.

The challenges faced by public services present new opportunities for digital technologies to be used to improve efficiency, reduce costs, and expand access to services.

Digital technology also has the ability to transform the way services are organised and delivered. As such, technology is no longer just a tool for enabling service delivery; it has become a critical service in its own right. If technology is unavailable or not working effectively, the organisation cannot operate or deliver services to its customers. The use of technology has the ability to transform the way services are organised and delivered. It has a fundamental role to play in improving efficiency and reducing costs whilst underpinning the delivery of services that meet our customers digital expectations.

To ensure the council maximises the use of technology for the benefit of the organisation and the wider community, this strategy has been divided into four strategic themes: digital customer, digital workforce, digital leadership, and digital infrastructure. These themes are explored in more detail further in the document.

3. Digital Vision - Digital First

This strategy describes how the council will use modern digital tools and technologies to enable, enhance and fundamentally change how services are delivered to both internal and external customers. Over the last twenty years, the use of technology has become mainstream, particularly the use of home computers, smartphones, and social media. These changes in the way society views technology and the continuing growth in processing power, network connectivity and storage capacity has placed digital technology at the centre of modern life. From business to banking, travel and shopping, all aspects of life now benefit from the use of digital technologies.

Customers and businesses expectations regarding access, ease of use, functionality and availability of services have been raised by the level of digital connectivity offered by large private sector organisations such as Amazon. Technology is already mainstream for younger generations. Older generations are also embracing new ways of doing things, including the delivery of essential services such as health or social care, via digital devices in the home.

As part of this evolving digital landscape, it is clear that our customers expect to be able to access local government services from multiple digital locations, at times and in ways that suit them.

Understanding the changing technological needs and abilities of our communities provides greater opportunities for technology and digital services to enhance and enable greater transformational change across the council. This change will provide a base from which to exploit initiatives such as commercialisation and 5G.

This 'digital revolution' is continuing to transform the way that many people live their lives, from the way we purchase goods and services to the way we communicate with others. It also represents a significant opportunity for local authorities to harness new and emerging technologies to redesign public services in a way which meets the expectations of customers.

This strategy sets out the council's approach to the required changes and sets out a vision for 'digital first' in which the council will:

- Make it as easy as possible for residents and citizens to access our services 24/7/365.
- Work with partners to be a digital district.
- Encourage as many people as possible to use online services.
- Ensure as many people as possible enjoy digital connectivity.
- Support businesses to exploit digital services to enhance business opportunities and growth.
- Ensure our area is well placed to take advantage of technical advancements e.g., full fibre and 5G.

In order to deliver this vision and affect the changes required to do so, technology needs to be fully embraced by all service areas across the council and harnessed effectively for our customers.

While we must increase our digital offering to keep up with the pace of change in society, we also need to do this in an inclusive way that supports all customers to exploit the additional ways of accessing our services, whilst also ensuring more traditional channels to our customers are maintained.

4. Strategic Themes

Digital Customer

What it means: Supporting our customers to get the services and information they need online by adopting a digital first approach to the provision of services and information. Whilst ensuring we provide choice of access for those who are not digitally connected or skilled. Providing as many services online as possible so our customers can book, order, pay and connect with us using digital channels. Utilising automation and self-serve options where appropriate to enhance customer access.

Digital Workforce

What it means: Ensuring our workforce have the digital systems and skills needed to deliver services to our customers as effectively and efficiently as possible. Working to ensure that our digital service delivery provides positive outcomes for our customers by giving staff access to data and appropriate technology alongside the skills needed to use it effectively. Exploiting and extending the use of collaborative tools to enable more remote and flexible working for employees. Ensuring our geographic data is accurate and available for use across different systems. Exploiting collaborative technical tools in order to support flexible working.

Digital Leadership

What it means: Providing the technology and support required to meet Councillors needs in a modern council. Our Councillors are increasingly working in a more mobile and agile way. To do this effectively they require access to appropriate technology, software, and information. Ensuring we exploit collaborative software applications to enhance the decision making process by using digital technologies to collaborate with partners and the business community. Engaging our customers in the local democratic process can be enhanced by focused use of digital communications, particularly for the younger more technology driven members of our communities.

Digital Infrastructure

What it means: Working to maximise the use of digital infrastructures, including cloud technologies, to enhance customer and business access. Encouraging residents and businesses to access high speed fibre and wireless technologies to deliver growth in the local economy. Also working with technology partners to support the use of high speed, high quality networking and mobile infrastructures. Whilst ensuring our infrastructure can securely process the increased demand placed on it by the expanding use of IoT devices.

5. Strategic Actions

Digital Customer	Digital Workforce
<ul style="list-style-type: none"> • Provide transactional services and information online in a user friendly and inclusive way that does not exclude any of our residents. • Use digital technologies to offer greater choice of access for our customers. • Develop customer account services on the council's website. • Help customers to access services and information online. • Promote 'Digital First' as the preferred option for people to contact us, whilst continuing to give people a choice. • Expand our use of digital technologies such as AI, chatbots & robotics to improve customer access. • Expand the number of council services available online. 	<ul style="list-style-type: none"> • Ensure access to appropriate digital tools and technologies to support service delivery e.g., mobile devices, data dashboards, software etc. • Support our workforce with the digital skills they need to deliver services more efficiently and effectively, whilst also reducing the use of paper documents. • Create a digitally-enabled workforce that isn't fixed in one location, by increasing the use of remote and mobile technologies. • Ensure our recruitment processes support the recruitment of a digitally skilled workforce. • Exploit geographic information to enhance services where possible. • Ensure data, information and insight is used to improve services.
Digital Leadership	Digital Infrastructure
<ul style="list-style-type: none"> • Ensure Councillors have access to appropriate technology that is fit for purpose and supports modern Councillor development. • Ensure the corporate team promote 'digital first' to the wider organisation. • Utilise digital channels to promote local engagement. • Ensure Councillors have the necessary digital skills to take advantage of new technologies. • Create a culture within the council where customer insight and intelligence is used to develop customer centric services. • Ensure we can contribute to the governments digital ambition to place the UK at the forefront of technological exploitation and development. • Exploit digital technologies to collaborate and work more effectively with partners. • Support technology providers to deliver full fibre and 5G to residents and the local business community. 	<ul style="list-style-type: none"> • Ensure investment in digital infrastructure leads to improved and enhanced customer access & services. • Ensure our digital infrastructure remains fit for purpose in order to allow the council to contribute to the national digital challenge. • Support and contribute to the government's full fibre and 5G network initiatives. • Redevelop the councils website to ensure it is designed to utilise digital technologies. • Exploit opportunities to develop an integrated technical infrastructure with other partner agencies. • Ensure we exploit our previous investment in technology. • Ensure our infrastructure and data are protected from cyber threats. • Make use of cloud technologies where appropriate. • Support residents and businesses to access digital services through the provision of full fibre and wireless networks e.g., 5G

6. Information Security

A vital part of the provision of technical services is ensuring that the council can transact its business in a safe and secure environment, while not inhibiting the development of digital delivery. This requirement is set against the need to adhere to the General Data Protection Regulation (GDPR), the fast pace of technological change, greater use of online and digital services by our citizens and the recent surge in the use of collaborative and partnership working technologies due to the Covid-19 pandemic.

Against this backdrop, the council will continue to adopt a pragmatic balance of information governance and risk, with emphasis placed on how to enable and support the business. The internal Information Management resources will continue to provide support and guidance to the wider organisation to ensure everyone manages and uses data in the most appropriate and secure way.

7. Data, Information & Insight

The use of data and information to provide customer and service insight should continue to be widely adopted across the council. The exploitation of data should be seen as an iterative process, used to support learning, and understanding prior to making long term business decisions. The valuing of customer insight will require the council to place greater emphasis on customer engagement and the use of information gained through this connection to our communities. The difference between data, information, and insight is briefly explored below:

Data are facts and figures captured in day-to-day activities or by use of customer surveys and questionnaires. Generally, data is used to measure something e.g., customer satisfaction, expenditure, income etc.

Information is data that has been processed in some way in order to provide better understanding. It can help to uncover issues and promote learning.

Insight is gained by analysing data and information to understand what is going on with the particular situation of interest.

Access to data and information is also key to enabling our services to understand and monitor their performance. In order to provide this access data dashboards will continue to be used. The corporate dashboard is an online tool used for the dissemination and integration of data throughout the organisation, as well as for measuring and managing performance. The council will continue to provide a corporate performance dashboard where a variety of datasets and measures will be maintained.

8. Cyber Security

The increasing global threat to the delivery of online services and the growing risk of information being stolen, requires the organisation to allocate a proportional amount of its resources to the protection of its data assets. As the threats change we need an environment that remains secure for staff, members, and customers to operate within.

To prove the integrity of the security level, regular testing, auditing, and adherence to the PSN (Public Services Network) standards will be maintained. The need to protect the valuable data assets held by the council is an ongoing and constant requirement. The threat of data loss, hacking or cyber ransom attacks are ever present. Extensive schedules of security patching, software updates and threat detection systems and software form a major part of the work undertaken by the ICT service to protect the technical and data infrastructure.

The use of the current hybrid of on premise and cloud infrastructure also affords the organisation some resilience in relation to the complete loss of systems and data in the event of a major cyber incident.

9. Cloud Technologies

Cloud computing is the delivery of on-demand computing services, from applications to storage and processing power, typically using the internet to provide access.

Cloud computing services cover a vast range of options, from storage, networking, and processing power to artificial intelligence and software applications.

Cloud computing can be broken down into three models:

- Infrastructure-as-a-Service (IaaS) refers to rented physical or virtual servers, storage, and networking.
- Platform-as-a-Service (PaaS) refers to development tools and software used to build applications on the infrastructure, including middleware, database management and operating systems.
- Software-as-a-Service (SaaS) refers to the delivery of applications-as-a-service and is the most widely used version of cloud computing. The end user accesses the service via a web browser or app.

Many of the large system and software suppliers now provide SaaS requiring organisations to use the internet to access their software. This model of cloud technology is already used by the council and over time, as more systems are replaced, it will become more extensive. The other models of cloud computing will also be explored by the council to assess their suitability for use.

10. The Future

Having made significant investment in ICT infrastructure, it is vital that further progress is made in exploiting these technologies to help deliver transformational change throughout the council. However, we cannot be complacent, more will need to be done in the future, including:

- Continuing to exploit our investment in technology to facilitate different ways of working.
- Identifying opportunities to integrate our infrastructure with partner agencies.
- Identifying and realising savings.
- Exploiting new technologies in order to automate as many processes as possible to release resources to undertake value work for our customers e.g., automation, blockchain, robotics.
- Continuing to use a hybrid infrastructure that exploits cloud computing as much as possible.
- Training and empowering staff to use technology to deliver improved service with greater efficiency.
- Allocating future funding to continue to develop our technical estate and resources.
- Using technology to help to realise different service operating models.
- Using customer information and data insight to understand our communities in order to provide services that meet their needs.

11. Summary

The successful delivery of this strategy will depend on it being integrated with other corporate policies and strategies in order to align them with the digital ambitions of the council. It will require the commitment and engagement of all employees, managers, and members to ensure its delivery.

Whilst all parts of the strategy are important, the order and timescales for moving them forward will vary depending on the needs of the business, and the impact of other changes, both internal and external, on the council. The ICT Service team will help to deliver, support, and drive the use of technology and digital services across the organisation. Working collaboratively with services to bring about the best outcomes for the organisation and for our customers. It is essential that the use of digital be designed with the customer at its heart in order to provide services that meet the needs of our communities.

Version Control

Title	Customer & Digital Strategy			
Description	Corporate Technology and Customer Strategy			
Created By	Head of Transformation, OD & Digital Services			
Date Created	2021			
Maintained By	Head of Transformation, OD & Digital Services, ICT Transformation Manager			
Next Review Date	March 2026			
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V.1.0	D.Poole		18/03/2021	

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