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BROMSGROVE DISTRICT COUNCIL

MEETING OF THE CABINET

WEDNESDAY 26TH MARCH 2025

AT 6.00 P.M.

PARKSIDE SUITE - PARKSIDE

MEMBERS: Councillors K.J. May (Leader), S. J. Baxter (Deputy Leader), S. R. Colella, B. McEldowney, K. Taylor, S. A. Webb and P. J. Whittaker

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 19th February 2025 (Pages 5 - 16)**
4. **Data Strategy (incl Data Standards Policy) (Pages 17 - 52)**
5. **UK Shared Prosperity Fund 2025 - 2026 (Pages 53 - 68)**
6. **Finance Recovery Programme Report (Pages 69 - 80)**
7. **Quarter 3 Revenue and Performance Monitoring 24-25 (Pages 81 - 130)**

8. **To consider any urgent business, details of which have been notified to the Assistant Director of Legal, Democratic and Procurement 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**

9. **To consider, and if considered appropriate, to pass the following resolution to exclude the public from the meeting during the consideration of item(s) of business containing exempt information:-**

"RESOLVED: that under Section 100 I of the Local Government Act 1972, as amended, the public be excluded from the meeting during the consideration of the following item(s) of business on the grounds that it/they involve(s) the likely disclosure of exempt information as defined in Part I of Schedule 12A to the Act, as amended, the relevant paragraph of that part, in each case, being as set out below, and that it is in the public interest to do so:-

<u>Item No.</u>	<u>Paragraph(s)</u>
10	3

10. **Minutes of the meeting of the Overview and Scrutiny Board held on 11th February 2025 and 17th February 2025 (Pages 131 - 150)**
 - (a) To receive and note the minutes

There are no outstanding recommendations contained within these minutes for consideration by the Cabinet.

Sue Hanley
Chief Executive

Parkside
Market Street
BROMSGROVE
Worcestershire
B61 8DA

18th March 2025

**If you have any queries on this Agenda please contact
Jo Gresham**

**Parkside, Market Street, Bromsgrove, B61 8DA
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**If you have any questions regarding the agenda or attached papers,
please do not hesitate to contact the officer named above.**

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Meeting attendees and members of the public are encouraged not to attend a Committee if they have if they have common cold symptoms or 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:

Although this is a public meeting, there are circumstances when Council might have to move into closed session to consider exempt or confidential information. For agenda items that are exempt, the public are excluded.



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- Meeting Minutes
- The Council's Constitution

at www.bromsgrove.gov.uk

BROMSGROVE DISTRICT COUNCIL

MEETING OF THE CABINET

WEDNESDAY 19TH FEBRUARY 2025, AT 1.00 P.M.

PRESENT: Councillors K.J. May (Leader), S. J. Baxter (Deputy Leader),
B. McEldowney, K. Taylor, S. A. Webb and P. J. Whittaker

Observers: Councillor P. M. McDonald – Chairman of the
Overview and Scrutiny Board

Officers: Mrs. S. Hanley, Mr P. Carpenter, Mr. G. Revans,
Mrs. R. Bamford, Mr. M. Dunphy and Mrs J. Gresham

72/24 **TO RECEIVE APOLOGIES FOR ABSENCE**

Apologies for absence were received from Councillor S. Colella.

73/24 **DECLARATIONS OF INTEREST**

There were no Declarations of Interest.

74/24 **TO CONSIDER A VERBAL UPDATE ON THE MEETINGS OF THE
OVERVIEW AND SCRUTINY BOARD DUE TO TAKE PLACE ON 17TH
FEBRUARY 2025 AND FINANCE AND BUDGET WORKING GROUP
DUE TO TAKE PLACE ON 18TH FEBRUARY 2025.**

The Leader invited Councillor P. McDonald in his capacity as Chairman of the Overview and Scrutiny Board to provide a verbal update following the meetings of the Overview and Scrutiny Board held on 17th February 2025 and Finance and Budget Working Group held on 18th February 2025.

In doing so, Cabinet was informed the Board had pre-scrutinised the Local Development Scheme report due to be considered at this meeting, however there had been no recommendations made as a result of this pre-scrutiny.

It was confirmed however, that following detailed scrutiny of the Poverty Truth Commission (PTC) at several Finance and Budget Working Group meetings, Members felt that funding for the PTC should not be allocated as part of the Medium-Term Financial Plan 2025 – 2026 to 2027 – 2028. It was discussed that some of the areas which the PTC covered such as

working with young people, were also dealt with by other organisations, that provided a similar service. Therefore, to allocate £40,000 to the project would not provide value for money for the residents of Bromsgrove. It was also stated that as a new Local Government structure was currently in the process of being decided upon, providing funding at this time would not be appropriate.

Cabinet were in agreement with this opinion and a recommendation to Council would be included in the Medium-Term Financial Plan when the report was considered later at this meeting at Minute No 77/24. Members noted that Officers and The Bromsgrove Partnership, who were to provide non-financial support for this project, would be notified of this decision by the relevant Cabinet Members.

The Leader thanked Councillor McDonald and the Board for the robust pre-scrutiny carried out in this area over the previous meetings of both the Board and the Finance and Budget Working Group.

75/24

LOCAL DEVELOPMENT SCHEME

The Cabinet Member for Planning, Licensing and Worcestershire Regulatory Services (WRS) presented the Local Development Scheme report for Members' consideration.

Members were informed that this report dealt with the new timetable for the development of the Local Plan as a result of the new National Planning Policy Framework (NPPF) published in December 2024. It was noted that it had been necessary to implement the timetable within a specific deadline as communications had been received from Central Government which stated, '*areas must commit to timetables for new plans within 12 weeks of the updated NPPF or ministers will not hesitate to use their existing suite of intervention powers to ensure plans are put in place*'.

The timetable included the consultation process which, it was noted, was due to take place in Summer 2025. Members would also be consulted on this process during Strategic Planning Steering Group meetings scheduled to take place throughout the year.

It was explained the overall process would take thirty months in total and result in the adoption of the Local Plan in 2028.

Members queried what the land supply currently was in Bromsgrove. Officers stated that it was 1.92 years, however, they would confirm this figure for Members following the meeting.

In proposing the recommendations, it was noted that there had been a slight amendment to those published in the main agenda. These updated recommendations appeared in the supplementary papers one pack and reflected that '*authority be delegated to the Assistant Director of Planning and Leisure Services, following consultation with the Cabinet Member for Planning, Licensing and WRS, to approve updates to the Local Development Scheme as required*'. It was explained that this was in line with Bromsgrove District Council's Constitution in that decisions were made as a collective rather than by individual Members. These updated recommendations would be considered at the Council meeting due to take place later that day.

Therefore, it was

RECOMMENDED that

- 1) Bromsgrove District Council Local Development Scheme 2025 be approved as the Council's programme for plan-making, effective as of 19th February 2025;
- 2) Delegated authority be granted to the Assistant Director for Planning and Leisure Services, following consultation with the Cabinet Member for Planning, Licensing and WRS, to approve updates to the Local Development Scheme as required.

76/24

COUNCIL TAX RESOLUTIONS (REPORT TO FOLLOW)

The Deputy Chief Executive and Section 151 officer presented the Council Tax Resolutions 2025 – 2026 for the consideration of Cabinet. It was explained that the report authorised the collection of Council Tax from Bromsgrove residents at the correct amount. Prior to the consideration of the report, it was noted that updated version of Schedules One and Two contained within the report had been re-issued for Members consideration. This was due to a rounding error which had been identified in the previous version.

It was stated that Council Tax included elements from the following:

- Worcestershire County Council
- Bromsgrove District Council

Agenda Item 3

Cabinet
19th February 2025

- Police and Crime Commissioner for West Mercia
- Hereford and Worcester Fire Authority
- Precepts from nineteen Parish Councils

Members were informed that Hereford and Worcester Fire Authority had met earlier on that day to agree their precept for 2025 – 2026 and it was confirmed that this had been agreed as detailed within the report.

Therefore, it was stated that the precepts for 2025 2026 were as follows:

	£
Worcestershire County Council	61,978,474.00
Police and Crime Commissioner for West Mercia	11,181,910.85
Hereford and Worcester Fire Authority	3,921,149.04
Bromsgrove District Council	9,876,907.05
Parish Precepts	1,373,801.44
Total	88,332,242.38

It was highlighted that all precepting authorities had increased their charges by the maximum amount for the year 2025 – 2026 as follows:

- Worcestershire County Council – an increase of 4.99 per cent
- Bromsgrove District Council – an increase of 2.99 per cent
- Police and Crime Commissioner for West Mercia – an increase of 5.05 per cent
- Hereford and Worcester Fire Authority – an increase of 5.14 per cent
- Parish Councils - an average increase of 11.18 per cent.

It was noted that the Parish Council precepts were determined at a local level and were dependent on the services provided and numbers of residents within that Parish. Members noted that Parish Councils were subject to scrutiny of their accounts and annual Statement of Accounts were published on the website or independently audited depending on income and turnover.

The total amount generated from the collection of Council Tax was £11,250,708.49 which was the combined total of Bromsgrove District Council's amount of precept of £9,876,907.05 and parish precepts of £1,373,801.44.

Members attention was drawn to the following areas contained within the report:

Agenda Item 3

Cabinet
19th February 2025

- 1) For the year 2025 - 2026, Worcestershire County Council, Police and Crime Commissioner for West Mercia, and Hereford and Worcester Fire Authority had issued precepts to the Council in accordance with Section 40 of the Local Government Finance Act for each category of dwelling in the Council's area as indicated below:

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

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

	Precept (£)	Surplus/Deficit on Collection Fund (£)	Total to Pay (£)
Worcestershire County Council	61,978,747.00	417,276.00	62,395,750.00
Police and Crime Commissioner for West Mercia	11,181,910.85	75,243.70	11,257,154.55
Hereford and Worcester Fire and Rescue Authority	3,921,149.04	26,361.05	3,947,510.09

- 3) That the Director of Resources was authorised to make transfers under section 97 of the Local Government Finance Act 1988 from the collection fund to the general fund the sum of £11,250,708.49 being the Council's own demand on the collection fund (£9,876,907.05) and parish precepts (£1,373,801.44) and the distribution of the surplus/deficit on the collection fund (£76,521.40).
- 4) That the Director of Resources was authorised to make payments from the general fund to parish councils the sums listed on **Schedule 3** by two equal instalments on 1st April 2025 and 1st October 2025 in respect of the precept levied on the Council.

- 5) That the above resolutions to be signed by the Chief Executive for use in legal proceedings in the Magistrates' Court for the recovery of unpaid council taxes.

Members were informed that due to the legislation connected to this report, it would be necessary for the Cabinet Member for Finance to read out all recommendations contained within the report at the Council meeting due to be held later that day.

On being put to the vote it was

RESOLVED that

at its meeting on 25th January 2025 Cabinet approved the calculated Council Tax base 2025/26 as:

- (a) for the whole council area as 38,359.9 [item T in the formula in section 31B of the Local Government Finance Act 1992, as amended (the "Act")]; and
- (b) for dwellings in those parts of its area to which a parish precept relate the amount as shown in column 5 of the attached schedule 1.

RECOMMENDED that

1.2.1 The calculation for the council tax requirement for the council's own purposes for 2025/26 (excluding parish precepts) as **£9,876,907.05**

1.2.2 That the following amounts be calculated for the year 2025/26 in accordance with sections 31 to 36 of the Act:

- a) £48,010,187.83 being the aggregate of the amounts which the council estimates for the items set out in section 31A(2) of the Act (taking into account all precepts issued to it by Parish Councils) (i.e., gross expenditure)
- b) £36,759,479.34 being the aggregate of the amounts which the council estimates for the items set out in section 31A(3) of the Act. (i.e gross income).
- c) £11,250,708.49 being the amount by which the aggregate of 1.2.2(a) above exceeds the aggregate of 1.2.2(b) above, calculated by the council, in accordance with section 31A(4) of

- the Act, as its council tax requirement for the year. (Item R in the formula in section 31B of the Act).
- d) £293.29 being the amount at 1.2.2(c) above (Item R), all divided by Item T (1.1(a) above), calculated by the council, in accordance with section 31B of the Act, as the basic amount of its council tax for the year (including parish precepts).
 - e) £1,373,801.44 being the aggregate amount of all special items (parish precepts) referred to in section 34(1) of the Act (as per the attached **schedule 3**)
 - f) £257.48 being the amount at 1.2.2(d) above less the result given by dividing the amount at 1.2.2(e) above by Item T (1.1(a) above), calculated by the council, in accordance with section 34(2) of the Act, as the basic amount of its council tax for the year for dwellings in those parts of its area to which no parish precept relates.
 - g) The amounts shown in column 4 of **schedule 1**. These are the basic amount of council tax for the year for dwellings in those parts of the council's area shown in column 1 of the schedule respectively to which special items relate, calculated by the council in accordance with section 34(3) of the Act. (District and parish combined at band D).
 - h) The amounts shown in columns 7 to 14 of **schedule 1** being the amount given by multiplying the amount at 1.2.2(g) above by the number which, in the proportion set out in section 5(1) of the Act, is applicable to dwellings listed in a particular valuation band divided by the number of dwellings listed in valuation band D, calculated by the council, in accordance with section 36(1) of the Act, as the amounts to be taken into account for the year in respect of categories of dwellings listed in different valuation bands.
- 1.2.3 It is to be noted that for the year 2025/26, Worcestershire County Council, Police and Crime Commissioner for West Mercia, and Hereford and Worcester Fire Authority have issued precepts to the council in accordance with section 40 of the Act for each category of dwelling in the council's area as indicated below:

Agenda Item 3

Cabinet
19th February 2025



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

1.2.4 That having calculated the aggregate in each case of the amounts at 1.2.2(h) and 1.2.3 above, that Bromsgrove District Council in accordance with sections 30 and 36 of the Local Government Finance Act 1992 hereby sets the amounts shown in **schedule 2** as the amounts of council tax for 2025/26 for each part of its area and for each of the categories of dwellings.

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

	Precept (£)	Surplus/Deficit on Collection Fund (£)	Total to Pay (£)
Worcestershire County Council	61,978,747.00	417,276.00	62,395,750.00
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Hereford and Worcester Fire and Rescue Authority	3,921,149.04	26,361.05	3,947,510.09

1.2.6 The Director of Resources be authorised to make transfers under section 97 of the Local Government Finance Act 1988 from the collection fund to the general fund the sum of £11,250,708.49 being the council's own demand on the collection fund (£9,876,907.05) and parish precepts (£1,373,801.44) and the distribution of the surplus/deficit on the collection fund (£76,521.40).

1.2.7 That the Director of Resources be authorised to make payments from the general fund to parish councils the sums listed on

Schedule 3 by two equal instalments on 1st April 2025 and 1st October 2025 in respect of the precept levied on the council.

1.2.8 That the above resolutions to be signed by the Chief Executive for use in legal proceedings in the Magistrates' Court for the recovery of unpaid council taxes.

1.2.9 Notices of the making of the said council taxes signed by the Chief Executive are given by advertisement in the local press under section 38(2) of the Local Government Finance Act 1992.

77/24

MEDIUM TERM FINANCIAL PLAN - TRANCHE 2 BUDGET INCLUDING FEES AND CHARGES (FOLLOWING CONSULTATION)

The Deputy Chief Executive and Section 151 Officer presented the Medium-Term Financial Plan (MTFP) - Tranche 2 Budget including Fees and Charges (following consultation) report for the consideration of Cabinet.

In doing so, Members were reminded that an updated MTFP had been issued for this meeting as a result of discussions that had taken place at the Overview and Scrutiny Board meeting held on 11th February 2025 and Cabinet meeting held on 12th February 2025. There had been some amendments made to the recommendations contained within the Strategic Parking Review report which had resulted in the following:

- a) An additional £85,000 be added to parking budgets, allocated as follows:
 - i) Additional funding of £70,000 for increased numbers of Civil Enforcement Officers (CEOs)
 - ii) £15,000 for maintenance of an Automatic Number Plate Recognition (ANPR) system
- b) £100,000 added to the Capital Budget in 2025/26 for ANPR systems to Recreation Road South, St Johns and Windsor Street car parks

Further amendments to the previous report also reported to members included:

- 1) Paragraph 3.19 of the MTFP report was discussed in detail and the wording amended to ensure:

Agenda Item 3

Cabinet
19th February 2025

- District infrastructure schemes were prioritised
 - That General Fund balances did not reduce below £5million.
- 2) A risk added to the Risk Section within the report following correspondence from Birmingham City Council regarding access to Greater Birmingham and Solihull Local Enterprise Partnership (GBSLEP) funding during the 2025/26 financial year.
 - 3) Inclusion of Appendix A to the report which contained draft Departmental Budgets.
 - 4) Revenue bottom line changed from a £167k deficit to a £252k deficit for 2025 - 2026.
 - 5) Revenue bottom line changed from a £1,030k deficit to a £1,115k deficit for 2026 – 2027.
 - 6) Revenue bottom line changed from a £399k deficit to a £484k deficit for 2027 – 2028.
 - 7) Support from Reserves rose from £1,596k to £1,851k.
 - 8) General fund balances reduced from £12,781m to £12.526m.
 - 9) Capital spending in 2025/26 increased from £8.017m to £8.117m.

This updated MTFP report had also been considered at the Finance and Budget Working Group (FBWG) meeting held on 18th February 2025. The Leader invited Councillor P. McDonald, in his role as Chairman of the FBWG, to inform Members what discussions had taken place during consideration of this report. It was noted that the FBWG Members felt that £1000,000 for an ANPR system was a significant cost. It was also noted that legal work needed to be carried out in respect of installation of ANPR in order to comply with any regulations involved in implementing such a system.

The Chairman of the FBWG also reported that there had been some discussion regarding Electric Vehicle (EV) chargers within the District at this meeting. It was noted that the current contract provider and the Council were in a profit share agreement and that profits would not be likely for approximately eight to ten years. Councillor McDonald expressed that after some research he had discovered that there were more beneficial models available when working with EV contractors and that this be looked at by the Council. Members queried the amount of time left on the contract with the current provider and Officers undertook to provide this information and to ascertain whether there were any 'break' clauses contained within the current contract.

As this seemed to be an area of interest for Members it was suggested that the Overview and Scrutiny Board scrutinise EV chargers in further

Agenda Item 3

Cabinet
19th February 2025

detail. The Chairman of the Board agreed and undertook to make the necessary arrangements in order for the Board to consider this at a future meeting.

As discussed earlier at this meeting, Members recommended that the £40,000 funding allocated to the Poverty Truth Commission be removed from the MTFP.

Therefore, it was

RESOLVED that

- 1) Members understand and accept the implications set out in the Section 151 Officer's Robustness (Section 25) Statement of this 2025/26 to 2027/28 Medium Term Financial Plan in moving the Council to financial sustainability.
- 2) The need for accelerated business cases to be worked up to enable upgrades of infrastructure to the District for consideration in line with work set out in paragraph 3.19 of the Appendix for completion prior to vesting day.

RECOMMENDED that

- 1) The updated MTFP following discussions at Overview and Scrutiny Committee on 11th February and amendments agreed at Cabinet on 12th February, as detailed in the Cabinet minute 69/24, is approved.
- 2) Subject to incorporating the changes detailed in recommendation 1 above, the MTFP Recommendations made in the report to Cabinet on 12th February are approved.
- 3) The funding of £40,000 from Reserves allocated to the Poverty Truth Commission project be removed from the Medium-Term Financial Plan.

78/24

TO CONSIDER ANY URGENT BUSINESS, DETAILS OF WHICH HAVE BEEN NOTIFIED TO THE ASSISTANT DIRECTOR OF LEGAL, DEMOCRATIC AND PROCUREMENT 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

There was no Urgent Business on this occasion.

79/24

**TO CONFIRM THE ACCURACY OF THE MINUTES OF THE MEETING
OF THE CABINET HELD ON 12TH FEBRUARY 2025**

The minutes of the meeting of Cabinet held on 12th February 2025 were submitted.

RESOLVED that the minutes of the Cabinet meeting held on 12th February 2025 be approved as a true and correct record.

The meeting closed at 1.39 p.m.

Chairman

Data Strategy (including Data Standards Policy)

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

1. RECOMMENDATIONS

The Cabinet RESOLVE :-

That the proposed Data Standards Policy be agreed and implement guidance policy for all employees.

2. BACKGROUND

- 2.1 During 2024, it was understood that the data the organisations captured, stored and used could be improved, so we embarked on engaging with managers, service teams, and corporate leadership to investigate this further. This confirmed the need to prioritise our data to improve data management and quality across the organisations.
- 2.2 Considerable progress has been made, and in order to build upon our current position this Data Standards Policy has been developed.
- 2.3 The Business Improvement Team (BIT) has engaged with service teams, managers and leadership, researching extensively around data improvement alongside ongoing collaboration with Local Government Association (LGA) to build the content covered in this policy.
- 2.4 The policy details clear guidelines and best practices to ensure consistency, quality, compliance, increased data security, efficiency, interoperability, trust, and transparency, in data management.
- 2.5 The BIT will continue in facilitating and supporting the organisations move to being a data driven authority. Further detail can be found in the supporting information.
- 2.6 The Data Standards Policy supports the existing Customer Digital Strategy 2022 - 2026 to provide the following:

- 2.6.1 A clear guidance framework for standardising and managing our data for consistency and quality across both organisations.
- 2.6.2 A standard to improve the quality of our customer centric data to improve accessibility and availability.
- 2.6.3 An accountability framework for roles and responsibilities regarding the management and processing of our customers data.
- 2.6.4 Improved data quality standards for better insight and performance management.
- 2.6.5 A standard to support a 'single source of truth' or 'golden record' for our customers

3. OPERATIONAL ISSUES

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

4. FINANCIAL IMPLICATIONS

- 4.1 Estimating the financial costs of improving data, namely standardising data formatting, in both existing and future technical systems is challenging. Research has shown the circumstances and current positions of other local authorities on improving data journey are all varied therefore have no similar comparisons.
- 4.2 System adjustments depend on specific requirements, obtaining accurate quotes is difficult without comprehensive details, which will only become available as the process progresses.
- 4.3 Given these uncertainties, an estimate of £10,000 per system is proposed as a reasonable approximation to start addressing data cleansing issues in our core Systems, which hold almost 90% of our data.
- 4.4 This estimate of £50,000 acknowledges that actual costs may differ based on the complexity and scope of necessary requirements.

Cabinet

26th March 2025

- 4.5 Currently the main systems are:
- Civica X Press (Elections)
 - Civica Open Revs (Revenues and Benefits)
 - IDOX – Uniform (Planning/Building Control & Env Services/Legal)
 - Abavus - (Env Services)
 - TechOne (Finance)
- 4.6 Regulatory Compliance (Adopting common data standards helps ensure compliance with regulations like GDPR and therefore non-compliance can lead to fines and reputational damage).
- 4.7 Operational efficiency: standardised data can streamline processes, reducing costs and improving decision making, however initial implementation needs to be driven and properly resourced.
- 4.8 Data Security – data governance reduces risk of data breaches which can result in financial and legal liabilities.

5. LEGAL IMPLICATIONS

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

6. OTHER - IMPLICATIONS

Relevant Council Priority

- 6.1 The policy links into the Councils priorities by:
- 6.1.1 To support the improvement and quality of our data standards which will provide the valuable insight required to measure performance against our council priorities.
 - 6.1.2 Improving data will improve decision making.
 - 6.1.3 Enabling High Quality Services.

6.2 Climate Change Implications

None

6.3 Equalities and Diversity Implications

- 6.3.1 If implemented effectively, the policy should have a positive impact on EDI as the data we hold would be more accurate and timely and any changes/updates to data would be easier to apply, ensuring that we hold the relevant and up-to-date

information on our residents, making it more likely we could deliver appropriate services.

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

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

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

7. RISK MANAGEMENT

Please see Section 3 (Operational Issues)

8. APPENDICES and BACKGROUND PAPERS

Data Standards Policy 2025 – 2028

Data Standards Policy Information Pack

Links:

Customer Digital Strategy 2020 – 2026 [BDC](#)

LGA Data Maturity [LGA Maturity Model](#)

Business Improvement Team -

businessimprovement@bromsgroveandredditch.gov.uk

February 2025

Cabinet

26th March 2025

9. REPORT SIGN OFF

Department	Name and Job Title	Date
Portfolio Holder	Cllr Karen May	
Lead Director / Assistant Director	Peter Carpenter	19/2/25
Financial Services	Peter Carpenter	19/2/25
Legal Services	Claire Green	11/02/25
Policy Team (if equalities implications apply)	Rebecca Green	11/02/25
Climate Change Team (if climate change implications apply)	Matthew Eccles	11/02/25

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Data Standards Policy

Information Pack

Contents:

Data Standards

1. Where are we at?

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

2. Where do we need to be?

LGA Data Maturity Model (Assessment Levels)

3. How will we get there?

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



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1. Where are we at?

1.1 Importance of having Data Standards:

The Data Standard Policy provides the foundation and guidance for effective data governance to help safeguard our organisations data assets and is essential for the following reasons:

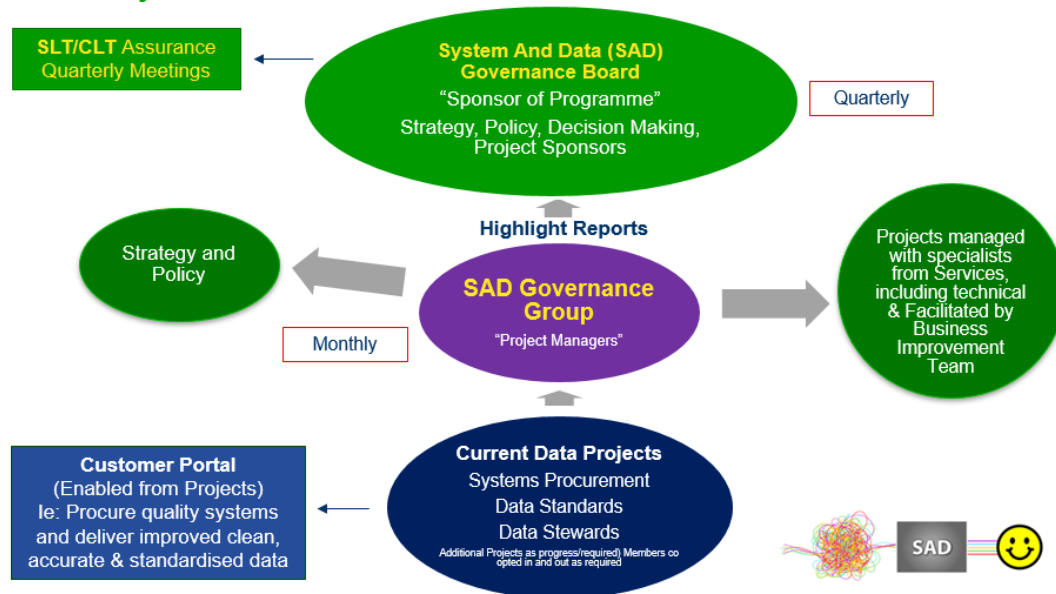
1. **Consistency and Quality:** It supports consistent, accurate and reliable data across the organisation to support informed business decisions and provide access to reliable data for our residents.
2. **Compliance:** It helps the organisation to comply with legal and regulatory requirements, such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



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1.2 System and Data Governance (SADG)

What is the System and Data Governance Structure ?



1.3 Data Maturity LGA Assessment Results:

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

SCORE: 2.7

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

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

2. Where do we need to be?

Next level up (LGA Data Maturity Assessment)

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

Key to the levels

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

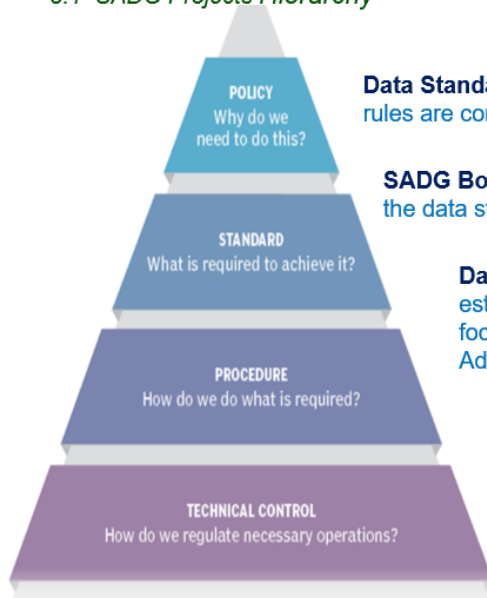


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3. How will we get there?



3.1 SADG Projects Hierarchy



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

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

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

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

Systems Procurement: to regulate the procurement of new systems



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3.2 Data Standards Project Overview



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

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



3.3 Data Stewards Project Overview



Data Stewards Project Group

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

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





3.4 System Procurement Project Overview

System and Data Procurement Group

Purpose: To regulate the procurement of new systems

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

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



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Project Timeline

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



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Bromsgrove District and Redditch Borough Councils Data Standards Policy



Purpose



People



Pride



Performance

Date issued: Jan 2025

Version number: 1



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Contents

1. Introduction	3
2. Data Governance and Documentation	4
3. Data Principles	6
4. Data Quality, Validation and Verification	7
5. Standardised Data Formats	8
6. Data Ownership - Roles and Responsibilities	11
7. Data Sharing and Interoperability	13
8. Data Retention and Disposal	14
9. Data Privacy and Security	15
10. Training	16
Appendix One	17
Appendix Two	19
Appendix Three	20

1. Introduction

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

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

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

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

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

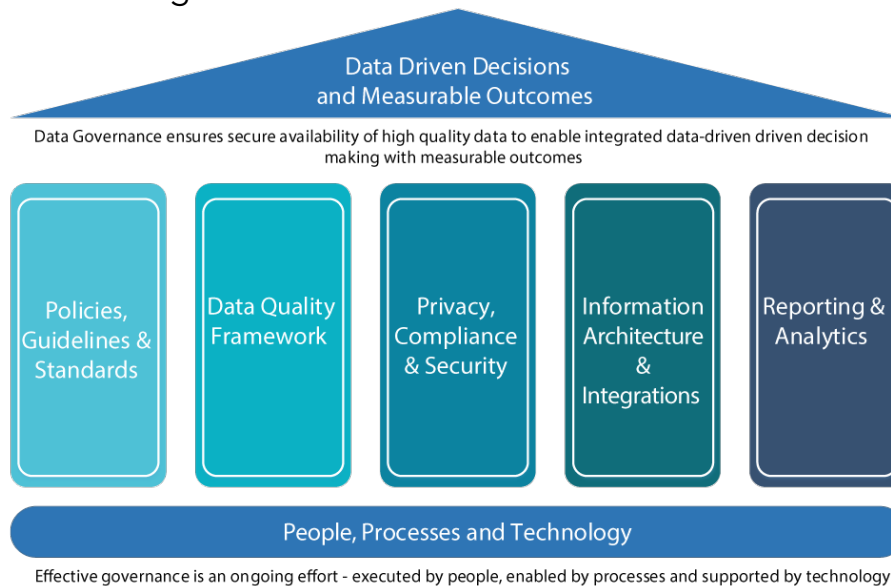
Senior Leadership Team and Corporate Leadership Team supported by the System and Data Governance Board and Group (made up of ICT, Business and Data Improvement Officers and other enabling Service Managers) will ensure that appropriate resources and training are provided to support implementation and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

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

2. Data Governance and Documentation

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

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



Data Governance:

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

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

Key components of data governance include:

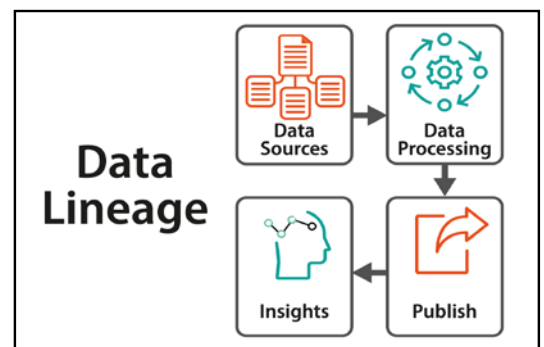
- **Data, Performance, and Insight Strategy:** a strategic plan that aligns data management practices with business objectives, defining data governance goals, and establishing roles and responsibilities.
- **Data Policies and Strategies:** strategies, policies, guidelines and standards that dictate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

Documentation:

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

Effective documentation includes:

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



3. Data Principles

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

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

4. Data Quality, Validation and Verification

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

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

Data Validation

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

The main objectives of data validation are:

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

Data Verification

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

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

5. Standardised Data Formats

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

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

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

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

Mandatory Fields

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

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

Purpose of Mandatory Fields

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

Identification of Mandatory Fields

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

Importance of Completing Mandatory Fields

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

Considerations for Designating Mandatory Fields

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

Controlled Vocabularies and Code Lists

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

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

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

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

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

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

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

6. Data Ownership - Roles and Responsibilities

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

A) Data Entry/Input

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

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

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

C) System Administrator

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

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

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

E) Assistant Directors

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

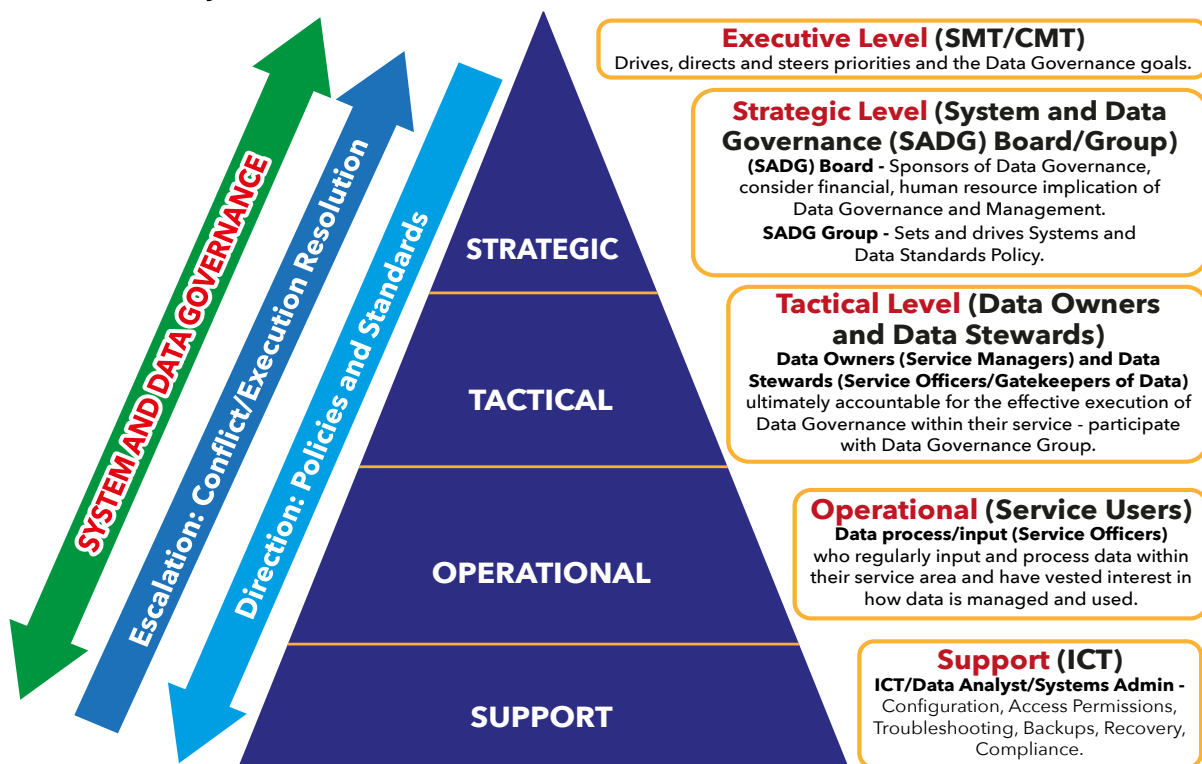
F) Senior Management Team/Directors

Has overall responsibility for challenging performance and data quality.

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

G) All Employees

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



7. Data Sharing and Interoperability

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

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

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

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

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

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

8. Data Retention and Disposal

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

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

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

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

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

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

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

Data Access and Transparency

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

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

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

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

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

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

9. Data Privacy and Security

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

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

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

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

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

10. Training

All Employees:

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

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

Data Stewards:

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

Appendix One

Data Input Standards, Processes, and Guidelines

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

1. Data Input Standards

1.1. Accuracy

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

1.2. Completeness

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

1.3. Consistency

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

1.4. Validity

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

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

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

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

2. Data Input Processes

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

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

2.2. Verify and Validate Data

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

2.3. Follow User Level Guidance

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

2.4. Review and Edit

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

2.5. Seek Clarification

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

3. Additional Guidelines

3.1. Data Privacy and Security

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

3.2. Timeliness

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

3.3. Documentation

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

4. Training

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

Appendix Two

Common Data Fields and Formats

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

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

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

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

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

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

Appendix Three

Summary Document - Data Standards Policy

1. Introduction

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

2. Scope

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

3. Data Governance

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

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

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

4. Objectives

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

5. Data Classification

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

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

6. Data Quality

All data should meet the following quality criteria:

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

7. Data Standards

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

8. Data Security

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

9. Data Sharing

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

10. Compliance and Monitoring

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

11. Review and Update

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

12. Exceptions

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

13. Consequences of Non-Compliance

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

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

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

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UK Shared Prosperity Fund 2025/26

Relevant Portfolio Holder	Councillor Sue Baxter Cabinet Member for Economic Development and Regeneration
Portfolio Holder Consulted	Yes
Relevant Assistant Director	
Report Author	Job Title: UK Shared Prosperity Fund Manager Contact email: Georgina.harris@bromsgroveandredditch.gov.uk Contact Tel: 01527 534082
Wards Affected	No specific ward relevance
Ward Councillor(s) consulted	No
Relevant Council Priority	Economic Development, Environment
Key Decision	
If you have any questions about this report, please contact the report author in advance of the meeting.	

1. RECOMMENDATIONS

The Cabinet **RESOLVE** that:-

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

2. BACKGROUND

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

Year	Capital	Revenue	Total
2022/23	£50,000	£290,499	£340,499
2023/24	£237,490	£443,508	£680,998
2024/25	£548,610	£1,235,605	£1,784,215

- 2.3 The UKSPF focussed on the 3 investment priorities of Communities & Place, Supporting Local Business, and People & Skills. These investment priorities were sub-divided into more than 50 interventions which described the intentions of the investment priorities. The available funding increased significantly in 2024/25 due to funding from the European Social Fund for activity relating to People & Skills ending in March 2024. To access the funding, the Council was required to submit an investment plan to government in August 2022.

- 2.4 In the investment plan, the Communities & Place investment priority was allocated £1,127,962 which has been used to fund grants for improvements to community facilities; improvements in public realm in the town and local centres; improvements to parks; and community safety measures. Funding was also made available to the voluntary and community sector to deliver sporting and cultural events, to support volunteering and to deliver advice and support to households vulnerable to fuel poverty.

- 2.5 The Supporting Local Business investment priority was allocated £859,371 which has been used to fund a suite of programmes designed to help businesses to start-up, grow and innovate in a sustainable way.

- 2.6 The People & Skills investment priority was allocated £706,151 which has been used to provide employability support to young people and economically inactive people. It has also been used to provide grants to businesses to upskill their workforce.

3. OPERATIONAL ISSUES

- 3.1 In the October 2024 budget the Chancellor announced an extension to UKSPF. The budget confirmed that UKSPF will be continued at a reduced rate for a further year, a transitional arrangement allowing local authorities to invest in growth, in advance of wider funding reforms.

- 3.2 On 13 December 2024, the Government published the UKSPF allocations for 2025/26. Bromsgrove District Council will receive the following funding:

Capital	Revenue	Total
£169,469	£748,409	£917,878

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

- 3.3 Under the grant conditions, capital funding must be spent on capital expenditure; however, revenue funding can be spent on either revenue or capital.

- 3.4 The Government has also published a technical note updating the UKSPF prospectus. The fund is still structured around the 3 investment priorities of Communities & Place, Supporting Local Business and People & Skills and can support the same range of activities as in previous years. However, the list of interventions has been replaced with 5 themes and 12 sub-themes that reflect the Government’s missions.
- 3.5 The sub-themes, and how they relate to the investment priorities, are as detailed below:

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

- 3.6 As the existing investment plan covers the period up to 31 March 2025 it is necessary to prepare a new investment plan for the financial year 2025/26.
- 3.7 The Investment Plan (Appendix 1) is primarily based on delivering priorities in the Council Plan that align with the UKSPF priorities.
- 3.8 As part of the process of preparing the new plan, the Cabinet Advisory Group has been consulted on the extension of the UKSPF and their feedback sought to shape the investment plan. Members on the group

support allocating the largest proportion of funding to the Communities & Place investment priority and the smallest proportion to People & Skills.

- 3.9 Cabinet Advisory Group recommended that the investment plan should prioritise the sub-themes “Bringing communities together, tackling homelessness”, “Advice & support to business”, “Enterprise culture & start up support”, “Supporting people to progress towards and into employment” and “Support for young people who are or at risk of being NEET”.
- 3.10 When preparing the investment plan, the performance of the current UKSPF funded programmes and the lessons learned from their delivery, has been taken into account. Consideration has been given to which activities are reliant on UKSPF funding and which are funded primarily through other sources. The findings from the recent Community Survey on budget priorities have also contributed to shaping the investment plan.
- 3.11 The Bromsgrove Partnership, in its role as Local Partnership Group for the UKSPF, has been consulted on the strategic fit and deliverability of the investment plan. A sub-group of the Bromsgrove Partnership met on 12 March 2025 to review the investment plan. The group were broadly supportive of the overarching strategy and felt that there was good support for projects that they know have worked well. The following recommendations were made.
- 3.12 Funding for the subtheme “bringing communities together, tackling homelessness” should include some revenue funding to provide grants for activities that brought people together. The partnership recommends that 40-50% of the allocation be used for revenue activity. This funding should be made available to all areas where people come together not just village halls and parks.
- 3.13 Capital funding for high streets & town centre improvements should not include the town centre as this location has received significant funding from other sources.
- 3.14 In terms of deliverability, where possible UKSPF should fund projects that are available countywide to avoid the “postcode lottery” of support being available in a nearby district but not in Bromsgrove.
- 3.15 Where there are a number of organisations delivering support across a common theme, eg skills, the organisation should be encouraged to join up their services to avoid duplication and competition.

- 3.16 In the investment plan, following the deduction of 4% for management and administration, the net allocation is distributed among the three investment priorities as follows:

Investment Priority	% of Allocation	Amount
Communities & Place	45%	£396,523
Supporting Local Business	30%	£264,349
People & Skills	25%	£220,291

- 3.17 The Investment Plan allocates 100% of the UKSPF funds to be received in 2025/26 to projects. However, experience delivering the UKSPF programme to date suggests that there is a risk that some projects may not fully utilise their allocated funds, potentially resulting in an underspend at the end of the programme. Any monies not spent by 31 March 2026 will have to be returned to Government.

- 3.18 In order to maximise the use of the grant, authority is sought to vary the investment plan to allow any underspend towards the end of the programme to be allocated to alternative projects.

4. FINANCIAL IMPLICATIONS

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

5. LEGAL IMPLICATIONS

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

6. OTHER - IMPLICATIONS

Relevant Council Priority

- 6.1 The investment plan supports delivery of the Council's priorities of economic development and environment.

Climate Change Implications

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

Equalities and Diversity Implications

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

7. RISK MANAGEMENT

- 7.1 The current investment plan expires on 31 March 2025. The Council is required to report to Government how it will spend its UKSPF allocation for 2025/26 by 1 May 2025. Failure to develop an investment plan for 2025/26 may delay receipt of the funding.

- 7.2 The Council will continue to implement appropriate programme and project management arrangements for the UKSPF allocation for Redditch in order to manage risks relating to the funding programme and to any projects for which it is directly responsible.

- 7.3 Any UKSPF monies that have not been spent by 31 March 2026 will have to be returned to government. Delivery of projects and the costs associated will be monitored throughout the programme to ensure maximum use of the grant. Any underspend that is identified will be allocated to alternative projects that will deliver the priorities in the Investment Plan.

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

8. APPENDICES and BACKGROUND PAPERS

Appendix 1 UK Shared Prosperity Fund Investment Plan 2025/26

UK Shared Prosperity Fund Prospectus

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

UK Shared Prosperity Fund 2025/26 Technical Note

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

Cabinet
2025

26 March

Cabinet
2025

26 March

9. REPORT SIGN OFF

Department	Name and Job Title	Date
Portfolio Holder	Councillor Sue Baxter Cabinet Member for Economic Development & Regeneration	27/2/25
Lead Director / Assistant Director	Rachel Egan Assistant Director Regeneration & Property	5/2/25
Financial Services	Debra Goodall Assistant Director Finance & Customer Service	12/2/25
Legal Services	Nicola Cummings Principal Solicitor	24/2/25
Policy Team (if equalities implications apply)	n/a	
Climate Change Team (if climate change implications apply)	n/a	

UK Shared Prosperity Fund Investment Plan 2025/26

Bromsgrove District Council has been allocated £917,878 of UK Shared Prosperity Fund (UKSPF) for the period 2025/26. The funding will primarily be used to deliver priorities and key objectives in the Council Plan that align with the UKSPF. The way in which the funding will be deployed to do this is detailed below.

Vibrant Town & District Centres

The eight centres across the district meet a range of needs of shoppers, residents and businesses. The Bromsgrove Town Centre 2040 vision focuses on developing an inclusive, vibrant and resilient town centre which is adaptable to change and we are building on this to develop a Strategic Framework for Bromsgrove Town Centre. Key to this is to bring together stakeholders to develop and deliver activities that improve safety and security, increase speciality markets, festivals and events and to promote the town centre as a leisure and retail destination.

We will:

- make improvements to Bromsgrove Town Centre public realm to improve traffic management on the high street and contribute to an attractive, high-quality environment that shoppers want to visit and businesses will want to locate in.
- provide grant funding to organisations and business consortiums deliver activities and events in the Bromsgrove centres which will attract visitors and bring communities together.

Supporting Our Businesses

By supporting businesses, we seek to create an environment conducive to growth and innovation, offering resources, incentives and infrastructure to bolster entrepreneurship and job creation. We will encourage and support new business start-ups to see Bromsgrove District as a natural place to locate and do business. Enabling established businesses to grow will embed them in the district and help us to retain them locally.

Business start-up rates are currently lower in Bromsgrove at 8.9% than Worcestershire (9%), the West Midlands (11.3%) and the UK (11%).¹ This is lower than recent very high start-up rates in the district but those rates have been attributed to a statistical anomaly. Recent 3-year business survival rates are unreliable due to this statistical anomaly. The current UKSPF funded start-up programme has experienced strong demand for pre-start support. There is a time lag between accessing supporting and starting a business so the conversion rate is currently 10%. Demand for support from early years businesses has not been as strong; however, grant funding is fully allocated.

The needs of established businesses vary depending upon their sector, size and business stage. Growth can come from scaling up young businesses through increased marketing or provision of additional services. More established businesses may be looking to develop new products or services, enter new markets through exporting or increasing their capacity through improved productivity. Data regarding innovation is not available at the local authority level; however, Worcestershire businesses are more likely to be engaged in innovation activity (51.7%) than the average for all of England (37.1%).² Productivity in Bromsgrove, measured in GVA per hour worked, has been growing steadily over the past 5 years and has consistently been higher than the UK average (£42.30 compared with £39.70 in 2022).³ The provision of high quality, business support programmes that meet the varying needs of our business community will sustain and enhance this positive performance.

We will:

- co-fund the delivery of the Enterprising Worcestershire start-up programme which will provide specialist support to help entrepreneurs from Bromsgrove to be enterprise ready. Match-funded grants will also be available to help businesses to start-up and become established.
- Procure an organisation to deliver an impactful business innovation programme offering advice and grants to help entrepreneurs and existing businesses to develop innovative products and services and to help established businesses to adopt new processes.

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

² Source: UK Innovation Survey [UK Innovation Survey 2023 Statistical Annex.ods](#)

³ Source: ONS [Subregional productivity: labour productivity indices by local authority district - Office for National Statistics](#)

- continue to offer match-funded grants to businesses to help them invest in measures to help them to grow and create employment.
- continue to fund the Worcestershire Growth Hub to help businesses to identify, and apply for, national, regional and local programmes of support. The Growth Hub will also deliver the specialist advisor programme providing advice and coaching on a range of key business topics to help businesses to grow and create employment.

Upskilling the workforce

Bromsgrove has a relatively high economic activity rate with 82.9% of residents in employment, self-employed or actively looking for work.⁴ This compares favourably with the West Midlands average (77.7%) and the national average (78.4%). Reasons for economic inactivity include being a student, early retirement, caring responsibilities, health conditions and being discouraged. Whilst levels of economic inactivity in the district are relatively low, it does account for 17.1% of the population. In times of high employment, low levels of a skilled and available workforce can be a hindrance to economic growth; therefore, it is important to ensure that any barriers to employment that economically inactive people are experiencing are addressed. The unemployment rate in Bromsgrove is consistently lower than the Worcestershire rate and the national rate. In October 2024 Bromsgrove's rate was 2.8% compared to Worcestershire at 3.4% and England at 4.4%.⁵ However, unemployment amongst young people in the district is much higher than the general population, running at 4.7%. Bromsgrove residents are highly qualified with a higher proportion of the population having qualifications at every level than the West Midlands and national average. For example, 62.2% of residents are qualified to RQF Level 4⁶ and above compared to 42.5% of the West Midlands and 47.3% of Great Britain.⁷ Despite these high levels of educational attainment, employers frequently cite lack of a skilled workforce as a barrier to growth. Consultation that took place in the development of the Worcestershire Local Skills Improvement Plan (LSIP) identified a lack of common skills, ie

⁴ Source: ONS Local Authority Profile [Labour Market Profile - Nomis - Official Census and Labour Market Statistics](#)

⁵ Source: Worcestershire County Council [Economic Summary November 2024](#)

⁶ Regulated Qualifications Framework Level 4 is equivalent to a Higher National Certificate (HNC)

⁷ Source: ONS Local Authority Profile [Labour Market Profile - Nomis - Official Census and Labour Market Statistics](#)

transferable skills such as communication, teamwork and organisation; technical skills and knowledge such as AI, cyber security, data analytics, CNC programming; and leadership and management skills.⁸

The Council plan recognises the value of upskilling the workforce. Enabling individuals and businesses involves providing opportunities for skills development, education and employment in order to develop prosperous communities where businesses flourish, people thrive and places prosper.

We will:

- continue to deliver the Careers Worcestershire programme for young people aged 16 to 24 years old who are not in employment, education or training (NEET). This programme provides wrap around support for education and career choices and engages with employers to open up opportunities to young people. In the first 6 months of delivery, the current programme has supported 88 young people.
- procure delivery of a targeted employability support programme designed to assist the economically inactive, to move closer to the jobs market. The programme will complement existing, national provision including recently announced programmes such as Connect to Work and WorkWell. The programme will support those that are not able to access mainstream support due to their complex barriers to employment.
- deliver a programme of support, via the Family Hubs, to help people caring for young children to develop employability skills in preparation for returning to the jobs market. The programme will also assist participants to access funded childcare provision to enable them to re-enter the jobs market.
- provide opportunities for residents in employment to upskill through the provision of fully funded training or grants to fund specialist courses.

⁸ Source: Herefordshire & Worcestershire Chamber of Commerce [Local Skills Improvement Plans | Herefordshire & Worcestershire Chamber of Commerce](#)

Energy Efficient Homes

The Council aspires to create a thriving and inclusive community where everyone has access to safe, healthy, affordable, and environmentally responsible housing options. Prioritising energy efficient homes will not only reduce environmental impact but will also contribute to long term sustainability and cost savings for residents.

We will:

- fund Act on Energy caseworkers to provide intensive support to residents to help them to adopt energy efficiency measures. The support will be focused on those that are experiencing, or are at risk of experiencing, fuel poverty.

Parks & Open Spaces

Since Covid, maintenance of green spaces has consistently been identified by residents as a priority in the annual community survey. Parks and open spaces link strongly with the Council's Environment priority, providing green spaces where people and nature can flourish. They provide opportunities for communities to come together and people to be active.

We will:

- provide grants to organisations that manage public spaces, such as parish councils, for improvements to parks, public gardens, playing fields, play areas, as well as green corridors.

Bringing Communities Together

Bromsgrove District is predominantly rural with 90% of the land designated as Green Belt. Whilst Bromsgrove Town and other large centres such as Alvechurch, Barnt Green, Rubery and Wythall are the main centres of population, smaller rural villages and hamlets are spread throughout the district. Maintaining the vitality of smaller villages is identified as a key challenge in the Bromsgrove District Plan.⁹ Provision of locally delivered services and places for communities to come together are vital across the district.

⁹ Source: Bromsgrove District Council [Adopted BDP January 2017](#)

We will:

- Provide a grant for improvements to community and neighbourhood infrastructure such as village halls, sports facilities, public toilets and other facilities.

Expenditure

Council Priority	Project	Deliverer	Capital	Revenue	Total
Community & Place					
Bringing Communities Together Parks & Open Spaces	Community Infrastructure Grant Grant programme providing funding for improvements to places where people come together such village halls and community parks	Grant administered by BDC	£280,000		£280,000
Energy Efficient Homes	Community Caseworker Providing advice and support to households vulnerable to fuel poverty to take up energy efficiency measures	Act on Energy		£70,000	£70,000
Vibrant Town & District Centres	High Streets & Town Centre Improvements Improvements to public realm in Bromsgrove Town Centre and grants to businesses and community groups for activities that attract visitors to the centres.	BDC	£20,000	£26,523	£46,523
Supporting Local Business					
Supporting Our Businesses	Enterprising Worcestershire Specialist advice for pre-start businesses	Worcestershire County Council		£25,000	£25,000

	Business Innovation Programme Specialist programme of support to help new and existing businesses to development new to market products or services or for existing businesses to adopt new processes	To be procured		£100,000	£100,000
	Growth Hub Business signposting and account management service helping enterprises to access support. Delivery of the specialist advisor programme providing coaching and advice covering key business topics such as marketing, growth planning and financial management.	Worcestershire Growth Hub		£60,000	£60,000
	Business Grants Grant funding for new and existing businesses to support them to start-up and grow.	BDC		£79,349	£79,349
People & Skills					
Upskilling the Workforce	Careers Worcestershire Bespoke advice to young people 16 – 24, including those who are NEET or at risk of becoming NEET, to move into employment, education and training	Careers Worcestershire		£100,000	£100,000
	Employability Support in Family Hubs Support to economically inactive people with caring responsibilities to move towards employment through the development of employability	BDC		£20,000	£20,000

	skills, job search support and accessing help with childcare.				
	Employability Skills Programme Support for economically inactive people to move towards employment through the development of employability skills.	To be procured		£48,000	£48,000
	In-employment Training Provision of grants and fully funded training to upskill the workforce	To be procured		£52,291	£52,291
Management & Administration of UKSPF				£36,715	£36,715
	Total		£300,000	£617,878	£917,878

BROMSGROVE DISTRICT COUNCIL

Cabinet 26th March 2025

Financial Recovery Plan

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

1. **SUMMARY**

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

2. **RECOMMENDATIONS**

Cabinet is asked to RESOLVE to NOTE:

- 1) Progress made on the financial recovery including:
 - a) Delivery of the Statutory Accounts
 - b) Delivery of Statutory Financial Returns
 - c) Improvements in the Control Environment

- 2) The work still under way to move back to a best practice operation and the associated timetable for completion of this work, as contained in this report.

3. **KEY ISSUES**

Financial Position

BROMSGROVE DISTRICT COUNCIL

Cabinet 26th March 2025

- 3.1 The Council implemented a new financial system in February 2021. The existing financial system was at the end of its useful life and would not deliver process improvements required to move the Council forward. This implementation has not been smooth and has led to a deterioration of the Council's financial position. This has included:
- Non completion of the 2020/21, and 2021/22 Accounts.
 - Non delivery of monitoring information during the 2021/22 financial year.
 - Non delivery of Government financial returns.
 - Incomplete take-up of the new system by both Finance and Service Users.
 - Loss of key financial staff.
- 3.2 A finance recovery programme was put in place from April 2022 to start to rectify the situation. This was reported through to Cabinet in September 2022.
- 3.3 These issues build on comments from the External Auditors relating to 2019/20 accounts, which were only approved in the fall of 2021 and the subsequent issuing of the S24 Recommendation on the 31st October 2022 due to non-delivery of the 2020/21 Statement of Accounts. Comments on the 2019/20 accounts highlighted issues on working papers were highlighted as a significant issue.
- 3.4 The Interim 2021/22 and 2022/23 Auditors Annual Report was received and reviewed by the Audit, Standards and Governance Committee on the 27th November and Council on the 6th December 2023. These reports have now been finalised following the completion of the Statement of Accounts up to the 2023/24 financial year. The present state of the Council's accounts are:
- Closure 2020/21
 - Reported as per the 5th December Audit Committee and Disclaimer Opinion received and approved.
 - Closure 2021/22
 - Reported as per the 5th December Audit Committee and Disclaimer Opinion received and approved.
 - Closure 2022/23
 - Reported as per the 5th December Audit Committee and "Disclaimer Opinion" received and approved following the completion of the public consultation period on the 7th January 2025.
 - Closure 2023/24
 - Reported as per the 16th January Audit Committee, draft accounts were produced and put out for public consultation on the 16th January. This was one day earlier than the "backstop" regulation date.
 - The Council's had to replace its allocated Auditors for 2023/24 onwards in November 2024 and the Council is still in the process of "onboarding its new External Auditors Ernst & Young. All Member disclaimer forms have been

BROMSGROVE DISTRICT COUNCIL

Cabinet 26th March 2025

completed and returned. No opinion on the Accounts can be given until this process is completed.

- MHCLG have been updated on this position.
- Closure 2025/26
 - This will start in March 2025 and draft accounts will be ready for public consultation by the end of June 2025.

3.5 As per the requirement of the Draft External Auditors Report 21/22 and 22/23 on the 27th November 2023, the External Auditors made a further written recommendation of the Authority under section 24 of the Local Audit and Accountability Act 2014 in relation to its financial systems and governance arrangements. They recommended that the authority should produce “true and fair” draft accounts for 2020/21, 2021/22 and 2022/23 signed off by the S151 Officer and supported by high quality working papers. This has now been complied with although given the instigation by the Government of the backstop date and the requirement of “Disclaimer Opinion” audits across the Country it is not clear how the new Auditors will frame their 2023/4 External Audit Report in respect of this matter

3.6 As has been reported previously the combined 2021/21 & 2022/23 Draft External Audit Report set out that:

- The S24 Recommendation still in place and extended for 2021/2 and 2022/3 Accounts.
- 5 of the 6 2020/21 Key Recommendations either delivered or now linked to Improvement Recommendations.
- 9 of 13 2020/21 Improvement Recommendations either fully or partially delivered.
- There was one new Key Recommendation – linked to Workforce Strategy.
- There were ten updated Improvement Recommendations.

This report has now been finalised following the issuing of “Disclaimer Opinions”.

3.7 In terms of those Draft External Audit Reports the following progress has been made against recommendations (Key and Improvement):

- The Accounting Policies Report goes to every Audit Committee.
- The key closure deliverables for each financial year are clearly set out. The owners of these deliverables are the S151 and Deputy S151 Officers.
- Progress on key financial and compliance indicators are reported monthly to CMT and to both Audit Committees by the S151/Deputy 151 Officers. There is a requirement to report all finance deliverables as per the Recommendations of the Audit Task Group.
- Delivery of Financial training detailed in this document will move staff to right level of skills.
- TechOne has been upgraded to version 24B in February 2025.
- Quarterly combined financial and performance monitoring started in the 2022/23 financial year and has continued in 2024/5 with Q1 and Q2 delivered and Q3 on today’s Agenda.
- The 2025/26 MTFP process has been completed on the 19th February 2025.
- Risk workshops are still to be run to assess Risk Appetite of Executive and Audit Committees. This will happen across both Council now the Redditch elections have been completed.
- A Treasury Management strategy, half yearly report, and outturn report are now part of the work programme. 2024/5 Half Yearly Reports have been delivered.

BROMSGROVE DISTRICT COUNCIL

Cabinet 26th March 2025

- To address staffing issues, additional posts have been recruited to as the team looks to start to move any from its reliance on external agency/consultants.

3.8 In terms of more specific items:

- More Budget Consultation is being addressed in Tranche 1 of the budget through a targeted consultation process which finished in January 2025.
- Wider savings monitoring is being undertaken by the Audit Committee quarterly.
- Benchmarking is now incorporated into the budget process (using LG Futures data).
- The Internal Audit Service has been externally assessed in early 2024 and passed that assessment.
- The Council is seeking an independent Audit Committee member and ensures the Committee remains apolitical in nature.
- The whistleblowing policy has been updated.
- Procurement and contract rules will be updated by the end of the financial year (to reflect changes to legislation happening in February 2025).
- Performance Indicators are being reviewed and updated following the Strategic Priority setting sessions and internal relaunch of simplified business plans and the Q3 monitoring reflects this new data.

3.9 It was confirmed by the PSAA that Ernst and Young would become the Councils External Auditors on the 24th October, and that the onboarding process is now starting and all Members and Officers have submitted their disclosure returns.

3.10 In terms of the 2023/4 Closure position, discussions are still to be held with Ernst and Young on the actual programme, pending onboarding, but all parties are aware of the backstop date of the 28th February 2025 by what time public consultation will have to have been completed. Accounts were provided for Public Consultation the 16th January. This was one day earlier than the “backstop date” requirement. The new External Auditors have confirmed that, due to onboarding checks still not being complete, they will not be able to submit an Opinion before the 28th February “backstop date”.

Rectification Process

3.11 A recovery programme highlighted in the previous report around replacing staff, due to Market shortages is now not such a significant issue given the recent successful recruitment drives.

3.12 Progress on the following key financial and compliance indicators are reported monthly to CMT monthly and to both Audit Committees bi-monthly by the S151/Deputy 151 Officers. This is also set out in calendar format within Appendix A with completed returns shown in green and outstanding or not yet due returns in red. There is a requirement to report all finance deliverables as per the Recommendations of the Audit Task Group:

Agenda Item 6

BROMSGROVE DISTRICT COUNCIL

Cabinet 26th March 2025

Form	Code	Description	Proposed Dispatch	Deadline	Proposed Publication	Position
Capital Payments & Receipts - Q3	CPR3	Cumulative capital expenditure and receipts for Q1, Q2 and Q3 2023-24	15-Dec-23	19-Jan-24	15-Feb-24	Delivered 26/1/24
Non-Domestic Rates Forecast	NNDR1	Billing authority forecasts of the amount of non-domestic rates to be collected in the 2024-25	15-Dec-23	31-Jan-24	21-Feb-24	Delivered 9/2/24 (Civica issue)
Council Tax & NDR Collection - Q3	QRC3	Quarterly return of how much council tax and non-domestic rates are collected in Q3 2023-24	15-Dec-23	12-Jan-24	14-Feb-24	Delivered 15/2/24 (Civica issue)
Quarterly Borrowing & Lending - Q3	QB3	Local authority borrowing and investments from all local authorities to the end of Q3 2023-24	15-Dec-23	08-Jan-24	15-Feb-24	Delivered 17/1/24
Quarterly Revenue Update - Quarters 3 & 4	QRU3	Quarter 1 to 3 2023-24 data and forecast end year local authority revenue expenditure update.	15-Dec-23	26-Jan-24	07-Mar-24	Delivered 19/2/24
Council Tax Requirement/ Parish Council Tax	CTR1/2/3/4	Information on council tax levels set by local authorities in 2024-25 and Council tax levels for 2024-25 set by parishes.	02/02/2024 (tbc)	11-Mar-24	21-Mar-24	Delivered 26/2/24
of which: Parish council tax	-	-	-	11-Mar-24	08-May-24	Delivered 26/2/24
Revenue Account Budget	RA	Local authority revenue expenditure and financing for 2024-25 Budget	16-Feb-24	05-Apr-24	20-Jun-24	Draft completed. 8/4/24
Capital Estimates Return	CER	Capital forecast for 2024-25	23-Feb-24	22-Mar-24	13-Jun-24	Delivered 22/3/24
Non-Domestic Rates Outturn-unaudited	NNDR3	Collects information from all billing authority on the amount of non-domestic rates collected in 2023-24- provisional data	28-Mar-24	30-Apr-24	10-Jul-24	Draft delivered to Pool 14/4/24
Non-Domestic Rates Outturn-audited	NNDR3	Collects information from all billing authority on the amount of non-domestic rates collected in 2023-24- final data	n/a	30-Sep-24	15-Nov-24	Delivered 30/09/24
Quarterly Borrowing & Lending - Q4	QB4	Local authority borrowing and investments from all local authorities to the end of Q4 2023-24	22-Mar-24	05-Apr-24	13-Jun-24	Delivered 5/4/24

Agenda Item 6

BROMSGROVE DISTRICT COUNCIL

Cabinet 26th March 2025

Capital payments & receipts Q4 and provisional outturn	CPR4	Cumulative capital expenditure and receipts for Q1, Q2, Q3, and Q4 2023-24. Expanded collection, used as provisional outturn.	22-Mar-24	19-Apr-24	13-Jun-24	Delivered 29/4/24
Council Tax & NDR Collection - Q4	QRC4	Annual data of levels of council tax and non-domestic rates collected by local authorities in 2023-24 and Q4 2023-24	12-Apr-24	03-May-24	19-Jun-24	Delivered 7/5/24
Capital Outturn Return	COR	Final capital outturn figures for 2023-24	26-Apr-24	26-Jul-24	10-Oct-24	Delivered 29/07/24
Revenue Outturn suite - provisional	RO	Local authority revenue expenditure and financing for 2023-24 Outturn (provisional)	26-Apr-24	28-Jun-24	29-Aug-24	Delivered 19/7/24
Revenue Outturn suite - certified	RO	Local authority revenue expenditure and financing for 2023-24 Outturn (final)	n/a	11-Oct-24	12-Dec-24	Delivered 10/02/24
Exit payments	-	Local authority exit payments 2023-24	03-May-24	07-Jun-24	18-Jul-24	Delivered 30/06/24
Quarterly Borrowing & Lending - Q1	QB1	Local authority borrowing and investments from all local authorities to the end of Q1 2024-25	24-Jun-24	05-Jul-24	08-Aug-24	Delivered 05/07/24
Quarterly Revenue Update - Q1	QRU1	Q1 2024-25 data and forecast end year local authority revenue expenditure update	28-Jun-24	02-Aug-24	12-Sep-24	Delivered 2/08/24
Capital Payments & Receipts - Q1	CPR1	Cumulative capital expenditure and receipts for Q1 2024-25	21-Jun-24	19-Jul-24	08-Aug-24	Delivered 19/07/24
Council Tax & NDR Collection - Q1	QRC1	Quarterly return of how much council tax and non-domestic rates are collected in Q1 2024-25	21-Jun-24	12-Jul-24	14-Aug-24	Delivered 01/07/24
Local Government Pension Funds	SF3	Collect information on income and expenditure on local government pension schemes for 2023-24	05-Jul-24	13-Sep-24	23-Oct-24	Delivered 21/06/24
Council Tax Base/ Supplementary	CTB	Information about the 2024 council tax base for each billing authority.	20-Sep-24	11-Oct-24	06-Nov-24	Delivered 11/10/24
Quarterly Borrowing & Lending - Q2	QB2	Local authority borrowing and investments from all local authorities to the end of Q2 2024-25	23-Sep-24	04-Oct-24	14-Nov-24	Delivered 02/10/24

Agenda Item 6

BROMSGROVE DISTRICT COUNCIL

Cabinet 26th March 2025

Quarterly Revenue Update - Q2	QRU2	Quarter 1 & 2 2024-25 data and forecast end year local authority revenue expenditure update	20-Sep-24	25-Oct-24	05-Dec-24	Delivered 25/10/24
Capital Payments & Receipts - Q2	CPR2	Cumulative capital expenditure and receipts for Q1 and Q2 2024-25	20-Sep-24	20-Oct-24	14-Nov-24	Delivered 21/10/24
Council Tax & NDR Collection - Q2	QRC2	Quarterly return of how much council tax and non-domestic rates are collected in Q2 2024-25	20-Sep-24	04-Oct-24	20-Nov-24	Delivered 11/10/24
Capital Payments & Receipts - Q3	CPR3	Cumulative capital expenditure and receipts for Q1, Q2 and Q3 2024-25	13-Dec-24	24-Jan-25	13-Feb-25	Delivered 24/01/24
Non-Domestic Rates Forecast	NNDR1	Billing authority forecasts of the amount of non-domestic rates to be collected in the 2025-26	13-Dec-24	31-Jan-25	19-Feb-25	Delivered 31/1/26
Quarterly Revenue Update - Quarters 3 & 4	QRU3	Quarter 1 to 3 2024-25 data and forecast end year local authority revenue expenditure update.	13-Dec-24	24-Jan-25	06-Mar-25	Delivered 25/01/24
Quarterly Borrowing & Lending - Q3	QB3	Local authority borrowing and investments from all local authorities to the end of Q3 2024-25	13-Dec-24	06-Jan-25	13-Feb-25	Delivered 06/01/25
Council Tax & NDR Collection - Q3	QRC3	Quarterly return of how much council tax and non-domestic rates are collected in Q3 2024-25	13-Dec-24	17-Jan-25	12-Feb-25	Delivered 02/01/24
Council Tax Requirement/ Parish Council Tax	CTR1/2/3/4	Information on council tax levels set by local authorities in 2025-26. Council tax levels for 2025-26 set by parishes	Early Feb 2025	12-Mar-25	20-Mar-25	
of which: Parish council tax	-	-	Early Feb 2025	12-Mar-25	07-May-25	
Revenue Account Budget	RA	Local authority revenue expenditure and financing for 2025-26 Budget	14-Feb-25	04-Apr-25	19-Jun-25	
Capital Estimates Return	CER	Capital forecast for 2025-26	21-Feb-25	21-Mar-25	12-Jun-25	
Monthly Borrowing & Lending	MB	Monthly sample used to provide an estimate of the level of net borrowing by local authorities to go into the ONS/HMT monthly publication Public	5 working days before 1st working day of the month	Day 5 of each month	for quarter months only, see QB1, QB2, QB3, QB4 dates	Delivered to date

BROMSGROVE DISTRICT COUNCIL

Cabinet 26th March 2025

		Sector Finance Statistics				
Local Government Finance Statistics	LGFS33	Annual compilation of finance data collected from local authorities covering out-turn data for 2022-23	N/A	N/A	Spring 2024	

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

- **Budget**
 - **2025/26 Budget and MTFP delivered Feb 2025.**
 - Council Tax Base – Yearly – **2025/26 delivered in January 2025.**
 - Council Tax Resolution – **Yearly 2025/6 delivered in February 2025.**
 - Council Tax Billing – Yearly – **Bills distributed in March 2025.**
- **Policies**
 - Treasury and Asset Management Strategies
 - **2025/6 Strategy Approved Feb 2025.**
 - 2024/25 Half Yearly Report **delivered in Q2 Monitoring Report Nov 24.**
 - Draft 2023/24 Outturn Report **delivered in July 24.**
 - Council Tax Support Scheme – **25/6 Approved January 2025.**
 - Minimum Revenue Provision – yearly – **Approved as part of the 2025/6 MTFP.**
 - Financial Monitoring – **delivered quarterly to Cabinet – Q1 in September, Q2 in November 2024. Q3 on this Agenda.**
 - Risk Management – **Delivered quarterly to Audit Committee.**
 - Savings Report – **Delivered quarterly to Audit Committee.**
 - Financial Controls (still in development)
 - Clearance of suspense accounts – See the chart at the end of this Report for progress.
 - Bank Reconciliation - **linked to above point although a separate stream assessing/clearing 2024/5 and prior year items.**
 - Over £500 spending.
 - **Updated to January 2025.**

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

3.15 There are a number of areas where compliance will be measured going forwards. Compliance to process and timetable is a key underlying theme of the Draft External Audit Reports 2020/21 through to 2022/23. These items are being measured to improve how we work and change behaviours. This will lead to an improved financial health/knowledge across both Councils. Not all these measures can be put in place

BROMSGROVE DISTRICT COUNCIL

Cabinet 26th March 2025

instantly but there should be the full suite by the middle of the summer (Debt indicators depend on the clearing of suspense and the updating of the bank reconciliations).

3.16 Training:

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

3.17 Treasury Management:

- The 2025/6 Strategies have been approved as part of the 2025/6 MTFP.
- The Q1, Q2. And Q3 2024/5 positions have been reported in the Finance and Performance Reports.

3.18 Errors:

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

3.18 Procurement:

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

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

4. Legal Implications

4.1 No Legal implications have been identified.

5. Strategic Purpose Implications

BROMSGROVE DISTRICT COUNCIL

Cabinet 26th March 2025

Relevant Strategic Purpose

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

Climate Change Implications

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

6. Other Implications

Customer / Equalities and Diversity Implications

- 6.1 None as a direct result of this report.

Operational Implications

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

7. RISK MANAGEMENT

- 7.1 The financial monitoring is included in the corporate risk register for the authority. The rectification of the Councils financial position is a specific Corporate Risk.

8. APPENDENCES

Appendix A – Calendar of financial returns – March 2025

AUTHOR OF REPORT

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BROMSGROVE DISTRICT COUNCIL

Cabinet 26th March 2025

APPENDIX A

MARCH 2025						
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
24	25	26	27	28	1	2
3	4	5	6	7	8	9
10	11	12 Council Tax Requirement / Parish Council Tax (CTR1/2/3/4)	13	14	15	16
17	18	19	20	21 Capital Estimates Return (CER)	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

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BROMSGROVE DISTRICT COUNCIL

Cabinet

26th March 2025

Q3 Financial and Performance Report 2024/25

Relevant Portfolio Holder	Councillor Colella – Portfolio Holder for Finance and Governance
Portfolio Holder Consulted	Yes
Relevant Head of Service	Debra Goodall
Report Authors	Head of Finance and Customer Services Debra.Goodall@bromsgroveandredditch.gov.uk Policy Manager R.Green@bromsgroveandredditch.gov.uk
Wards Affected	All Wards
Ward Councillor(s) consulted	No
Relevant Strategic Purpose(s)	All
Key Decision	

1. **RECOMMENDATIONS**

The Cabinet is asked to **RESOLVE** that:

- 1) The current Revenue underspend position of £53k and actions the Council are taking to mitigate this position is noted.
- 2) The current Capital spending of £2.284m against a budget of £7.070m is noted.
- 3) The Ward Budget allocation position to date is 23 approved allocations at £33,137.
- 4) There is an updated procurements position set out in the appendix, with any new items over £200k to be included on the forward plan.
- 5) The Q3 Performance data for the period October to December 2024 be noted. This is in the new format.
- 6) The Council submit a bid for £2.425m to Birmingham City Council for funding allocated to Bromsgrove by the former Greater Birmingham & Solihull Local Enterprise Partnership (GBSLEP) to support the completion of the Market Hall regeneration initiative.

The Cabinet is asked to **RECOMMEND** that:

- 7) That the Balance Sheet Monitoring Position for Q3 is noted – which is the Treasury Monitoring Report and required to be reported to Council.
- 8) In the event that the bid is successful, the budget is amended to reflect that the GBSLEP funding is being applied to the Market Hall development.

2. **BACKGROUND**

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

BROMSGROVE DISTRICT COUNCIL

Cabinet

26th March 2025

- The Council’s forecast outturn revenue monitoring position for 2024/25 based on data to the end of Quarter 3.
- The position in respect of balance sheet monitoring as requested by the Audit, Governance and Standards Committee.
- The spending as of Q3 of Ward Budget Funds.
- The updated procurement pipeline of Council projects to be delivered over the next 12 months in order to properly plan for the delivery of these projects.
- The organisations performance against the strategic priorities outlined in the Council Plan Addendum, including operational measures to demonstrate how the council is delivering its services to customers.

3. DETAILED PERFORMANCE

Financial Performance

- 3.1 As part of the monitoring process a detailed review has been undertaken to ensure that issues are considered, and significant savings and cost pressures are addressed. This report sets out, based on the position at the end of Quarter 3, the projected revenue outturn position for the 2024/25 financial year and explains key variances against budget.
- 3.2 The £12.5m full year revenue budget included in the table below is the budget that was approved by Council in April 2024. Formats have not yet been changed to the new structures with a separate Regeneration and Property Service as work continues to fully disaggregate the budgets.

Service Description	2024-25 Approved Budget	2024-25 Approved Q3 Budget	Q3 Adjusted Spend	Q3 Budget Variance	Full Year Forecast	Full Year Budget Variance
Business Transformation and Organisational Development	1,792,618	1,312,963	1,544,321	231,358	1,957,113	164,495
Community and Housing GF Services	1,159,987	869,990	582,338	-287,652	794,009	-365,978
Corporate Services	994,465	745,849	252,617	-493,232	629,666	-364,799
Environmental Services	3,798,721	2,849,041	2,973,009	123,968	4,862,838	1,064,117
Financial and Customer Services	1,441,300	1,080,975	5,657,701	4,576,726	1,748,555	307,255
Legal, Democratic and Property Services	1,563,913	1,172,934	1,573,674	400,740	1,004,340	-559,573
Planning, Regeneration and Leisure Services	1,365,472	1,024,105	2,023,143	999,038	1,861,169	495,697
Regulatory Client	397,337	298,003	218,224	-79,779	579,989	182,652
Starting Well	0	0	44,618	44,618	0	0
Grand Total	12,513,813	9,353,860	14,869,645	5,515,785	13,437,679	923,866
Service Description	2024-25 Approved Budget	2024-25 Approved Q3 Budget	Q3 Adjusted Spend	Q3 Budget Variance	Full Year Forecast	Full Year Budget Variance
Corporate Financing	-12,513,813	-9,497,860	-7,620,608	-1,096,526	-13,490,735	-976,922
Grand Total	-12,513,813	-9,497,860	-7,620,608	-1,096,526	-13,490,735	-976,922
TOTALS	0	-144,000	7,249,037	4,419,259	-53,056	-53,056

Budget Variances

Cabinet

26th March 2025

- 3.3 The draft position is set out in the above table. As this is expenditure at Q3 it is important to note that, at this stage in the financial year there are a number of instances where annual expenditure or accruals may distort the profiling as reflected in the Q3 actual. The above profiles have assumed support services and grant are adjusted to budgetary levels and accruals are netted out of the figures.
- 3.4 Overall, the Council is currently forecasting a full year revenue underspend of £53k at Quarter 3. This compares to an overspend figure of £344k reported at Quarter 2 – a £397k improvement of the Council's position. The underspend is mainly due to the additional grants received. This position will continue to be reviewed particularly given the impact of the increasing costs linked to inflation and further updates will be provided to Councillors throughout 2024/25. This includes service projections as follows:

Business Transformation £164k overspend

Within Business Transformation & Organisational Development, ICT salaries are overspending by £330k which is offset by savings in Equalities of £24k on salaries, savings of £83k within Business Transformation due to salaries and shared service arrangements, savings of £35k in Corporate Training and £24k within HR.

Community and Housing GF Services £366k underspend

Within Community and Housing GF Services there is a projected underspend due to additional grants received £342k and additional Lifeline shared services £244k income offset by increased expenditure on Homelessness of £139k and Social Prescribing of £81k.

Corporate Services £365k underspend

There are a number of variances within Corporate Services:

- A saving of £678k following the release of a pay award provision offset by an overspend of £33k on external audit fees within Corporate Expenses
- An underspend of £49k on professional fees and charges in Treasury Management and Bank Fees
- An overspend of £269k due to council pension costs.
- An overspend of £20k on recruitment costs for the positions of Chief Executive and Executive Director Finance and Resources
- A £40k reduction of shared service income for Redditch Partnership (LSP)

Environmental Services £1,064k overspend

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

- Bromsgrove Domestic Waste Collection service is forecast to overspend by £742k due to additional staff and agency costs of £173k, vehicle hire of £250k and fleet maintenance of £319k.
- Bromsgrove Place Teams is forecast to overspend by £38k due to additional staff and agency costs of £70k, insurance £9k and an income shortfall of £14k on bulky waste.
- Car Parking is forecast to have reduced income of £136k income, consultancy fees of £72k, however utilities are underspending by £17k

Financial and Customer Services £307k overspend

Within Finance and Customer Services there are overspends in Finance due to agency staff amounting to £290k (we have had issues with recruitment in finance which is a national issue, and have had to complete 4 years accounts to deliver to the Government's Backstop dates and therefore we have higher agency staff costs as a result of this) together with £17k in unachieved efficiency savings within Customer Services.

Legal, Democratic and Property Services £560k underspend

Legal, Democratic and Property Services are forecast to underspend £560k due to additional elections income of £313k and salary savings of £221k in Legal due to vacancies. Democratic Services are showing a small underspend of £14k due to staff vacancies. There is also a small underspend of £12k on utilities in the Parkside building.

Planning, Regeneration and Leisure Services £496k overspend

Within Planning, Regeneration and Leisure Services there are a number of variances:

- Development Management is forecast to overspend budget at £459k due to a shortfall in Planning Application income of £186k, (it was assumed that central Government changes to planning fees nationally would have a bigger positive impact on income. An extra £145k income was anticipated that has not been achieved) £97k on agency fees due to staffing shortage and £176k on professional fees, This £176k overspend includes unavoidable costs for running of service, for example subscriptions to online resources, archaeology/archive support from County Council. Also, Legal costs, including some legacy work

BROMSGROVE DISTRICT COUNCIL

Cabinet

26th March 2025

involved in significant enforcement work and legal advice, as well as costs for providing enforcement function prior to July 2024. Other costs are for consultants' advice, some of which is off set via a cost recovery activity.

- Sports Development is overspending by £37k due to agency costs, however expected Income of around £27k is to be moved from Redditch to Bromsgrove to offset some of this spend.

Regulatory Client £183k overspend

Within Regulatory Client, there is an overspend due to Envirocrime and Planning Enforcement (£154k). This overspend has been rectified in Q4 by actioning virements from Planning and Environment Services which will move the overspend to those services as agreed by Council. There is also a projected shortfall in taxi licensing income (£29k).

- 3.5 The above overspends (£1.349m) are offset by additional income (£0.977m) in Corporate Financing from additional grant income together with increased investment interest receivable and lower interest payable.

3.6 Cash Management

Borrowing

- As of the 31st December 2024, there was no short-term borrowings. The Council has no long-term borrowings.

Investments

- On 31st December 2024 there were £6.0m short-term investments held.

Capital Monitoring

- 3.7 A capital programme of £7.1m was approved in the Budget for 2024/25 in April 2024. This has been fully reviewed as part of the MTFP using actual data as at the end of December 2023. The table below and detail in **Appendix A** set out the Capital Programme schemes that are approved for the MTFP time horizon.
- 3.8 Many of these schemes are already in partial delivery in the 2024/25 financial year. By approving this list, the Council also agreed sums not spent in 2023/24 (and 2022/23 by default if schemes originated earlier than 2023/24 as sums have been carried forward through to the 2023/24 MTFP Report) to be carried forward into 2024/25. The table also splits amounts by funding source, Council or third party.

BROMSGROVE DISTRICT COUNCIL

Cabinet

26th March 2025

Year	Total Programme	Council Funded	Grant Funded
2024/5	7,069,671	4,334,500	2,735,171
2025/6	4,516,377	3,716,377	800,000
2026/7	2,558,000	1,758,000	800,000
2027/8	6,658,000	5,858,000	800,000
2028/9	1,879,000	1,079,000	800,000

3.9 Included in this funding the Council also have the following Grant Funded Schemes which are being delivered in 2024/25:

- The two Levelling Up schemes – Old Fire Station and Market Hall which are funded via £14.5m of Government Funding, and the Council is funding £1.6m of works.
 - For the Market Hall Scheme
 - Construction is progressing on site. Piling is completed and groundworks are underway. Kier have submitted an initial claim which includes work clearing ground obstructions. The Arcadis Quantity Surveyor has reviewed this and considers their claim reasonable. The costs are covered by contingency and provisional sums so there is no increase to the budget. It is expected that now Kier are almost out of the ground, some of the provisional sums can be reallocated.
 - Arcadis have been appointed as employer’s agent and Quantity Surveyor for RIBA Stage 5 of the project.
 - GJS Dillon have been appointed to develop the marketing strategy for the commercial building and will manage letting enquiries
 - For the Windsor Street Scheme
 - The site has been demolished and fencing is securing the site.
 - Soilfix are on site carrying out remediation work including testing two zones for contaminated material.
 - The Site Investigation indicated Zone 2 had the highest concentrations of PFAS, and they had excavated below the depth initially identified by Brownfield as the potential contamination layer (into the underlying sands). This means there is a possibility that the resampling may produce additional failures.
 - Thomas Lister have been appointed to support with the development appraisal that will inform the options paper.
- Public Realm work will be fully completed before the end of the calendar year.

3.10 It is still expected that there will be an overspend position on the overall projects of circa £1.1m although there is scope to bring this down by £300-£500k. To mitigate this position the Council can either fund through debt financing or use other potential funding routes.

BROMSGROVE DISTRICT COUNCIL

Cabinet

26th March 2025

- 3.11 One of these is the former GBSLEP. The Council can claim up to £2.45m although this will require the final costs as a complete application process needs to be followed. Birmingham City Council have informed all Councils wanting to access money from GBSLEP fund in 2025/26 that funds will not be available until the 2026/2027 financial year. Therefore, BDC may have to use short term borrowing until the funding is available.
- 3.12 Although the Council cannot access GBSLEP funds until the 2026/27 financial year, the sum of £2.45m is ringfenced for Bromsgrove District Council subject to the development and approval of a full business case.
- 3.13 It is proposed, given the fact that the Council will cease to exist due to Local Government Reorganisation in April 2028 and that to access funds that the Council required a fully compliant business case, that a business case is submitted for the Market Hall project to cover Council side costs, including the original 10% match funding investment to ensure that the Council use these funds before it ceases to exist. This will ensure that the full £2.45m will be drawn down. It is unlikely that there will be time to deliver another scheme and associated business case within these timescales. If funding is not used in this way the Council will need to finance this spending by the use of debt.
- 3.14 UK Shared Prosperity Schemes totalling £2.8m (although it should be noted that these grants funded schemes are a mix of capital and revenue) need to be completely spend by the end of the 2024/5 financial year.
- 3.15 The outturn spend is £2.284m against a capital budget totalling £7.069m and is detailed in **Appendix A**. It should be noted that as per the budget decision carry forwards of £7.166m will be rolled forward from 2023/24 into 2024/25 to take account of slippage from 2023/24.

Earmarked Reserves

- 3.16 The updated position, taking account of the now submitted draft accounts for 2020/21, 2021/22, 2022/23 and 2023/24 are set out in **Appendix B**. As part of the MTFP all reserves were thoroughly reviewed for their requirement and additional reserves set up as per that report. At the 31st December 2028, based on the present MTFP that was approved by Council on the 19th February, the Council holds £12.873m of General Fund Reserves.
- 3.17 The application from Earmarked Reserves for the use of £40,000 on a Poverty Truth Commission (PTC) in Bromsgrove District, requested in the Q2 monitoring was rejected as part of the MTFP process. Earmarked Reserves are at £9.534m

Ward Budgets

- 3.18 This report is the second quarterly report to show what has been spent to date on Ward budgets. Each Ward Member has £2,000 to spend on Ward Initiatives subject to the

Cabinet

26th March 2025

rules of the Scheme which were approved by Council in February. As of the 11th March there have been applications from 23 Members approved totalling £33,137. There are still 8 Members who have not allocated any funding and overall £28,863 is still to be allocated. Two Members are awaiting clarification on spending. This year's funding allocations must be spent by the 31st March. Full detail is set out in **Appendix C**.

Balance Sheet Monitoring Position

- 3.19 There has been the request from Audit Committee that the Council include Balance Sheet Monitoring as part of this report.
- 3.20 This initial balance sheet reporting is set out as the Q3 Treasury Report which is attached as **Appendix D**. This report sets out the Council's debt and borrowing position for Q3 2024/25. Included in this is how the Council is using its working capital as well as measurement of the Council's Prudential Indicators, this appendix will need to be noted and approved that Council note the position

Procurement Pipeline

- 3.21 The Procurement pipeline is shown in **Appendix E**. The Council's Procurement Pipeline includes details of contracts expected to be reprocured and new procurement projects expected to be undertaken in the future. Those happening in the next 12 months and over £200k will need to be put on the Forward Plan. The pipeline is refreshed quarterly.
- There are 17 contracts between the old threshold of £50k and the new threshold of £200k.
 - There are 10 contracts that are over the key decision threshold of £200k
 - There are 4 contracts procured by Redditch Bromsgrove on behalf of Bromsgrove.

Performance

- 3.22 This is the first iteration of the new Corporate Performance Indicators. These are based on work undertaken when formulating the New Corporate Strategy with Cabinet and also the bottom up Business Planning processes that has been undertaken by budget managers. The new format sets out:
- The measure.
 - Performance against that measure.
 - A commentary.
- The measures are set out in **Appendix F**.

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

4. Legal Implications

- 4.1 No Legal implications have been identified.

Cabinet

26th March 2025

5. Strategic Purpose Implications

Relevant Strategic Purpose

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

Climate Change Implications

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

6. Other Implications

Customer / Equalities and Diversity Implications

- 6.1 None as a direct result of this report.

Operational Implications

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

7. RISK MANAGEMENT

- 7.1 Items identified in the Finance and Performance monitoring is included in a number of the Corporate Risks. These are listed below. The mitigations to these risks are set out in the Risk Report, of which the Quarter 3 Report is reported to Audit, Standards and Governance Committee in March:

- COR 10 - Decisions made to address financial pressures and implement new projects.
- COR16 – Management of Contracts.
- COR17 – Resolution of the Approved Budget Position.
- COR19 – Adequate Workforce Planning.
- COR20 – Financial Position Rectification.
- COR22 - Delivery of Levelling Up and UK SPF Initiatives
- COR23 – Cost of Living Crisis
- COR25 – The new Environment Bill

8. APPENDENCES

Appendix A – Capital Outturn

BROMSGROVE DISTRICT COUNCIL

Cabinet

26th March 2025

- Appendix B – Reserves Position
- Appendix C – Ward Budget Position
- Appendix D – Treasury Management Position
- Appendix E – Procurement Pipeline
- Appendix F – Performance Indicators

AUTHOR OF REPORT

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BROMSGROVE DISTRICT COUNCIL

Cabinet

26th March 2025

Appendix A - Capital Outturn

Cap Proj	Description	2023/24 Total £	23/24 Spend £	c/f	2024/25 Total (Original) £	2024/25 Total (Incl C/F's) £	24/25 Spend £
	Large Schemes						
	Levelling Up Fund						
200072	- Market Hall	7,563,360	428,395	7,134,965	0	7,134,965	1,921,799
200072	Market Hall (LUF)						
200073	- Ex-Fire Station/Windsor Street	805,133	15,592	789,541	0	789,541	77,300
	UK Shared Prosperity Fund						
200086	- Remainder (to be allocated)	680,988	73,987	607,001	1,784,215	2,391,216	289,679
	Other Schemes						
200006	Burcot Lane	0	927,642	-927,642	0	-927,642	-915,914
200008	Funding for DFGs	913,000	842,776	70,224	913,000	983,224	567,033
200009	Home Repairs Assistance	50,000	-19,690	69,690	50,000	119,690	0
200010	Energy Efficiency Installation	0	0	0	110,000	110,000	0

BROMSGROVE DISTRICT COUNCIL

Cabinet

26th March 2025

Cap Proj	Description	2023/24 Total £	23/24 Spend £	c/f	2024/25 Total (Original) £	2024/25 Total (Incl C/F's) £	24/25 Spend £
200016	New Finance Enterprise system	0	0	0	20,000	20,000	0
200019	Fleet Replacemnet new line	0	0	9,400	3,090,000	3,099,400	13,860
200022	Replacement Parking Machines	96,000	212,270	-116,270	125,000	8,730	85,003
200026	Rubery Redevelopment Works	0	0	0	0	0	821
200030	Wheelie Bin Purchase	55,000	188,195	-48,195	60,000	11,805	88,772
200033	Bus Shelters	0	0	0	18,000	0	19,180
200045	Greener Homes	0	197,505	-197,505	0	-197,505	6,125
200069	Cisco Network Update	11,574	0	11,574	0	11,574	0
200070	Server Replacement	2,000	93,201	-91,201	177,500	86,299	0
200071	Laptop Refresh	25,000	11,542	13,458	150,000	163,458	18,352
200075	Sanders Park	0	33,027	-33,027	0	-33,027	8,550

Cap Proj	Description	2023/24 Total £	23/24 Spend £	c/f	2024/25 Total (Original) £	2024/25 Total (Incl C/F's) £	24/25 Spend £
200076	Play Area, POS and Sport improvements at Lickey End Recreation Ground in accordance with the S106 Agreement	0	8,842	-8,842	37,956	29,114	30,000
200079	Footpaths	75,000	75,408	-408	75,000	74,592	54,926
200082	New Digital Service	33,668	0	33,668	0	33,668	0
200104	Buildings	100,000	0	100,000	100,000	200,000	780
200105	Initial Play Audit Requirements	87,000	0	87,000	364,000	451,000	0
200106	New ongoing Cyber security budget	0	0	0	25,000	25,000	0
200107	Artrix - Landlord Obligations	0	0	0	20,000	20,000	17,587
n/a	Wild Flower Machinery	62,000	0	62,000	0	62,000	0
	Total	11,050,723	3,978,960	7,166,163	7,069,671	14,667,102	2,283,853

Agenda Item 7

BROMSGROVE DISTRICT COUNCIL

Cabinet

26th March 2025

Appendix B - Earmarked Reserves

	Balance as at 31 March 2023 £000	Transfers In 2023/24 £000	Transfers Out 2023/24 £000	Balance as at 31 March 2024 £000	Prior Yr Bud Prior year Changes	Transfers In 2024/25 £000	Transfers Out 2024/25 £000	Balance as at 31 March 2024 £000	Transfers In 2025/26 £000	Transfers Out 2025/26 £000	Balance as at 31 March 2024 £000	Transfers In 2026/27 £000	Transfers Out 2026/27 £000	Balance as at 31 March 2024 £000	Transfers In 2027/28 £000	Transfers Out 2027/28 £000	Balance as at 31 March 2024 £000
General Fund Balances	13,104	1,747	(1,330)	13,521	1,200	53	(50)	14,724		(252)	14,472		(1,195)	13,357		(484)	12,873
General Fund:																	
Building Control Other	7	0	0	7	0	0	0	7	0	0	7	0	0	7	0	0	7
Building Control Partnerships	82	0	0	82	0	0	0	82	0	0	82	0	0	82	0	0	82
Community Services	321	0	(125)	196	0	0	0	196	0	0	196	0	0	196	0	0	196
Economic Regeneration	1,348	50	0	1,398	(600)	0	0	798	0	0	798	0	0	798	0	0	798
Election Services	85	0	0	85	0	0	0	85	0	0	85	0	0	85	0	0	85
Environmental Services	27	0	0	27	0	0	0	27	0	0	27	0	0	27	0	0	27
Financial Services	4,705	430	(500)	4,635	(750)	0	0	3,885	0	(334)	3,551	0	0	3,551	0	0	3,551
HR Backlog Funding					75	0	0	75	0	0	75	0	0	75	0	0	75
ICT Backlog Funding					75	0	0	75	0	0	75	0	0	75	0	0	75
Housing Schemes	864	0	0	864	0	0	0	864	0	0	864	0	0	864	0	0	864
ICT/Systems	197	0	0	197	0	0	0	197	0	0	197	0	0	197	0	0	197
Leisure/Community Safety	115	0	0	115	0	0	0	115	0	0	115	0	0	115	0	0	115
Local Neighbourhood Partnerships	16	0	0	16	0	0	0	16	0	0	16	0	0	16	0	0	16
Other	67	0	0	67	0	0	0	67	0	0	67	0	0	67	0	0	67
Planning & Regeneration	463	0	0	463	0	50	0	513	0	0	513	0	0	513	0	0	513
Regulatory Services (Partner Share)	85	0	0	85	0	0	0	85	0	0	85	0	0	85	0	0	85
Replacement Reserve (Inc. Recycli)	0			0	0	0	0	0	0	0	0	0	0	0	0	0	0
Shared Services (Severance Costs)	311	0	0	311	0	0	0	311	0	0	311	0	0	311	0	0	311
Covid-19 (General Covid Grant)	766	0	0	766	0	0	0	766	0	0	766	0	0	766	0	0	766
Covid-19 (Collection Fund)	1,604	0	0	1,604	0	0	0	1,604	0	0	1,604	0	0	1,604	0	0	1,604
Utilities	0			0	0	0	0	0	0	0	0	0	0	0	0	0	0
Ward Budgets	0			0	0	234	(78)	156	0	(78)	78		(78)	0			0
Council Tax Hardship Fund	79	0	0	79	0	0	0	79	0	0	79	0	0	79	0	0	79
Property Services Review								0	100	(100)	0			0			0
EPR Funding Allocationb								0	1,004	(100)	904		(450)	454		(450)	4
Arrix Holding Trust	17	0	0	17	0	0	0	17	0	0	17	0	0	17	0	0	17
Total General Fund	11,159	480	(625)	11,014	(1,200)	284	(78)	10,020	1,104	(612)	10,512	0	(528)	9,984	0	(450)	9,534

BROMSGROVE DISTRICT COUNCIL

Cabinet

26th March 2025

Appendix C - Ward Budget Funds Allocated to March 11th 2025

Councillor Ward Fund Balances – 24/25

Activity	Spend	Balance £2,000
Cllr Alan Bailes	1,700.00	300.00
Cllr Ruth Lambert	400.00	1,600.00
Cllr Sam Ammar	1,430.00	570.00
Cllr Ester Gray	2,000.00	0
Cllr Peter McDonald	2,000.00	0
Cllr Harrison Rone-Clarke	400.00	1,600.00
Cllr Anita Dale	214.00	1,786.00
Cllr Webb	2,000.00	0
Cllr Hunter	1970.00	30.00
Cllr Rachel Bailes	2,000.00	0
Cllr Sue Baxter	0	2,000.00
Cllr J Clarke	0	2,000.00
Cllr Stephen Colella	2,000.00	0
Cllr J Elledge	900.00	1,100.00
Cllr Derek Forsythe	0	2,000.00
Cllr D Hopkins	913.00	1,087.00
Cllr Charlie Hotham	540.00	1,460.00
Cllr Helen Jones	0	2,000.00
Cllr B Kumar	2,000.00	0
Cllr M Marshall	2,000.00	0
Cllr Karen May	555.00	1,445.00
Cllr Brian McEldowney	2,000.00	0

BROMSGROVE DISTRICT COUNCIL

Cabinet

26th March 2025

Activity	Spend	Balance £2,000
Cllr D Nicholl	2,000.00	0
Cllr Simon Nock	375.00	1,625.00
Cllr S Peters	2,000.00	0
Cllr J Robinson	0	2,000.00
Cllr S Robinson	0	2,000.00
Cllr J Stanley	0	2,000.00
Cllr Kit Taylor	0	2,000.00
Cllr Peter Whittaker	2,000.00	0
Cllr S Evans	1,740.00	260.00

Appendix D - Treasury Management Position

1. SUMMARY

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

2. RECOMMENDATIONS

Cabinet are asked to:

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

3. BACKGROUND

Introduction

3.1 The Authority has adopted the Chartered Institute of Public Finance and Accountancy's *Treasury Management in the Public Services: Code of Practice* (the CIPFA Code) which requires the Authority to approve, as a minimum, treasury management semi-annual and annual outturn reports.

3.2 This third quarterly report provides an additional update and includes the requirement in the 2021 Code of quarterly reporting of the treasury management prudential indicators. The non-treasury prudential indicators are incorporated in the Authority's normal quarterly revenue report.

External Context

3.3 **Economic background:** The Chancellor of the Exchequer delivered her Autumn Budget at the end of October. Based on the plans announced, the Office for Budget Responsibility reported they would provide a short-term boost to GDP growth before weakening it further out and push inflation higher over the medium-term. This change to the economic and inflation outlook caused financial markets to readjust expectations of Bank of England (BoE) Bank Rate and gilt yields higher. The council's treasury management advisor, Arlingclose, also revised its interest rate forecast upwards in November, with Bank Rate expected to eventually fall to 3.75%.

3.4 UK annual Consumer Price Index (CPI) inflation remained above the Bank of England (BoE) 2% target in the later part of the period. The Office for National Statistics (ONS) reported headline consumer prices rose 2.6% in November 2024, up from 2.3% in the previous month and in line with expectations. Core CPI also rose, but by more than

Agenda Item 7

BROMSGROVE DISTRICT COUNCIL

Cabinet

26th March 2025

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

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

Agenda Item 7

BROMSGROVE DISTRICT COUNCIL

Cabinet

26th March 2025

rate reductions. Moreover, the US economy continues to expand at a decent pace, suggesting that monetary policy may need to remain more restrictive in the coming months than had previously been anticipated.

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

Agenda Item 7

BROMSGROVE DISTRICT COUNCIL

Cabinet

26th March 2025

- 3.19 Financial market volatility is expected to remain a feature, at least in the near term and, credit default swap levels will be monitored for signs of ongoing credit stress. As ever, the institutions and durations on the Authority's counterparty list recommended by Arlingclose remain under constant review.

Local Context

- 3.20 On 31st March 2024, the Authority had net borrowing of £10.67m arising from its revenue and capital income and expenditure. The underlying need to borrow for capital purposes is measured by the Capital Financing Requirement (CFR), while balance sheet resources are the underlying resources available for investment. These factors are summarised in Table 1 below.

Table 1: Balance Sheet Summary

	31.3.24	31.3.25
	Actual	Forecast
	£m	£m
General Fund CFR	38.67	42.70
Total CFR	38.67	42.70
Less: *Other debt liabilities	0	0
Borrowing CFR	38.67	42.70
Less: External borrowing**	-7.50	0
Internal borrowing	31.17	42.70
Less: Usable reserves	-17.40	-17.20
Less: Working capital	-3.10	-3.10
Net borrowing	10.67	22.40

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

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

Agenda Item 7

BROMSGROVE DISTRICT COUNCIL

Cabinet

26th March 2025

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

Table 2: Treasury Management Summary

	31.3.24 Balance £m	Movement £m	31.12.24 Balance £m	31.12.24 Rate %
Long-term borrowing				
Short-term borrowing	-7.5	7.5	0	
Total borrowing	-7.5	7.5	0	
Short-term investments				
Cash and cash equivalents	0.0	6.0	6.0	4.70%
Total investments	0.0	6.0	6.0	
Net investments	-7.5	13.5	6.0	

Borrowing Strategy and Activity

- 3.22 As outlined in the treasury strategy, the Authority's chief objective when borrowing has been to strike an appropriate risk balance between securing lower interest costs and achieving cost certainty over the period for which funds are required, with flexibility to renegotiate loans should the Authority's long-term plans change being a secondary objective. The Authority's borrowing strategy continues to address the key issue of affordability without compromising the longer-term stability of the debt portfolio. During the period short term interest rates have been higher than long term interest rates.
- 3.23 After substantial rises in interest rates since 2021 many central banks have now begun to reduce their policy rates, albeit slowly. Gilt yields were volatile but have increased overall during the period. Much of the increase has been in response to market concerns that policies introduced by the Labour government will be inflationary and lead to higher levels of government borrowing. The election of Donald Trump in the US in November is also expected to lead to inflationary trade policies.
- 3.24 The PWLB certainty rate for 10-year maturity loans was 4.80% at the beginning of the period and 5.40% at the end. The lowest available 10-year maturity rate was 4.52% and

Agenda Item 7

BROMSGROVE DISTRICT COUNCIL

Cabinet

26th March 2025

the highest was 5.44%. Rates for 20-year maturity loans ranged from 5.01% to 5.87% during the period, and 50-year maturity loans from 4.88% to 5.69%.

- 3.25 Whilst the cost of short-term borrowing from other local authorities spiked to around 7% in late March 2024, primarily due a dearth of LA-LA lending/borrowing activity during that month, as expected shorter-term rates reverted to a more market-consistent range and were generally around 5.00% - 5.5%. Rising rates were seen towards the end of the period in the LA-LA market.
- 3.26 CIPFA's 2021 Prudential Code is clear that local authorities must not borrow to invest primarily for financial return and that it is not prudent for local authorities to make any investment or spending decision that will increase the capital financing requirement and so may lead to new borrowing, unless directly and primarily related to the functions of the Authority. PWLB loans are no longer available to local authorities planning to buy investment assets primarily for yield unless these loans are for refinancing purposes. The Authority has no new plans to borrow to invest primarily for financial return.
- 3.27 **Loans Portfolio:** At 30th December the Authority held no loans.

Table 3: Borrowing Position

	31.3.24 Balance £m	Net Movement £m	31.12.24 Balance £m
Public Works Loan Board			
Banks (LOBO)			
Banks (fixed-term)			
Local authorities (long-term)			
Local authorities (short-term)	-7.5	7.5	0
Total borrowing	-7.5	7.5	0

Treasury Investment Activity

- 3.28 The CIPFA Treasury Management in the Public Services Code of Practice and Cross-Sectoral Guidance Notes (revised in 2021) defines treasury management investments as investments that arise from the organisation's cash flows or treasury risk management activity that ultimately represents balances that need to be invested until the cash is required for use in the course of business.

Agenda Item 7

BROMSGROVE DISTRICT COUNCIL

Cabinet

26th March 2025

- 3.29 The Authority does not hold any invested funds, representing income received in advance of expenditure plus balances and reserves held. During the period, the Authority's investment balances ranged between £1.0 and £10.5 million due to timing differences between income and expenditure. The investment position is shown in table 4 below.

Table 4: Treasury Investment Position

	31.3.24 Balance £m	Net Movement £m	31.12.24 Balance £m	31.12.24 Income Return %	31.12.24 Weighted Average Maturity days
Total investments	0.0	6.0	6.0		

- 3.30 Both the CIPFA Code and government guidance require the Authority to invest its funds prudently, and to have regard to the security and liquidity of its treasury investments before seeking the optimum rate of return, or yield. The Authority's objective when investing money is to strike an appropriate balance between risk and return, minimising the risk of incurring losses from defaults and the risk of receiving unsuitably low investment income.
- 3.31 As demonstrated by the liability benchmark in this report, the Authority expects to be a long-term investor and treasury investments therefore include both short-term low risk instruments to manage day-to-day cash flows and longer-term instruments where limited additional risk is accepted in return for higher investment income to support local public services.
- 3.32 Bank Rate reduced from 5.25% to 5.00% in August 2024 and again to 4.75% in November 2024 with short term interest rates largely being around these levels. The rates on DMADF deposits and money market rates ranged between 4.94% and 4.70%.

Non-Treasury Investments

- 3.33 The definition of investments in the Treasury Management Code now covers all the financial assets of the Authority as well as other non-financial assets which the Authority holds primarily for financial return. Investments that do not meet the definition of treasury management investments (i.e. management of surplus cash) are categorised as either for service purposes (made explicitly to further service objectives) and or for commercial purposes (made primarily for financial return).

Agenda Item 7

BROMSGROVE DISTRICT COUNCIL

Cabinet

26th March 2025

- 3.34 Investment Guidance issued by the Department for Levelling Up Housing and Communities (DLUHC) and Welsh Government also includes within the definition of investments all such assets held partially or wholly for financial return.

Treasury Performance

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

Table 5: Performance

	Actual £m	Budget £m	Over/ under	Actual %	Benchmark %	Over/ under
Total borrowing	0.0	0.0	0.0			
PFI and Finance leases	0.0	0.0	0.0			
Total debt	0.0	0.0	0.0			
Total treasury investments	6.0	0.0	6.0			
				n/a	n/a	n/a

MRP Regulations

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

Compliance

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

Agenda Item 7

BROMSGROVE DISTRICT COUNCIL

Cabinet

26th March 2025

Table 6: Investment Limits

	2024/25 Maximum	31.12.24 Actual	2024/25 Limit	Complied? Yes/No
Any single organisation, except the UK Government	£4m each			
UK Central Government	Unlimited			
Unsecured investments with banks and building societies	£2.5m in total			
Loans to unrated corporates	£1m in total			
Money Market Funds	£20m in total	£6.0m	£20m	Yes
Foreign countries	£5m per country			
Real Estate Investment Trusts	£2.5m in total			

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

Table 7: Debt and the Authorised Limit and Operational Boundary

	Q1 2024/25 Maximum	30.9.24 Actual	2024/25 Operational Boundary	2024/25 Authorised Limit	Complied? Yes/No
Borrowing	Nil	Nil	55,000	60,000	Yes
PFI and Finance Leases	Nil	Nil	1,000	1,000	Yes
Total debt	Nil	Nil	56,000	61,000	

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

Treasury Management Prudential Indicators

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

Agenda Item 7

BROMSGROVE DISTRICT COUNCIL

Cabinet

26th March 2025

Liability Benchmark

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

	31.3.24	31.3.25	31.3.26	31.3.27
	Actual	Forecast	Forecast	Forecast
Loans CFR	38.6	42.7	45.4	47.7
Less: Balance sheet resources	-20.5	-20.3	-20.2	-20.2
Net loans requirement	18.1	22.4	25.2	27.5
Plus: Liquidity allowance	0.2	0.2	0.2	0.2
Liability benchmark	18.3	22.6	25.4	27.7
Existing borrowing	0	0	0	0

3.43 Following on from the medium-term forecast above, the long-term liability benchmark assumes capital expenditure funded by borrowing of £0m, minimum revenue provision on new capital expenditure based on a 40 year asset life and income, expenditure and reserves all increasing by inflation of 2.0% p.a. This is shown in the chart below together with the maturity profile of the Authority’s existing borrowing. Presently borrowing has been delivered through the use of internal resources and the Council has no long term borrowing.

Maturity Structure of Borrowing

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

BROMSGROVE DISTRICT COUNCIL

Cabinet

26th March 2025

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

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

Long-term Treasury Management Investments

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

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

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

Additional indicators

Security:

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

Agenda Item 7

BROMSGROVE DISTRICT COUNCIL

Cabinet

26th March 2025

average, weighted by the size of each investment. Unrated investments are assigned a score based on their perceived risk.

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

Liquidity:

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

	31.12.24 Actual	2024/25 Target	Complied?
Total cash available within 3 months	£6.0m	Nil	Yes
Total sum borrowed in past 3 months without prior notice	Nil	Nil	Yes

Interest Rate Exposures:

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

Interest rate risk indicator	2024/25 Target	31.12.24 Actual	Complied?
Upper limit on one-year revenue impact of a 1% <u>rise</u> in interest rates	500,000	0	Yes
Upper limit on one-year revenue impact of a 1% <u>fall</u> in interest rates	500,000	0	Yes

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

BROMSGROVE DISTRICT COUNCIL

Cabinet

26th March 2025

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

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

4. IMPLICATIONS

Legal Implications

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

Service / Operational Implications

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

Customer / Equalities and Diversity Implications

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

5. RISK MANAGEMENT

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

Cabinet

26th March 2025

6. APPENDICES

None

7. BACKGROUND PAPERS

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

AUTHOR OF REPORT

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E Mail: Debra.Goodall@bromsgroveandredditchbc.gov.uk

BROMSGROVE DISTRICT COUNCIL

Cabinet

26th March 2025

Appendix E - Procurement Pipeline

Council	Contract Title	Department
	Over £200,000	
Bromsgrove	Fleet Replacement	Environmental Services
Bromsgrove	Mobile Veterinary Services	WRS
Bromsgrove	Replacement Parking Machines	Engineering & Design
Bromsgrove	Microsoft Licenses	ICT
Bromsgrove	PROVIDE Kennelling of Dogs	WRS
Bromsgrove	Planning/GIS/Gazetteer	ICT
Bromsgrove	Pest Control	WRS
Bromsgrove	Supply of HVO fuel	Supplies
Bromsgrove	Air Quality Analysers	WRS
Bromsgrove	Data Access Services	ICT
	£50,000 to £200,000	
Bromsgrove	Idox Support & Maintenance	ICT
Bromsgrove	Server/SAN Replacement	ICT
Bromsgrove	Cisco Network Maintenance	ICT
Bromsgrove	Vehicle Hire	Environmental - Fleet
Bromsgrove	out of hours dog warden services	WRS
Bromsgrove	Charford Rec & Upland Gr play area refurbishments	Parks / Leisure
Bromsgrove	Automation/Robotics	ICT
Bromsgrove	Web security subscription (Ironport)	ICT
Bromsgrove	GIS System	ICT
Bromsgrove	Web Filter	ICT
Bromsgrove	Community Transport	Community Services
Bromsgrove	VMware License & Support	ICT
Bromsgrove	Digital Forms	WRS
Bromsgrove	IDOX Software	WRS
Bromsgrove	Street Naming and Numbering	ICT
Bromsgrove	LogPoint SIEM	ICT
Bromsgrove	Cloud Storage	ICT
	Over £200,000 Purchased by Partner	
Joint	Civil Engineering works	Engineering and Design
Joint	Corporate Building Electrical contract	Property Services
Joint	Enforcement Services	Finance and Customer Services
Joint	Public Space CCTV Maintenance	CCTV and Lifeline

Cabinet

26th March 2025

Appendix F BROMSGROVE Strategic & Operational Performance Measures

BROMSGROVE Strategic & Operational Performance Measures

Quarter 3, 2024/25

1. Introduction

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

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

The Council Plan 2024-27 has been adopted, which identifies priorities and key projects, and contains a suite of measures to assess delivery of against these, which be the foundation for performance reporting going forward. These measures and the associated data collection requirements are currently under development; where appropriate, they have been included in this report.

2. Strategic Priorities and Performance Measures

The measures shown in the next section are structured around the Council Plan and the Service Business Planning Framework, part of a transition to a new set of comprehensive performance measures.

BROMSGROVE DISTRICT COUNCIL

Cabinet

26th March 2025

2.1. Economic Development

Measure:	Business grant funding being taken up																										
Performance:	<table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr> <th style="width: 25%;"></th> <th style="width: 25%;">START UP</th> <th style="width: 25%;">GROWTH</th> <th style="width: 25%;">TOTAL OF GRANTS FOR QUARTER</th> </tr> </thead> <tbody> <tr> <td>23/24 Q3</td> <td>£569.60</td> <td>0</td> <td>£569.90</td> </tr> <tr> <td>23/24 Q4</td> <td>£5,000.00</td> <td>£10,000.00</td> <td>£15,000.00</td> </tr> <tr> <td>24/25 Q1</td> <td>£38,307.06</td> <td>£13,594.67</td> <td>£51,901.73</td> </tr> <tr> <td>24/25 Q2</td> <td>£13,486.53</td> <td>£21,561.60</td> <td>£35,048.13</td> </tr> <tr> <td>24/25 Q3</td> <td>£2,954.90</td> <td>14,102.87</td> <td>£17,057.77</td> </tr> </tbody> </table>				START UP	GROWTH	TOTAL OF GRANTS FOR QUARTER	23/24 Q3	£569.60	0	£569.90	23/24 Q4	£5,000.00	£10,000.00	£15,000.00	24/25 Q1	£38,307.06	£13,594.67	£51,901.73	24/25 Q2	£13,486.53	£21,561.60	£35,048.13	24/25 Q3	£2,954.90	14,102.87	£17,057.77
	START UP	GROWTH	TOTAL OF GRANTS FOR QUARTER																								
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2.2. Housing

Measure:	% of building control applications determined within 5 weeks
Performance	Q3- 92% (target of 85%)

BROMSGROVE DISTRICT COUNCIL

Cabinet

26th March 2025

Measure:	Number of new homes - total and affordable (annual)																																																																										
Performance:	<div style="display: flex; justify-content: space-around;"> <div style="width: 45%;"> <p>Total New Homes Completed</p> <table border="1"> <caption>Total New Homes Completed</caption> <thead> <tr> <th>Year</th> <th>Total New Homes Completed</th> </tr> </thead> <tbody> <tr> <td>2020-21</td> <td>166</td> </tr> <tr> <td>2021-22</td> <td>172</td> </tr> <tr> <td>2022-23</td> <td>199</td> </tr> <tr> <td>2023-24</td> <td>131</td> </tr> </tbody> </table> </div> <div style="width: 45%;"> <p>New Homes Completed by Property Size</p> <table border="1"> <caption>New Homes Completed by Property Size</caption> <thead> <tr> <th>Year</th> <th>1 Bed</th> <th>2 Bed</th> <th>3 Bed</th> <th>4 Bed</th> </tr> </thead> <tbody> <tr> <td>2020-21</td> <td>19</td> <td>37</td> <td>60</td> <td>50</td> </tr> <tr> <td>2021-22</td> <td>53</td> <td>53</td> <td>34</td> <td>32</td> </tr> <tr> <td>2022-23</td> <td>59</td> <td>56</td> <td>56</td> <td>28</td> </tr> <tr> <td>2023-24</td> <td>29</td> <td>30</td> <td>44</td> <td>28</td> </tr> </tbody> </table> </div> </div>	Year	Total New Homes Completed	2020-21	166	2021-22	172	2022-23	199	2023-24	131	Year	1 Bed	2 Bed	3 Bed	4 Bed	2020-21	19	37	60	50	2021-22	53	53	34	32	2022-23	59	56	56	28	2023-24	29	30	44	28																																							
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Comment:	<p>The final data for the 2023/24 is:</p> <ul style="list-style-type: none"> • Total Homes Built (including affordable) -131 (net) • Total affordable homes built - 51 (net) 																																																																										
Measure:	No. of people requiring DFGs																																																																										
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Comment:	<p>Demand for DFG's is subject to the number of qualifying clients identified by external organisations and therefore beyond control of the Authority. The figures do not include those assisted with other related forms of assistance also funded through the council's Better Care Fund allocation.</p>																																																																										

BROMSGROVE DISTRICT COUNCIL

Cabinet

26th March 2025

Measure:	Homelessness: prevention																																																																	
Performance:	<div style="border: 1px solid #ccc; padding: 10px; margin: 0 auto; width: 80%;"> <p>Number Threatened and Prevented</p> <p>No. threatened and prevented by month of approach</p> <p>— Threatened ····· Prior Year — Prevented ····· Prior Year</p> <table border="1" style="margin-top: 10px; width: 100%; border-collapse: collapse; font-size: small;"> <thead> <tr> <th>Month</th> <th>Threatened (Current)</th> <th>Threatened (Prior Year)</th> <th>Prevented (Current)</th> <th>Prevented (Prior Year)</th> </tr> </thead> <tbody> <tr><td>Jan-24</td><td>25</td><td>20</td><td>8</td><td>7</td></tr> <tr><td>Feb-24</td><td>13</td><td>25</td><td>5</td><td>8</td></tr> <tr><td>Mar-24</td><td>22</td><td>22</td><td>2</td><td>5</td></tr> <tr><td>Apr-24</td><td>17</td><td>17</td><td>7</td><td>7</td></tr> <tr><td>May-24</td><td>22</td><td>22</td><td>4</td><td>4</td></tr> <tr><td>Jun-24</td><td>17</td><td>22</td><td>7</td><td>7</td></tr> <tr><td>Jul-24</td><td>15</td><td>17</td><td>4</td><td>7</td></tr> <tr><td>Aug-24</td><td>15</td><td>15</td><td>2</td><td>4</td></tr> <tr><td>Sep-24</td><td>18</td><td>18</td><td>2</td><td>2</td></tr> <tr><td>Oct-24</td><td>20</td><td>18</td><td>4</td><td>4</td></tr> <tr><td>Nov-24</td><td>14</td><td>14</td><td>3</td><td>3</td></tr> <tr><td>Dec-24</td><td>9</td><td>9</td><td>3</td><td>3</td></tr> </tbody> </table> </div>	Month	Threatened (Current)	Threatened (Prior Year)	Prevented (Current)	Prevented (Prior Year)	Jan-24	25	20	8	7	Feb-24	13	25	5	8	Mar-24	22	22	2	5	Apr-24	17	17	7	7	May-24	22	22	4	4	Jun-24	17	22	7	7	Jul-24	15	17	4	7	Aug-24	15	15	2	4	Sep-24	18	18	2	2	Oct-24	20	18	4	4	Nov-24	14	14	3	3	Dec-24	9	9	3	3
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Measure:	Cost of B & B placements																																																																	

BROMSGROVE DISTRICT COUNCIL

Cabinet

26th March 2025

Performance:			21/22	22/23	23/24	24/25
		Expenditure	4,769.50	13,532.50	25,223.00	36,644.25
	Q1	Income	3,347.48	4,825.28	5,730.77	12,022.96
		SPEND	1,422.02	8,707.22	19,492.23	24,621.29
		Expenditure	9,408.71	9,931.21	30,346.30	31,846.40
	Q2	Income	5,454.40	5,412.04	6,450.05	9,378.26
		SPEND	3,954.31	4,519.17	23,896.25	22,468.14
		Expenditure	8,444.65	18,938.19	18,345.95	54,886.03
	Q3	Income	5,058.39	6,137.66	8,481.76	4,644.41
		SPEND	3,386.26	12,800.53	9,864.19	50,241.62
		Expenditure	12,256.35	44,491.00	40,326.03	
	Q4	Income	2,007.33	11,412.56	7,921.47	
	SPEND	10,249.02	33,078.44	32,404.56		
	Expenditure	34,879.21	86,892.90	114,241.28	123,376.68	
TOTAL	Income	15,867.60	27,787.54	28,584.05	26,045.63	
	SPEND	19,011.61	59,105.36	85,657.23	97,331.05	

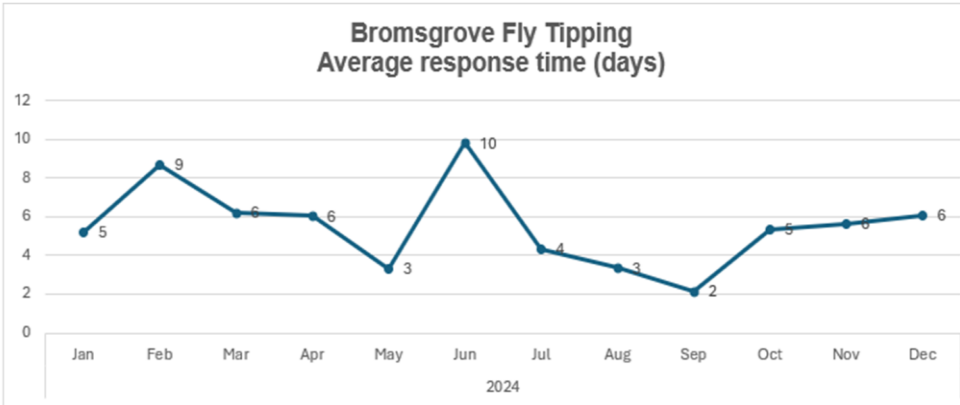
Comment:	The cost of temporary accommodation continues to increase in line with the national picture. This is due to periods in temporary accommodation being longer due to the lack of suitable affordable housing being available.
Measure:	No. of households in temporary accommodation- snapshot
Performance:	23
Measure:	% of households in temporary accommodation which have exceeded 6 weeks
Performance:	22%

BROMSGROVE DISTRICT COUNCIL

Cabinet

26th March 2025

2.3. Environment

Measure:	No. of environmental enforcement actions taken																										
Performance:	This is a new measure for inclusion in quarterly reporting and data will be available from Q4 2024/25 (with a one-quarter lag)																										
Measure:	Average time taken to remove fly-tipping reported																										
Performance:	<div style="text-align: center;">  <p>Bromsgrove Fly Tipping Average response time (days)</p> <table border="1" style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th>Month</th> <th>Average response time (days)</th> </tr> </thead> <tbody> <tr><td>Jan</td><td>5</td></tr> <tr><td>Feb</td><td>9</td></tr> <tr><td>Mar</td><td>6</td></tr> <tr><td>Apr</td><td>6</td></tr> <tr><td>May</td><td>3</td></tr> <tr><td>Jun</td><td>10</td></tr> <tr><td>Jul</td><td>4</td></tr> <tr><td>Aug</td><td>3</td></tr> <tr><td>Sep</td><td>2</td></tr> <tr><td>Oct</td><td>5</td></tr> <tr><td>Nov</td><td>5</td></tr> <tr><td>Dec</td><td>6</td></tr> </tbody> </table> </div>	Month	Average response time (days)	Jan	5	Feb	9	Mar	6	Apr	6	May	3	Jun	10	Jul	4	Aug	3	Sep	2	Oct	5	Nov	5	Dec	6
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Comment:	<p>Since June 2024 WRS have taken over the enforcement side of Fly-tipping. The process of dove-tailing the clean-up works carried out by BDC Place teams with the investigation side led by WRS has taken a few months to bed in. This was primarily because of the wide rural nature of Bromsgrove District and the volume and nature of some of the fly-tips encountered in these areas.</p> <p>The good news is that most fly-tips of interest are now assessed by WRS and then released for collection by Bromsgrove Place team within 48 Hours. WRS are moving forward with several cases in the Bromsgrove area that should eventually lead to prosecution that will then be utilised in communications to try and vastly reduce the incidents across the District.</p>																										

BROMSGROVE DISTRICT COUNCIL

Cabinet

26th March 2025

Measure:	% household waste recycled or composted																																
Performance:	<table border="1" style="margin: 10px auto; border-collapse: collapse;"> <caption>% household waste recycled or composted</caption> <thead> <tr> <th>Month</th> <th>%</th> </tr> </thead> <tbody> <tr><td>Oct-23</td><td>50</td></tr> <tr><td>Nov-23</td><td>45</td></tr> <tr><td>Dec-23</td><td>38</td></tr> <tr><td>Jan-24</td><td>28</td></tr> <tr><td>Feb-24</td><td>32</td></tr> <tr><td>Mar-24</td><td>42</td></tr> <tr><td>Apr-24</td><td>52</td></tr> <tr><td>May-24</td><td>60</td></tr> <tr><td>Jun-24</td><td>55</td></tr> <tr><td>Jul-24</td><td>45</td></tr> <tr><td>Aug-24</td><td>45</td></tr> <tr><td>Sep-24</td><td>48</td></tr> <tr><td>Oct-24</td><td>50</td></tr> <tr><td>Nov-24</td><td>42</td></tr> <tr><td>Dec-24</td><td>28</td></tr> </tbody> </table>	Month	%	Oct-23	50	Nov-23	45	Dec-23	38	Jan-24	28	Feb-24	32	Mar-24	42	Apr-24	52	May-24	60	Jun-24	55	Jul-24	45	Aug-24	45	Sep-24	48	Oct-24	50	Nov-24	42	Dec-24	28
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Comment:	<p>December 2024 saw a significant increase in the volume of Residual Waste collected, which was mirrored across all of the Worcestershire Authorities, although was not mirrored by an increase in dry mixed recycling, and so our performance is down by 1.26% when compared against Qtrs 1-3 of 2023/24. We are reviewing Q3 data with WCC to make sure the tonnages this calculation is based on have been logged correctly.</p>																																
Measure:	No. of households supported by energy advice service (AoE)																																
Performance:	<table border="1" style="margin: 10px auto; border-collapse: collapse;"> <caption># households supported by energy advice service</caption> <thead> <tr> <th>Quarter</th> <th>Number</th> </tr> </thead> <tbody> <tr><td>Jun-23</td><td>16</td></tr> <tr><td>Sep-23</td><td>59</td></tr> <tr><td>Dec-23</td><td>202</td></tr> <tr><td>Mar-24</td><td>162</td></tr> <tr><td>Jun-24</td><td>562</td></tr> <tr><td>Sep-24</td><td>1326</td></tr> <tr><td>Dec-24</td><td>320</td></tr> </tbody> </table>	Quarter	Number	Jun-23	16	Sep-23	59	Dec-23	202	Mar-24	162	Jun-24	562	Sep-24	1326	Dec-24	320																
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BROMSGROVE DISTRICT COUNCIL

Cabinet

26th March 2025

Comment:	Act On Energy’s activity for Q3 highlights the continued impact of the service on residents in Bromsgrove. In October, November and December, AOE received 320 calls for help, significantly higher than the same period in the previous year. These calls resulted in numerous residents accessing support and funding help with their energy bills, including those funded by the Household Support Fund, ECO4, and Shared Prosperity Funding. Notably, the Household Support Fund remains the primary source of project funding in Bromsgrove with 1 in 5 calls resulting in residents being referred onto the HSF.
Measure:	% energy improvements grant funding of private housing available being taken up
Performance:	This measure is currently under development due to ongoing changes to the grant funding options available.

2.4. Infrastructure

Measure:	% of minor planning applications determined within 8 weeks or agreed extension																																				
Performance:	<div style="text-align: center;"> <p>% minor planning applications determined in time</p> <table border="1" style="margin: 10px auto; border-collapse: collapse;"> <caption>Data for % minor planning applications determined in time</caption> <thead> <tr> <th>Quarter</th> <th>Minor Applications (%)</th> <th>Govt. target (%)</th> </tr> </thead> <tbody> <tr><td>Jun-22</td><td>78</td><td>70</td></tr> <tr><td>Sep-22</td><td>79</td><td>70</td></tr> <tr><td>Dec-22</td><td>79</td><td>70</td></tr> <tr><td>Mar-23</td><td>81</td><td>70</td></tr> <tr><td>Jun-23</td><td>80</td><td>70</td></tr> <tr><td>Sep-23</td><td>82</td><td>70</td></tr> <tr><td>Dec-23</td><td>85</td><td>70</td></tr> <tr><td>Mar-24</td><td>86</td><td>70</td></tr> <tr><td>Jun-24</td><td>84</td><td>70</td></tr> <tr><td>Sep-24</td><td>84</td><td>70</td></tr> <tr><td>Dec-24</td><td>88</td><td>70</td></tr> </tbody> </table> </div>	Quarter	Minor Applications (%)	Govt. target (%)	Jun-22	78	70	Sep-22	79	70	Dec-22	79	70	Mar-23	81	70	Jun-23	80	70	Sep-23	82	70	Dec-23	85	70	Mar-24	86	70	Jun-24	84	70	Sep-24	84	70	Dec-24	88	70
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BROMSGROVE DISTRICT COUNCIL

Cabinet

26th March 2025

Comment:	<p>There has been a change in how the rolling period is calculated. This was previously assessed over the preceding 2 years, however in December 2024 this changed to being assessed over the preceding 12-month period. This means that the numbers of applications involved is reduced and thus when an application goes out of time it has more statistical impact. The Government target remains the same at 70%. Performance for the rolling 1 year period has marginally improved, as more applications determined in the last 12 months have been determined in time or with an extension of time, as a result performance is now 88.05%.</p>																																				
Measure:	% of major planning applications determined within 13 weeks or agreed extension																																				
Performance:	<div style="text-align: center;"> <p>% major planning applications determined in time</p> <table border="1" style="margin: 10px auto; border-collapse: collapse;"> <caption>Data for % major planning applications determined in time</caption> <thead> <tr> <th>Quarter</th> <th>Major Applications (%)</th> <th>Govt. target (%)</th> </tr> </thead> <tbody> <tr><td>Jun-22</td><td>82</td><td>60</td></tr> <tr><td>Sep-22</td><td>81</td><td>60</td></tr> <tr><td>Dec-22</td><td>81</td><td>60</td></tr> <tr><td>Mar-23</td><td>85</td><td>60</td></tr> <tr><td>Jun-23</td><td>85</td><td>60</td></tr> <tr><td>Sep-23</td><td>90</td><td>60</td></tr> <tr><td>Dec-23</td><td>89</td><td>60</td></tr> <tr><td>Mar-24</td><td>88</td><td>60</td></tr> <tr><td>Jun-24</td><td>88</td><td>60</td></tr> <tr><td>Sep-24</td><td>88</td><td>60</td></tr> <tr><td>Dec-24</td><td>78</td><td>60</td></tr> </tbody> </table> </div>	Quarter	Major Applications (%)	Govt. target (%)	Jun-22	82	60	Sep-22	81	60	Dec-22	81	60	Mar-23	85	60	Jun-23	85	60	Sep-23	90	60	Dec-23	89	60	Mar-24	88	60	Jun-24	88	60	Sep-24	88	60	Dec-24	78	60
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	<p>There has been a change as above in how the rolling period is calculated. The Government target remains the same at 60%. Performance for the rolling 1 year period is now 78.5% which is still comfortably above the requirement.</p>																																				

BROMSGROVE DISTRICT COUNCIL

Cabinet

26th March 2025

Measure:	No. of planning enforcement actions taken																																																		
Performance:	<div style="text-align: center;"> <p><u>Planning Enforcement - Number of New Cases Opened and Cases Closed</u></p> <table border="1" style="margin: 0 auto; border-collapse: collapse;"> <caption>Planning Enforcement - Number of New Cases Opened and Cases Closed</caption> <thead> <tr> <th>Month</th> <th>New Cases Opened</th> <th>Cases Closed</th> </tr> </thead> <tbody> <tr><td>Apr-24</td><td>10</td><td>20</td></tr> <tr><td>May-24</td><td>10</td><td>13</td></tr> <tr><td>Jun-24</td><td>3</td><td>11</td></tr> <tr><td>Jul-24</td><td>7</td><td>8</td></tr> <tr><td>Aug-24</td><td>12</td><td>10</td></tr> <tr><td>Sep-24</td><td>17</td><td>12</td></tr> <tr><td>Oct-24</td><td>16</td><td>16</td></tr> <tr><td>Nov-24</td><td>8</td><td>13</td></tr> <tr><td>Dec-24</td><td>13</td><td>5</td></tr> </tbody> </table> </div> <div style="text-align: center;"> <p><u>Planning Enforcement Cases on Hand</u></p> <table border="1" style="margin: 0 auto; border-collapse: collapse;"> <caption>Planning Enforcement Cases on Hand</caption> <thead> <tr> <th>Month</th> <th>Cases on Hand</th> </tr> </thead> <tbody> <tr><td>Apr-24</td><td>303</td></tr> <tr><td>May-24</td><td>296</td></tr> <tr><td>Jun-24</td><td>288</td></tr> <tr><td>Jul-24</td><td>271</td></tr> <tr><td>Aug-24</td><td>282</td></tr> <tr><td>Sep-24</td><td>284</td></tr> <tr><td>Oct-24</td><td>281</td></tr> <tr><td>Nov-24</td><td>288</td></tr> <tr><td>Dec-24</td><td>283</td></tr> </tbody> </table> </div>	Month	New Cases Opened	Cases Closed	Apr-24	10	20	May-24	10	13	Jun-24	3	11	Jul-24	7	8	Aug-24	12	10	Sep-24	17	12	Oct-24	16	16	Nov-24	8	13	Dec-24	13	5	Month	Cases on Hand	Apr-24	303	May-24	296	Jun-24	288	Jul-24	271	Aug-24	282	Sep-24	284	Oct-24	281	Nov-24	288	Dec-24	283
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Dec-24	283																																																		
Measure:	% of green flags awarded																																																		
Performance:	Q3- 50%																																																		

BROMSGROVE DISTRICT COUNCIL

Cabinet

26th March 2025

Comment:	<p>There are 4 sites that are part of the schedule for the Green Flag Awards:</p> <ul style="list-style-type: none"> - Sanders Park- awarded green flag - Lickey End- awarded green flag - St. Chad's Park- due to be judged in 2025 - Recreation Ground- due to be judged in 2026
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2.5. General

Measure:	No. of crimes recorded (excl. ASB)																																																				
Performance:	<div style="text-align: center;"> <p>Total by Month: Last 12 Months v Prior Years</p> <p>Click a month to filter the table to the right. Click again to reset.</p> <p>● Month Total ● 1 Year Prior ● 2 Years Prior</p> <p>----- All Crime Types</p> <p>Avg. 418</p> <table border="1" style="margin: auto; border-collapse: collapse; text-align: center;"> <thead> <tr> <th>Month</th> <th>Month Total</th> <th>1 Year Prior</th> <th>2 Years Prior</th> </tr> </thead> <tbody> <tr><td>Jan-24</td><td>350</td><td>530</td><td>490</td></tr> <tr><td>Feb-24</td><td>418</td><td>510</td><td>510</td></tr> <tr><td>Mar-24</td><td>422</td><td>500</td><td>530</td></tr> <tr><td>Apr-24</td><td>407</td><td>500</td><td>530</td></tr> <tr><td>May-24</td><td>444</td><td>570</td><td>510</td></tr> <tr><td>Jun-24</td><td>466</td><td>500</td><td>530</td></tr> <tr><td>Jul-24</td><td>422</td><td>450</td><td>580</td></tr> <tr><td>Aug-24</td><td>477</td><td>500</td><td>530</td></tr> <tr><td>Sep-24</td><td>447</td><td>480</td><td>570</td></tr> <tr><td>Oct-24</td><td>483</td><td>470</td><td>550</td></tr> <tr><td>Nov-24</td><td>440</td><td>440</td><td>500</td></tr> <tr><td>Dec-24</td><td>406</td><td>380</td><td>500</td></tr> </tbody> </table> </div>	Month	Month Total	1 Year Prior	2 Years Prior	Jan-24	350	530	490	Feb-24	418	510	510	Mar-24	422	500	530	Apr-24	407	500	530	May-24	444	570	510	Jun-24	466	500	530	Jul-24	422	450	580	Aug-24	477	500	530	Sep-24	447	480	570	Oct-24	483	470	550	Nov-24	440	440	500	Dec-24	406	380	500
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Comment:	<p>Across North Worcestershire (NW) there has been a 5% (n=218) decrease in offences during Q3 2024/25 compared to the previous quarter. There was also a 9% decrease (n=440) compared to the same quarter in the previous year. The offence categories that showed an increase when compared to the same quarter of the previous year were Vehicle offences (16%, n=53), Theft from the person (18%, n=4), Robbery – business (200%, n=4).</p> <p>Locally, the largest volume of offences for Q3 2024/25 were in Sanders Park Ward however, this was a decrease of 13 offences when compared to the same quarter in the previous year. The highest volume offences in the Ward were Shoplifting (n=30), Violence without injury (n=22), and Violence with injury (n=14). The largest numerical decrease of offences was seen in Charford Ward (-26%, n=23).</p>																																																				

BROMSGROVE DISTRICT COUNCIL

Cabinet

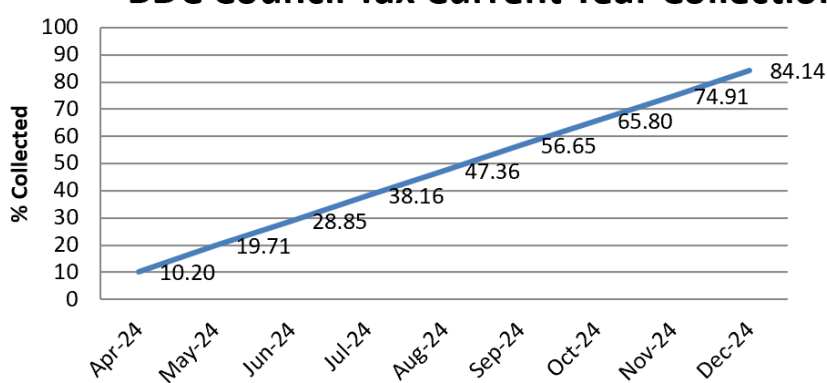
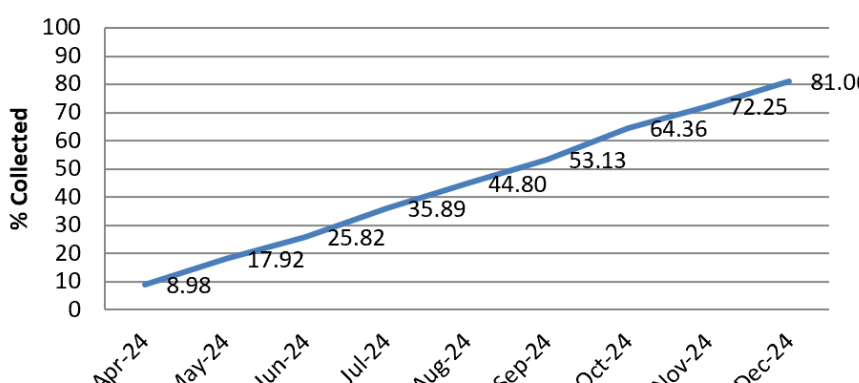
26th March 2025

Measure:	Participation- SLM Leisure																																		
Performance:	<table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr> <th style="width: 45%;">Category</th> <th style="width: 15%;">Quarter Total</th> <th style="width: 15%;">Same Quarter Previous Year</th> <th style="width: 25%;">Difference</th> </tr> </thead> <tbody> <tr> <td>Total no. of visits including EA cards and non-card holders</td> <td>101511</td> <td>112864</td> <td>-11,353</td> </tr> <tr> <td>EA Cards added in this period</td> <td>1970</td> <td>1969</td> <td>1</td> </tr> <tr> <td>Total EA Cards to date</td> <td>76661</td> <td>70410</td> <td>6,251</td> </tr> <tr> <td>No. of Gym members</td> <td>2723</td> <td>2993</td> <td>-270</td> </tr> <tr> <td>Swimming Lessons – children enrolled on scheme</td> <td>1270</td> <td>1497</td> <td>-227</td> </tr> <tr> <td>Swim Lesson Occupancy</td> <td>74%</td> <td>84%</td> <td>-10%</td> </tr> <tr> <td>RIDDOR Reportable Events</td> <td>0</td> <td>0</td> <td>0</td> </tr> </tbody> </table>			Category	Quarter Total	Same Quarter Previous Year	Difference	Total no. of visits including EA cards and non-card holders	101511	112864	-11,353	EA Cards added in this period	1970	1969	1	Total EA Cards to date	76661	70410	6,251	No. of Gym members	2723	2993	-270	Swimming Lessons – children enrolled on scheme	1270	1497	-227	Swim Lesson Occupancy	74%	84%	-10%	RIDDOR Reportable Events	0	0	0
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Comment:	<p>The second quarter of the financial year has proven to be a period of both challenges and significant achievements. We began this quarter with the installation of new boilers, a necessary upgrade aimed at improving our operational efficiency and service reliability. As the quarter progressed, we shifted our focus to a busy summer program, successfully delivering the Holiday Activities and Food (HAF) programme to over 115 children. This initiative provided engaging and enjoyable experiences, utilizing our climbing wall and pool facilities, and underscoring our commitment to fostering a supportive community for families. In addition, we hosted our Regional Gym Team meeting, welcoming fitness Managers from various locations to experience our exceptional facilities firsthand. This event was</p>																																		

BROMSGROVE DISTRICT COUNCIL

Cabinet

26th March 2025

	<p>a valuable opportunity for networking and sharing best practices. We also participated in the Business Fitness Launch in Dunstable, where we gained insights into the future of community wellness, further aligning our strategic objectives with emerging trends in health and fitness. We are proud to share that we received a 'Very Good' accreditation from our Quest Plus assessment. This recognition reflects our dedication to excellence in service delivery and our ongoing commitment to enhancing the experiences of all our users.</p>																				
Measure:	% of Council Tax collection rates																				
Performance:	<div style="text-align: center;"> <h3>BDC Council Tax Current Year Collection</h3>  <table border="1" style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th>Month</th> <th>% Collected</th> </tr> </thead> <tbody> <tr><td>Apr-24</td><td>10.20</td></tr> <tr><td>May-24</td><td>19.71</td></tr> <tr><td>Jun-24</td><td>28.85</td></tr> <tr><td>Jul-24</td><td>38.16</td></tr> <tr><td>Aug-24</td><td>47.36</td></tr> <tr><td>Sep-24</td><td>56.65</td></tr> <tr><td>Oct-24</td><td>65.80</td></tr> <tr><td>Nov-24</td><td>74.91</td></tr> <tr><td>Dec-24</td><td>84.14</td></tr> </tbody> </table> </div>	Month	% Collected	Apr-24	10.20	May-24	19.71	Jun-24	28.85	Jul-24	38.16	Aug-24	47.36	Sep-24	56.65	Oct-24	65.80	Nov-24	74.91	Dec-24	84.14
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BROMSGROVE DISTRICT COUNCIL

Cabinet

26th March 2025

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

BROMSGROVE DISTRICT COUNCIL

Cabinet

26th March 2025

Measure:	Housing Benefit local authority error rate																																																																																																																																																																																																			
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BROMSGROVE DISTRICT COUNCIL

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Comment:	The LA error levels are projected up to the end of the year, the levels for 24/25 are expected to be the lowest they have been over recent years. This is due to two main factors, increased quality checking on Housing Benefit claims, thus ensuring the correct benefit gets to the resident the first time. And the continuation of the DWP Housing Benefit Accuracy Award scheme (HBAA) where LA's are required to review percentages of their caseload each year, therefore cleansing the data and the caseload.
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2.6. Organisational Priorities

Measure:	% of media enquiries responded to within agreed timescales
Performance:	100% (new measure)
Comment:	The team has a media mailbox feature on Outlook which means that all enquiries from the media come to all officers. The query is then allocated by the manager if not picked up by member of the team who would alert colleagues in the Teams chat that it is in hand. Once completed, if necessary, the comment is shared with the team, again in the Teams chat in case a similar query is made. This ensures all media queries are dealt with. We further bolster with by regularly reminding media contacts to use the media mailbox address, so queries are not sent to individuals increasing the potential to be missed due to leave, meetings or a busy work schedule.

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Cabinet

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Measure:	% complaints answered within agreed timescales																																																																																																																											
Performance:	<div style="border: 1px solid #ccc; padding: 10px; margin-bottom: 10px;"> <p>% Responses in 10 Wrkg. Days by Date Received to 28/02/2025 All Services</p> <p>● % Response in 10 w/d ● 1 Yr Prior ● 2 Yrs Prior</p> <table border="1" style="font-size: small; margin-top: 10px;"> <caption>Chart Data: % Responses in 10 Wrkg. Days</caption> <thead> <tr> <th>Date</th> <th>% Response in 10 w/d</th> <th>1 Yr Prior</th> <th>2 Yrs Prior</th> </tr> </thead> <tbody> <tr><td>Jul-23</td><td>63.6%</td><td></td><td></td></tr> <tr><td>Aug-23</td><td>36.4%</td><td></td><td></td></tr> <tr><td>Sep-23</td><td>33.3%</td><td></td><td></td></tr> <tr><td>Oct-23</td><td>75.0%</td><td></td><td></td></tr> <tr><td>Nov-23</td><td>71.4%</td><td></td><td></td></tr> <tr><td>Dec-23</td><td>50.0%</td><td></td><td></td></tr> <tr><td>Jan-24</td><td>66.7%</td><td></td><td></td></tr> <tr><td>Feb-24</td><td>83.3%</td><td></td><td></td></tr> <tr><td>Mar-24</td><td>75.0%</td><td></td><td></td></tr> <tr><td>Apr-24</td><td>71.4%</td><td></td><td></td></tr> <tr><td>May-24</td><td>75.0%</td><td></td><td></td></tr> <tr><td>Jun-24</td><td>80.0%</td><td></td><td></td></tr> <tr><td>Jul-24</td><td>66.7%</td><td></td><td></td></tr> <tr><td>Aug-24</td><td>100.0%</td><td></td><td></td></tr> <tr><td>Sep-24</td><td>100.0%</td><td></td><td></td></tr> <tr><td>Oct-24</td><td>50.0%</td><td></td><td></td></tr> <tr><td>Nov-24</td><td>50.0%</td><td></td><td></td></tr> <tr><td>Dec-24</td><td>100.0%</td><td></td><td></td></tr> </tbody> </table> </div>	Date	% Response in 10 w/d	1 Yr Prior	2 Yrs Prior	Jul-23	63.6%			Aug-23	36.4%			Sep-23	33.3%			Oct-23	75.0%			Nov-23	71.4%			Dec-23	50.0%			Jan-24	66.7%			Feb-24	83.3%			Mar-24	75.0%			Apr-24	71.4%			May-24	75.0%			Jun-24	80.0%			Jul-24	66.7%			Aug-24	100.0%			Sep-24	100.0%			Oct-24	50.0%			Nov-24	50.0%			Dec-24	100.0%																																																	
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BROMSGROVE DISTRICT COUNCIL

Cabinet

26th March 2025

Measure:	% staff turnover																																																
Performance:	<div style="border: 1px solid black; padding: 10px;"> <p>% Staff Turnover: Year to Month End v Prior Years Latest month is provisional. Records may be updated after month end.</p> <p>● Year to Month End ● 1 Year Prior ● 2 Years Prior (i)</p> <p>All Services</p> <table border="1" style="margin-top: 10px; width: 100%; border-collapse: collapse; font-size: small;"> <thead> <tr> <th>Month</th> <th>Year to Month End (%)</th> <th>1 Year Prior (%)</th> <th>2 Years Prior (%)</th> </tr> </thead> <tbody> <tr><td>Feb-24</td><td>9.2%</td><td>15.5%</td><td>15.5%</td></tr> <tr><td>Mar-24</td><td>8.6%</td><td>14.5%</td><td>16.5%</td></tr> <tr><td>Apr-24</td><td>8.7%</td><td>13.5%</td><td>15.5%</td></tr> <tr><td>May-24</td><td>9.1%</td><td>13.0%</td><td>15.5%</td></tr> <tr><td>Jun-24</td><td>8.9%</td><td>11.5%</td><td>16.0%</td></tr> <tr><td>Jul-24</td><td>9.4%</td><td>10.5%</td><td>17.0%</td></tr> <tr><td>Aug-24</td><td>10.1%</td><td>10.0%</td><td>16.5%</td></tr> <tr><td>Sep-24</td><td>9.4%</td><td>10.5%</td><td>17.5%</td></tr> <tr><td>Oct-24</td><td>8.8%</td><td>10.5%</td><td>16.5%</td></tr> <tr><td>Nov-24</td><td>8.2%</td><td>9.5%</td><td>17.0%</td></tr> <tr><td>Dec-24</td><td>8.5%</td><td>9.0%</td><td>18.0%</td></tr> </tbody> </table> </div>	Month	Year to Month End (%)	1 Year Prior (%)	2 Years Prior (%)	Feb-24	9.2%	15.5%	15.5%	Mar-24	8.6%	14.5%	16.5%	Apr-24	8.7%	13.5%	15.5%	May-24	9.1%	13.0%	15.5%	Jun-24	8.9%	11.5%	16.0%	Jul-24	9.4%	10.5%	17.0%	Aug-24	10.1%	10.0%	16.5%	Sep-24	9.4%	10.5%	17.5%	Oct-24	8.8%	10.5%	16.5%	Nov-24	8.2%	9.5%	17.0%	Dec-24	8.5%	9.0%	18.0%
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Comment:	<p>Over the last quarter staff turnover has dropped slightly from 8.8% to 8.3% which is substantially below the National rate which currently stands at 15%. The Service areas with the highest levels of staff turnover over the year to the end of December 2024 are Planning and Regeneration (14.5%) and Community and Housing Services (13.6%). The Service area with the lowest level of staff turnover is Legal, Democratic and Property Services with 3.1%.</p>																																																
Measure:	No. of sickness days lost per FTE																																																

BROMSGROVE DISTRICT COUNCIL

Cabinet

26th March 2025

Performance:	<p style="text-align: center;">Short term / long term sickness</p> <table border="1"> <caption>Approximate data from 'Short term / long term sickness' chart</caption> <thead> <tr> <th>Month</th> <th>Short Term</th> <th>Long Term</th> </tr> </thead> <tbody> <tr><td>Jan-23</td><td>250</td><td>170</td></tr> <tr><td>Mar-23</td><td>210</td><td>130</td></tr> <tr><td>May-23</td><td>270</td><td>140</td></tr> <tr><td>Jul-23</td><td>170</td><td>310</td></tr> <tr><td>Sep-23</td><td>170</td><td>310</td></tr> <tr><td>Nov-23</td><td>200</td><td>130</td></tr> <tr><td>Jan-24</td><td>270</td><td>180</td></tr> <tr><td>Mar-24</td><td>210</td><td>310</td></tr> <tr><td>May-24</td><td>230</td><td>170</td></tr> <tr><td>Jul-24</td><td>250</td><td>240</td></tr> <tr><td>Sep-24</td><td>140</td><td>240</td></tr> <tr><td>Nov-24</td><td>250</td><td>180</td></tr> </tbody> </table>	Month	Short Term	Long Term	Jan-23	250	170	Mar-23	210	130	May-23	270	140	Jul-23	170	310	Sep-23	170	310	Nov-23	200	130	Jan-24	270	180	Mar-24	210	310	May-24	230	170	Jul-24	250	240	Sep-24	140	240	Nov-24	250	180
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Comment:	<p>There was a slight increase in absences due to sickness for the first part of Q3, followed by a decline for the final part of the Q3; the authority is currently in line with public sector absence days lost per FTE (10.07 days per FTE as at end December 2024). The Wellbeing event held in November 2024, was led from data showing that stress/depression/anxiety continues to be in the top 5% of absence reasons. Work is being undertaken to review absence reasons and data.</p>																																							
Measure:	% of FOIs responded to within timescale																																							
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Measure:	% of property portfolio which is compliant																																							
Performance:	This is a new measure for the quarterly report and is being developed for reporting in the Q4 report.																																							

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BROMSGROVE DISTRICT COUNCIL

MEETING OF THE OVERVIEW AND SCRUTINY BOARD

11TH FEBRUARY 2025, AT 6.00 P.M.

PRESENT: Councillors P. M. McDonald (Chairman), S. T. Nock (Vice-Chairman), A. Bailes, R. Bailes, A. M. Dale, E. M. S. Gray, R. J. Hunter, B. Kumar, D. J. Nicholl, J. Robinson (Substitute), J. D. Stanley and S. J. Baxter

Observers: Councillor S.J. Baxter – Cabinet Member for Economic Development and Regeneration

Officers: Mr. G. Revans, Mr S. Parry, R Egan, McElliott, Ms J. Willis and Mrs S. Woodfield

86/24

APOLOGIES FOR ABSENCE AND NAMED SUBSTITUTES

Apologies for absence were submitted on behalf of Councillor S.A. Robinson with Councillor J.W. Robinson in attendance as named substitute.

87/24

DECLARATIONS OF INTEREST AND WHIPPING ARRANGEMENTS

No declarations of interest were received nor of any whipping arrangements.

88/24

TO CONFIRM THE ACCURACY OF THE MINUTES OF THE MEETING OF THE OVERVIEW AND SCRUTINY BOARD HELD ON 6TH JANUARY 2025

The minutes of the Overview and Scrutiny Board meeting held on 6th January 2025 were considered.

RESOLVED that the minutes of the Overview and Scrutiny Board meeting held on 6th January 2025 be agreed as a true and correct record.

89/24

STRATEGIC PARKING REVIEW - PRE-SCRUTINY

The Assistant Director of Environmental and Housing Property Services presented the Strategic Parking Review and firstly apologised for the delay in the report for Member's consideration.

Waterman Infrastructure and Environment were commissioned by Bromsgrove District Council to undertake the Strategic Review. The proposal was based on a brief that was discussed in consultation with the Cabinet Advisory Group (CAG) on 8th May 2024 and included three key deliverables:

Agenda Item 10

Overview and Scrutiny Board
11th February 2025

- A review of existing and future parking requirements, including supply and demand carried out on a site-by-site basis with options to address existing parking issues. The review was also required to be linked to the wider Worcestershire Transport Strategy due to regeneration objectives to increase town centre living and footfall to support retention of the existing traders. The review was also to include Leisure Centre users and the Shopmobility service.
- A review of car park management arrangements with solutions identified to reduce the need for off-street parking enforcement including an outline of costs, together with operational and enforcement issues. Also to be included were recommendations for time and day of restrictions to address existing parking issues and assess enforcement requirements for identified parking management design options.
- Review of on-street enforcement to be carried out to address member and resident concerns around coverage of activities. A review to concentrate on enforcement and hotspots for law breaking and nuisance was to be undertaken, focusing on repeat offences.

As part of the strategic parking review, car parks were assessed across several factors including capacity, condition, usage, proportions of blue badge parking and Electric Vehicle (EV) charging bays, safety and security, accessibility, convenience and usability.

As part of the discussions through CAG on 8th May 2024 and at the Overview and Scrutiny Board meeting held on 12th February 2024, there was a clear desire expressed by Members to ensure a more equitable balance in patrols across the whole District. The Service Level Agreement (SLA) with Wychavon District Council (WDC) included a 10% provision for out-of-town centre patrol time. To assist with on-street enforcement, the review of off-street enforcement was included.

On-street parking enforcement, together with off-street enforcement was contracted to WDC to administer the service with 5.5 Civil Enforcement Officers (CEOs) spread across the mainly rural District, which in turn, lead to coverage issues based on the geographical nature of the District. Through the course of the review, Bromsgrove District Council (BDC) Officers had been working closely with WDC Officers to review patrols based on the feedback given by Members, regarding the volume of time spent within the parishes versus the town centre. In the initial version of the SLA, there was an indication that 10% of patrol time should be spent outside of the town centre. As a consequence of the reviews of patrols, the proportion of time spent outside Bromsgrove town centre had increased.

Across most of the ward-based engagement with Members, issues around parking outside schools at peak times was frequently raised. There was no uniform approach to addressing these concerns based on the different stakeholders that had a role to play in achieving more considerate and compliant parking.

Examples of both 'softer' and 'harder' measures were highlighted in the report such as a social media and community engagement campaign targeted at drivers to encourage considerate parking outside of shops and schools, as a "softer measure" behavioural change campaign. Further investigation and action were required to review and amend "harder measure" parking

restrictions and increase coverage of signing and lining options (i.e. double yellow lines and designated parking areas). A key element of delivery was to ensure a clear partnership working amongst the various stakeholders. It was therefore recommended that a Parking Task Group be established including representatives from BDC, WDC and Warwickshire County Council (WCC) to work through the various options pertinent to each organisation.

To assess how car parking enforcement may be delivered in the medium and long term, an options appraisal identifying the positives and negatives of the three key options had been undertaken which included maintaining the SLA with WDC, tender out to external contractors and delivery with internal resources.

The publication of the English Devolution White Paper on 16th December 2024 had provided uncertainty on the impact that this would have on BDC over the forthcoming two to four years. As such, continuity of service for parking enforcement was recommended by an extension to the period of the services delivered by WDC. This continuity would ensure compliance of service delivery during the period of the extended SLA and would also allow officers the time and capacity to deliver the Automatic Number Plate Recognition (ANPR) solutions for the three car parks identified.

Whilst the review of patrols was ongoing, as part of the review and working with the Parish Councils, an investigation into whether it would be viable to purchase additional time for patrols within their locations could be undertaken.

The Shopmobility Service had five customers with one customer being a regular user (once a week). The other customers used the service on an ad-hoc basis, typically once every few months and others who may have considered using the service a few times per year. Pre COVID, there were more customers using the service; approximately 12-15 customers per week, however, since COVID the demand had been low, which was possibly due to several factors, including the closure of the multi-storey car park and more people owning their own mobility equipment.

During consideration of the item, Members raised the following discussions:

- Enforcement Officers should be more prevalent in the outer areas of the District.
- Why the Council were suggesting an extension to the Service Level Agreement (SLA) when considering the English Devolution White Paper. In-house would be a preferred option for the Council to gain better control and to leave a legacy.
- The proposal to amend the SLA for parking enforcement to include a minimum of 25% of patrol time to be undertaken outside the town centre was discussed by Members as follows:
 - The proposal was not considered to be adequate. Members requested an explanation of how the calculations had been measured and what the evidence had been based on. Members also expressed the view that the review had been more of a broader consideration and not an in-depth evaluation. – In response it was explained that the proposal was to ensure further coverage of the District, including the recommendation that ANPR could free up time for additional CEOs. Analysis was required to understand where and how the Council could redesign the patrols in ward areas where there were major

concerns. Members were also advised to note that the minimum of 25% was based on the 5.5 post efficiency rating in relation to the introduction of ANPR. It was also explained that if the Board's proposed recommendation was to increase the number of CEOs as opposed to the introduction of ANPR, there would be risk that additional funding would be required due to the loss of revenue from the PCNs to fund the posts required. Members also noted that WCC had advised that with the recommended introduction of ANPR, income was considered adequate and therefore WCC would not be contributing further funds.

- Parking around school areas was also discussed and Members requested an explanation regarding the lack of coverage of Traffic Regulation Orders (TROs) outside some schools should be addressed.
 - In response it was explained that TROs around certain problem hotspot areas was a considered approach as BDC did not receive the revenue for carrying out enforcement (which was carried out on behalf of WCC). It was also explained that areas around schools were difficult to enforce due to waiting times which required observation, prior to issuing tickets.
- Members raised a concern regarding BDC social media and community engagement campaign, targeted at drivers, to encourage considerate parking outside of shops and schools, as a “softer measure” behavioural change campaign. It was considered that this approach was inadequate, and a harder approach was required as some areas within the District was becoming an increasing concern.
- Clarification was requested regarding the full administration service including general enquiries, challenges, appeals and adjudication for 2.5 posts. – Members were advised that this was in relation to back-office administration duties carried out on behalf of the Council.
- Members suggested that the Council should retain cash payment options for car parks within the District, which was only considered as a general recommendation within the report. Members also queried if there were any specific security issues regarding the cash machines within the District. – In response it was agreed that this would be carried out as an action and would be reported back accordingly.
- Members suggested the need to expand the provision of CEOs should be funded to operate in the District as opposed to introducing an Automatic Number Plate Recognition (ANPR) service. – In response the Board were advised to consider that the introduction of ANPR was a significant income stream, along with the added value of ensuring legal parking requirements across the District.
- Due consideration was requested for the provision of the Shopmobility Service to ensure individuals could live independently, specifically for those who relied regularly on the service.
- The Business Case and Service Review for the strategic parking review be deferred for 6 months until the issues had been addressed by Members as it was not fit for purpose and did not cover bringing the service in house.
- Discussions regarding the implementation of ANPR were discussed by Members as follows:
 - Clarification of what was defined as the Town Centre for the introduction of ANPR. – In response Members were informed that ANPR was a more up to date solution, with a point of entry. There was also a traffic management system included when a

- vehicle enters the car park which would assist with long queues, avoiding less accidents. Town Centre car parks were where the implementation of ANPR was most concentrated.
- Discussions continued and Members expressed concerns that the introduction of ANPR implemented within other areas had caused frustration for some residents, in particular, when receiving Parking Charge Notices (PCN). Members also felt that complaints were not always being actioned which caused further frustration for residents.
 - Members felt that the use of ANPR outside school areas was not a viable option.
 - Some Members did view the option that ANPR could be considered a solution to free up CEO resources, but that further information would need to be provided before this would be a consideration.
 - If ANPR could be considered to pay on exist to encourage residents to stay in local areas for a longer period as opposed to the inconvenience of paying on entry. -In response the Executive Director advised Members that enforcement of ANPR would be carried out by the Council and not by a private company. The Council were unable to issue PCNs via the post and would be issued on a car which is why barriers were required on Council car parks rather than just cameras on the way out.
 - Members expressed their gratitude that the technical and legal issues had been reported well within the report, however, were disappointed that it had taken so long for fruition, with only five working days available to scrutinise and evaluate such a complex report.
 - Alvechurch parking requirements within the report were considered in detail as follows:
 - That after providing parking strategy proposals in December 2023 to address the issues faced in the Village, Members were advised that Alvechurch would form part of the review and would not be considered separately, however not all the issues reported had been considered within the report.
 - The Average Length of Stay per Car Park detailed within the report was incorrect and misleading as the village car park was considered to be free for up to 30 minutes.
 - Alvechurch Car Park, which scored poorly, was discussed with Members, expressing the view that “Bicycle Parking” was already available within the village and “General Maintenance” was not a requirement as car parks within the village had been resurfaced.
 - The report suggesting Alvechurch and Catshill being worded as towns was incorrect.
 - In conclusion, it was felt that the parking issues within Alvechurch had not been addressed within the report and that urgent action was required with concerns of the decreased vitality and economic viability for the village.
 - The upcoming changes to the Local Plan should be considered, with the inclusion of extra houses being built, requiring further car parking requirements.
 - The Market Hall, which was due to open in 2026, would have a considerable impact on parking requirements and should be considered.

Agenda Item 10

Overview and Scrutiny Board
11th February 2025

- Car parking usage was discussed by Members who were of the view that using ticket machine data was not the most reliable method to be used as these findings were based on fixed times. Members suggested that to establish demand the most efficient method was to use beat surveys which studied the duration and occupancy every half an hour. A visitor survey was also a suggested option which would reveal parking stay preferences.
- The use of the TEMPRO tool was considered an inappropriate method to depict parking demand. Population and Gross Domestic Product (GDP) growth was a more effective solution.
- Conclusion and Recommendations within the report was discussed by Members as follows:
 - Improve car park directional signage to town centre car parks and associated wayfinding signage to direct visitors to nearby facilities in the town centre would need to be considered as an additional cost to the Council.
 - Investigate a nighttime car parking tariff that can be used as a basis to advertise the nighttime offer in Bromsgrove and encourage the evening economy required further evidence.
 - A business case would be required when considering improvements to town centre car parks, generated by increasing parking tariffs.
 - Investment in redeveloping the School Drive Car Park to make it more attractive to people wishing to use the car park required further explanation.
 - Costs implications would need to be considered to place yellow lines on the on-street parking outside of the leisure centre to encourage people to use the paid parking instead of parking for free.
 - Additional cost considerations would be required regarding the aim to get more people to pay for parking charges by using card payments or by the app, with the long-term aim to go cashless.
 - The consideration of bringing in a small charging regime for the village car park, due to its respective locations. Members felt this would have the adverse effect and possibly deter people from parking in these areas.
- The Executive Summary was discussed by Members which was included within the report and that BDC involve their legal advisers. Members expressed the view that costs would need to be considered.
- Software and back office for the roll out of ANPR and PCNs needed to be reviewed in more detail.
- A detailed explanation should be included in the report of who would fund and implement the Traffic Regulation Order (TRO),
- If the consultants Waterman had engaged with Warwickshire County Council (WCC), as this was critical? – In response it was agreed that this would be reviewed as an action and would be reported back to Members accordingly.
- The section on Background within the report was discussed regarding the inclusion of on-street parking enforcement in Churchfields Car Parks. However, Members were under the assumption that this car park was closed.
- Members expressed the view that double yellow line considerations in Beoley was not a requirement as these were already present, however, increasing the frequency of CEOs was a necessity.
- Further clarification was required regarding Option Assessments with the preferred Option 2 – SLA Enhancements in that the SLA should be

Agenda Item 10

Overview and Scrutiny Board
11th February 2025

renegotiated with Wychavon District Council (WDC) to enhance the Service Officer.

- Recommendations and Next Steps covered in the report were considered regarding increasing the number of CEOs to include a variety of places to patrol (including Belbroughton, Clent and Portway). Was this in addition to the 5.5 posts in place?
- Enforcement costs for the Lickey Hills area were considered by Members suggesting that the introduction of Birmingham City Council parking charges could have a considerable impact when considering on-street parking around the area.
- Would extra costs be incurred for Recommendation 2?
- The legal costs of £100k for Recommendation 8 was considered too low, in order to take account of legal and back-office administration costs.
- The revenue budget cost and date suggested in Recommendation 10 required further consideration.
- The following wording included in the report was discussed by the Board, *“It was suggested that Waterman Infrastructure and Environment were commissioned by Bromsgrove District Council to undertake the Strategic Review. This proposal was based on a brief that was discussed and **agreed**, in consultation with, the Cabinet Advisory Group (CAG) on 8th May 2024 and included three key deliverables was discussed”*. Members expressed the view that the wording “agreed” was misleading as CAG was not a decision-making group.
- Members also expressed a view that putting the SLA out to tender to possibly reduce any further costs could be a consideration.
- The report page numbers were not sequential and printing the report in colour when reviewing diagrams would be more useful for Members.
- The proposals from the Board put forward to Cabinet on 14th February 2024 had not been addressed within the report.
- Members expressed the view that the consultancy fees should be discussed in more detail. Members expressed the view that the original brief had not been fully considered within the report and that further costs should not be incurred.

After consideration of the points raised by the Board the Portfolio Holder made the following comments as follows:

- If the Council, through Devolution, was a single unitary Council, delivery of the Civil Parking Enforcement Service (CPE) would be in-house, however, continuity should be a consideration in the interim period.
- The Shopmobility service was being reviewed in more detail to accommodate the regular user who required the service once a week.
- Members were asked to consider that inconsistencies of parking charges in the report were correct at the time of writing.
- It was difficult to establish what further studies could be carried out for Alvechurch as the land was outside of the Council’s control.
- It was noted that some proposals put forward to Cabinet had not been addressed and was not an in-depth business case for the back-office administration requirements.
- It was agreed that in-house delivery of the service had not been addressed in detail as requested by the Board.

The following verbatim minutes had been requested by Councillor R. Bailes:

Thank you for the apology and thank you for the response.

Agenda Item 10

Overview and Scrutiny Board
11th February 2025

I am despondent. Please forgive me for reading from my script – I feel too emotional to say my words from the heart today.

The Strategic Parking Review has failed to give any way forward with the complex and real issues in Alvechurch.

Please bear with me – I will explain:

My first week of becoming a Councillor, my fellow Councillor A. Bailes and I met Kevin Hiron and Lyndsey Berry in Alvechurch - the parking areas are in both our wards, as a result they totally understood the complexities of the situation. Repeatedly Alvechurch parking has been raised or rather attempted to be raised as an urgent issue. No one appeared to really understand our issues. Car parking was also raised in a drop in forum for Regeneration on 25th April 2023.

Fast forward to last year at Cabinet Advisory Group (CAG) in May - specifically Car Parking Strategic Review – I attended.

All Members present were asked to give an overview of issues in their wards. I attempted to do this – once again explaining the complex situation – however I was stopped in my very first sentence – literally being shouted down saying “It is a study for on road parking only.” I was not allowed to finish.

The brief of the Strategic Parking Review was decided – this was not stated. It has delivered what essentially the brief asked for – which is an inventory.

At every opportunity Councillor A. Bailes, myself, or sometimes both of us have raised the impending serious situation waiting to happen. The answer has always come back – wait until the study. This was due firstly to be September 2024 – it is now six months later and finally it has arrived.

I did meet with the consultant in Alvechurch. He greeted me with – you don't have any car parks that are Bromsgrove District Council (BDC) in Alvechurch. After a good discussion for my ward – I note that the points I explained are in the study – the points are the things I told the consultant

So, residents in the village and surrounding areas have been waiting.

Businesses in the village have been waiting...

Employees in the village have been waiting...

I have been waiting...

There is nothing in the Strategic Review that resolves the situation within Alvechurch – we are no further forward than when I became a Councillor nearly two years ago.

Thank you to Guy Revans and Simon Parry who now totally understand the whole picture – following a visit in October 2024, however there are no amendments, or an additional section included for Alvechurch.

To add to my sleepless nights that this has caused, the study suggests that a parking fee could be introduced for the initial time of parking. This is not a

recommendation, or a good solution and I would not support. This is insult to injury. I am beyond words...

The Chairman concluded discussions, and it was felt that the Business Case and Service Review should be deferred until Member's concerns and considerations had been addressed. Following Members discussions, the following were agreed as recommendations to Cabinet.

The Board **RECOMMENDED** to Cabinet that:

- 1) The Business Case and Service Review for the strategic parking review be deferred for 6 months until the issues have been addressed as not fit for purpose, in that it doesn't cover bringing the service in house.
- 2) There should be an increase in the proposed Civil Enforcement Officer (CEO) patrol time, greater than 25%, included in the Service Level Agreement (SLA), as the current proposal of 25% is not considered to be adequate.
- 3) More CEOs should be funded to operate in the District as opposed to introducing an Automatic Number Plate Recognition (ANPR) service.
- 4) The Council retain cash payment options for car parks in the District.
- 5) A study be launched reviewing parking in Alvechurch.

90/24

TASK GROUP UPDATES

This item was deferred to the next ordinary meeting which would take place on 25th March 2025.

91/24

WORCESTERSHIRE HEALTH OVERVIEW AND SCRUTINY COMMITTEE - UPDATE

This item was deferred to the next ordinary meeting which would take place on 25th March 2025.

92/24

FINANCE AND BUDGET WORKING GROUP - UPDATE

The Chairman of the Finance and Budget Working Group, Councillor P. McDonald updated the Board of the recent meeting which took place on 10th February 2025.

The group reviewed Tranche 2 of the Budget setting, and the following were discussed:

- The Council would be increasing the Council Tax by a further 1%.
- There was no increase in government funding and a balanced budget was to be taken from the general fund.
- After consideration of The Poverty Truth Commission presented during the meeting, Members requested further information to detail how the commission had helped individuals and to provide examples. An extraordinary Finance and Budget Working Group meeting would take place on 18th February 2025 for further consideration of this item.

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

93/24

CABINET WORK PROGRAMME

The Cabinet Work Programme was considered by the Board.

RESOLVED that the content of the Cabinet Work Programme be noted as per the preamble above.

94/24

OVERVIEW AND SCRUTINY BOARD WORK PROGRAMME

The Overview and Scrutiny Board Work Programme was considered by Members, and it was agreed that the following would be added as items to consider:

- Members suggested that the Board should review the implications of the decision that the Council no longer recycled waste on the Bromsgrove High Street.
- A Member advised the Board of a recent article provided by Martin Lewis, Money Savings Expert. The report suggested that residents consulted with their local constituents to enquire how compassionate and fair the Council were with the debt recovery process for Council Tax, if residents were in financial difficulties. Also, if bailiffs were a requirement, was the debtor charged further costs.

RESOLVED that the Overview and Scrutiny Work Programme be noted.

95/24

OVERVIEW AND SCRUTINY ACTION SHEET

The Overview and Scrutiny Action Sheet was considered by Members.

Discussions were considered with regards to the removal of the Artrix scrutiny item from the action sheet.

The Chairman expressed the view that the item was not appropriate to be held at the Committee for scrutiny and that discussions should be held with individual Members concerning the matter.

Other Members commented that the item was appropriate as a subject to be scrutinised by the Board to discuss the Trust's prospects and to consider if further funding would be required. It was felt that other outside charities, such as the Basement Project, had been of past consideration and scrutiny by the Board.

The Cabinet Member, Councillor S.J. Baxter advised Members to consider that funding for this matter was for maintenance purposes.

Following discussions and consideration of the item, the following recommendation was proposed by Councillor R. Hunter:

"That the Artrix item be reinstated onto the Overview and Scrutiny Work Programme for scrutiny and consideration by the Board".

The recommendation was proposed by Councillor R. Hunter and seconded by Councillor J. Robinson.

On being put to the vote the recommendation was lost.

RESOLVED that the Overview and Scrutiny Board Action sheet be noted.

96/24

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.

There was no urgent business for consideration.

97/24

TO CONSIDER, AND IF CONSIDERED APPROPRIATE, TO PASS THE FOLLOWING RESOLUTION TO EXCLUDE THE PUBLIC FROM THE MEETING DURING THE CONSIDERATION OF ITEM(S) OF BUSINESS CONTAINING EXEMPT INFORMATION:-

RESOLVED: that under Section 100 I of the Local Government Act 1972, as amended, the public be excluded from the meeting during the consideration of the following items of business on the grounds that they involve the likely disclosure of exempt information as defined in Part I of scheme 12A to the Act, as amended, the relevant paragraph of that part, in each case, being as set out below and that it is in the public interest to do so:-

<u>Item No</u>	<u>Paragraph</u>
12	3

98/24

LEVELLING-UP FUND PROGRAMME - QUARTERLY UPDATE

The Regeneration Project Delivery Manager presented the Levelling-Up Fund Programme – Quarterly Update to the Board as follows:

- The Windsor Street site was discussed and as of the 15th of January, all the buildings on the site had been demolished. The removal of the gas pipe in November had added a six-week delay to the project and incurred City Demolition's standing time costs which were agreed at circa £118k.
- Brownfield Solutions had reviewed the contaminated materials and installed monitoring wells as part of the remediation strategy. Ground water monitoring had commenced in February 2025 and would continue until mid-August 2025.
- Further to the testing of two zones for contaminated material detecting 14 exceedances, the programme would be extended due to the analysis turnaround time.

Agenda Item 10

Overview and Scrutiny Board
11th February 2025

- Thomas Lister had been appointed to support with the development appraisal that would inform the options paper. Officers had also engaged with Homes England to discuss potential funding streams, if the Council decided to develop the site. Homes England confirmed that they could only provide funding for affordable housing above the policy requirements.
- Whilst the gas pipe removal added a six-week delay to the demolition programme, the project was continuing to progress in line with timescales and remained to be on track to be delivered by January 2026.
- The key risks affecting the project were contaminated land with further investigations required during the works, working adjacent to occupied buildings and right of way (easement across site).
- The Public Realm Works site was discussed. Worcestershire County Council (WCC) were responsible for the design and delivery of the Public Realm element of the project, given their statutory responsibilities. Final prices were agreed and linked to a Memorandum of Understanding (MOU) that existed between Bromsgrove District and Worcestershire County Councils who were delivering the works.
- Both the works on the High Street and on Chapel Street had been completed with an updated Risk Register provided to Members.
- The Council had requested a lesson learned workshop to be held with WCC.
- The Former Market Hall Site was discussed. The main contract with Kier was signed on 29th October 2024. The main construction programme had commenced in November 2024. Piling was completed at the end of December 2024 and groundworks had commenced in January 2025.
- During the Pre-Construction Services Agreement (PCSA), significant quantities of ground obstructions were discovered, leading to delays in the formal commencement of the main contract.
- Minor delays of six weeks had been incurred due to ground obstructions and Kier had formally submitted a claim for ground obstructions, loss and expenses. The QS from Arcadis had reviewed the claim and considered it reasonable.
- Kier had provided the cash flow forecast. Whilst the programme had a revised end date of January 2026, the Levelling-UP Fund (LUF) monies would be spent by the September 2025 deadline. Officers had also received confirmation that BDC had an extension period until the end of March 2026 to spend the LUF money.
- In January, the LUF Board agreed to directly appoint Arcadis to provide employer agent and quantity surveyor (QS) services for RIBA stage 5.

Following a recommendation from the project manager, it was agreed that carrying out a procurement exercise would carry too much risk as another supplier may not provide a lower fee proposal. Due to the value of the contract, an urgent decision was taken.

- A Clerk of Works was appointed on behalf of the Council and would carry out site inspections twice a month for building works and for mechanical and engineering (M&E) works.
- The project team had held a design meeting to agree the layout of the commercial building. It was agreed that the first and second floor office space would be split into two units, following advice from local agents, GJS Dillon.
- Following a procurement exercise, GJS Dillon had been appointed as the agents for the commercial building who would be preparing a marketing strategy and advertise the space as well as handle lettings on behalf of the Council. This was agreed by LUF Board Members in December 2024.
- The project team were preparing an Expression of Interest (EOI) to Birmingham City Council for the Greater Birmingham and Solihull Local Enterprise Partnership (GBSLEP) monies totalling £2.45m. Following the EOI being accepted, the project manager would prepare the full business case for submission. However, BDC were informed that Birmingham City Council were unable to provide any Local Authority funding until 2026/2027 financial year, therefore, BDC may be required to utilise short-term borrowing to complete the FMH project until funding could be drawn down.

Following consideration of the item, the Board made the following comments:

- When would the right of access be reinstated on Windsor Street? – In response it was advised that City Demolition were preparing quotes for reinstatement.
- If statutory responsibilities between the Council and Worcestershire County Council could be formerly agreed and considered.
- What the additional costs for provisional sums and contingency included in the project budget were referring to? – The Board noted that this was in relation to predicted budget fees. A fees and tracker survey carried out in 2022 reviewed the professional fees incurred such as design, architecture and list surveys. The original budget for RIBA 5 and 6 services for Arcadis QS was set at £180k, however the revised fee was for approximately £220k. Officers were confident that there shouldn't be a necessity for any further surveys, however, contingencies were in place.
- Members expressed concerns that Birmingham City Council were unable to provide any Local Authority funding until 2026/2027 for the Greater Birmingham and Solihull Local Enterprise Partnership

Agenda Item 10

Overview and Scrutiny Board
11th February 2025

(GBSLEP) monies and that the Council may be required to consider utilising short-term borrowing to complete the FMH project until funding could be drawn down. Members had raised concerns during previous meetings but had been reassured that withdrawing the funds would not be an issue. – In response the Assistant Director of Regeneration and Property Services advised that the matter would be investigated further to review the legal framework and recent correspondence received from Birmingham City Council. Members would be updated on progress in this matter.

RESOLVED that the Levelling-Up Fund Programme – Quarterly Update be noted.

(During consideration of this item, Members discussed matters that necessitated the disclosure of exempt information. It was therefore agreed to move to exclude the press and public prior to any debate on the grounds that information would be revealed Information relating to the financial or business affairs of any particular person (including the authority holding that information)).

The meeting closed at 8.47 p.m.

Chairman

By virtue of paragraph(s) 3 of Part 1 of Schedule 12A
of the Local Government Act 1972.

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BROMSGROVE DISTRICT COUNCIL

MEETING OF THE OVERVIEW AND SCRUTINY BOARD

17TH FEBRUARY 2025, AT 6.00 P.M.

PRESENT: Councillors P. M. McDonald (Chairman), S. T. Nock (Vice-Chairman), A. Bailes, R. Bailes, A. M. Dale, S. M. Evans, E. M. S. Gray, B. Kumar, D. J. Nicholl and J. Robinson

Observers: Councillor K.J. May – Leader and Cabinet Member for Strategic Partnerships and Enabling

Officers: Mr. G. Revans, Mrs. R. Bamford, Mr. M. Dunphy and Mrs S. Woodfield

99/24

APOLOGIES FOR ABSENCE AND NAMED SUBSTITUTES

Apologies for absence were submitted on behalf of Councillor R.J. Hunter with Councillor S.M. Evans in attendance as named substitute and Councillor S.A. Robinson with Councillor J.W. Robinson in attendance as named substitute.

100/24

DECLARATIONS OF INTEREST AND WHIPPING ARRANGEMENTS

No declarations of interest were received nor of any whipping arrangements.

101/24

LOCAL DEVELOPMENT SCHEME (PRE-SCRUTINY)

The Strategic Planning and Conservation Manager presented the Local Development Scheme (LDS) to the Board.

Following Government consultation in the summer of 2024 on the 12th December 2024, a new version of the National Planning Policy Framework (NPPF) was published and to meet the requirement, a new LDS had been produced. The LDS was the timetable for the Planning Policies which the Council intended to produce and outlined the likely path the Bromsgrove District Local Plan would take to adoption.

The timetable was explained in detail which set out the following timeframes:

- **Draft Plan Consultation** – The Draft Plan Consultation was planned to begin in May or June 2025 and Members would be consulted on progress of this through the Strategic Planning Steering Group (SPSG), Cabinet and Council meetings.
- **Notice of start of plan making under reformed** – This was notification of the new local plan process.
- **Gateway 1 (Advisory)** – This date was set to meet with the Planning Inspectorate in February 2026.
- **Public Consultation (8 weeks)** was due between June/July 2026.

- **Gateway 2 (Advisory)** – The Council would be advised on progress and any likely issues going forwards in December 2026.
- **Public Consultation (6 weeks)** – This would be the final public consultation publication in April/May 2027.
- **Gateway 3 (Stop/Go)** – This would detail the likely prospects of the local plan in December 2027.
- **Examination** – The examination process would take 6 months between January – July 2028.
- **Finalisation and adoption** – The finalisation and adoption of the local plan was due in July 2028.

Until the final details of the new system were known, the stages of plan making identified for 2026 and beyond were considered by Officers to be the likely process, however, dates could differ. Members also noted that the Council would be judged based on its capabilities to deliver against the processes set by Government.

The significant element to note on the timetable was the publication of the draft plan for wide ranging public and stakeholder consultation in May/June 2025. The details of the draft plan and the approach to engagement and consultation would be covered and reported through SPSG, Cabinet and Council meetings.

Following the presentation, Members made the following comments and considerations as follows:

- Members queried why the timetable at the SPSG meetings had not been presented to the Board, which demonstrated the groups involvement. – In response it was explained that the timetable presented during SPSG was appropriate for that meeting, however, the table displayed within the report was more appropriate for publication in the public domain.
- If the 8-week consultation period set for June/July 2026 was “Regulation 18”, which was the start of the formal public consultation period. – Members noted that this terminology would not exist as part of the new regulations.
- Members queried who would be consulted on the Draft Plan set for May/June 2025. – Officers explained that although the exact details were to be worked up there would be a full public consultation.
- If the 8-week public consultation period set for June/July 2026 was a full consultation period for the public and stakeholders? – It was advised that all stakeholders would be consulted, including SPSG which would be set up for Members to attend.
- Members referred to the recommendation of delegated authority to approve updates on the LDS. Members expressed the view that the Board should be provided with regular updates along with the necessary delegated powers. It was agreed that Officers would be updating Members on the LDS through SPSG. It was also agreed that any updates to the LDS would be presented to the Board for scrutiny as requested by the Chairman.
- Members enquired how much weight would be put on Neighbourhood Plan for Parish Councils as it was important that Members could advise the Parish Councils on how the Neighbourhood Plan would be applied through the Local Plan. - In response it was explained that when the Local Plan was near to completion, there may be some conformity issues between the two plans, however, Officers didn't see anything

significant within the current Local Plan which had allocation or strategic policies. Proposals and policies in the Neighbourhood Plan would need to be reviewed as to what influence they had. If proposals were agreed, these would form part of the development plan and carried through the decision-making process, however, most Neighbourhood Plans mirrored what was within the Local Plan.

- The reference in the report that it was not considered that the LDS would have any climate change implications was discussed by the Board and Members expressed concerns that climate change should be addressed imminently as the LDS and Local Plan were linked. – In response Members were informed that this would be addressed through the Local Plan in May/June.
- If public consultations considered all comments made. – Members noted that all comments were welcomed and not restricted. Forms were available for completion, “drop in” sessions and online platforms were also available. Following consultations, comments received would be reviewed by Officers and fed back for Members’ consideration.
- If Parish Councils formed part of the consultation process? – The Board were informed that all stakeholder comments were welcomed. Formal engagement would also be set up for Parish Councils at Village Halls to hold talks with residents.
- Members expressed concerns that the Draft Plan consultation set for May/June was imminent and if there were adequate resources in place to achieve the timescale. Members also queried if the consultations were District wide. – In response Members were reassured that sufficient resources were in place and that consultations were District wide.
- Members also queried if due notice would be given to Members prior to the Draft Plan Consultation so that Members were prepared. – The Board were advised that if the report and recommendations had been approved by Cabinet and Council on 19th February 2025 then Members would be informed, with the forward plan ready for consultation in June.
- Members requested if the final report for the Draft Plan was complete. – In response the Board were advised this was not complete as Member engagement was required through the SPSG meetings.
- Members requested specific details which would be contained within the Draft Plan going out to consultation in May/June and reassurance that Members would be given ample opportunity to consider the relevant proposed details? – In response Members were advised that the content of the report would be discussed during the SPSG meetings for Members’ consideration and input and were reassured that there would be adequate time to consider the relevant details.
- The Leader of the Council informed Members that the LDS was a requirement set by Government with strict timeframes in place. Members were urged to respond to consultations in a timely manner.
- If the Draft Plan consultation in May/June would include the additional sites for the various wards to ensure the Council would meet the required housing number target. – The Board were advised that this would form part of the proposals considered.
- Following a request and for ease of reference, the different terminologies of documentations within the report were explained to Members.
- Members queried that if their Parish did not have a proposed development, would they still be consulted in advance? – In response Members were advised that all Members would be consulted.

RECOMMENDED that:

The Cabinet RECOMMEND that:

- 1) Appendix A: Bromsgrove District Council Local Development Scheme 2025 is approved as the Council's programme for plan-making, effective as of 19th February 2025.

Delegated authority is granted to the Assistant Director for Planning and Leisure Services, following consultation with the Cabinet Member for Planning, Licensing and WRS, to approve updates to the Local Development Scheme as required.

102/24

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.

There was no urgent business for consideration.

The meeting closed at 6.36 p.m.

Chairman