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BROMSGROVE DISTRICT COUNCIL

MEETING OF THE CABINET

WEDNESDAY 19TH NOVEMBER 2025

AT 12.00 P.M.

PARKSIDE SUITE - PARKSIDE

MEMBERS: Councillors K.J. May (Leader), S. J. Baxter (Deputy Leader), 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 10th September 2025 (Pages 7 - 22)**

4. **Minutes of the meeting of the Overview and Scrutiny Board held on 9th September, 2nd October and 28th October 2025 (Pages 23 - 54)**

(a) To receive and note the minutes

(b) To consider any recommendations contained within the minutes

There was one recommendation made by the Overview and Scrutiny Board at the meeting held on 9th September 2025 in respect of Planning Enforcement.

There were no other recommendations arising from the Overview and Scrutiny Board meetings on 2nd October and 28th October 2025.

5. **Bereavement Services - Burial Strategy (Pages 55 - 76)**
6. **Homelessness Prevention Grant and Domestic Abuse Grant (Pages 77 - 88)**
7. **Housing Allocations Policy Consultation and System Update (Pages 89 - 160)**
8. **Business Rates Retention (BRR) Pool 2026-2027 (Pages 161 - 164)**
9. **Medium Term Financial Plan Budget Update and Consultation Report 2026/2027 to 2028/29 (Pages 165 - 194)**
10. **Quarter 2 2025/26 Finance and Performance Monitoring Report (including Financial Savings and Half Yearly Treasury Management Report) (Pages 195 - 234)**
11. **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**
12. **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>
13	3

13. **Windsor Street Site** (Pages 235 - 296)

J. Leach
Chief Executive

Parkside
Market Street
BROMSGROVE
Worcestershire
B61 8DA

11th November 2025

If you have any queries on this Agenda please contact
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GUIDANCE ON FACE-TO-FACE MEETINGS

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

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
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BROMSGROVE DISTRICT COUNCIL

MEETING OF THE CABINET

WEDNESDAY 10TH SEPTEMBER 2025, AT 6.06 P.M.

PRESENT: Councillors K.J. May (Leader), S. J. Baxter (Deputy Leader), B. McEldowney, K. Taylor (during Minute No's 33/25 to 39/25 and 41/25 to 43/25), S. A. Webb and P. J. Whittaker

Observers: Councillor S. T. Nock, Vice-Chairman of the Overview and Scrutiny Board, Councillor S. R. Colella, Councillor C. A. Hotham and Councillor J. W. Robinson

Officers: Mr. J. Leach, Mr. B. Watson, Mrs. C. Felton, Mrs. R. Bamford, Mr. S. Parry, Mrs. R. Green, Ms. T. Ainscough, Mr. M. Cox and Mrs. P. Ross

It was noted that at the discretion of the Leader, that the running order of the agenda was altered. Minute number 37/25 – Urgent Business to be considered after Minute number 36/24 - Minutes of the Overview and Scrutiny Board meeting held on 22nd July 2025.

33/25

TO RECEIVE APOLOGIES FOR ABSENCE

There were no apologies for absence.

However, it was noted that Councillor P. J. Whittaker had been delayed due to the traffic.

34/25

DECLARATIONS OF INTEREST

There were no Declarations of Interest.

35/25

MINUTES OF THE MEETING OF THE CABINET HELD ON 23RD JULY 2025

The minutes of the Cabinet meeting held on 23rd July were submitted for Members' consideration.

RESOLVED that the minutes of the Cabinet meeting held on 23rd July 2025 be approved and signed as a true and accurate record.

36/25

MINUTES OF THE MEETING OF THE OVERVIEW AND SCRUTINY BOARD HELD ON 22ND JULY 2025

The Leader invited Councillor S. T. Nock in his capacity as Vice-Chairman of the Overview and Scrutiny Board to address Members on the recommendation within the minutes.

Councillor S. T. Nock further drew Members' attention to the recommendation in respect of the Bromsgrove Town Centre Recycling Bins.

It was agreed by the Cabinet that Officers would proceed with preparing a budget bid to Cabinet to invest in new (recycling) bins for installation in Bromsgrove Town Centre.

Cabinet were in agreement with this recommendation.

RESOLVED that

- 1) Officers proceed with preparing a budget bid to Cabinet to invest in new (recycling) bins for installation in Bromsgrove Town Centre; and
- 2) the minutes of the Overview and Scrutiny Board meeting held on 22nd July 2025 be noted.

37/25

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

With regards to the consideration of urgent business it was recorded that at the meeting of the Overview and Scrutiny Board held on 9th September 2025, the Board had voted to agree that the Chairman of the Board should submit a request on behalf of the Board that Cabinet consider, as an item of urgent business, whether to extend the current public consultation period for the Local Plan. This item had been considered necessary to raise as urgent business because the consultation period was due to end on 22nd September 2025 and there were not due to be any further meetings of either the Cabinet or Council prior to the end of the consultation period nor was there sufficient time to schedule any further meetings prior to the end of this consultation period.

The Leader stated, that as detailed in the Supplementary Documentation 2 - "Consideration of whether to make a recommendation that Council extend the period of consultation for the Local Plan. The Assistant Director of Legal, Democratic and Procurement Services had agreed that this could be added as an urgent item of business for consideration at the meeting, following receipt of a form from the Chairman of the Overview and Scrutiny Board on behalf of the Board requesting that Cabinet discuss this matter as an item of urgent business. This request had been approved by the Leader, as Chairman of the Cabinet.

The item has been added in accordance with requirements set out in paragraph 5.2 of the Access to Information Rules, at Part 9 of the Council's constitution".

It had not been possible to include this item in the Cabinet agenda when that was published because the request had only been received from the Overview and Scrutiny Board after the agenda for the Cabinet meeting had been published.

38/25

CONSIDERATION OF WHETHER TO MAKE A RECOMMENDATION THAT COUNCIL EXTEND THE PERIOD OF CONSULTATION FOR THE LOCAL PLAN

The Leader made the following announcement –

"As Members will be aware the consultation process provides several ways for our residents to engage with the local planning consultation process.

Members of the public can;

- Write in
- Email in
- Use the commonplace platform
- There is a phone number manned between 10 and 4 Monday to Friday to support any local planning queries.

Members will appreciate that some councils indeed our council did not historically use a platform. This is an additional step that we have introduced to promote greater accessibility and engagement and is proving to be our residents preferred form of engagement.

Recognising that this is a hugely important topic and the tremendous response that we have received to date. I think we should respond to our

residents requests to extend the time by 4 weeks to maximise public engagement”

Clarification was provided that should Members be in agreement then additional communications would commence in order to inform residents that the consultation period was being extended by 4 weeks.

In response Councillors S. J. Baxter and P. J. Whittaker both commented that they were also in attendance at the Overview and Scrutiny meeting and were in agreement with extending the consultation period by 4 weeks.

Members subsequently discussed the consultation and commented that they had found the commonplace platform easy to use but it was very cumbersome. Some had therefore submitted a response to the consultation via email.

Members questioned if there would be any concerns or response from the Government should Members agree to extending the consultation period.

In response the Assistant Director for Planning, Leisure and Culture Services informed Members that the Government was extensively promoting Local Plan making, seeking significant building developments. The Government might not comment on an extension to the consultation period by 4 weeks. However, going forward, each time the Council changed the Local Development Plan (LDP), the Council could be challenged.

The Assistant Director for Planning, Leisure and Culture Services further stated that there were two elements to consider, the Council’s Website and the commonplace platform. Officers could change the information on the Council’s website, but not on the commonplace platform. The Council’s website included a section on ‘Frequently asked questions’ and could more prominently place and promote the phone number that was manned between 10:00am and 4:00pm, Monday to Friday.

Members added that there had been mixed reviews from residents. Some had found the commonplace platform ‘clunky’ whilst others had not. Residents in one ward area had produced a ‘user’ video to assist other residents.

Members suggested that having a ‘step by step’ guide on the Council’s website would be helpful.

The Leader commented that she would welcome anything that helped to make the commonplace platform easy to use and encouraged residents to respond.

Members questioned if an extension to the consultation period would affect the confidence of developers.

In response the Assistant Director for Planning, Leisure and Culture Services commented that a 4 week extension could be viewed differently by different people. The Council could be seen as 'dragging our feet'. The pragmatic response to residents was that the Council was progressing and trying to adhere to the Council's LDP timelines and that any further re-jigging would be as tight as possible. To date Officers had not received any significant comments from developers, however, Officers were expecting comments to be received later.

As highlighted by the Leader, there were a number of ways for residents to respond to the consultation.

Cabinet then discussed the information with regards to the number of visitors to the commonplace platform (23137), the different respondents (1901) and the individual respondents (4377).

Members commented that this should not reflect on the effort made by Officers who had organised and attended 19 different events to inform and engage with residents on the LDP.

The Leader then invited Councillor S. R. Colella to address the Cabinet.

Councillor Colella thanked Members for being given the opportunity to raise his concerns.

He explained that he had been informed that the commonplace platform software issues were raised at the Overview and Scrutiny Board meeting on 9th September 2025, and that Board Members had discussed an extension to the consultation period.

As a District Councillor he had raised his concerns and the concerns of his residents about the commonplace platform with the Councils' Strategic Planning and Conservation Manager. Two of his residents had looked at the commonplace software and had found it to be 'clunky' and full of bugs. They had also carried out analytical and output performance checks.

Concerns were raised that the commonplace platform was too complicated to complete a response. Ultimately, this needed to be looked into. Some Cabinet Members had commented that they had found it 'clunky' and difficult to navigate. Residents had lost information on their responses and information submitted was not always saved.

Cabinet was urged not to extend the consultation period, but instead to look at the issues / concerns raised. Residents had encouraged other residents to respond. Members should focus on the consultation ending on 22nd September 2025. Concerns were raised that extending the consultation period would be received negatively. Instead, it was suggested that Members should close the consultation on the agreed date, pause and then take stock of the whole consultation. Questions were raised about whether the consultation had reached everyone and whether people returning from holiday were not aware of the consultation.

The suggestion was made that the Council should close the consultation and go through the analytical and statistical data.

In response the Assistant Director for Planning, Leisure and Culture Services, highlighted that whole Local Plan process was complicated, and there was a high level of scrutiny. People would have to invest time in what would be a long process and then be invited to sit before the Planning Inspectorate. It was positive that the Council had enabled residents to have their say via a range of forums and to put forward their views, in what was a complicated process. The commonplace platform was introduced to give people another choice to respond.

If people were experiencing problems, there was a team of Officers who were ready to serve residents. Officers kept a log of issues received and Officers were happy to speak with residents directly. Officers expressed hopes that people would think that shaping the district up to 2024 was an important process to engage in.

Cabinet was informed that people were put off by the complexities of the system and questions were raised about how much the software cost? The suggestion was made that the Council had invested heavily, and it was not a good use of public money. In this context, it was suggested that it would not increase the response rate by extending the consultation period. The diagnostic data needed to be looked at.

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10th September 2025

At the invitation of the Leader, Councillor S. T. Nock also addressed the Cabinet.

Councillor Nock stated that he would emphasise that at the Overview and Scrutiny Board meeting on 9th September 2025, Board Members had unanimously voted in favour of taking action that would extend the consultation period.

At the invitation of the Leader, Councillor J. W. Robinson subsequently addressed the Cabinet.

Councillor Robinson took the opportunity to express his thanks to the Assistant Director for Planning, Leisure and Culture Services and her team, and also to the Councils' Strategic Planning and Conservation Manager, and his team.

Councillor Robinson stated that he had attended four consultation events over a period of ten weeks. He would ask Members as to why they wanted to extend the consultation period. A problem with the commonplace platform had been identified by residents, the system needed to be sound, and the Council needed to be open. Cabinet Members were looking to go out with further communications about extending the consultation period, with a system that was 'clunky.' Instead, it suggested that the Council needed to give residents assurances that the system was working.

In response the Leader explained that Members were looking to extend the consultation period as there had been a tremendous response and Members wanted to enable residents that had experienced issues to be helped and assisted by Officers. The additional communications would show residents that their voices should be heard and that Members wanted to ensure that everyone had had a chance to respond. For transparency the Council wanted people to be fully engaged and encouraged to respond / assisted to respond.

Cabinet Members added that for the number of hits received, the response rate to the consultation was good, the Council had achieved 10%, which was a good conversion rate.

Questions were raised again regarding the reasons given for extending the consultation period.

The Leader emphasised, that as highlighted during the course of the meeting, there were a number of ways for residents to respond to the

consultation. Future communications would detail this, and also useful information / guidance should people choose to use the commonplace platform.

At the invitation of the Leader, Councillor C. A. Hotham also addressed the Cabinet.

Councillor Hotham explained that he clearly understood the issues raised, but he had some questions with regards to the constitution, the urgent decision and what would happen if Members decided not to go ahead with extending the consultation period.

The Assistant Director Legal Democratic and Procurement Services (and Monitoring Officer), reassured Members that the correct process had and would be followed. As this was a Council decision, ultimately Cabinet could not determine the matter but could make a recommendation to Council. Should Members conclude that an extension was required, this would need to be determined as a Council function through an urgent decision.

The Assistant Director for Planning, Leisure and Culture Services took the opportunity to respond to questions raised by Members on the number of new dwellings to meet the Council's housing land supply by 2043 (12,000), the number of dwellings included in current developments (3,000), with 9,000 dwellings left to be provided. Between now and the adoption of the LDP, any large windfall sites would be taken off the 9,000.

Further questions and debate followed on the Council's 5 year housing land supply.

Members commented that it needed to be made clear in any communications, how to use the commonplace platform and other ways to respond. People may have been looking at gathering information and were now ready to respond.

The Assistant Director for Planning, Leisure and Culture Services assured Members that a well prepared press release / messages would be generated, also taking into account the comments and suggestions made by Members during the course of the meeting. Officers were there to help and it was noted that very few Members had passed on information with regards to residents experiencing issues or needing help with replying to the consultation.

The Leader thanked all Members in attendance for their input.

RECOMMENDED that the Local Plan consultation period be extended by four weeks.

39/25

ADOPTION OF FIXED PENALTY CHARGE FOR BREACH OF COMMUNITY PROTECTION NOTICE

The Principal Officer (Planning & Enviro- Crime Enforcement), Worcestershire Regulatory Services (WRS), presented the report for Members' consideration.

As detailed in the report, in June 2024 responsibility for enforcement of Planning Enforcement, such as fly-tipping, littering, duty of care of waste offences and dog fouling had been passed onto WRS. One of the tools for dealing with some of these issues was a Community Protection Notice (CPN) under Part 4 of the Anti-Social Behaviour, Crime and Policing Act 2014.

Whilst WRS had a remit to undertake enforcement of Planning Enforcement related matters, CPNs could be used to tackle a wider range on anti-social behaviours by the Police or other Council departments.

In accordance with the Council's enforcement policy, there were alternatives to prosecution which should also be considered for use where appropriate. Section 52 of the Act provided that an authorised person may issue a Fixed Penalty Notice (FPN) as an alternative to prosecution for breach of a CPN.

Payment of the FPN within 14 days from the date of issue had the effect of discharging any liability to convict for the offence but allowed for action to be taken for any subsequent offences.

A fixed penalty could not be more than £100.

The use of FPNs would be an additional enforcement tool for WRS Officers to use.

In response to questions from Members, the Principal Officer (Planning & Enviro- Crime Enforcement), explained that the use of a CPN or FPN would be determined on a case by case basis. An FPN might not be appropriate. If there was a total disregard of a CPN or part compliance, this would be considered by Officers as to how best to proceed. It would

also show the Courts, should it go for prosecution, that Officers had followed a process. The use of FPNs would provide Officers with an alternative option if necessary.

The Leader took the opportunity to thank the WRS Officers.

RECOMMENDED that Council adopt a Fixed Penalty Notice Charge of £100 for failure to comply with a Community Protection Notice.

40/25

QUARTER 1 2025/26 FINANCE AND PERFORMANCE MONITORING REPORT

The Deputy Chief Executive and Finance Officer presented the Quarter One Revenue and Performance Report 2025/26 for Members' consideration.

It was noted that this report had been pre-scrutinised by the Finance and Budget Working Group (FBWG) at the meeting held on 5th September 2025.

During consideration of this report, Members were informed of the following:

- As of the end of Quarter 1, the Council was forecasting a £0.173 million revenue overspend for the full financial year.
- The Council had delivered £0.398 million of its £0.913 million savings target.
- Treasury Management Position – the Council had no long term debt and had complied with all prudential indicators.
- Ward Budget Spending Quarter 1, which was running under 10%.

Members' attention was drawn to recommendation 3. There was some concern that the Council may not achieve all of the savings by the year-end. However, this would be closely monitored by Officers.

Members were further informed that the Quarter 2 Finance and Performance Report 2025/26 would be more detailed separate reports for further transparency.

Members referred to paragraph 4.4.8 of the report, which detailed '.... as a result of the introduction of the 2-hour free parking', which was incorrect. Officers agreed to amend the report prior to consideration at Council, as the free parking was for 30 minutes.

In response to Members, the Deputy Chief Executive and Finance Officer briefly explained external debt / borrowing compared to internal borrowing, using Capital expenditure.

The Policy Manager subsequently presented the performance monitoring information.

The Policy Manager stated that with regards to performance monitoring it was the responsibility of service areas to take ownership of their measures and to liaise with her.

The report had evolved further with more targets and more RAG rating. A lot of hard work was being carried out in order to achieve this. There were one or two measures that could be beneficial to Portfolio Holders. Work was also being carried out with Worcestershire Regulatory Services (WRS) in respect of fly-tipping, and Economic Development to improve and include further context.

Freedom of Information (FOI) measures would be included in Quarter two and future reports. Going forward each Assistant Director would look at including data from any Corporate surveys for Members consideration.

The Leader took the opportunity to thank Officers.

RESOLVED Cabinet note

- 1) the current Revenue position of £0.173 million unfavourable variance.
- 2) the current Capital spending of £3.326 million against a revised budget of £21.876 million.
- 3) the current savings delivery was £0.398 million against an annual target of £1.733 million for 2025/26. This was included in the above Revenue position
- 4) the Earmarked Reserves balances of £11.266 million.
- 5) the Ward Budget allocation position to date with 6 approved allocations at £5,450, leaving a balance of £56,550 to be allocated before year end.
- 6) there was an updated procurements position set out in Appendix D, with any new items over £200,000 to be included on the forward plan.
- 7) the position on Council Tax and Business Rates.
- 8) the position on benefits processing.

- 9) the Performance data for the period April to June 2025 (Quarter 1).

RECOMMENDED following the amendment, in respect of the free car parking, as detailed in the preamble above, that

- 10) the Balance Sheet Monitoring Position for Quarter 1 be noted – which was the Treasury Monitoring Report and was required to be reported to Council.

(During consideration of this item, Councillor K. Taylor left the meeting.)

41/25

MEDIUM TERM FINANCIAL PLAN SCENE SETTING REPORT 2026/2027

The Deputy Chief Executive and Finance Officer presented the Budget Setting proposal for Members' consideration.

It was noted that there was a typographical error on page 69 of the main agenda pack, as follows:-

- Final budget approved by CWG

It was agreed that this be amended to:

- Final budget reviewed by CWG

The Deputy Chief Executive and Finance Officer stated that he would like to clarify some points with Members, in that the Finance and Budget Working Group (FBWG) had expressed the view that, as previously, a two staged approach should be re-introduced. Members were reassured that for transparency that a two staged approach would be used in December 2025.

The FBWG had also suggested that an all Member budget briefing be held in January 2026. This suggestion was well received by the Cabinet.

Members were informed that with the Government's budget being announced late, that this would have a knock on effect on local Government Grants. It was anticipated that the Government Grants settlement would be announced in December.

Members were referred to the Government's fairer funding review; which would be in time for the provisional financial settlement in December.

Also, whilst considering the Fairer Funding review, the Government had indicated that it was considering reviewing how council tax was assessed and determined.

Included in the base assumptions to be used in developing the budget were:

- Pay Award for next year to be budgeted at 2% in line with the HMT inflationary targets.
- There would also be an additional 1% cost of living increment built in as contingency in the case of a higher than budgeted pay settlement.

The Deputy Chief Executive and Finance Officer commented that there was a good level of transparency and an opportunity for everyone to be involved in the budget setting process.

RESOLVED that the budget process outlined in the report, and as amended in the preamble above, be followed for the 2026/27 annual budget and for the Medium Term Financial Plan up to 2028/29.

(During consideration of this item, Councillor K. Taylor returned to the meeting.)

42/25

EXPANSION OF COMMERCIAL WASTE COLLECTION SERVICE

The Assistant Director of Environmental and Housing Property Services presented the Expansion of Commercial Waste Collection Service report for Members' consideration.

The report detailed the requirements of the Environment Act 2021 which required businesses with more than 10 employees to separate food waste. This would expand to micro-businesses (with fewer than 10 employees) by 2027.

As detailed in the report, during 2021 and 2024 the Commercial Waste Service had delivered a surplus each year but had seen increased costs in 2023/24 as a result of wider fleet and maintenance issues that had impacted on the resilience of the service and the need for the increased use of hire vehicles.

Having recently successfully recruited into vacant positions within the workshop, and delivery of a new Domestic Waste Fleet in late 2025, these expenses were expected to reduce considerably and see a return to the Council's previous financial performance levels. The Council was also now compliant with the Environment Act 2021.

With the unexpected exit of Dudley Metropolitan Council from the commercial waste market, this had created an immediate opportunity as well as a pressure on the Council's service. Businesses were keen to work with a Local Authority, and a number of the authority's peers had actively sought the Council's support as a nearby waste provider.

This was seen as a potential to further increase the Council's customer base in this area to maximise the efficiency of operating the service in a high-density area for businesses. With over £135,000 of new enquiries and 50+ new customers signed by April 2025, this had left the existing service with little to no capacity to take on additional customers.

The Assistant Director of Environmental and Housing Property Services highlighted that service failures could quickly result in complaints or lost contracts, and compliance failures could result in significant penalties or even the loss of the authority to operate a vehicle fleet, which would impact on all services.

By appointing a new Commercial Waste Coordinator this would address these daily risks ensuring that services were delivered to schedule and any issues were identified quickly and acted upon.

Members briefly discussed the recent communications on the Council's social media with regards to leaving bins out until 5pm and the letters that had been sent to all residents on the 'Changes to your wheeled bins'.

The Assistant Director of Environmental and Housing Property Services reassured Members that Officers were working with the Council's Communications Team in order to get the message out and to make everyone aware of the new wheeled bins and the collection days / times in specific roads.

The Leader took the opportunity to thank the Assistant Director of Environmental and Housing Property Services.

RECOMMENDED that

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10th September 2025

- 1) Capital Funding of £489,760 be added to the Capital Programme for 2026/27 to purchase two Refuse Collection Vehicles (RCV's)
- 2) the Council allocate Capital funding of £35,000 annually in the Medium-Term Financial Plan from the 2025/26 financial year to fund wheeled bins for Commercial Services.
- 3) the Council allocate £334,342 Revenue Funding in the Medium-Term Financial Plan to fund operational costs of providing the expanded service from 2025/26.

43/25

MINUTES OF THE MEETING OF THE OVERVIEW AND SCRUTINY BOARD HELD ON 22ND JULY 2025

The Leader explained that the confidential minutes of the Overview and Scrutiny Board meeting held on 22nd July 2025 had been included for consideration at the end of the meeting and notice had been provided that the Cabinet might have needed to go into exempt session to consider the content of those minutes.

However, Members agreed to stay in public session for this item, as there were no recommendations to consider, the confidential minutes were for noting only.

RESOLVED that the confidential minutes of the meeting of the Overview and Scrutiny Board held on 22nd July 2025 be noted.

The meeting closed at 7.50 p.m.

Chairman

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BROMSGROVE DISTRICT COUNCIL

MEETING OF THE OVERVIEW AND SCRUTINY BOARD

9TH SEPTEMBER 2025, AT 6.00 P.M.

PRESENT: Councillors P. M. McDonald (Chairman), S. T. Nock (Vice-Chairman), S. Ammar, A. Bailes, R. Bailes, A. M. Dale, B. Kumar and S. A. Robinson

Observers: Councillors K. May (Leader of the Council), S. Baxter (Deputy Leader of the Council), K. Taylor (Cabinet Member for Planning, Licensing and WRS), P. Whittaker (Cabinet Member for Environmental Services and Community Safety), E. M. S. Gray and M. Marshall

Officers: Mr. G. Revans, Mrs. C. Felton, Mr S. Parry, Mrs. R Egan, Ms. R. McElliott, Mrs. J. Bayley-Hill, Ms. T. Ainscough, Mr. M. Cox, Mr. D. Riley, Mr. M. Roche and Mr. M. Sliwinski

32/25

APOLOGIES FOR ABSENCE AND NAMED SUBSTITUTES

Apologies for absence were received on behalf of Councillor J. D. Stanley.

Some Members expressed disappointment that Councillor R. Lambert did not attend this meeting as named substitute for Councillor Stanley.

The Board was advised that Councillor S. Ammar had replaced Councillor R. Hunter as a member of the Board.

33/25

DECLARATIONS OF INTEREST AND WHIPPING ARRANGEMENTS

There were no declarations of interest nor of whipping arrangements.

34/25

COUNCIL TAX RECOVERY

A presentation on the Council Tax debt recovery procedures was provided to the Board by the Revenue Services Manager. This followed a request by the Board for a report to explain the legislative framework governing council tax recovery, outline the procedures applied by the Council for council tax recovery and the use of enforcement agents, and which identified the actions the Council could take to improve the recovery process and the barriers to improvement.

It was noted that the Money and Mental Health Policy Institute (MMHPI) report titled "In the Public Interest?" argued that legislation governing

council tax collection required reform and identified four areas of improvement, namely communication with individuals in debt, the speed at which council debt escalated, the over-reliance on automated procedures and lack of flexibility in dealing with debt cases and the enforcement action used. The report clarified and responded to these areas of concern, detailing how the Council managed its debt recovery process.

After the presentation of the report, the following matters were raised by Members:

- Use of enforcement agents for council tax recovery – It was confirmed that the Council used external enforcement agents to recover debt in cases where the debtor did not engage with the Council and all avenues to obtain deductions (attachment of earnings order, deductions from benefits) had been exhausted with no success.
- The Council used two external debt enforcement agencies (bailiffs), appointed from April 2025, both entities being regulated by the Enforcement Conduct Board (ECB) and with all their enforcement agents having specialist training in identifying and handling vulnerability and mental health issues.
- Concerns were expressed about the publicised case in which one of the enforcement agents appointed by the Council had been overcharging in car parking enforcement cases. Officers clarified that this issue was identified by the company concerned, Marston Holdings, after the Council procured them as an enforcement agency and that this case was an isolated software error relating to car parking charges which was being rectified by the company and which had no effect on the council tax enforcement work carried out for the Council.
- The Revenue Services Manager explained that the Council appointed two enforcement agents in order to monitor and compare the performance of these and for the Council to have more agency in resolving issues through contact with those enforcement agencies.
- Fairness and consideration in using enforcement action – The Revenue Services Manager reiterated that the enforcement agencies contracted by the Council were regulated and professional. All enforcement agents were fully trained in identifying vulnerabilities, including if necessary to support making referrals to support agencies. It was noted that enforcement agents did wear body-worn cameras during enforcement work so that footage could be reviewed independently if required.
- It was reiterated that enforcement agents would carry out credit and address reference checks and would undertake a contact

programme (telephone calls/letters/emails) before actual enforcement took place. Prior to enforcement agents being engaged, the Council would also provide opportunities for taxpayers in arrears to discuss pay term options to suit individual circumstances.

- It was noted that Bromsgrove and Redditch Councils had a shared service for council tax recovery with the same officers employed in the department across the two councils having the same policy and adopting identical recovery processes.
- In referring to the Council's actions to prevent people falling into council tax arrears, it was noted that Bromsgrove District Council applied a discretionary council tax reduction policy of 100 per cent council tax reduction for eligible residents on low incomes.
- Members queried why council tax was demanded in 10 instalments as default and asked whether offering a 12 instalment (monthly) payment option could be more convenient for residents. Officers responded that the default option was payment of council tax in 10 instalments over the year; however, the taxpayer could make a request to pay in 12 instalments if the request was made before 15th April, and if made at a later date, the number of instalments was reduced proportionally.
- It was further explained that payment in 10 instalments allowed more time for the taxpayer to repay any short-term council tax arrears without reminders or notices having to be issued. Officers advised that the Council received 55 per cent of arrears payments over February and March.
- Council tax demand – It was clarified that although the legislation allowed the Council to charge a full year's council tax if, following a reminder notice, the payment of the outstanding amount had not been made within seven days; in practice the Council issued further discretionary reminder notices and would make further attempts to discuss payment options/instalments with the debtor before enforcing a full year's liability.
- Debt Recovery Policy Review – Members remarked that the policy should be reviewed every five years but was last reviewed in December 2016. Members were informed that the delay was due to under-capacity within the revenues team and the need to concentrate on the requirement to deliver the Government's coronavirus funding schemes during the period 2020-2023. The Revenue Service Manager stated that the next review was expected to take place in the 2026-27 financial year.
- Implementing revisions to the Debt Recovery Plan – It was stated that such revisions as introducing a pre-enforcement protocol and revised debt recovery strategy and processes could be

introduced. However, this could not be undertaken at this time, due to limited resources within the Council's recovery services team (2.54 FTE staff in post managing Council Tax and Non-Domestic Rates enforcement across Bromsgrove District and Redditch Borough). It was stated that this resource-level did not allow officers to do the checks in house and there was reliance on the private enforcement sector to carry this out for the Council.

- Finance Department Service Review – It was explained that there was an ongoing service review of the Council's Finance department, which was considering resourcing within teams including the council tax recovery team. This review was expected to be finalised by the end of the 2025/26 municipal year and it was agreed that the outcomes would be reported to the Overview and Scrutiny Board. It was stated that the service review would provide data on whether the in-house council tax enforcement resources required increasing or any changes or restructuring.
- The number of council tax debtors in relation to Bromsgrove District's population and the council tax collection rate – It was explained that the Council had generally had a council tax collection rate of over 99 per cent. As part of its finance planning, the Council assumed a 99 per cent collection rate each year.
- Some Members expressed the opinion that the review of council tax enforcement and debt recovery was not required given this affected less than 1 per cent of Bromsgrove taxpayers. Officers responded by explaining that this was part of a wider service review of the finance team and following the review it might be considered that no changes were required. Conversely, if any increase in staffing was deemed to be necessary, then a budget bid would be prepared by officers for consideration by elected members.
- Information was requested on the monetary value of council tax arrears within Bromsgrove District.
- Members requested that information be provided to Members on the number of people in Bromsgrove on special payment plans to repay council tax debt.
- A further request was received that the table at paragraph 2.31 of the report should be updated with target dates for each action and scoring of proposals by order of priority, with the revised table to be circulated to Members. In addition, there was a request that there be information provided on how the risk of a potential reduction of council tax income through the transitory period of Local Government Reorganisation (LGR) was to be mitigated.

- The concern was raised that LGR also presented a risk in terms of what council tax and other support schemes the new unitary authority would put in place for people on the lowest incomes. It was stated that a new unitary authority might decide to implement a less generous scheme than that currently in place at Bromsgrove District Council.
- It was suggested that there could be performance measures introduced for council tax recovery, for example in terms of how residents in arrears were assisted prior to resorting to enforcement agents.

RESOLVED that the contents of the report be noted.

35/25

PLANNING ENFORCEMENT

A report on Planning Enforcement was considered by the Board. Members were reminded that the delivery of the planning enforcement was largely transferred to Worcestershire Regulatory Services (WRS) on 1st June 2024, with investigation of cases the responsibility of WRS and input provided from planning officers where their professional expertise was required. It was highlighted that prior to the formal takeover of the planning enforcement function by WRS, there had been assistance provided to the Council's planning officers with the investigation officer role since the beginning of coronavirus pandemic.

There were 302 cases of alleged planning breaches in 2024/25 which required WRS to undertake an investigation. Of these, 5 cases were assigned as priority 1 cases as they satisfied the criteria for this set out in the Enforcement Policy. Of the valid cases, 173 out of 175 were closed and resolved by informal compliance or no issue in 2024/25. There were 304 open planning enforcement cases as of September 2025.

It was stated that the backlog in open cases had fallen slightly from 320 to 304 over the most recent period. Progress in clearing the backlog was slowed by the need to establish and embed the team within Bromsgrove since 1st June 2024 and the complexity of some cases where evidence of harm (in planning terms) had been identified. The short-term additional resource available to WRS to work on clearing the backlog would end in June 2026.

In relation to the number of valid cases with Community Protection Warnings (CPWs) or Community Protection Notices (CPNs) served, it was stated that since April 2025, four additional CPWs and two additional CPNs were served.

Officers highlighted that planning policy allowed retrospective applications to be considered (i.e. applications after an action had been taken) which necessitated the maintenance of an informal approach to negotiate compliance with planning rules.

The benefits of the current approach to planning enforcement were set out including that this allowed planning officers to focus on planning matters whilst the investigation and enforcement cases were dealt with by WRS.

After the presentation, Members discussed the content of the report as follow:

A breakdown of planning enforcement cases by priority – It was requested that Members be provided with the breakdown of ongoing / live planning enforcement cases by priority level. A Member explained that currently when residents approached Members for information on how the cases were being addressed, the elected members were unable to provide an indication or timeline of when they might be actioned or resolved. It was further requested that information on the length of time these enforcement cases had been ongoing should also be shared with Members. The Technical Services Manager for WRS advised the Board that legal advice would need to be sought in relation to sharing detail on case priority as providing this information could potentially lead to identification of properties and lead to investigations being compromised.

- Case studies of successes and failures in relation to planning enforcement – A Member commented that more case studies needed to be provided for the planning enforcement cases which resulted in failure, in addition to those of enforcement successes. Officers responded that in many instances it was difficult to define cases in this way as the serving of notices could be seen as a failure where informal approaches could have led to a resolution. It was stated that in planning enforcement the informal approach needed to be maintained to work on resolving any breaches.
- Fieldwork and desktop-based investigations – A question was asked in relation to whether enforcement officers undertook visits on site to assess whether breaches of planning rules had taken place. Clarification was provided that officers liaised with informants prior to undertaking a visit. For priority 1 cases, the enforcement officer would be expected to visit the site immediately after this. For priority 2 cases, the timescales for site visits would be longer. All cases were triaged to determine priority. In each case, what needed to be established was evidence of harm in planning terms.
- Effectiveness of issuing CPNs – Some Members questioned the effectiveness of issuing CPNs in light of examples where action to repair harm had still taken considerable time following the issue of a CPN. It was noted that issuing a CPN was not appropriate in every case and the case file would be reviewed before a decision

was taken on whether a CPN was appropriate in a given case. The Technical Services Manager stated that within Bromsgrove, all CPNs issued bar one was being complied with, these mostly relating to waste-related issues.

- Frustration was expressed by some Members in relation to a perceived lack of action in respect of large-scale planning enforcement breaches within Bromsgrove. The suggestion was made that planning breaches had occurred in recent months where it was deemed that limited monitoring of planning conditions had taken place, or where the Council was not in a position to enforce planning conditions despite having itself set the conditions through the planning process. Concerns were raised that this could result in the Council letting down residents.
- Some Members felt that a review of the planning function (including planning enforcement) needed to be carried out. In response, it was explained that the Council was in the final stages of agreeing the terms of reference for the review with the Planning Advisory Service (PAS). The review was expected to start in October 2025, to commence by requesting feedback from elected members.
- Possible legal tools to address planning condition breaches – A Member queried if it was within Council's remit to prevent organisations from submitting planning applications for a certain period in cases where planning breaches were identified. Officers responded that as each planning application had to be considered on its own merits this was not possible to apply.
- Capacity to monitor compliance with planning conditions / enforcement actions – It was noted that given the volume of cases, WRS did not have the resources to routinely monitor compliance with conditions.
- The Cabinet Member for Planning, Licensing and WRS addressed the Board and reiterated that Members could contact him directly so that cases could be escalated through regular meetings between the Cabinet Member for Planning, Licensing and WRS and the respective Assistant Director.
- Cooperation between planning officers and WRS enforcement officers in dealing with cases – It was explained that the difference of approach since June 2024 had related to the prioritisation of enforcement. This ensured that resources were concentrated on the most serious breaches of planning control, where breaches were escalating or severe harm was being caused.
- In terms of cases, it was explained that investigation of a case would be undertaken and a report compiled by the WRS

investigation officers with input from the Council's planning officers where their planning expertise was required. This enabled the strongest evidence possible to be gathered. In all enforcement situations, the Council's planning officers would attempt to ensure compliance with planning rules through negotiation and persuasion. Where formal action was required, WRS Investigating Officers would complete the steps to confirm the offence and prepare formal notice.

Following consideration of this item, Members agreed that it should be recommended that there should be more information regarding planning enforcement cases including monitoring of the WRS performance through key performance indicators (KPIs). This recommendation was proposed, seconded and, on being put to the vote, approved.

RECOMMENDED that key performance indicators (KPIs) be introduced to measure Worcestershire Regulatory Services' (WRS) planning enforcement performance in Bromsgrove and that the KPIs be incorporated into monthly reporting to Members together with enhanced information on live enforcement cases data.

36/25

TASK GROUP UPDATES

There was no update provided on the Housing Task Group at this meeting as the Chairman of the group, Councillor H. Warren-Clarke, was not present.

37/25

WORCESTERSHIRE HEALTH OVERVIEW AND SCRUTINY COMMITTEE - UPDATE

Councillor Kumar provided an update on the meeting of the Worcestershire Health Overview and Scrutiny Committee (HOSC) which took place on 30th July 2025. He explained the subject discussed was routine immunisation and Members were assured that Worcestershire had high immunisation uptake with the rate significantly above the England average. Members had considered the possible implications for Worcestershire residents of travelling to Birmingham where routine vaccination rates were significantly lower than in Worcestershire.

Following the presentation, Members asked whether the views of County Councillors in relation to vaccinations had been addressed at the HOSC meeting. It was clarified that the directors from NHS England were represented on the HOSC which allowed for expert input on the matter to take place and be considered by the Members present.

RESOLVED that the Worcestershire Health Overview and Scrutiny Committee (HOSC) update be noted.

38/25

FINANCE AND BUDGET WORKING GROUP - MEMBERSHIP REPORT AND UPDATE

The update on membership of the Finance and Budget Working Group was discussed and Members were reminded that there were four Councillors currently represented on the Working Group, Councillors A. Bailes, E. Gray, P. McDonald, and S. Nock and there remained three vacant seats. It was noted that since the last meeting of Overview and Scrutiny Board, three Councillors had expressed an interest in joining the Working Group: Councillors S. Ammar, S. Colella, and C. Hotham. The Board considered these requests and on being put to the vote it was agreed that the three Councillors be appointed to the Finance and Budget Working Group.

The Chairman of the Finance and Budget Working Group, Councillor P. McDonald, updated the Board on the recent meeting which took place on 5th September 2025. The matters reported to the Board included the following:

- Members were informed that additional resource was required within the finance department. Officers expressed confidence that the costs arising could be covered from within existing budgets.
- The Council's Statements of Accounts had been brought up to date. The Council expected to receive a qualified opinion on its 2023/24 Accounts which, however, was unlikely to result in financial implications for the Council.
- At Quarter 1 2025/26, the forecast expenditure against the full-year revenue budget was an overspend of £173,000. This was expected to reduce through the year, however, there was some concern at this forecast overspend figure.
- The recharging process between the two shared service councils (Bromsgrove and Redditch) was discussed.
- Budget setting discussion took place and at the meeting Officers were proposing that the Council should revert to doing its budget in one tranche. However, it was felt by Members that undertaking the budget setting in two tranches enabled greater input by elected Members. At the Group Leaders' meeting, it had been suggested that the Council should continue to undertake its budget in two tranches.

RESOLVED that Councillors S. Ammar, S. Colella, and C. Hotham be appointed as Members of the Finance and Budget Scrutiny Working Group for the remainder of the 2025/26 municipal year.

39/25

CABINET WORK PROGRAMME

The Cabinet Work Programme for the period 1st October 2025 to 31st January 2026 was considered by the Board. It was requested as an

action that information on the Council's current empty homes discounts and premiums be circulated to Members.

RESOLVED that the content of the Cabinet Work Programme for the period 1st October 2025 to 31st January 2026 be noted.

40/25

OVERVIEW AND SCRUTINY BOARD WORK PROGRAMME

The Overview and Scrutiny Board's Work Programme was considered by Members.

A request was made to add to the work programme an item to review the consultation platform that was being used for the current Draft Development Strategy (Local Plan) consultation. Concerns were raised by Members in regard to the quality and ease of use of the platform and it was requested that information on the costs of obtaining the platform, details of testing done prior to release for public consultation, information about the functionality of the platform and the lessons learned from the implementation of the platform should be provided in a report to Overview and Scrutiny. It was requested that this be considered by the Overview and Scrutiny Board at its next meeting.

Members commented that, given the circumstances and importance of the Draft Strategic Development Plan Consultation, an urgent decision should be made to extend the consultation period. In this context, Members proposed that this item should be considered as urgent business at the Cabinet meeting due to take place on 10th September. It was noted that the consultation was currently due to finish on 22nd September and it was imperative that time was allowed for a decision to take place prior to the end of consultation.

The Board received advice from the Monitoring Officer on how urgent business could be reviewed by Cabinet and still comply with access to information rules. Members deliberated on the wording of the recommendation and the Board formulated the proposal that the Chairman of the Overview and Scrutiny Board submit a request on behalf of the Board asking that Cabinet discuss as an item of urgent business whether to extend the current public consultation period for the Draft Development Strategy Consultation. This recommendation was proposed, seconded and on being put to the vote agreed.

RECOMMENDED that the Chairman of the Overview and Scrutiny Board submit a request on behalf of the Board that Cabinet consider, as an item of urgent business, whether to extend the current public consultation period for the Local Plan.

41/25

OVERVIEW AND SCRUTINY ACTION SHEET

The Overview and Scrutiny Action Sheet was considered by Members.

Members discussed the action regarding the profit share arrangements with Electric Vehicle (EV) charger providers in Bromsgrove, Zest. It was raised by the Chairman that previously the Board was advised that some authorities had contracts in place where immediate revenue profit sharing took place with the EV charger suppliers and that as per the response provided in the action sheet, this was not the case in relation to the Council's contract with Zest. Members asked Officers to explore further the potential for there to be a profit-sharing arrangement in place in future. The Assistant Director Environmental and Housing Property Services explained that advice would be sought on this matter.

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

42/25

TO CONSIDER ANY URGENT BUSINESS, DETAILS OF WHICH HAVE BEEN NOTIFIED TO THE ASSISTANT DIRECTOR 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 for consideration.

43/25

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:-

Item No	Paragraph
13	3
14	3
15	3

44/25

EXPANSION OF COMMERCIAL WASTE COLLECTION SERVICE - PRE-SCRUTINY

A report was presented detailing proposals for the expansion of the Council's commercial waste collection service. It was stated that the provisions of the Environment Act 2021, with businesses being required to separate food waste (and microbusiness due to be required to do the same from April 2027), afforded increased opportunities for service

growth, as there would be growth in demand for commercial food waste services.

It was highlighted that the Council's Commercial Waste Collection Service had expanded considerably since its inception in 2015 and there was a risk that in excess of £800,000 annual income would be placed at risk if the Council could not provide a compliant service.

The Cabinet Member for Environmental Services and Community Safety addressed the Board and stated that this request for funding was well documented. The Cabinet Member stated that the commercial waste service had been a profit-maker for the Council and only recently saw increased costs as a result of wider fleet and maintenance issues within the service. The recommendations in the report were designed to address this with the purchase of two refuse collection vehicles (RCVs) designed to reduce reliance on hire vehicles in the long term. The requirement for businesses to separate food waste provided an opportunity to expand the commercial waste collection service.

Following the presentation, Members discussed some aspects of the report as follows:

- The effect of Local Government Reorganisation (LGR) on service delivery – It was explained that the duty to collect commercial waste would be unaffected by LGR and a number of neighbouring authorities were also undertaking expansion of their commercial waste services in anticipation of additional requirements on businesses from 2026/27. It was reported that the Council's commercial waste service had built a strong reputation with local businesses and this provided a good starting point for the LGR reorganisation when the independent commercial waste teams operated by District Councils in Worcestershire would be merged into either one or two considerably larger teams.
- It was clarified that the figures included in the report were for Bromsgrove District Council only as of the two shared service authorities (Bromsgrove and Redditch) only Bromsgrove had a commercial waste service.
- The reasons for Dudley Metropolitan Borough Council (DMBC) exiting the commercial waste market – Officers explained that DMBC was geared primarily towards general waste services and their pricing structure was low, meaning it would be unsuitable to replicate in Bromsgrove.
- The space needed for additional fleet vehicles at the Council's Depot – It was reported that Officers had considered how to better utilise space at the Depot and additional space had been found to accommodate the two Refuse Collection Vehicles (RCVs).

Following the consideration of the subject, the recommendations as set out in the report were endorsed by the Board.

RECOMMENDED that

- 1) Capital Funding of £489,760 be added to the Capital Programme for 2026/27 to purchase two Refuse Collection Vehicles (RCV's).
- 2) The Council allocates capital funding of £35,000 annually in the Medium-Term Financial Plan from the 2025/26 financial year to fund wheeled bins for Commercial Services.
- 3) The Council allocate £334,342 Revenue Funding in the Medium-Term Financial Plan to fund operational costs of providing the expanded service from 2025/26.
- 4) The Council allocate £100,000 Revenue Funding in the Medium-Term Financial Plan across 2025/26 and 2026/27 for interim vehicle hire.

(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 that included information relating to the financial or business affairs of any particular person (including the authority holding that information)).

45/25

WINDSOR STREET (OPTIONS PAPER)

The Regeneration Project Manager presented a report on the options for the delivery of housing on the Windsor Street site in Bromsgrove. This paper was submitted for discussion by Overview and Scrutiny Board prior to consideration of the report by Cabinet in November.

The Regeneration Project Manager recapped on the details in relation to the Windsor Street site development. It was noted that the site had stood derelict since 2014 and that Council had been successful in obtaining £3,490,000 for the redevelopment of the site from various sources. No Bromsgrove District Council funding had been used in the project to date.

It was noted that residential use was considered as most appropriate for the site, and only development opportunities for housing had been considered in this report. The three potential delivery options were set out as follows:

- Option A: Obtain outline planning permission and dispose of the site on the open market
- Option B: Develop through Spadesbourne Homes Ltd and retain market value properties (dispose of affordable units)

- Option C: Enter into partnership with a private developer or a registered social landlord (RSL).

Members discussed and evaluated the three potential delivery options for the Windsor Street site and in doing so commented on the following:

- Option C, to enter into partnership with a RSL, was identified as a preference by the majority of Members present.
- Some Members expressed the opinion that the option to transfer to an RSL would protect the site from being sold off. The option would also secure the most affordable housing units.
- A Member asked if development of mixed housing / entertainment venue(s) was possible on the site. Officers replied that given the size of the site, it would not be financially viable to provide mixed use on the Windsor Street site. However, the Nailers Yard site would be utilised for mixed use.
- The building of flats was considered but it was identified by Officers that the greatest demand in the District was for 2- and 3-bedroom houses.
- Some Members expressed strong disapproval of the proposal to build houses on the site and argued that, given there was a recognised demand for young people to have affordable opportunities to enter the housing market, small flats should be provided on the site.
- A Member noted it was important to verify how many young people with demand for flats or maisonette-type properties were on the Council's housing waiting list.
- Given the site's location in Bromsgrove Town Centre, it was suggested by some Members that this should be a car-free sustainable development as there were transport links available (with Birmingham via train etc.) and car club / car share opportunities.
- A Member expressed the view that the site could deliver 50 dwellings rather than the 29 units as per current calculations if housing was built. It was argued that this development provided an opportunity to encourage town living which was most suited to longer-term sustainability and that this development was an opportunity to shape the Local Plan. Allowing for 50 units would also likely result in more private developers expressing interest in the site.

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- Other Members argued that there should be some parking provision allowed for in the development and that there could be a mixture of properties with and without parking.
- The suggestion was made to consider the residents with disabilities on the housing register and to check with the housing associations on the specific needs of people with disabilities and whether this could be accommodated as part of this development.
- It was clarified by Officers that at this stage, the make-up of housing types on the site had not been determined and this report only concerned the preferred delivery option.
- Indicative layout of the site – Members were advised that there was a right of way running through the houses and a listed building near the site and consideration had to be given to the scale and massing of the buildings on site.

RESOLVED that the contents of the report be noted.

[Following consideration of this item, the meeting was adjourned between 9.00pm and 9.07pm].

(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 that included information relating to the financial or business affairs of any particular person (including the authority holding that information)).

46/25

TO CONFIRM THE ACCURACY OF THE MINUTES OF THE MEETING OF THE OVERVIEW AND SCRUTINY BOARD HELD ON 22ND JULY 2025

The minutes of the meeting of the Overview and Scrutiny Board held on 22nd July 2025 were considered.

Councillor A. Bailes asked for the record to be clarified in relation to Minute No. 20/25 – Bromsgrove Town Centre Strategic Framework. Councillor A. Bailes commented that he recalled a recommendation to Cabinet having been agreed in relation to inclusion of town centre living within the Bromsgrove Town Centre Strategic Framework and the Local Plan.

It was agreed that Officers would review the record of the meeting of the Overview and Scrutiny Board held on 22nd July 2025 to verify if this recommendation had been tabled and agreed. It was noted that inclusion of town centre living was currently recorded as an action for consideration by Officers.

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RESOLVED that, subject to clarification of the query raised in the preamble above, the minutes of the Overview and Scrutiny Board meeting held on 22nd July 2025 be agreed as a true and correct record.

The meeting closed at 9.17 p.m.

Chairman

BROMSGROVE DISTRICT COUNCIL

MEETING OF THE OVERVIEW AND SCRUTINY BOARD

2ND OCTOBER 2025, AT 6.00 P.M.

PRESENT: Councillors P. M. McDonald (Chairman), S. T. Nock (Vice-Chairman), A. Bailes, S. R. Colella, A. M. Dale, B. Kumar and S. A. Robinson

Observers: Councillors K. May – Leader and Cabinet Member for Strategic Partnerships, Economic Development and Enabling, K. Taylor – Cabinet Member for Planning, Licensing and Worcestershire Regulatory Services (WRS) and D.J. Nicholl.

Officers: Mr. G. Revans, Mrs. R. Bamford, Mrs. J. Bayley-Hill, Mr. M. Dunphy and Mrs S. Woodfield

47/25

APOLOGIES FOR ABSENCE AND NAMED SUBSTITUTES

Apologies for absence were received on behalf of Councillor R. Bailes with confirmation provided that Councillor S.R. Colella was attending as her named substitute. Apologies for absence were also received for Councillor H.D.N. Warren-Clarke.

48/25

DECLARATIONS OF INTEREST AND WHIPPING ARRANGEMENTS

There were no declarations of interest nor of whipping arrangements.

49/25

TO CONFIRM THE ACCURACY OF THE MINUTES OF THE MEETING OF THE OVERVIEW AND SCRUTINY BOARD HELD ON 9TH SEPTEMBER 2025

The minutes of the meeting of the Overview and Scrutiny Board held on 9th September 2025 were considered.

Members highlighted that Councillors K. May, S. Baxter and K. Taylor, as the portfolio holders, were not listed as attendees to the meeting but had been present and spoken at the meeting. Members agreed that this was a typographical error to note in relation to the minutes of the meeting.

A suggestion was made that an additional sentence should have been included in respect of minute no. 35/25 – Planning Enforcement reflecting inappropriate language that was alleged to have been used by a Member in attendance at the meeting. The suggestion was made by some Members that where inappropriate language was not included, the

accuracy of the minutes might be questionable. However, Members were reminded to note that the minutes of meetings held at the Council were not verbatim.

The Chairman requested that in future, where Members had concerns about the minutes, they should contact Officers with regard to the matter in advance of a meeting.

RESOLVED that, subject to the amendments detailed in the preamble above, the minutes of the Overview and Scrutiny Board meeting held on 9th September 2025 be approved as a correct record.

50/25

LOCAL PLAN CONSULTATION METHODS

A presentation on the Local Plan Consultation Methods was provided to the Board by the Strategic Planning and Conservation Manager. This followed a request by the Board at a recent meeting held on 9th September 2025, for a report to provide an overview of the current methods of public consultation for the Local Plan, including the online consultation platform and to learn lessons for future consultation exercises.

The following key points were highlighted to Members:

- The consultation was being conducted in line with the Statement of Community Involvement.
- A new digital platform had been introduced, enabling online responses to be submitted alongside traditional consultation methods such as in writing via email, post or submitting written feedback at drop in events.
- The digital platform was in line with National Planning Policy Framework (NPPF) requirements, as specified by Government for the public to engage digitally.
- The platform had attracted nearly 30,000 visitors and generated approximately 7,000 responses, with a conversion rate currently standing at of 8.9% which compared favourably with other consultations.
- The bounce rate (the percentage of visitors who viewed only a single page before leaving, indicating a single page session without further interaction), also compared well to other online platforms.
- To date, 78% of respondents had been aged over 55.
- There had been limited engagement from younger demographics.

- The consultation process still had a few remaining weeks of engagement left to complete. Therefore, the statics and data would vary at completion.
- There had been a small number of issues identified with the consultation platform, with only one reported as technical, however, issues had been minimal and quickly resolved.
- Feedback indicated that some users may have anticipated more advanced functionality than the software currently offered.
- Data available to the Council indicated that the online consultation platform was the preferred method for many consultees to submit responses.
- The platform had been procured via the Government's G-Cloud framework and built in-house by the Council's planning team with support from the platform providers.
- Quality assurance exercises were conducted prior to the launch and minor updates had been made after the launch to the Council's website pages dedicated to the consultation, such as amendments to the Frequently Asked Questions (FAQs), the introduction of how-to videos and the addition of emoticons.
- The team were developing internal systems to manage and analyse the data efficiently.

After the presentation, Members provided key considerations as follows:

- Members requested clarification of how the software, provided by the developer, had been adapted in-house. – In response, it was explained that the developers had agreed on a set of core, basic elements for the software. The structure was then refined to enhance user friendliness, while certain features were deliberately removed as they were considered unnecessary.
- It was queried if there was consistency in the reporting when comparing statistical analysis to other local authorities, considering the uniqueness of the software. - Officers explained that although some elements were different, the platform provided useful guidelines to assist the user, if required.
- With approximately 30,000 visits to the site but only 7,000 responses, Members suggested results were fairly low and queried if individuals had been contacted who had visited but not submitted a formal response. – The Board was informed that communications had been issued to inform the public of the extension period and to encourage incomplete responses.

Officers also expressed the view that the platform was performing well and had exceeded expectations in terms of engagement.

- Some Members suggested the online platform risked repetition and framed questions in a way that might be viewed as which steering responses rather than allowing open, structured feedback. Members were reminded that the questions included in the consultation were those which had been reported to the Council meeting held in June 2025.
- Suggestions of a lack of transparency and accountability, unlike traditional methods which created a clear audit trail, were also raised by the Board. – In response, Officers explained that responses could be short, complex or technical to drive as much engagement as possible. Members were also asked to note that all responses, regardless of format, would be read and included in the consultation statement.
- It was queried whether the platform was suitable for non-professional users and whether it might potentially exclude vulnerable groups or people without internet access. – However, Officers highlighted that, as reported, the conversion rate was rated high compared to all but one of the other consultations listed in the report. Traditional methods were available as an alternative for users, however, the vast majority of people engaging using the online platform method, were aged over 55.
- Concerns were raised that issues were being reported to Members and that Officers seemed unaware. As a consequence, it had been necessary for some Members to hold ward member engagement meetings to assist the public with the online platform. – In response, Members were encouraged to report the specific issues to enable Officers to assist individuals with their queries.
- Requests were raised for further detailed demographic analysis in respect of the responses received. – Officers advised that a Consultation Statement would be produced to outline how the consultation process was conducted and how responses would be reported. The statement would include relevant statistical analysis where the data was sufficiently robust. The Board was asked to note that the consultation had been carried out across the entire District.
- Members queried whether responses would still be recorded, if demographic fields on the online platform were not completed, given that these fields were part of the submission process. - Officers clarified that whilst the demographic information was useful for analysis, it was not mandatory. The Board also noted that individuals submitting responses by letter or email would not typically provide this information.

- Clarification was requested on how consultation responses would be weighted and analysed, particularly in cases where users were unable to complete their submissions. - Officers explained that responses could vary in length and complexity and that the consultation was designed to encourage as much engagement as possible. All responses, regardless of format, length, or completeness, would be read, considered and included in the final Consultation Statement.
- The Board raised questions regarding the transparency of the process and whether an independent review would be undertaken. - Officers clarified that the Council's role was to present the evidence gathered to the Planning Inspectorate, which was standard practice for all Local Authorities. It was also noted that the most appropriate independent planners were Council Officers. Furthermore, Members were informed that if any concerns arose regarding the consultation process, there was a right of appeal through the Secretary of State.
- A Member reported having received one concern from a resident regarding difficulties in submitting and completing the consultation and queried whether similar issues had been reported more widely. - Officers responded that there had been very few such reports and it was noted that the issue in question may have been the result of user error.
- Members suggested ways to enhance engagement, particularly with younger people and vulnerable groups including outreach to schools, collaboration with organisations such as Age UK and utilising the Council's Communications Team to explore social media channels. The Board also queried how other Local Authorities had successfully engaged these demographics. - In response, Officers acknowledged that historically, younger people had shown limited engagement in the plan making process, potentially due to lower home ownership rates. Members were also informed that some school engagement had already taken place, with further targeted efforts planned.
- The Board queried whether sufficient resources were in place to manage and evaluate the large volume of consultation responses received. - Officers assured Members that robust testing procedures had been implemented with the appropriate technology being used to streamline the process. It was also confirmed that the need for additional resources would be assessed and addressed if necessary.
- Some Members expressed concerns, suggesting that the consultation platform might be viewed as favouring developers. - Officers clarified that this was a public consultation and all interested public stakeholders, including developers, were eligible

to respond. While developer participation was expected, it was standard practice and not unique to the consultation. In addition, Members were reminded that the Bromsgrove District Local Plan Draft Development Strategy Consultation had been approved by Council at its meeting on 19th June 2025. In response, some Members expressed the view that there should have been an additional stage in the process to allow political groups the opportunity to collaborate on a more composite plan.

- Clarification was sought on whether the consultation constituted a new call for sites. – It was explained that part of the planning consultation process was to include a call for new sites. During discussions, following further discussions on this point, Members requested that it be noted in the minutes that as part of the consultation process, the public, including developers, could submit suggestions about potential new sites as this was how the planning system worked. Furthermore, it was confirmed that if Members wished to refer to this as another call for sites then they could do so.
- Questions were raised about the number of respondents who had completed answers to all of the questions included on the online consultation platform and the implications arising for submissions where answers were not provided to all of the questions. Officers clarified that the consultation process had been designed in such a way to enable the public to respond to as many questions as they wished and there was no requirement for answers to be provided to all questions. All such responses, including responses to only a small number of questions, would be taken into account and analysed when the final consultation feedback was assessed.
- Members expressed frustration that requests had been raised in meetings of the Strategic Planning Steering Group, such as for infrastructure plans but that these had not been provided.
- Questions were raised about why letters had not been sent to all residents within the district at the start of the consultation process to assist with maximum engagement. - Officers explained that doing so would have had significant cost implications. It was also highlighted that over 30,000 individuals had accessed the website, representing a substantial level of engagement.
- A member raised a typographical error suggesting the Conversion Rate should be recorded as 8.9% and not 9.8%.
- Members queried whether it was a fair comparison to evaluate responses from a Local Plan Regulation 19 consultation when the Council was still at the Regulation 18 stage. - Officers explained that whilst full details of other consultations could not be

disclosed, there were still valid and fair examples available for comparison.

- Concerns were raised about the potential risk of documents referenced during the consultation process being out of date. - Officers clarified that while some documents may be older, they were not necessarily considered out of date or irrelevant to the current consultation process.
- The Board requested information on how many developers had submitted speculative planning applications during the consultation period. - Officers explained that it was not within the Council's control to determine whether developers chose to submit speculative applications, as this depended on their individual resources and approach. However, if speculative applications were submitted, the Council would address them accordingly.
- Discussions were held regarding the timing of the consultation during the Summer period, with suggestions being made by some Members that it may have impacted participation levels. - Officers responded that selecting a universally suitable time was challenging. It was noted that whilst the Summer period may coincide with holidays, holding the consultation in Winter could also present barriers, such as poor weather conditions and shorter daylight hours, which might deter engagement.

In response to a Member query, the Chairman confirmed to the Board that the extraordinary meeting had fulfilled its purpose of reviewing the consultation process and as such the item would not return to the Overview and Scrutiny Board meeting scheduled for 18th November 2025.

RESOLVED that the Local Plan Consultation Methods report be noted.

51/25

TO CONSIDER ANY URGENT BUSINESS, DETAILS OF WHICH HAVE BEEN NOTIFIED TO THE ASSISTANT DIRECTOR 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 for consideration.

The meeting closed at 7.12 p.m.

Chairman

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BROMSGROVE DISTRICT COUNCIL

MEETING OF THE OVERVIEW AND SCRUTINY BOARD

28TH OCTOBER 2025, AT 6.00 P.M.

PRESENT: Councillors P. M. McDonald (Chairman), S. T. Nock (Vice-Chairman), S. Ammar, A. M. Dale, C.A. Hotham, B. Kumar, S. A. Robinson, J. D. Stanley and H. D. N. Warren-Clarke

Observers: K. May – Leader and Cabinet Member for Strategic Partnerships, Economic Development and Enabling and Councillor K. Taylor, Cabinet Member for Planning, Licensing and WRS

Officers: Mr. G. Revans, Mrs. R. Bamford, R Egan, Ms J. Willis, McElliott and Mrs. J. Bayley-Hill and Mrs S. Woodfield

52/25

APOLOGIES FOR ABSENCE AND NAMED SUBSTITUTES

An apology for absence was received on behalf of Councillor A. Bailes, with confirmation provided that Councillor C.A. Hotham was attending as his named substitute.

Apology for absence was also received on behalf of Councillor R. Bailes as well as Councillor S.R. Colella (who was due to attend as her named substitute).

Members were advised that the Cabinet Member for Finance, Councillor S. Baxter, had also submitted an apology for the meeting.

53/25

DECLARATIONS OF INTEREST AND WHIPPING ARRANGEMENTS

There were no declarations of interest nor of whipping arrangements.

54/25

CITIZENS ADVICE (USES OF GRANT FUNDING)

The Chief Executive of Citizens Advice Bromsgrove and Redditch (CABR) delivered a presentation to the Board.

Members were informed that the charity received strong support from the Council and he expressed gratitude for the opportunity to present to Members on how the grant funding was being used.

The following key points were presented to the Board:

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- The four key support areas provided by CABR were Core Services, Household Support Fund Distribution, Affordability Assessments and Outreach Development Projects.
- The Funding contribution from Bromsgrove District Council (BDC) was £123,400 with Worcestershire County Council (WCC) adding £23,606 per year.
- BDC was the highest funding contributor in Worcestershire to the CABR.
- The national average for funding the CABR was £1.34 per head in 2023/2024.
- CABR provided advice, not just information, which was regulated by the Advice Quality Standard (AQS), Financial Conduct Authority (FCA) and Money and Pensions Service (MaPS).
- The charity was supported by 50–60 volunteers. The call answer rate had improved from 24% in 2020 to 38% in 2025.
- In total, 4,710 households in Bromsgrove District received full advice and 773 households received light-touch advice.
- In addition, £388,601 income had been gained and £676,674 debts had been managed for residents.
- The Household Support Fund (HSF) costed £7,000 per annum to deliver with £50,000 of funds distributed.
- £2,745 had been provided a year to carry out affordability assessments for Bromsgrove District Housing Trust (BDHT) clients.
- In addition, £62,000 had been provided by the Council for an Outreach project over 18 months. To date, regular sessions were held in Charford, Catshill, Rubery, Wythall, Alvechurch, Sidemoor and Clent.
- There were future challenges with increased demand expected, funding sustainability and the Local Government Review (LGR) implications to consider.
- There were potential outsourcing opportunities for the follow-on funding from the HSF Scheme, including discretionary housing payments and tenancy support.

After consideration of the presentation the following discussions were carried out by the Board:

- Various Parish Council contributions were discussed, with Members noting one contribution of £5,000 was provided in the previous financial year.
- There would be a review of the charity's website, however, it was agreed that the Outreach calendar updates relating to the availability of the CABR would be shared with Members as requested.
- There were numerous collaborations with other partners for the Outreach project, including work with food banks and community hubs.
- There were a wide range of discussions with various client age groups at Outreach events with advice offered on issues with pensions and wills to debts and housing.

RESOLVED that the Citizens Advice report be noted.

55/25

LOCAL HERITAGE ACTION LIST (QUARTERLY UPDATE)

The Assistant Director of Planning, Leisure and Culture Services presented the Local Heritage Action List update to Members.

The following key points were discussed.

- Progress on the Local Heritage List had been delayed but there were mitigation steps in place at the application stage, to identify any buildings of local significance.
- The first tranche of parishes had been adopted, with the website updated and owners had also been notified accordingly.
- The draft list for Wythall had been completed and work was ongoing for the Lickey and Blackwell areas.
- There were staffing challenges as two Conservation Officers had resigned. The Principal Conservation Officer remained to cover the work, but they worked part-time. A Consultant had been appointed to assist with the Local Heritage Lists and recruitment was also underway to fill the vacant posts.

After the Local Heritage List update had been provided, Members discussed the following points:

- Backlog concerns were raised and it was explained that priority remained at the planning application stage. However, it was

reiterated that buildings of local significance were mitigated by the application stage checks.

- Details of the cost of consultancy work to assist with the Local Heritage List was requested, which was agreed would be circulated to Members by relevant Officers.
- Members queried the recruitment outlook for the vacant posts. Officers responded that they were hopeful the positions would be filled, citing the flexibility in working hours as a key factor.

RESOLVED that the Local Heritage Action List update report be noted.

56/25

LEVELLING UP FUND PROGRAMME (QUARTERLY UPDATE)

The Regeneration Project Delivery Manager presented an update on the Levelling Up Fund Programme in Bromsgrove to the Board.

Members were informed that there was a typographical error within the report at point 3.8 of the table under 'Risk and fixed price allowance' and that the figure stated should have read £58,151.08 and not £55,151.08 as recorded.

The following key points were discussed with the Board:

Windsor Street

- Brownfield Solutions had completed Phase One of remediation works. The Environment Agency (EA) technical feedback was expected to be completed in October 2025.
- Once feedback from the EA was received, the Council was likely to undertake Phase Two remediation works, with a budget allowance in place to cover the costs. Completion was expected by May 2026.
- Cabinet was due to consider housing delivery options in November 2025.

Nailers Yard

- Works to the culvert had increased to £1.6m, with a provisional sum allowance of approximately £225,000 in the Kier contract. This had increased the overall Levelling Up Programme costs by £165,000. Therefore, an urgent decision was taken in August 2025 to commit a further £500,000 to the Levelling Up Programme, which included an allowance of £335,000 for additional contingency.

- The completion date was originally expected to be January 2026; however, this had been extended to 4th May 2026.
- There had already been strong commercial interest in the office space and food and beverage units in the commercial building with service charge arrangements in progress.
- The Full Business Case (FBC) to secure the Council's funding from the former Greater Birmingham and Solihull Local Enterprise Partnership (GBSLEP) was in progress.
- The overall funding secured of £16.103 million had increased by £1.093 million to a total of £17.194 million including the additional £500,000 agreed by BDC which increased the total to £17.694 million. The final cost would be an estimated £19.8 million. The GBSLEP bid for £2.425 million was pending. Therefore, the total potential funding pot was £20.118 million.
- There were risks reported with a potential impact on project budget and programme at the Nailers Yard site for culvert works, incoming electrics and the commercial building layout. Potential risks were also highlighted at the Windsor Street site for EA sign off of remediation works and BDC were due to agree future delivery options for the site prior to any works.

Following the levelling up update, Members discussed a number of points:

- Assurance on the completion date was discussed, due to the delays arising from culvert works. It was explained that any delays caused by the client or beyond anyone's control, such as poor weather, would be met by the Council whereas any delay based on contractor performance would be applied to the contractor Kier Construction Limited.
- Service charge explanations and concerns were discussed with the Board. Officers reassured Members that a resolution to secure the leases with incoming tenants would be a priority.
- Clarification on a cost breakdown was discussed for Mechanical and Electrical (M&E) works, prolongation, insurance and overheads. Officers agreed that a more detailed breakdown would be provided to Members.

- Return on investment was also discussed with the Board and Officers provided details of the six-year payback claim.
- Clarification on the specifics of spend for the GBSLEP funding were also discussed with details provided to the Board.
- Further information about housing density at the Windsor Street site was discussed and Members were informed that a meeting was scheduled with the Principal Conservation Officer to review the options available.
- Members were provided with an explanation of the culvert works as requested. It was noted that the works were deemed necessary to mitigate flood risks and that omitting them would have significantly increased the risks.
- Revenue expectations were discussed, with an estimated annual income of £330,000 to the Council. It was explained that service charges covered building upkeep, while voids liability remained with the Council.
- Members were also given clarification on what service charges entailed and it was explained that it applied to the property management. The Board was informed that the appointment of a property management agent had been delayed due to the procurement process, but progress was being made.
- Homes England funding for Windsor Street was also discussed with Members querying if any restrictions applied. It was explained that additional affordable housing provision could attract funding opportunities.

RESOLVED that the update on the progress of the Levelling Up Fund projects 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 that included information relating to the financial or business affairs of any particular person (including the authority holding that information). However, there is nothing exempt in this record of the meeting).

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28th October 2025

57/25

TO CONSIDER ANY URGENT BUSINESS, DETAILS OF WHICH HAVE BEEN NOTIFIED TO THE ASSISTANT DIRECTOR 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 for consideration.

The meeting closed at 7.20 p.m.

Chairman

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Cabinet

19TH November 2025

Bereavement Services - Burial Strategy

Relevant Portfolio Holder		Councillor Whittaker
Portfolio Holder Consulted		Yes
Relevant Assistant Director		Simon Parry, Assistant Director of Environmental and Housing Property Services
Report Author	Job Title: Environmental Services Manager, Doug Henderson Contact email: doughendersonbromsgroveandredditch.gov.uk Contact Tel: 07483 151469	
Wards Affected		All
Ward Councillor(s) consulted		N/A
Relevant Council Priority		Economic Development & Environment
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 is asked to RESOLVE that

- 1) The Bromsgrove District Council Burial Strategy be approved.

and to note that

- 2) A further report will be prepared for Cabinet's consideration in due to course in respect of burial provision in Bromsgrove

2. BACKGROUND

- 2.1 In 2014 the Bereavement Services Team worked up a plan for expanding burial provision into Council owned adjoining fields at the Catshill Cemetery . This would provide in excess of 65 years of burial space at a 5-year average burial rate.
- 2.2 In more recent times, the same plot of land has been offered up for potential new housing provision putting a lack of suitable burial space in Bromsgrove sharply back on the agenda.

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- 2.3 A Burial Strategy is crucial for the Council because it ensures long-term, respectful, and inclusive management of burial spaces while meeting legal, cultural and environmental needs.
- 2.4 Burial space is finite, and the Council must plan ahead to avoid shortages. This strategy will help forecast future demand and a suitable trigger point for beginning an exercise for seeking expansion to an existing site or seeking a new site in a timely fashion.
- 2.5 Without prior planning, the Council risks running out of burial plots, leading to distress for families and logistical challenges.
- 2.6 This Burial Strategy will also ensure cemeteries continue to accommodate diverse religious and cultural practices, such as Muslim and Jewish burial requirements or Hindu cremation preferences.
- 2.7 The Council must comply with laws such as the Burial Act 1857, registration of Burials Act 1864, Local Authorities Cemeteries Order 1977, Local Government Act 1972 and the Public Health (Control of Disease) Act 1984, which govern cemetery management and public health funerals.
- 2.8 This strategy will help align Burial Services with local planning policies and national legislation.
- 2.9 Cemeteries are valuable green spaces that offer areas for reflection and biodiversity. This strategy ensures our spaces are well-maintained and accessible.
- 2.10 The strategy outlines a clear vision: to ensure that all residents have access to dignified burial options that reflect their beliefs, traditions and personal wishes. It establishes key objectives around service quality, environmental sustainability, future capacity planning and community engagement.
 - 2.10.1 Key themes and content include:
 - 2.10.1.1 The Council's remaining capacity
 - 2.10.1.2 Reclaiming rights
 - 2.10.1.3 Up to date fees and charges
 - 2.10.1.4 Rule and Regulations
 - 2.10.1.5 Grounds maintenance
 - 2.10.1.6 Memorial Safety
 - 2.10.1.7 Memorialisation
 - 2.10.1.8 New IT systems
 - 2.10.1.9 Top level action plan against each theme.

3. OPERATIONAL ISSUES

- 3.1 In Bromsgrove, the service has gone from a comprehensive long term solution set out in 2014 to 5 years of capacity left before a new site or extension process needs to begin based on the new strategy and operational pressures.
- 3.3 In light of the national drive for housing, losing the Catshill expansion opportunity could create a scenario where nothing else suitable becomes available and the Council loses its ability to bury its local people appropriately, forcing people out of their area and away from existing loved ones.
- 3.4 This scenario will also have a fiscal effect because of the loss in income from losing the burial function in Bromsgrove. This, at a time when generating surplus, particularly revenue surplus, is so important for long term sustainability in local government.

4. FINANCIAL IMPLICATIONS

- 4.1 The new unbudgeted costs associated with purchasing new land for burials. Circa £100,000
- 4.2 The loss of income from a failure to expand or secure new land needs to be noted. This would be circa £200,000 per annum.

5. LEGAL IMPLICATIONS

- 5.1 The Council is a burial authority and as such has the responsibilities associated with that status. Should the Council be unable to provide burial plots in future, this would create financial and reputational risks.

6. OTHER - IMPLICATIONS

Local Government Reorganisation

- 6.1 Entering into either North/South Unitary Authority arrangements or a One Worcestershire entity without have suitable burial provision in place would apply pressure on adjoining sites across borders.

Relevant Council Priority

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- 6.2 This strategy supports both economic development and the environment as outlined in the current Bromsgrove Council Plan.

Climate Change Implications

- 6.3 The Burial Strategy has important climate change considerations. Traditional burial practices contribute to carbon emissions through land use, materials, and ongoing grounds maintenance. Cemetery expansion plans must incorporate climate resilience measures, including flood risk mitigation, tree planting, and sustainable drainage systems.

Operational activities—such as grounds maintenance and infrastructure upgrades—should align with the Council’s net zero ambitions. Cemeteries also offer opportunities to enhance green infrastructure and carbon sequestration, supporting wider environmental goals in the Bromsgrove Council Plan.

7. RISK MANAGEMENT

- 7.1 No longer being able to offer burials to the Bromsgrove community is both a reputational and financial risk for the authority.
- 7.2 The mitigation would be to either agree an expansion at an existing site or secure a new site within the timeframes outlined within the Burial Strategy or begin a consultation and communication strategy to highlight that Bromsgrove will within 15 years phase out full earth burials and will simply maintain the closed sites.

8. APPENDICES and BACKGROUND PAPERS

Appendix 1 – Bromsgrove District Council Burial Strategy

9. REPORT SIGN OFF

Department	Name and Job Title	Date
Portfolio Holder	Cllr Whittaker	20 th Oct 2025
Lead Director / Assistant Director	Simon Parry	20 th Oct 2025
Financial Services	Bev Docherty	20 th Oct 2025

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Legal Services	Nicola Cummings, Principal Solicitor - Governance	25/10/26
Policy Team (if equalities implications apply)	N/A	N/A
Climate Change Team (if climate change implications apply)	Matthew Eccles	28 th Oct 2025

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Bromsgrove
District Council

www.bromsgrove.gov.uk

Bromsgrove District Council Burial Strategy 2025

Contents

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Theme 2 - Reclaiming Graves

Theme 3 - Fees & Charges

Theme 4 - Management Rules & Regulations

Theme 5 - Grounds Maintenance

Theme 6 - Memorial Safety

Theme 7 - Memorialisation

Theme 8 - Evolving & Developing Burial Systems

Actions table

Foreword

This is our council's first burial strategy and a positive step forward to ensuring that we will continue to deliver effective control and management of the burial service and future development of cemeteries for the benefit of our communities across the area. Bromsgrove District Council has a statutory responsibility to provide a means of burial across our region.

Careful consideration for the appropriate management and regulation of the council's cemeteries has been undertaken as the burial authority operates within The burial Act 1857 and the Health and Safety Act 1974.

Bromsgrove District Council has three working cemeteries under its remit of management and maintenance as well as a number of closed churchyards. Only one of these cemeteries has provision for new burial space which is situated at Catshill, North Bromsgrove.

It is recognised that the burial service needs to be sympathetic to and meet the needs of the bereaved and the wider communities of Bromsgrove for both the short and longer term. This burial strategy has been developed around the eleven themes which have been highlighted during our consultation process, and our future service delivery will concentrate on these themes and required actions to deliver on these.

The burial service is managed and carried out by our Bereavement Services team and supported by the wider Environmental Services departments who carry out grave digging and grounds maintenance duties.

3 working cemeteries

4 closed churchyards

50 burials per year on average

136 cremated remains interments per year on average

2 Environmental Operatives involved in the burial process

4 burial administration staff

Approximately 30 hectares across 3 cemeteries

40,000 headstone memorials

In a traditional standard cemetery with a dense number of graves up to 300 full graves can be interred per acre when factoring in road and path access for the operational teams and the public.

Land required

Burial Provision	Space required
10 Years	2 acres
20 years	4 acres
50 years	10 acres

Theme 1 - Our Cemeteries

Bromsgrove District operates three cemeteries (detailed in the table below), two of which can no longer accommodate new burial space. The remaining capacity within the active cemetery is analysed on an annual basis, based on a 5 year average of interments both full earth burials and ashes interments. A cemetery is highlighted when it has under 15 years capacity remaining, with full analysis and consideration given to potential extensions from when 10 years remain.

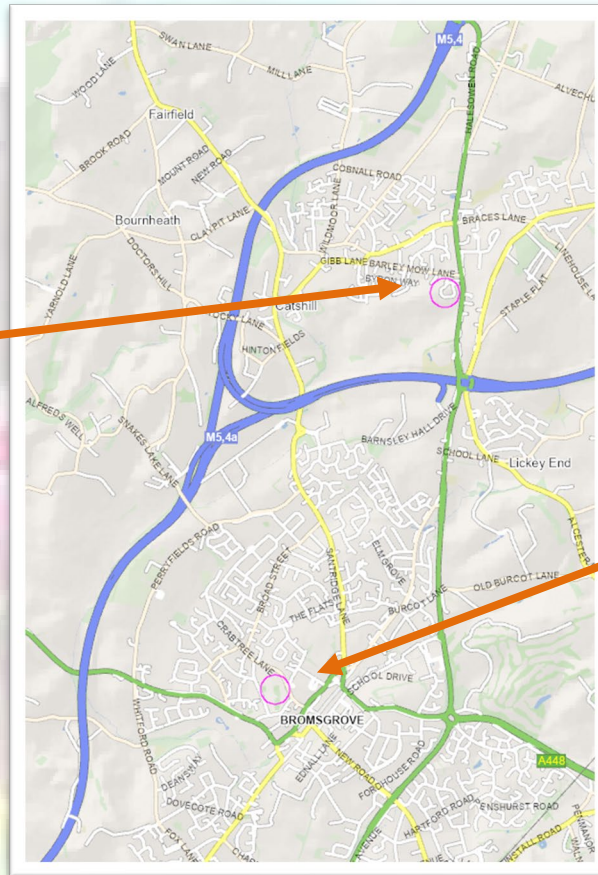
Area	Cemetery	Number of sections that remain	Approximate years of burial space remaining
Bromsgrove	North Bromsgrove (Catshill)	5	15
	Bromsgrove Old	0	0
	Bromsgrove New	0	0

At the time of writing this strategy, work is ongoing to explore an extension at North Bromsgrove, as well as analysing other locations for potential new sites for burial ground.

In the past it has been customary for the council to extend all cemeteries when they reach capacity. This may not be possible in future due to availability of land, suitability of land due to strict planning guidelines and land purchase costs. It may become necessary for people to be buried in neighbouring towns and villages. We appreciate how important it is for people to be buried in their local area and will make every effort to extend cemeteries where possible.



Catshill



Locations



New and Old

Financing Extensions

Future financing of cemetery extensions will be progressed through existing Capital Budgets. At the exploratory stage of considering a cemetery extension a business case will be prepared detailing full projected costings. These will then be considered and built into the existing Capital Budget for agreement by members at an appropriate committee. This will ensure that prior to an extension project starting the funds are set aside solely for this purpose and will therefore allow the seamless completion of the project.

Theme 2 - Reclaiming Graves

Bromsgrove District Council operate under the Local Authorities Cemeteries Order 1977, in that burial authorities may “reclaim” rights in reserved graves purchased at least 75 years ago if the rights have not been exercised and the relevant notice has been given. As of the start of this burial strategy, the bereavement services team are beginning a project to go through all purchased plots which have not been used and also have lapsed a 75 year time period in order to establish a communication list to all relevant grave owners through council communication channels and appropriate signage. Stage 1 will be to carry out a thorough desktop survey of all records in order to assess how many graves qualify for this, followed by physical assessments of the grounds and an established report to members detailing findings for each cemetery. Sites with the lowest remaining capacity will take priority, with other sites to follow under the same process.



Theme 3 - Fees & Charges

As of 1st April 2025, our current fees and charges for burials are shown via the link below

Bromsgrove [fees and charges](#)

These fees and charges are created on a twofold basis for Bereavement Services, via utilising the Competition and Markets Authority guidance and the Council internal governance policies. To address the price and service transparency concerns identified during the [2019 to 2020 investigation into the funeral sector](#), the Competition and Markets Authority made a legally binding Order, the [Funerals Market Investigation Order 2021](#). This places various requirements on funeral directors as well as cemetery and crematorium operators. On top of each year, fees and charges are reviewed as part of the Council's budget setting process – usually to reflect an increase in line with RPI inflation, this helps identify budget pressures, priorities and future works.

The council also annually bench marks its fees and charges against a range of similar size neighbouring councils and select few commercial operators. This process makes sur that the public are always charges a fair and transparent fee for the services on offer.

Theme 4 - Management Rules & Regulations

Rules and Regulations formally apply to all active cemeteries, giving agreed powers to the burial authority in the safe management of burial interments, memorial installations, unauthorised tribute management, anti social behaviour and any other disturbance, memorial safety and site safety. The rules and regulations will be reviewed on an annual basis in line with the financial year change, and any changes put forward shall be agreed by the burial authority officers in post at that time. All stakeholders ie, funeral directors and stonemasons will receive an electronic copy of set regulations, as well as having physical copies at relevant reception points.

Theme 5 - Grounds Maintenance

Grounds maintenance operations within our cemeteries are carried out following good horticultural practice, using suitable machinery and are carried out when weather permits.

Grass cutting shall take place between the months of March and October on a sequence put in place by the service's place team co-ordinator, careful consideration will be given to areas most frequently visited, in particularly the lawned areas surrounding the crematorium building and scattering areas. Selected areas shall be left for wildlife enhancement across all active cemeteries. Older sections which no longer have new grave space and are less frequently visited will be cut on a lesser sequence.

Weed control shall be in place across all active sites, particularly on hard surface areas which are frequently used e.g. the entrance drive to the crematorium building and all public footpaths. A non-selective herbicide shall be used on 2 occasions per annum at the beginning and midway point through the grass cutting season when weather permits.

Litter picking shall be carried out at least once per week across all cemeteries and litter bins shall be checked twice weekly and changed when required.

Tree maintenance shall be carried out on request from officers or members of the public to the reception point, a monthly site inspection shall be carried out by management or site supervisors who will raise any issues as and when necessary.

It is the aim of the Bereavement Services team to look at bio-diversity enhancements, management plans and potential funding and awards such as Green Flag and potential Arboretum status.

Theme 6 - Memorial Safety



At the creation point of this burial strategy, a memorial programme was in its design phase with an aim to have officers suitably trained by the autumn period of 2025. A clear strategy across all cemeteries will be mapped out with officers carrying out regular inspections and uploading detailed risk assessments accordingly on the service's appropriate software.

It is recognised that any work progressed within our cemeteries requires to be completed in a sensitive and respectful manner, this has and will continue to be a priority for council officers and our contractors. It is a requirement for any stonemason carrying out work within the councils cemeteries, that they are BRAMM registered (The British Register of Accredited Memorial Masons) operating to the British Standard 8415 and have been working to the NAMM (National Association of Memorial Masons) code of conduct. It is the councils aim to develop a memorial mason registration scheme which will require any stonemason wanting to carry out work in one of Bromsgrove District Council cemeteries to be signed up to. This will ensure that Bromsgrove District Council knows who is working within the cemeteries and will allow for ad hoc inspections of work to be carried out to ensure safety and best practice is maintained.

Theme 7- Memorialisation

Bromsgrove District Council offers a range of memorial items in all of its cemeteries, items and lease details are in the table below. Prices are reviewed by members annually.

Memorial Item	Lease period
Memorial bench (Wooden/Composite/Metal) with inscription	20 years
Book of remembrance	No lease
Wall (outdoor/indoor) and planter plaques	5/10/20 year options
Memorial leaves	3 years

At the creation stage of this strategy, the services memorial options are under review with intention of acquiring new options for bereaved families.

Theme 8 - Evolving & Developing Burial Systems

The Bereavement Services team within Bromsgrove District Council will be adopting a new Abavus system in the summer of 2025 in line with wider council departments which will enhance both the staff and customers experience in being able to use a more efficient and user-friendly software. This system will collaborate with the services current internally built system to extract essential historic data from all of the council's sites, as well as incorporate a GIS mapping system for burial plots, a genealogy section, an improved funeral booking system, memorial details, as well as environmental and local service updates. The aim of this will be to bring the local community and its stakeholders on to a portal in which will be easy to use and understand, as well as making enquiries more efficient and time saving for staff.

The council holds and will maintain up to date ledgers for exclusive rights of burial and grave registers. Cremation paperwork will also remain in paper form within the councils archive room for a period of 15 years in line with GDPR responsibilities. Maps will still be kept up to date in paper form as well as on the councils newly developed Abavus system.

Actions Table

Theme	Action	Anticipated Start Date	Completion Date
Theme 1 - Cemeteries and capacity	For noting	Ongoing	Ongoing
Theme 2 - Reclaiming lairs	Reviewing all cemeteries and assessments made.	June 2025	Ongoing
Theme 3 - Fees and Charges	For noting	1 st April each year	1 st April each year
Theme 4 – Rules and Regulations	Reviewed annually	1 st April each year	1 st April each year
Theme 5 - Grounds Maintenance	Biodiversity and grounds maintenance management plan to be created	Summer 2026	Summer 2028
Theme 6 - Memorial Safety	Memorial safety programme created, and all relevant staff trained with qualification.	October 2025	April 2026
Theme 7 – Memorialisation	Memorialisation audit conducted, review of current products and new memorials selected for options.	Winter 2025	Winter 2026
Theme 8 - Evolving and developing burial systems	Abavus software launched. Data capture carried out from old system. GIS mapping system in place.	Summer 2025	Summer 2026

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Homelessness Prevention Grant and Domestic Abuse Grant

Relevant Portfolio Holder	Councillor Shirley Webb
Portfolio Holder Consulted	Yes
Relevant Head of Service	Judith Willis Assistant Director Community and Housing Services
Report Author	Job Title: Amanda Delahunty Contact email: a.delahunty@bromsgroveandredditch.gov.uk Contact Tel: 01527 881269
Wards Affected	All
Ward Councillor(s) consulted	Not Applicable
Relevant Strategic Priorities(s)	Housing
Key Decision	
If you have any questions about this report, please contact the report author in advance of the meeting.	

1. RECOMMENDATIONS

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

- 1.1 Subject to the final decision by central Government, that the proposed element of the Revenue Support Grant 2026/27 attributed to Temporary Accommodation is ring fenced to the Homelessness Prevention and Rough Sleeping Grant.**

The Cabinet **RESOLVE** that subject to agreement of 1.1:-

- 1.2 the initiatives in 4.6 be approved to receive the Homelessness Prevention Grant and Domestic Abuse Grant allocations of funding for 2026/27.**
- 1.3 delegated authority be granted to the Assistant Director of Community and Housing Services, following consultation with the Portfolio Holder for Strategic Housing to use any unallocated Grant during the year or make further adjustments and uplifts as necessary to ensure full utilisation of the Grants for 2026/27 in support of existing or new schemes;**

1. BACKGROUND

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- 1.1 From 2026/27, the government plans to consolidate several existing grants into a single Homelessness and Rough Sleeping Grant. This new grant will encompass funding for prevention and relief activities currently funded through the Homelessness Prevention Grant, as well as the Rough Sleeping Prevention and Recovery Grant. It is expected that this will be a three year award.
- 1.2 Officers propose that the grants given under this funding are for a three year period with any uplift of grant allocation aligned with any MHCLG grant uplift year on year. Grant funding will be subject to satisfactory performance of the service with targets set for continual improvement.
- 1.3 The Government's recent consultation has made changes to the provision of Homelessness Prevention Grant in relation to its use towards Temporary accommodation. It is proposed that a proportion of Homelessness Prevention Grant will be transferred to the Revenue Support Grant from 2026–27. This funding will be allocated using the new Settlement Funding Assessment (SFA), which will include a dedicated Temporary Accommodation formula.
- 1.4 The percentage of Homelessness Prevention Grant allocation, removed for temporary accommodation is anticipated to be approximately 51% of the usual grant, and provided through Revenue Support Grant in the Local Government Finance Settlement.
- 1.5 This report seeks Council's approval for the temporary accommodation element of the Revenue Support Grant to be ringfenced to homeless prevention activities set out in 4.6.
- 1.6 This report seeks Members approval to award the MHCLG Homelessness Prevention Grant including Rough Sleeping Prevention and Recovery Grant and Domestic Abuse New Burdens Grant in addition to the Council's own Homelessness Grant to specific schemes recommended by the Development and Enabling Manager. Additionally, it seeks to delegate authority to the Assistant Director Community and Housing Services, in consultation with the Portfolio Holder for Strategic Housing, to allocate any underspend of grant during 2026/27 on schemes to prevent homelessness and assist those who become homeless.
- 1.7 The purpose of the ringfenced Homelessness Prevention Grant fund is to give local authorities control and flexibility in managing homelessness pressures and supporting those who are at risk of homelessness. The Government expects local authorities to use it to deliver the following priorities:

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- To fully enforce the Homelessness Reduction Act and contribute to ending rough sleeping by increasing activity to prevent single homelessness.
 - Reduce family temporary accommodation numbers through maximising family homelessness prevention
 - Eliminate the use of unsuitable bed and breakfast accommodation for families for longer than the statutory six week limit.
 - The Government requires that at least 49% of the grant is spent on prevention and relief activities and staffing.
- 1.8 The council received a number of applications for this funding and the above criteria was used to support the award of this grant.
- 2.9 Domestic Abuse New Burdens Grant funding has been allocated to ensure that councils can comply with the requirements to provide safe and supported accommodation for those fleeing domestic abuse and provide monitoring of services to central government via Worcestershire County Council who are responsible for the overall duties set out in the Domestic Abuse Act 2021. The grant will contribute to a specialist County co-ordinator post and a specialist County Research and Intelligence Officer post and will also be used to support existing services that meet the needs of this cohort.

2. OPERATIONAL ISSUES

- 3.1 The management and administration of grant forms part of the Strategic Housing day to day operations.

3. FINANCIAL IMPLICATIONS

- 3.1 In addition to the annual Homelessness Grant £112,000, the Council is expecting to be awarded by the Ministry of Housing and Local Government (MHCLG), Homelessness Prevention Grant £349,018, £34,899 Rough Sleeping and Prevention Grant and £35,774 Domestic Abuse New Burdens funding. This report sets out how the Council intends to utilise this funding to create a package of support and services to prevent homelessness and support those who become homeless.
- 3.2 It is anticipated that 51% of this the £349,018 MHCLG Homelessness Prevention Grant and £34,899 Rough Sleeping and Prevention Grant

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will form part of the Revenue Support Grant in the Local Government Finance Settlement which would equate to £195,798

- 4.3 The Homelessness Prevention Grant and Rough Sleeping will be ring fenced by MHCLG for activities that prevent and deal with homelessness.
- 4.4 The Council has a budget of £112,000 for the 2026/27 Homelessness Grant allocation in addition to the MHCLG grant award.
- 4.5 The Council therefore has the following for Homelessness Prevention and Domestic Abuse Services and Housing Options in 2026/27 as follows:

Grant	2026/27
Homelessness Grant	£112,000
Homelessness Prevention Grant (including Temp Accom element)	£349,018
Rough Sleeping Prevention and Recovery Grant	£34,899
Sub Total	£495,917
Domestic Abuse Grant	£35,744
Grant Total Grant Available	£531,661

- 4.6 It is recommended that the funding is allocated as follows:

Homelessness Grant Allocation	2026/27 £ (up to £495,917)
The Council is committed to maintain the spend below to meet its statutory duties under homelessness legislation	
BDHT Housing Agency Agreement Top Up Staffing Costs	52,475
Static Temporary Accommodation for an additional 4 units of accommodation	30,688
Worcestershire Strategic Housing Partnership Co-ordinator – contribution towards county-wide development and delivery of housing initiatives in partnership with other agencies	10,500
Severe Emergency Weather Provision	18,347
St Basils Foyer – provides stable accommodation/support for young people - 14 units – fully occupied during last financial year	50,203

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St Basils Crash pad – provides emergency temporary accommodation for 16 and 17 year olds	19,711
Bromsgrove Home Choice CBL and Homelessness Module	14,600
Sub Total	£196,524
The services support the delivery of the Council's Homelessness Service.	
St Basils Young Persons Pathway Worker – support to prevent homelessness for under 25's and Crash Pad to provide a unit of emergency accommodation for young people.	41,116
NewStarts - Provide Furniture and Volunteering Opportunities for Ex-Offenders – supports tenancy sustainment and provides future employment opportunities/reduces risk of reoffending	10,000
GreenSquare Accord Housing Related Support – helping ex-offenders remain housed/seek employment	31,172
Maggs Rough Sleeper outreach and prevention service targeting rough sleepers and those at risk of rough sleeping.	35,607
North Worcestershire Basement Project - Support for young people at risk of homelessness	30,000
BDHT - Sunrise Project intensive support	46,886
Mental Health Link Worker (part funded)	21,554
CAB – Debt Advice for Home Owners and Private Renters	27,611
CAB – Affordability Assessments	6,021
Housing First/Housing Led Service	29,563
Part time Empty Homes Officer	7,680
Spend to Save Top Up	5,683
County Rough Sleeper Coordinator	5,500
Rough Sleeper Access to Accommodation Fund and NFNO/NSNO	1,000
Sub Total	299,393
Total committed expenditure	£495,917
Underspend	£0

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Domestic Abuse Grant Allocation	2026/27 Up to £35,744
County Domestic Abuse Co-ordinator	5,112
County Domestic Abuse Research and Intelligence Officer	4,573
Top up to DA Housing Options Officer	6,059
NewStarts Furniture Project	5,000
Basement Project	15,000
Total committed expenditure	£35,744
Underspend	0

- 4.7 With the exception of BDHT, the majority of the above are voluntary sector organisations and without this funding the support provided would cease which will lead to an increase homelessness pressures and have a negative impact on council finances and reputation. Performance monitoring of these services is available in Appendix 1
- 4.8 Their prevention role is crucial in helping people remain in their existing accommodation wherever possible. This is even more relevant due to affordability issues in all sectors. In addition, there has been less churn in social housing, so fewer properties are becoming available and social housing options are very limited.
- 4.9 An element of the grant supplements the cost of the Housing Agency Agreement 5 year contract with BDHT which ends on 31st March 2028.
- 4.10 The Citizens Advice have submitted bid for a new service £27,611 for targeted Debt Intervention for home owners and private renters who are facing repossession or eviction with an aim to intervene and provide advice to prevent homelessness.
- 4.11 Officers are proposing £29,563 for a Housing First/Housing Led service. This is currently provided by St Pauls Hostel which is a county initiative but likely to come to an end on 31st March 2026, however, the intensive support service is still required locally.
- 4.12 The Council is proposing to provide funding for additional officer hours to support bringing empty properties back into use.
- 4.13 Officers are requesting delegated authority be granted to the Assistant Director Community and Housing Services following consultation with

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the Portfolio Holder for Health and Well Being and Strategic Housing to use any unallocated Grant during the year or make further adjustments to current initiatives as necessary to ensure full utilisation of the Grant for 2026/27.

5. LEGAL IMPLICATIONS

- 5.1 The Council has statutory duty under the Housing Act 1996 (as amended) to assist those who are threatened with homelessness or experiencing actual homelessness and has placed additional duties on the Council regarding preventing and relieving homelessness.
- 5.2 The Homelessness Prevention Grant has been ring fenced to homelessness prevention and tackling homelessness by the Ministry of Housing, Communities and Local Government.
- 5.3 The Domestic Abuse New Burdens Grant has been provided to ensure that councils comply with the requirements of the Domestic Abuse Act 2021.

6. OTHER IMPLICATIONS

Local Government Reorganisation

- 6.1 The new unitary authority/authorities will be required as a local housing authority to provide duties under Homelessness legislation. The 3 year funding allocation to organisations would include a clause that it is subject to any implications arising from Local Government Reorganisation.

Relevant Council Priority

- 6.2 Homelessness Prevention Grant and Domestic Abuse Grant supports the Council's priority of Housing. It allows the Council to support a range of holistic services to help prevent or tackle homelessness and rough sleeping in the district.
- 6.3 The combination of practical support such as furniture, compliments those services that provide outreach support to help clients access accommodation, sustain tenancies, manage budgets, engage in positive activities and access employment.

Climate Change Implications

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- 6.4 The recycling of furniture supports the Council's green thread as it minimises waste and provides reuse and recycling of household items wherever possible.

Equalities and Diversity Implications

- 6.5 The Homelessness Grant and Homelessness Prevention Grant will benefit customers by offering household's more options to prevent their homelessness, support them to remain in their own homes or help the Council to manage and support households in Temporary Accommodation.
- 6.6 The grant will also benefit the larger community as opportunities to prevent homelessness will be maximised.
- 6.7 Domestic Abuse New Burdens Grant will ensure that there are resources to support the provision of a range of services available to meet the needs of those victims/survivors of domestic abuse who become homeless and need support to set up a new home and recover from their experience, many of whom are women.

7. RISK MANAGEMENT

- 7.1 If the recommended schemes are not approved there is a risk that more households who are threatened with homelessness, or who are in housing need, will have limited alternative options. There is also therefore the risk that they may have to make a homeless approach and this could consequently lead to the following negative outcomes:
- Increased B&B costs with 80% having to be picked up by the local authority.
 - Increased rough sleeping in the district
 - Impacts on physical and mental health, educational achievement, ability to work and similar through increased homelessness.
- 7.2 All recipients of Grant will enter into a grant agreement and have regular monitoring with officers on the delivery of the service.

8. APPENDICES and BACKGROUND PAPERS

Appendix 1 Outcomes Monitoring Table

9. REPORT SIGN OFF

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Department	Name and Job Title	Date
Portfolio Holder	Councillor Shirley Webb Portfolio Holder Strategic Housing	28/10/25
Lead Director / Head of Service	Judith Willis Assistant Director Community and Housing Services	28/10/25
Financial Services	Deb Goodall, Assistant Director of Finance and Customer Services	28/10/25
Legal Services	Nicola Cummings, Principal Solicitor Governance	28/10/25
Climate Change Officer (if climate change implications apply)	Matt Bough, Strategic Housing and Business Support Manager	28/10/25

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**GRANT MONITORING OUTCOMES
SUMMARY
2025 - 2026**

		Basement	CABR	Maggs	GSA	Crash Pad	YPPW	Foyer
Clients	B/F CASES	120	3	0	11	0	21	14
	NEW APPLICATIONS	38	3	8	2	2	42	3
	APPLICATIONS CLOSED	50	5	1	4	1	43	4
	C/F CASES	108	1	7	9	1	20	13
Support to access	Benefits	15		2	2	2	7	3
	ID/Bank Acc/etc	28		7	0	1	21	0
	Mental health	15		0	0	0	0	0
	Substance Misuse	0		0	0	0	0	0
	GP	3		2	0	0	0	0
	Voluntary	18		2	1	0	0	0

GRANT MONITORING OUTCOMES

2025 - 2026

QUARTER 1

CATEGORY		Basement	CABR	Maggs	GSA	Crash Pad	YPPW	Foyer	
Clients	B/F CASES	120	3	0	11	0	21	14	169
	NEW APPLICATIONS	13	1	3	1	2	26	3	49
	APPLICATIONS CLOSED	0	3	0	3	1	24	3	34
	C/F CASES	133	1	3	9	1	23	14	184
Support to access	Benefits	6		1	1	2	6	3	19
	ID/Bank Acc/etc	13		3	0	1	21	0	38
	Mental health services	7		0	0	0	0	0	7
	Substance Misuse services	0		0	0	0	0	0	0
	GP services	1		0	0	0	0	0	1
	Voluntary Services	7		1	1	0	0	0	9

QUARTER 2

CATEGORY		Basement	CABR	Maggs	GSA	Crash Pad	YPPW	Foyer	
Clients	B/F CASES	133	1	3	9	1	23	14	184
	NEW APPLICATIONS	25	2	5	1	0	16	0	49
	APPLICATIONS CLOSED	50	2	1	1	0	19	1	74
	C/F CASES	108	1	7	9	1	20	13	159
Support to access	Benefits	9		1	1	0	1	0	12
	ID/Bank Acc/etc	15		4	0	0	0	0	19
	Mental health services	8		0	0	0	0	0	8
	Substance Misuse services	0		0	0	0	0	0	0
	GP services	2		2	0	0	0	0	4
	Voluntary Services	11		1	0	0	0	0	12

QUARTER 3

CATEGORY		Basement	CABR	Maggs	GSA	Crash Pad	YPPW	Foyer	
Clients	B/F CASES	108	1	7	9	1	20	13	159
	NEW APPLICATIONS								0
	APPLICATIONS CLOSED								0
	C/F CASES	108	1	7	9	1	20	13	159
Support to access	Benefits								0
	ID/Bank Acc/etc								0
	Mental health services								0
	Substance Misuse services								0
	GP services								0
	Voluntary Services								0

QUARTER 4

CATEGORY		Basement	CABR	Maggs	GSA	Crash Pad	YPPW	Foyer	
Clients	B/F CASES	108	1	7	9	1	20	13	159
	NEW APPLICATIONS								0
	APPLICATIONS CLOSED								0
	C/F CASES	108	1	7	9	1	20	13	159
Support to access	Benefits								0
	ID/Bank Acc/etc								0
	Mental health services								0
	Substance Misuse services								0
	GP services								0
	Voluntary Services								0

Housing Allocations Policy Consultation and System Update

Relevant Portfolio Holder	Councillor Shirley Web
Portfolio Holder Consulted	Yes
Relevant Assistant Director	Judith Willis Assistant Director Housing and Community Services
Report Author	Job Title: Amanda Delahunty Contact email: a.delahunty@bromsgroveandredditch.gov.uk Contact Tel: 01527 881269
Wards Affected	All
Ward Councillor(s) consulted	Not applicable
Relevant Council Priority	
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 is asked to RESOLVE:-

- 1) To consult on the draft Housing Allocations Policy for a period of six weeks commencing 27th November 2025;
- 2) That the Council's Housing Register be referred to as 'Bromsgrove Home Choice'.
- 3) That authority be delegated to the Assistant Director for Community and Housing Services and the Assistant Director for Legal, Democratic and Procurement Services to agree final changes and make any future amendments to the Council's Housing Allocations Policy that are deemed to be necessary to comply with Government guidance and which do not trigger the statutory obligation to consult the persons affected by the changes pursuant to section 168(3) of the Housing Act 1996.

2. BACKGROUND

- 2.1 Local Housing Authorities (LHA) are required by Section.166A of the Housing Act 1996 to have an allocation scheme for determining priorities and for defining the procedures to be followed in allocating social housing accommodation and they must allocate in accordance with that scheme.
- 2.2 The Homelessness Reduction Act 2017 (HRA 2017) enhanced the Council's duties for applicants who were facing homelessness by preventing or relieving homelessness at an earlier stage. The Allocations Policy supports the Council in these duties by prioritising homeless households in line with the policy and providing

accommodation through the housing allocations available through the system.

- 2.3 This report advises Members that the Home Choice Plus Partnership will be dissolving during 2025 and outlines the proposed changes to the Council's Allocations Policy that will be required to accommodate this and also some additional changes recommended by officers, following a review of the policy.

OPERATIONAL ISSUES

- 3.1 The current Home Choice Plus partnership which is subject to an SLA between Stratford on Avon and Wyre Forest District Councils and Bromsgrove District Council, is coming to an end on the 31st March 2026. This is due to a combination of the current ICT system requiring an expensive upgrade in order for it to continue to be secure, and Local Government Re-organisation which would lead to one of the partners needing to develop their own system in any event. The changes proposed to the policy are set out below and aim to support the Council to fulfil its homelessness duties and help minimise the length of time that households spend in temporary accommodation. In addition, those with a low housing need and no local connection will no longer be able to access the housing register and within the reasonable preference bands, we have provided further clarity to what the Council considers to be a reasonable preference for housing.
- 3.2 The current number of live applications on the housing register are 2,888 and are banded below.

BDC Active Applications	1 Bed	2 Bed	3 Bed	4 Bed	5+ Bed	TOTAL :
Priority	18	11	5	1	0	35
Gold Plus	188	92	49	8	2	339
Gold	28	31	17	6	0	82
Silver Plus	15	4	2	0	0	21
Silver	3	4	0	0	0	7
Reduced Preference	14	11	9	2	0	36
Bronze Plus	1,172	337	145	23	3	1,680
Bronze	473	138	63	12	1	687
Grand Total	1,911	628	290	52	7	2,888

- 3.3 **Name and Banding Changes.** It is proposed that the new policy and system will be named the Bromsgrove Home Choice. The Bandings will be changed from Priority, Gold Plus, Gold, Silver Plus Silver, Reduced Banding, Bronze Plus and Bronze, to Band numbers 1 to 6.
- 3.4 **Community Contribution** - additional waiting time will not apply for those in Priority Band that will in the future be known as Band 1. The Community Contribution additional waiting time will not be applied for those in Band One as they are already in the most extreme housing need and should be prioritised based on their time in that band. By allowing community contribution in the past, some households have been left in temporary accommodation for longer than necessary. The Government does not consider Bed and Breakfast (B&B) suitable temporary accommodation for families and pregnant women and requires that those whose households includes dependent children or a pregnant woman must not be housed in B&B accommodation unless there is no other suitable accommodation available, and only for a maximum of six weeks. This change will support the Council to achieve this directive.
- 3.4 **Move on from Supported Accommodation.** Those who are confirmed by the support provider as ready to move-on from supported accommodation into independent living are placed into Gold Plus which in the future will be known at Band 2. The policy has been clarified to confirm that this will only apply where Bromsgrove District Council referred that person into the supported accommodation in the first place and at that time made an agreement with the landlord to support with move on.
- 3.5 **Lower levels of disrepair** - The current practice of awarding reasonable preference for lower levels of disrepair that do not constitute a Category 1 hazard will be removed. It will be left for the Council's Private Sector Housing Team to work with landlords to improve the standard of properties.
- 3.6 **Those in Reasonable Preference but without a Local Connection to Bromsgrove.** It is proposed that those in a reasonable preference for housing as defined under the Housing Act 1996 but without a local connection be placed into what was known at the Reduced Banding, but under the new policy will be Band 4.
- 3.7 **Home Owners in a reasonable preference for housing as defined under the Housing Act 1996.** Homeowners that own or part own a freehold or leasehold property in the UK or abroad will be unable to join the housing register. It is proposed that discretion to this ruling will be applied where exceptional circumstances apply, these may include:

- Evidence supplied that the property is having a significant detrimental impact on the health of the applicant, it has been verified by a professional that the property cannot be adapted to meet their needs and they have limited financial resources to meet their own housing needs elsewhere.
 - The current property is unaffordable, and the applicant does not have the financial resources to meet their rehousing needs. This will be assessed through an application on the grounds of homelessness.
 - Cases where the applicant or a member of their household is suffering from domestic abuse or harassment, and there is evidence to suggest emergency rehousing is required. This will be assessed through an application on the grounds of homelessness.
 - If homeowners are accepted onto the housing register, they will need to evidence they are in the process of selling their home prior to any offer being made. Those deemed to have sufficient financial resources to resolve their own housing needs will be placed in the reduced banding which will be known as Band 4.
- 3.8 Homeowners that do not fulfil any of the reasonable preference categories will be assessed as having no housing need and therefore will not qualify to join the housing register.
- 3.9 **Increase in minimum income threshold before the reduced banding, Band 4 is applied.** It is proposed that the maximum income a household can earn before being placed into the reduced banding in respect of having sufficient resources to solve their own housing need, is increased:
- 3.10 **Financial Resources** - Currently households who qualify for reasonable preference will be deemed to have sufficient financial resources to resolve their own housing need through home ownership or private renting where their earnings exceed;
- For single people and couples with no children, a gross household income (including benefits) of more than £47,000 per annum (which is the equivalent of two adults over 21 years of age working full time and earning the minimum wage) or
 - Households with children with a gross income (including benefits) of over £60,000.

These applicants will be placed into the reduced banding, Band 4.

3.11 **No local connection and low housing need** – As there is little prospect of anyone being housed where they have no local connection and a low housing need, Band 6, will be restricted to those who are:

- Eligible and interested in shared ownership
- Eligible and interested in older persons accommodation
- In social housing and seeking a transfer

3.12 All current housing applicants will need to apply to the new system as it will not be possible to transfer the information over given the changes to both the bandings and the policy outlined above. They will be able to retain their current effective date if they apply within three months of the new system going live.

4. FINANCIAL IMPLICATIONS

4.1 The new system to support the Allocations Policy will cost approximately £46,000 per annum. The cost will be met from current resources and a top up from Homelessness Prevention Grant for the remaining £14,600.

5. LEGAL IMPLICATIONS

5.1 Under Section 166A of the Housing Act 1996 the authority is required to have an allocation scheme for determining priorities and for defining the procedures to be followed in allocating social housing accommodation and must allocate in accordance with that scheme.

5.2 Legal advice will be obtained from a legal specialist to ensure that the policy meets all statutory requirements.

6. OTHER - IMPLICATIONS

Local Government Reorganisation

6.1 The new unitary authority/authorities will be required, as a local housing authority, to have an allocations scheme for determining priorities and for defining the procedures to be followed in allocating social housing accommodation and must allocate in accordance with that scheme. Any new scheme will require consultation with relevant stakeholders and those on the Housing Register.

Relevant Council Priority

6.2 The Council's Allocations Policy supports the Council's Priority:

- Housing

Climate Change Implications

6.3 There are no climate change implications.

Equalities and Diversity Implications

6.4 There are unlikely to be any equalities implications in the above changes as the Council is already operating a choice based lettings system and routinely offers support for those who are digitally excluded from accessing technology. The Council will carry out an Equalities Impact Assessment following the consultation process during which the Council will ask for feedback on any accessibility concerns.

6.5 An effective and robust allocations policy has the positive implication of ensuring those with the greatest need can access suitable housing sooner; this is particularly crucial when considering victims of domestic abuse, pregnant women, families with dependent children and individuals with additional needs, be they health, disability or age related.

7. RISK MANAGEMENT

7.1 A risk assessment is shown at Appendix 2

8. APPENDICES and BACKGROUND PAPERS

Appendix 1 – Draft Housing Allocations Policy

Appendix 2 – Risk Assessment

Appendix 3 – Allocations Policy Proposed Changes Table

9. REPORT SIGN OFF

Department	Name and Job Title	Date
Portfolio Holder	Councillor Shirley Webb Cabinet Member for Health	28/10/25

	and Well-being and Strategic Housing	
Lead Director / Head of Service	Judith Willis Assistant Director Community and Housing Services	28/10/25
Financial Services	Deb Goodall, Assistant Director of Finance and Customer Services	28/10/25
Legal Services	Nicola Cummings, Principal Solicitor - Governance	27/10/25
Policy Team (if equalities implications apply)	Rebecca Green, Policy Manager	28/10/25

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BROMSGROVE HOME CHOICE

Housing Allocations Scheme



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BROMSGROVE HOME CHOICE

Glossary of terms

Term	Definition
Affordable housing	housing let at a social or affordable rent or a low cost home ownership property let to a specified eligible household whose needs are not met in the market. Also known as social housing
Allocation	an offer of housing from a Housing Association or Local Authority either directly or via a nomination from a Local Authority
Band start date	the date the household is awarded the banding applicable to their housing need
Banding/bands	the prioritisation of households on the housing register based on their housing need
Bid	A households’ expression of interest in an available / vacant property
Direct matching	an allocation outside of the Bromsgrove Home Choice Policy/Scheme. Please see the policy for more details.
Bromsgrove Home Choice Allocations Policy / Allocations policy	the policy document that determines how housing is allocated to households
Bromsgrove Home Choice Scheme / Allocations Scheme	the scheme including the software, the policy and the processes involved for allocating housing to households
UK Data Protection Legislation	UK General Data Protection Regulation (UK GDPR) governs how personal data must be processed, ensuring it is: ○ Used lawfully, fairly, and transparently ○ Collected for specified, explicit purposes ○ Adequate, relevant, and limited to what is necessary ○ Accurate and kept up to date ○ Stored only as long as necessary ○ Handled securely Data Protection Act 2018 (DPA 2018) • Supplements the UK GDPR by providing additional rules and exemptions. • Includes specific provisions for: ○ Law enforcement processing (Part 3) ○ National security (Part 4) ○ ICO powers and enforcement (Parts 5 and 6)

	Data (Use and Access) Act 2025 (DUAA). Aims to modernize data use while promoting innovation and reducing compliance burdens for businesses Privacy and Electronic Communications Regulations (PECR) Works alongside the UK GDPR and DPA 2018.
Homelessness	The legal definition of homelessness in the Housing Act 1996 Part VII / Homelessness Reduction Act 2017 is that a person is homeless if they have no accommodation available to them in the UK or anywhere which would be reasonable for them to continue to occupy. They would also be homeless if they have accommodation but are not able to gain access to it, or if it is a moveable structure but they have nowhere to place it. A person is threatened with homelessness if they are likely to become homeless within the next 56 days.
Housing Association	for the purposes of this Scheme also includes Registered Providers and refers to social housing providers regulated by the Homes England
Housing Register	a database/list of households who have applied for affordable housing
Local Authority Agents	An organisation that acts on behalf of the Local Authority in relation to the Housing Register and Homelessness, under a contractual arrangement usually a Housing Association
Local connection	a household's connection to a local area or authority including residency, family connections and employment
Local Lettings Plan	Housing Associations may adopt specific lettings criteria in relation to particular developments or areas in order to address identified problems and to create sustainable and balanced communities. In these circumstances a local lettings policy would apply. Local lettings plans are tailored to the needs of an area and protect the interests of existing residents and the wider community.
Persons from abroad	people subject to immigration control and any other persons from abroad where the secretary of state makes regulations
Qualification Criteria	To join the Housing Register the applicant must meet the eligible qualification criteria which relates to connection to the Bromsgrove District and Housing Need
Reasonable preference	categories of housing need which are defined by the Housing Act 1996, Part Six that are required to be included in an allocations policy
Registration / Effective date	the date of registration of the Housing Application
Section 106 Site	A Section 106 site is a parcel of land or housing development where planning permission has been granted subject to a Section 106 agreement . This agreement outlines specific planning obligations that the developer must fulfil, which can include the Affordable housing provision (e.g. a percentage of homes at below-market rent or sale).
Shared Ownership	Affordable housing option where the applicant parts buys and part rents a property. The Registered Provider owns the remaining share of the property.
Statutorily homeless	This term describes those households who have made a homeless application to the Council and where the full homeless duty has been accepted. This means the household has been determined to be eligible, homeless, in priority need,

	unintentionally homeless and having a local connection and has been issued with a written decision which confirms this.
Weekly bidding cycle	the period of time available for households to place bids on properties they are interested in

1. Introduction

Bromsgrove Home Choice is a scheme used to advertise and/or allocate social rented, low cost home ownership and privately rented properties.

Within the Bromsgrove Home Choice Scheme is an **allocation policy** which outlines how the Council will prioritise households on the Housing Register.

The Council works in partnership with a number of Housing Associations to allocate social housing in a fair and transparent way. **Housing Associations and Registered Providers will have their own Allocations Policies which they will apply when allocating to their properties. This means applicants at the top of the Housing Register on banding and date time may not be rehoused by the Housing Association / Registered Provider if they don't meet the requirements of their allocations policy.**

The Council has the following aims;

Aims of the Scheme

- The Council is committed to offering choice from a range of housing options for people in housing need.
- We aim to challenge the perception that the way social housing is allocated is unfair by ensuring that Bromsgrove Home Choice is easy to understand, transparent and fair.
- We will work to ensure that households are able to access the service we provide.
- We will develop sustainable communities by enabling people to make realistic and informed choices about where they wish to live.
- We will make effective use of all affordable housing stock.
- We will ensure that local people will have an enhanced priority within the banding structure.
- We want to encourage and recognise households who make a positive contribution to their community.
- We will enable a better understanding of the housing demand.
- We will ensure the scheme meets our equalities duties.
- We will publish information that enables households to understand how we assist them through the allocations scheme.

Access to Bromsgrove Home Choice is via a housing register. Once registered households are then able to bid for vacancies advertised in any of the participating registered providers.

Bromsgrove Home Choice enables people with a housing need to look for a home in an area of their choice. Households registered with Bromsgrove Home Choice will be banded according to the suitability of their current accommodation to meet their needs and their local connection.

What are Allocations under this Scheme?

The following are allocations of accommodation under this Scheme:

1. The nomination of an applicant or existing tenant to be an Assured or an Assured Shorthold tenant of housing accommodation held by a Housing Association/Registered Provider (via a Council's Nomination Rights Agreement with the Housing Association). Often the nomination will be that of a 'Starter Tenant' of a Housing Association whereby the Housing Association will grant an Assured Shorthold Tenancy for a set probationary period (usually 12 months) and provided the tenant successfully completes the probationary period the Housing Association will grant an Assured Tenancy or a fixed term tenancy (please see individual Housing Association / Registered Provider's tenancy policies).

By 'affordable housing' we mean social rent and affordable rent, allocated to specified eligible households whose needs are not met in the market. It should meet the needs of eligible households, including availability at a cost low enough for them to afford, determined with regard to local incomes and local house prices.

The ways in which we advise and assist applicants on a whole range of housing options, including access to the private rented sector and low cost home-ownership opportunities, can be found on the [Council's website](#).

The scheme may also be used to advertise intermediate market rent, shared ownership and private rented properties. Please see the eligibility criteria of the relevant landlord for more details regarding allocation of these types of properties.

Allocations Policy

This Allocations Policy describes how you can qualify for the Bromsgrove Home Choice scheme and how it prioritises housing applicants to identify their housing need with regard to the legal definition of Reasonable Preference and other categories of housing need that the Council has recognised.

Whilst all applicants are assessed in accordance with the scheme, the allocation of properties will be subject to the allocation policies of individual Housing Associations where they have one who will assess applicants on the Housing Register according to their stated priorities. They may have different rules about the number of people who can live in a home of a particular size. This will be made clear when a property is advertised.

This policy sets out in detail who can or cannot be accepted under the policy and how this assessment is made. It also sets out how applicants can apply for, and access, housing.

We have designed the Allocations Policy to meet current legal requirements and to promote sustainable communities and balance housing markets.

The Legal Framework

This Allocations Scheme complies with the requirements of the Housing Act 1996 (as amended) and the Homelessness Reduction Act 2017 and the Domestic Abuse Act 2021 and takes into account the relevant code of guidance Allocation of Accommodation Code of Guidance. All of these documents can be obtained through the Gov.uk website. The Scheme also complies with the Localism Act 2011, Welfare Reform legislation and Equalities Act 2010 where applicable.

This section describes this legal framework.

The 1996 Housing Act (as amended by the 2002 Homelessness Act and Homelessness Reduction Act 2017) requires local authorities to make all allocations and nominations in accordance with an Allocations Scheme. A summary of the Allocations Scheme must be published and made available free of charge to any person who asks for a copy. A summary of the Allocations Scheme and general principles is available through the [Council's website](#).

The Housing Act 1996, (as amended) requires local authorities to give Reasonable Preference in their allocations policies to people with high levels of assessed housing need. This includes homeless people, those who need to move on welfare or medical grounds, people living in unsatisfactory housing and those who would face hardship unless they moved to a particular locality within the local authority's area.

The Act also requires local authorities to state within the policy its position on offering applicants a choice of housing accommodation or offering them the opportunity to express preference about the housing accommodation to be allocated to them.

The policy is also drafted and framed to ensure that it is compatible with the Council's equality duties including the duty to eliminate unlawful discrimination and to promote good relations between different racial groups, as well the duty to promote equality between disabled persons and other persons and between men and women.

This Policy has considered:

- The Local Authority's statutory obligations and discretion as to who is eligible for housing allocation.
- The Local Authority's statutory obligation to provide Reasonable Preference to certain categories of applicants set down by law i.e. those who must be given a greater priority under the Allocations Policy.
- The Local Authority's statutory discretion to grant "additional preference" and/or to determine priority between applicants with Reasonable Preference.
- The general and specific statutory discretions that can be exercised when allocating housing.

Service Standards

We will aim to:

- Register all eligible applications within 10 working days (where full information is available) although, where additional information is required, applications can take up to four weeks to assess.

- Process all supporting information within 10 working days.
- Complete shortlisting of applicants for properties within 10 working days of advertising cycle ending.
- Advise all applicants excluded from the housing register within 10 working days with the reason for the exclusion.
- Assist applicants to bid for properties where required.
- Respond to applicant letters, client messages and emails within 10 working days.
- Respond to telephone calls within 1 working day.

We will:

- **Treat all customers with courtesy, fairness, honesty, and respect.**
- Use **plain English** in all communications and explain decisions clearly.
- Be **polite and helpful** in every interaction—whether face-to-face, by phone, or in writing.
- **Listen actively** to tenants' concerns and act on their feedback.
 - Suggestion - **Treat all customers with courtesy, fairness, honesty, and respect.**
 - Use **plain English** in all communications and explain decisions clearly.
 - Be **polite and helpful** in every interaction—whether face-to-face, by phone, or in writing.
 - **Listen actively** to tenants' concerns and act on their feedback.
- Maintain an **accessible website** with clear navigation and housing service sections.
- Make **reasonable adjustments** for individuals with disabilities or specific needs.
- Ensure **contact details are visible** in all published documents and communications.

What we ask of you...

- Speak to us in a polite and courteous manner.
- Provide us with the information we need, so we can help you.
- Contact us if you are unable to keep appointments.
- Inform us with any changes in your circumstances which may affect the service we provide to you.
- If you are unhappy with the service you have received, please contact us.
- If you are happy with the service let us know.

2. Statement on Choice

Choice and Constraints

We are committed to offering the greatest choice possible in the allocation of housing through the Bromsgrove Home Choice scheme. However, this is in the context of considerable pressure on allocations within our affordable housing stock and which means we will therefore have qualification criteria covering who is and isn't eligible to join the waiting list.

Whilst keen to encourage and facilitate mobility within housing, Bromsgrove Council recognises that provision of choice has to be balanced along with local needs. Those without a connection to Bromsgrove District, will not be eligible to go on the housing register unless they meet one of the exceptions criteria.

In determining priority for housing within the banding structure, a higher degree of preference will be awarded to applicants who have the greatest need and have a local connection to Bromsgrove District.

Applicants have the opportunity to view details of all properties that are available and to choose to 'bid' for properties for which they are eligible.

Whilst a key objective of the Bromsgrove Home Choice scheme is to offer applicants more choice, there will be a number of exceptional situations where this may not be possible, for instance;

- Where the applicant does not meet the eligibility criteria for the scheme or the vacant property.
- Where a Local Lettings Plan has been agreed and the applicant does not qualify.
- Where there is a legal agreement restricting who can be offered the property.
- Where the applicant is statutory homeless, or is a prevention or relief case under the Homelessness Reduction Act 2017.

These exceptional circumstances will be made clear when the property is advertised, unless the exceptional circumstance concerns the individual specifically (who has bid for the property) in which case it will be discussed with the applicant at the point of allocation.

Applicants who bid on and subsequently refuse properties for no reason will be moved into the Band 4 (Reduced Priority) – for further details please see the relevant section in the Allocations Policy.

The Council will collect information from applicants about their particular preferences regarding where they want to live. This is to support our work in identifying housing needs and demands within specific parts of districts.

3. Eligibility and Reasonable Preference

Who is and who is not eligible under this Scheme.

Who can apply to register on the Bromsgrove Home Choice scheme?

Any United Kingdom resident aged 16 years or over can apply to join the scheme by completing an application form. The Bromsgrove Home Choice policy does exercise an eligibility criteria and so not all applications will be accepted where there is no close association to the area and/or where there is no or low housing need. Please see the following sections regarding the eligibility criteria.

Anybody can make joint applications including married couples, civil partners, cohabiting couples, same sex couples, and brothers and sisters. In such cases, it is usual for a joint tenancy to be granted in the event of an offer of accommodation being made. The eligibility of applicants to be on the Housing Register will also be checked at the point of allocation.

Qualification Eligibility Criteria

Applicants are not eligible to join the Bromsgrove Home Choice housing register unless they met the qualifying criteria of a close association outlined below;

In determining whether the household has a close association we will agree a connection exists in the following circumstances;

- Where the local connection arises due to residency the applicant(s) must have lived in Bromsgrove District (by choice) for a minimum period of two years.
- Where the applicant(s) meets any of the statutory homelessness definitions included in the allocations policy.
- Where the local connection arises due to employment and the applicant(s) have been in permanent, paid employment for a minimum period of six months, within Bromsgrove District, immediately prior to the application (please see further information below).
- Where the applicant(s) has a close (immediate) family member living in Bromsgrove District and has done so for a minimum period of five years, immediately prior to the application (please see further information below).
- Where the applicant has resided in Bromsgrove District for three out of the last five years at the point of application.
- Has a local connection as a result of special circumstances (this would include people with a reasonable preference without a local connection identified above).

Local connection for homeless purposes will be assessed having regard to the definition of local connection contained in Section 199 Housing Act 1996 (in the case of homeless applicants) and the various codes of guidance.

In determining permanent employment we will give consideration to the Local Government Association guidelines which state that this is employment other than that of a casual nature.

In determining close family member we mean mother, father, sister, brother or adult child (aged 18 and over).

If an applicant(s) hasn't got a connection that meets the qualification criteria and claims a connection on the basis of special circumstances then the decision about allowing them on the list must be made by a senior officer or manager.

Where the applicant is a member of the armed forces or is a care leaver, there are special arrangements – please see further details within this policy.

Applicants with a local connection to Bromsgrove District will be awarded a band depending on their housing need. For applicants who qualify for a reasonable preference but do not have a connection, they will be awarded Band 4.

Residency of Choice

For the purposes of determining eligibility on residency grounds, living in the Local Authority area will not include the following:

- Occupation of a mobile home, caravan or motor caravan where it is not their only or principal home.
- Occupation of a holiday letting (which includes a permanent building, hotel or bed and breakfast accommodation) for the purposes of a holiday.
- Resident of a prison, Bail Hostel or other such accommodation.
- In-Patient of Hospitals/specialist centres where they have a connection elsewhere.

Under the Homeless Reduction Act, Care Leavers will have a local connection with the area of the local authority that owes them leaving care duties – therefore if someone is placed in care by Worcestershire County Council they will have a local connection with all six Local Housing Authorities in Worcestershire.

A care leaver aged under 21 who normally lives in a different area to that of the local authority that owes them leaving care duties, and has done for at least 2 years including some time before they turned 16; will also have a local connection in that area. For example if Worcestershire County Council places a young person in Stratford District Council before they turn 16 and they are in care in Stratford District Council for two year period the young person will have a local connection with Stratford and all of Worcestershire.

Housing Need

Applicant(s) wishing to join the Bromsgrove Home Choice Housing Register must have a housing need recognised by the Allocations Scheme. This will include those applicant(s) with reasonable preference, those who are underoccupying social housing stock and those covered by the categories within the relevant banding. Where an applicant does not fall within a reasonable preference banding and does not have a local connection, they will not be qualified to register and will be offered alternative housing options. Applicant(s) will also be offered the right to request a review of this decision.

Age Eligibility Criteria

Young people aged between 16 – 18

Young people aged between 16 and 18 can apply to Bromsgrove Home Choice. For young people under the age of 18 years who are not able to hold a tenancy, a Housing Association may grant permission to allow the occupation of a property by way of an "Equitable Tenancy".

However a Housing Association / Registered Providers will not normally grant a tenancy to anyone under the age of 18 years unless they are also able to provide a guarantor to cover rent. Please refer to individual Housing Association and Registered Providers policies for more details.

Persons from abroad

Applicants must have a right to live in the United Kingdom and be entitled to claim public funds. This will include applicants who are British Citizens, EEA nationals who are habitually resident in the United Kingdom, exercising their right as a worker or have settled or pre-settled status. People applying to join the Housing Register have to provide documents to confirm their identity and their immigration status.

A person from abroad (or two or more persons jointly if any of them is an ineligible person) is ineligible for an allocation of housing accommodation if they are subject to immigration control within the meaning of the Asylum and Immigration Act 1996, or are excluded from entitlement to housing benefit by s.115 of the Immigration and Asylum Act 1999 (c 33) (exclusion from benefits) unless they are of a class prescribed by regulations made by the Secretary of State. Persons who are subject to immigration control and eligible for housing assistance are;

- Refugee status.
- Exceptional leave to remain.
- Indefinite leave to remain.

This does not apply to a person who is already a secure or introductory tenant of the Council or housing association.

If an applicant has any further questions regarding their status they should contact the Council or seek independent legal advice.

Households who are living abroad and therefore not habitually resident will not be eligible to register.

Applicants who have been considered as ineligible due to immigration status can re-apply at any time.

Persons with no local connection to Bromsgrove District

Applicants who have no local connection to Bromsgrove District will not be eligible to join Bromsgrove Home Choice.

However, the following categories will be exempt and will be eligible to register;

- Households accepted as statutory homeless under the Housing Act 1996 (as amended by Homelessness Act 2002 and Homelessness Reduction Act 2017) by a Local Authority which has not yet been discharged.
- Households with a reasonable preference under the 1985 Housing Act.
- Households where the Council is satisfied that the applicant(s) needs to live in the area to provide ongoing, regular and significant care and support to a relative who lives in the area and their application is supported by the local Adult or Childrens Services team.

- Households where the Council has agreed to rehouse the applicant under a reciprocal agreement with their current landlord or local authority.
- Households where rehousing or relocation into the Local Authority area is accepted by the Local Authority as being essential due to public protection issues or for other exceptional reasons.
- Members of the armed forces as outlined in the Allocations Scheme.
- Victims of domestic abuse as outlined in the Allocations Scheme.
- Social services care leavers as outlined in the Allocations Scheme.
- Social housing tenants who need to move because they work or have been offered work in the Partnership Area and they have a genuine intention to take up the offer and will suffer hardship otherwise.
- Where a Local Letting Plan or s106 restriction applies on a specific site.

Unacceptable behaviour

Where the applicant, or a member of their household, has been guilty of unacceptable behaviour serious enough to make them unsuitable to be a tenant of the authority, they will be ineligible for registration.

Unacceptable behaviour is defined as behaviour which would, if an applicant or member of their household was a secure tenant, entitle a landlord to outright possession under any of the Grounds 1 to 7, Schedule 2 of the Housing Act 1985.

Unacceptable behaviour can include:

- Owing significant rent arrears and/or failing to comply with a current tenancy condition with a Council, Housing Association or private landlord to such an extent that a Court would grant a possession order.
- Conviction for using the property for an illegal or immoral purpose.
- Causing nuisance and annoyance to neighbours or visitors for example anti-social behaviour.
- Being convicted for committing certain indictable offences in or near the home and still posing a threat to neighbours or the community.
- Being violent towards a partner or members of the family.
- Allowing the condition of the property to deteriorate.
- Allowing any furniture or fixtures provided by the landlord to deteriorate due to ill treatment.
- Obtaining a tenancy by deception, for example by giving untrue information.
- Paying money to illegally obtain a tenancy.

- Having lost tied accommodation provided in connection with employment due to conduct making it inappropriate for the person to reside there.

In determining whether an applicant is ineligible due to unacceptable behaviour, the Council, will consider:

- Has the applicant or a member of the applicant's household been guilty of unacceptable behaviour?
- Was the unacceptable behaviour serious enough to have entitled the Landlord to obtain an order for possession?
- At the time of the application, is the applicant still unsuitable to be a tenant by reason of that behaviour, or the behaviour of a member of their household who wishes to reside with them?

The applicant will be excluded from the housing register. The applicant does have a right to review against this decision. This decision will be taken by the District Council. An applicant may be rendered ineligible at anytime during the process should Bromsgrove Home Choice become satisfied that they are ineligible.

Applicants classified as being ineligible for any reason can make an application for accommodation in the future if their circumstances have changed for any reason. It is for the Local Authority to consider behaviour, at the point of application to the housing register, and whether they are now eligible under the Policy.

Each application will be assessed on its merits and a decision regarding eligibility will be made accordingly. Anyone deemed ineligible for the Scheme will be provided with a full written explanation for the decision and will have a right of review of the decision.

Please see the section on Reviews below.

Applicants who are not eligible to join the housing register

At the point of registration all applicants are asked for information about their housing history and legal status to establish eligibility to join the housing register under the relevant legislation and this allocations policy.

Applicants are not assessed for the Scheme or placed into a Band until a decision has been made regarding their eligibility.

Armed Forces

Members of the UK armed forces stationed abroad will be considered as living in the United Kingdom for the purposes of applying for social housing.

The Localism Act 2011 amends the Housing Act 1996 to give local housing authorities in England the power to decide what classes of persons are or are not qualifying persons under section 160ZA(7) of the Housing Act 1996, for an allocation of housing accommodation.

The Secretary of State has the power to prescribe in Regulations criteria that may not be used by local housing authorities in deciding what classes of persons are not qualifying persons (section 160ZA(8)(b)). These Regulations require that local housing authorities do not use local connection (within the meaning of section 199 of the Housing Act 1996) as a criterion in deciding whether the following are not qualifying persons:

(a) persons who are serving in the regular forces or have previously served in the armed forces;

(b) bereaved spouses or civil partners of those serving in the regular forces where their spouse or partner's death is attributable (wholly or partly) to their service and the bereaved spouse or civil partner's entitlement to reside in Ministry of Defence accommodation then ceases;

(c) seriously injured, ill or disabled reservists (or former reservists) whose injury, illness or disability is attributable wholly or partly to their service.

The allocations policy will also extend the provision above, to include divorced or separated spouses or civil partners of Service personnel who are required to move out of accommodation provided by the Ministry of Defence.

Victims of domestic abuse

The qualifying criteria for local connection will not be applied to households who are victims of domestic abuse as per Regulation 2 The Allocation of Housing (Qualification Criteria for Victims of Domestic Abuse and Care Leavers) (England) Regulations 2025.

This includes where any individual of the household is, or was, a victim of domestic abuse carried out by another person, who needs to move for reasons connected with that abuse. This will include accommodation initially occupied on a temporary basis such as refuge accommodation.

Care leavers

The qualifying criteria for local connection will not be applied to care leavers as per Regulation 2 of The Allocation of Housing (Qualification Criteria for Victims of Domestic Abuse and Care Leavers) (England) Regulations 2025. This includes:-

Eligible children as per 19B of Schedule 2 to the Children Act 1989, which are those who are aged between 16-17 and have been looked after by a local authority for a prescribed period, or periods amounting in all to a prescribed period, which began after they reached a prescribed age and ended after they reached the age of sixteen

- A relevant child as per section 23A(2) to the Children Act 1989 who is not being looked after by any local authority in England or by any local authority in Wales, was, before last ceasing to be looked after, an eligible child for the purposes of paragraph 19B of Schedule 2; and is aged sixteen or seventeen.
- A former relevant child under section 23C(1) of the Children Act 1989 who is a person who has been a relevant child for the purposes of section 23A (and would be one if they were under eighteen), and in relation to whom they were the last responsible authority; and a person who was being looked after by them when they attained the age of eighteen, and immediately before ceasing to be looked after was an eligible child.

Social housing tenants

The Secretary of State has the power, to prescribe in Regulations, criteria that may not be used by local housing authorities in deciding what classes of persons are not qualifying persons (section 160ZA(8)(b)). These Regulations require that local housing authorities do not

use local connection (within the meaning of section 199 of the Housing Act 1996) as a criterion in deciding whether social housing tenants are a “relevant person”

A relevant person has a need to move because the relevant person—

- (a) works in the district of the local housing authority, or
- (b) (i) has been offered work in the district of the local housing authority, and
 - (ii) the authority is satisfied that the relevant person has a genuine intention of taking up the offer of work.

This regulation does not apply if the need to move is associated with work or the offer of work which is—

- (a) short-term or marginal in nature,
- (b) ancillary to work in another district, or
- (c) voluntary work.

In this regulation “voluntary work” means work where no payment is received by the relevant person or the only payment due to be made to the relevant person by virtue of being so engaged is a payment in respect of any expenses reasonably incurred by the relevant person in the course of being so engaged.

Specifically a qualification criteria may not be applied to existing social housing tenants seeking to transfer from another local authority district in England who have a reasonable preference under s166(3)(e) because of a need to move to the local authority’s district to avoid hardship where they need to move because the tenant works in the district, or need to move to take up an offer of work.

In considering registering applications the Council will take into account the Right to Move Statutory Guidance March 2015 (or any relevant successor document).

Any other social housing tenant, who satisfies the eligibility criteria will be eligible to join the Housing Register, even if they have no housing need and don’t currently live in the local authority area.

The Application of Reasonable Preference

Bromsgrove Council is required by law to assess the relative priority that housing applicants are awarded. This is particularly important when the demand for social housing is greater than the availability of homes.

The law, as it applies to local housing authorities, requires that Reasonable Preference for housing must be given to those in the categories set out in the Housing Act 1996 (as amended). The statutory Reasonable Preference categories cover:

- All homeless people as defined in Part VII of the Housing Act 1996 and Homelessness Reduction Act 2017.
- People who are owed an accommodation duty because they have a priority need but are intentionally homeless (under s190 (2)), because they are not in priority need and not homeless intentionally 193 (2) or because they are threatened with homelessness, in priority need and not intentionally homeless (195 (2) of the 1996 Act (or under section

65 (2) or 68(2) of the Housing Act 1985) or who are occupying accommodation secured by any housing authority under section (192 (3).

- People occupying unsanitary, overcrowded or otherwise unsatisfactory housing.
- People who need to move on medical or welfare grounds (including grounds relating to a disability).
- People who need to move to a particular locality within the district to avoid hardship to themselves or others.

Specific details and examples of how Reasonable Preference and priorities are determined and applied are detailed in section 5: The Banding Structure.

Determining priority between applicants with Reasonable Preference

The Council determines priority between applicants with Reasonable Preference by taking into account various factors including:

- The financial resources available to a person to meet their housing costs.
- Any local connection – as defined in s199 Housing Act 1996 (as amended) – that an applicant has with Bromsgrove District.
- The length of time the applicant has been waiting within their current band.
- Any community contribution made by the household.

Households with a reasonable preference can have their banding reduced because of their behaviour or circumstances

4. Registration and Assessment Process

How to Apply

Before anyone can apply for vacancies advertised through the Bromsgrove Home Choice scheme they must first register.

Initial registration can be completed on line. Where an applicant is unable to use the online registration support to complete a registration form can be offered by phone or in person. It is also acceptable for an advocate (for example, a family member, friend or support agency) to complete the registration form on behalf of an applicant who is requesting assistance.

If the applicant is not eligible to register they will be notified giving the reason for the decision and informing them of their right to request a review.

All applications once received will be assessed and placed in the appropriate band. Assessment may involve a home visit or interview to discuss housing options.

Where additional information is required to confirm that a higher band is appropriate, the application may be placed in a lower band until the circumstances of the applicant have been confirmed.

Once registered with the Bromsgrove Home Choice scheme the applicant will be given a membership number.

Applicants to the scheme are entitled to request details about information that has been used to make a decision on their registration.

Help with registration

Help with registration can be given to applicants by the Bromsgrove District Council or other organisations such as County Council social care services, health workers, support workers and voluntary bodies. Help will be available to applicants who find it hard to fully participate in the scheme.

Support can be offered to assist an applicant to use the system where they are interested and ready to move.

Definition of Household Types

An Applicant(s) household type determines the size and type of housing they may be eligible for.

Single person (under 60)	One person household and with no resident children A woman who is less than 25 weeks pregnant
Couple	Married, cohabiting, civil partnership and same sex couples without resident children or with a woman who is less than 25 weeks pregnant
Family	Single parent or couple (as defined above) with minimum of one dependant child, who lives with parent (s) as the main or principal home A woman who is 25 weeks pregnant or more
Pensioner / Disability Living Allowance (DLA)	One person household and couples over 60 or person in receipt of DLA / Personal Independence Payment (PIP) or households with a disabled household member
Other	Any other household group including friends, brother and sister and families with non dependent children

In order to reflect an applicant's housing requirement for a particular property type or size the Council may need to put the applicant into a different category in order to achieve a correct allocation

Example – if the applicant is a single person with a medical need that means they require a larger property for a resident carer, their household type will be amended to “family” or “other” to enable them to bid.

Bromsgrove Home Choice Bedroom Standard			
Household Make-up	Suitable Property Size :		
	1 Bed	2 Bed	3 Bed
Single Person	✓		
Childless Couple	✓		
Parent(s) & 1 child		✓	
25+ weeks pregnant woman with or without partner and no other children		✓	
Parent(s) and 2 children of same sex aged between 0 and 16		✓	
Parent(s) and 2 children of same sex over 16			✓
Parent(s) and 2 children of different sex under the age of 10		✓	
Parent(s) and 2 children of different sex when the oldest reaches 10			✓
Parent(s) and 3 children – 2 of same sex aged between 0 and 16. Plus 1 other child			✓
Parent(s) and 3 children - 2 of different sex under the age of 10. Plus 1 other child			✓

To calculate the property size eligibility for larger households, please use the following guidance:

- 2 children of the same sex are able to share a room until the oldest reaches the age of 16, at which point an additional bedroom will be required.
- 2 children of different sex are able to share a room until the oldest reaches the age of 10, at which point an additional bedroom will be required.

For example:

A family with 2 parents and 3 children of the following age and sex:

- one girl aged 4
- one girl aged 6
- one boy aged 10

are eligible for a 3 bedroom property (one bedroom for the parents, one for the two girls and one for the boy).

A family with 2 parents and 3 children of the following age and sex:

- one girl aged 4
- one girl aged 16
- one boy aged 10

are eligible for a 4 bedroom property (one bedroom for the parents, one for the boy, one for the 4 year old girl and one for the 16 year old girl).

The appropriate Bromsgrove Home Choice senior officer within the Local Authority may exercise discretion in deviating from the Bedroom Standard to increase the number of rooms an applicant requires. Examples would include where an extra room is required to accommodate a carer on health grounds, or where the applicant is a registered foster carer. In some circumstances it may be possible to award this banding and direct match a potential foster parent living in social housing to a more appropriately sized property with the agreement of the landlord.

The bedroom standard allows the policy to determine whether there is underoccupation or overcrowding for the purposes of banding. The Housing Association will determine, through their allocation policy the type and size of property an applicant can occupy.

Band 2 or Band 3 (please see below) will also apply to applicants needing to be re-housed on the application if they have no bed spaces available to them.

Evidence of overcrowding must be provided at the point of registration and at the allocation of accommodation and may be verified by a home visit.

There may be some exceptions to the bedroom requirements including the following;

- where there is a carer included in the household who cannot share a bedroom.
- where the household contains "a child who cannot share a bedroom". This definition applies to a child who (1) is entitled to the care component of disability living allowance (or equivalent PIP allowance) at the highest or middle rate, and (2) by reason of their disability is not reasonably able to share a bedroom with another child.
- where the household has care and supervision responsibilities for other children not normally residing with the household.

A carer is someone who, with or without payment, provides help and support to a partner, relative, friend or neighbour, who would not manage without their help. This could be due to age, physical or mental health, addiction, or disability. In all cases the carer must have been identified by the applicant as the person who is primarily responsible for providing them with care and that they need to live with them.

Even if a carer is in receipt of Carer's Allowance this does not necessarily mean that it is necessary for them to reside with the person who is being cared for. An application to include a carer on a housing application will be considered if the need for a carer has been assessed by a relevant specialist organisation e.g. a social care, health professional as needing to provide overnight support by a resident carer. In these circumstances the applicant must provide supporting evidence from other agencies e.g. Social Care or a Health professional.

In some limited circumstances it may be possible to consider cases where the carer is not in receipt of Carer's Allowance but would be eligible. Under these circumstances it will still be necessary for the applicant to demonstrate that the person looked after is in receipt of a relevant care related benefit.

Household with a disabled child

Where the household includes a disabled child and the child isn't able to share a room with another child because of their disability then an additional bedroom requirement can be considered. The disabled child would need to be in receipt of the care component of the disability living allowance (or equivalent PIP award) at the highest or middle rate.

Households with access to other children

Anyone with access to children will need to demonstrate their involvement in the care and supervision of the child. A senior officer will give consideration to factors including regularity of contact, who claims the relevant benefits for the child and any residency orders as well as legislation, codes of guidance and case law in determining which parent has **primary responsibility** for the children. Therefore, unless there is an exceptional circumstance we would be unlikely to provide family accommodation where they are not the primary carer for the child even if they have 50% access rights to their child.

Currently case law around eligibility for benefits and homeless case law has found that separated parents do not have an automatic right to benefits or a bedroom for a child they do not have primary responsibility for.

Please note: the bedroom standard assessment is for determining overcrowding and does not guarantee that an applicant will be offered the exact property size for their household needs. In particular, where their housing need exceeds four bedrooms but there is a limited supply of larger properties, they are unlikely to be offered social housing that exactly meets their needs.

Also, households that include other adults rather than children may find it difficult to obtain social housing where they require larger properties normally allocated only to households with children, as priority is usually given for family houses to people with dependant children within the Housing Association / Registered Provider's allocation policies.

There may be other special circumstances subject to emerging case law where the bedroom standard does not apply and this will be determined by a senior officer or manager.

Adding adults to an application

Applicants can add other adults to their application, in addition to Applicants 1 and 2. In such cases, the Council would require written confirmation from the adult that they wish to be added to the application. The Council would also require ID; proof of address; confirmation of immigration status; confirmation of income or benefits etc.

5. The Banding Structure

Bromsgrove Home Choice operates a needs-based banding system as described below. Bands are arranged to reflect housing need, with the highest band indicating the greatest need for housing. The scheme consists of five bands, as summarised below. A more detailed description of the bands and of Reasonable Preference can be found under each band section.

The bands within the policy are based on the reasonable preference criteria set out within the 1996 Housing Act.

Once registered the applicant can only be in one band and the highest banding possible will always be applied according to the policy.

The table below describes the bands into which households will be placed according to their housing circumstances.

Band 1 (3-month time limit)

Applicants who are statutorily homeless with a duty to re-house under s193 of Housing Act 1996 (eligible, homeless, priority need, not intentional and with a local connection).

Applicants owed the relief duty who are likely to be accepted as statutorily homeless with a duty to rehouse under the above Act.

Applicants in this band are in the highest priority due to experiencing homelessness and therefore the community contribution will not apply.

Band 2 (6 months time limit) (Local Connection)

- Homeless cases where no statutory duty to re-house (excludes intentional homeless)
- Occupying property in a serious state of disrepair; factors taken into consideration by the Local Authority include where the Local Authority could have served an improvement notice for a Category 1 hazard or equivalent (not for overcrowding and space hazards)
- Verified high medical need / disability that is directly affected by the current housing situation and would be immediately improved by moving
- Applicant is homeless or threatened with homelessness, through no fault of their own (excludes those in priority band)
- Applicant is homeless or threatened with homelessness under the HRA 2017 (Prevention and Relief)
- Requiring move-on from supported accommodation where Bromsgrove Council has referred that person into the supported accommodation and made an agreement with the landlord to support with move on.
- Tenants who are under-occupying social rent or affordable rent housing in the within Bromsgrove District.
- Tenants who are occupying a social housing property within Bromsgrove District with major adaptations that they do not need

▪ Households suffering with serious overcrowding (3 or more bedrooms lacking) ▪ Two or more criteria in Band 3
Band 3 (12 months time limit) (Local Connection) ▪ Households suffering from harassment (excludes priority band cases) ▪ Overcrowding or lacking up to and including 2 bedrooms ▪ Living in exceptional circumstances ▪ Households with children under 10 years old and living in flat with no access to a private garden
Band 4 Reduced Banding (with reasonable preference) ▪ Households with financial resources above defined limits ▪ Households who have deliberately worsened their circumstances to qualify for a higher banding ▪ Households who are intentionally homeless ▪ Households in a reasonable preference but with no local connection to Bromsgrove District ▪ Owner Occupiers in reasonable preference ▪ Households with housing-related debts ▪ Households who have committed acts of anti-social behaviour and other tenancy breaches but not severe enough to have obtained outright possession ▪ Households who aren't bidding for properties that are available and suitable for their needs or successfully bid but then refuse properties that are suitable for their needs
Band 5 (12 month time limit) (Local Connection) Households who do not meet any of the above reasonable preference criteria and with a local connection, and who may have a low housing need including; ▪ Eligible and interested in shared ownership ▪ Eligible and interested in older peoples accommodation ▪ Households with low level medical or welfare issues ▪ Households that are newly forming ▪ Households who are suffering financial hardship ▪ Households who are sharing facilities with other non-related households ▪ Households residing in an institution or supported housing scheme e.g. hospital with no access to settled accommodation ▪ Households who have insecurity of tenure (those in tied accommodation or lodging with family members) ▪ In social housing and seeking a transfer

Band 6 (12 month time limit) (Local Connection)

Households who do not meet any of the above reasonable preference criteria and with a local connection, and who may have a low housing need including;

- Eligible and interested in shared ownership
- Eligible and interested in older peoples accommodation
- In social housing and seeking a transfer

Cumulative Preference in Band 3

Applicants whose circumstances match more than one criterion in Band 3 will be awarded 'cumulative preference', which means that they will move up a band. If an applicant fits the criteria for two or more reasonable preference categories in Band 3 they will move into Band 2 but cannot then move to the higher Band 1 unless they are accepted for the rehousing duty under s193 Housing Act 1996.

The Bandings Explained

Band 1

(Awarded for 3 months)

The following criteria will lead to Band 1 being awarded:

Statutory Homeless with a duty to re-house

Band 1 is awarded by the Local Authority it has accepted a full duty under Part VII of the Housing Act 1996 (as amended by the Homelessness Act 2002) to provide accommodation for an applicant.

This will include victims of domestic abuse who are accommodated in refuge or other temporary accommodation, who the authority owe a rehousing duty to.

Where households are owed the relief duty under the HRA 2017 and it is likely that they would be owed the full statutory rehousing duty (if their homelessness doesn't come to an end through one of the potential discharge routes during the relief period) they will be placed in this band at the point the determination is made.

Band 2

(Local Connection and High housing need – awarded for 6 months)

The following criteria will lead to Band 2 being awarded:

Homeless cases where no statutory duty to re-house (excludes intentional homeless)

Band 2 is awarded by the local authority where an applicant is determined under the homelessness legislation to be eligible for assistance, homeless, not in priority need, not homeless intentionally and has a local connection.

Homeless cases covered by the prevention (HRA 2017)

Band 2 is awarded by the local authority where the applicant will become homeless within 56 days (the prevention duty). The Band 2 award will last for 56 days and then the banding will be reassessed and a band based on housing need / duties owed at the time will be awarded. This will also be awarded to households owed the relief duty where they will not meet the thresholds for a main rehousing duty to be owed.

Properties subject to serious disrepair

Band 2 is awarded where an applicant is living in sub-standard accommodation (regardless of the tenure) and (following confirmation or notification by the relevant Officer) it is determined that action is required under the Housing Act 2004. This would be for a Category 1 hazard that is very severe and may have led to the service of the following notices (only);

- Emergency Remedial Action
- Demolition or Clearance Orders
- Improvement Notices for Category 1 hazard (other than for overcrowding and space)

NB In circumstances where the applicant is in a Local Authority tenancy and the Local Authority can't legally serve notice upon itself then this category would still be awarded where a notice would be served if the tenure was different.

Where applicants report poor housing conditions, the relevant Enforcement Officers may inspect the property to consider using their powers to remedy hazards.

Bromsgrove Home Choice will need to liaise with the relevant Officer on a regular basis to check that the property circumstances are still in disrepair prior to an offer of accommodation being made.

Where the property disrepair has been remedied the applicant's banding will need to be reassessed.

Where a notice has been served that prohibits occupation or the disrepair is so serious that the relevant Officer advises occupation of the property is not appropriate on health and safety grounds, applicants will be dealt with under the Homelessness legislation.

High Medical Need or Disability

This band is awarded following an assessment by Bromsgrove Home Choice, of the evidence provided by the applicant and/or by the preferred medical advisor in relation to their health and/or disability.

An applicant will normally be expected to complete a medical assessment if they have indicated that there is a medical or disability problem that is made substantially worse by their current housing. Their circumstances will be assessed by a Bromsgrove Home Choice officer based on evidence provided by the applicant, and officers will consider evidence from all appropriate medical professionals.

This banding will only be awarded if the current accommodation is so unsuitable in relation to their medical, welfare or disability needs that a move is essential. The assessment is not of the applicant's health, but how their health or welfare is affected by their accommodation.

The following are examples of cases that would qualify for this band:

- The applicant's accommodation is directly contributing to the deterioration of the applicant's health; e.g. severe chest condition requiring intermittent hospitalisation as a result of prolonged periods of exposure to damp (i.e. mould spore allergens). The most vulnerable group is that of persons aged 14 and under. The effects of damp must be recognised as severe under the Housing, Health and Safety Rating System as assessed by the relevant Officer.
- A person with a severe disability requiring substantial adaptations to a property which are not provided in their current accommodation and where the current property cannot be adapted.
- A person suffering with a severe and enduring mental illness or disorder where the medical condition would be significantly improved by a move to alternative accommodation, including members and former members of the armed forces.
- An applicant suffering from terminal illness where they have not already been accepted for a duty under the Homelessness Reduction Act 2017.

Households who are homeless or threatened with homelessness through no fault of their own (who have not made a homeless application)

This status is awarded to all households who are homeless as defined by the Homelessness legislation but have not made a homeless application or do not wish to be considered under the homelessness legislation and where, following investigation, it is proven that the applicant is threatened with homelessness through no fault of their own.

Tenants who are under – occupying affordable social housing or living in an adapted property where they do not require the adaptations

It is important that the best possible use is made of existing housing stock and priority will be given where a Local Authority or Housing Association tenant, in Bromsgrove District, applies to move to a smaller, or more appropriate type of property.

Some examples would be;

- a) Applicant's currently living in family sized accommodation, either social or affordable rent, who wish to 'downsize' and free up at least one bedroom.
- b) applicants currently living in family sized accommodation, either social or affordable rent, wishing to move to a one bed property or a two bed property designated for older people e.g. Retirement housing, Extra Care or a bungalow.
- c) an applicant occupying an adapted property where they do not require the adaptations.

Please note this only applies where a family sized property or a property with substantial adaptations will become available for reletting following the move

Move on from Supported Accommodation.

This status is awarded where an applicant was referred to the supported housing provider and an agreement between the Local Authority and the Supported Housing provider, is in place for applicants to move on from supported accommodation.

This status will only be awarded to applicants in supported accommodation or care-leavers where the following criteria have been met:

- The Council referred the applicant into the supported accommodation.
- The applicant is ready to move to independent settled social housing on the recommendation of the support provider.
- An ongoing support package has been assessed and where required, is in place.

In the case of young people moving on from care, applicants are awarded this category in accordance with the 16 and 17 year old Joint Protocol and the Care Leavers Protocol between the Local Authority and the County Council's Children's Services Department. Applicants must be a former "Relevant Child" as defined by the Children Act 1989.

The evidence to support this will be provided by the County Council's leaving care service and will consist of confirmation that:

- The care-leaver is ready to move to independent settled housing and is genuinely prepared for a move to independent living based on an assessment by the care leavers team, the support provider and housing options officer.
- The care-leaver possesses the life skills to manage a tenancy including managing a rent account.
- An ongoing support package has been assessed and where required, is in place.

Applicants are expected to make full use of their priority by placing bids on all suitable properties to enable them to move on to independent accommodation. Bromsgrove Home Choice officers may use their discretion to place bids on behalf of the applicant where bids are not being placed or are being inappropriately placed to facilitate move-on through supported accommodation. This will be done in consultation with the applicant and (if relevant) their support worker.

For applicants meeting this criteria the band start date will be the date the applicant moved into the supported accommodation

Children accommodated out of area by Children's Services or Unaccompanied Asylum Seeking Children under the responsibility of Worcestershire County Council will be awarded a Band 2 under move on from supported accommodation and will be granted a local connection.

Serious Overcrowding

Applicants lacking three or more bedrooms will be awarded Band 2 e.g. where the applicant has a four bedroom need and is living in a one bedroom property.

Overcrowding assessments will include all household occupants and the overall size of the property in determining the band, regardless of whether the whole household wish to be rehoused together or not. In cases where there is a pregnancy (including multiple births, officers will need to consider whether the current property would be overcrowded when the baby (babies) arrive at the 25 week stage and beyond.

Applicants who claim they are overcrowded will have their circumstances assessed against the Bromsgrove Home Choice Bedroom Standard. The table below shows the bedroom entitlement for adults and children:

Band 3

(Local Connection and Housing Need - valid for 12 months)

The following criteria will lead to Band 3 being awarded:

Households suffering from harassment

Applicants who cite harassment as the main reason for making the application will be asked to provide information about all the circumstances surrounding the application and each case will be assessed on its merits. Any enquiries will be made in a sensitive manner so as not to prejudice the safety of the applicant. Any claims of harassment should be substantiated by evidence from a third party e.g. Police, Housing Officer etc. If the harassment is deemed so severe that it is not reasonable to continue to occupy the accommodation, this will be investigated under the Homelessness legislation.

If an applicant is suffering from domestic abuse or harassment from outside the home, and unable to remain in their home, it is likely that they will be treated as homeless and therefore awarded the appropriate homelessness-related bands.

Overcrowding or lacking required bedrooms

This applies to households who are overcrowded or lacking up to (and including) two bedrooms. Please see section above in Band 2 regarding how overcrowding is determined.

Living in exceptional circumstances

This banding on Bromsgrove Home Choice should only be awarded in those instances where the applicant's living circumstances are considered to be exceptional given the prevailing housing conditions in the district and where no other banding criteria reflects or addresses the problem(s).

In reaching a decision to award the banding, account must be taken of the suitability of the current accommodation and the location of the accommodation in relation to the applicant's needs.

Examples are given below of potential situations where this banding may be granted – the list is not exhaustive and the decision lies with the local authority.

- The applicant is adequately housed but needs to give or receive support on the grounds of disability or illness that is substantial and ongoing and it is not possible for the person giving care to use public transport or their own transport to provide assistance.
- The applicant needs to move on welfare grounds e.g. hardship.
- The applicant's household is overcrowded, coupled with medical issues that do not accrue medical priority.
- The applicant needs to take up or continue employment, education and/or training that is not available elsewhere and they do not live within reasonable commuting distance.

Households with Children living in flats or maisonettes

This status is awarded to households with children under 10 and living in a flat or maisonette with no access to a garden. This may be verified by a home visit.

Band 4 - Reduced Banding

(Reasonable preference but reduced priority)

This band will be used for households in reasonable preference categories where their priority is reduced for one of the following reasons;

Applicants will be banded according to their current housing need but demoted to Band 4. This decision will be reassessed by the District Council after a period of six months, or at the applicant's request at any time.

1. Households who have been determined to have become homeless intentionally

Where the local authority has carried out investigations under Part VII of the Housing Act 1996 (as amended by the Homelessness Act 2002) and found the applicant intentionally homeless.

2. Financial Resources

Home Owners in a reasonable preference for housing as defined under the Housing Act 1996, that own or part own a freehold or leasehold property in the UK or abroad will be unable to join the housing register. It is proposed that discretion will be applied where exceptional circumstances apply, these may include:

- Evidence supplied that the property is having a significant detrimental impact on the health of the applicant, it has been verified by a professional that the property cannot be adapted to meet their needs and they have limited financial resources to meet their own housing needs elsewhere.
- The current property is unaffordable, and the applicant does not have the financial resources to meet their rehousing needs. This will be assessed through an application on the grounds of homelessness.
- Cases where the applicant or a member of their household is suffering from domestic abuse or harassment, and there is evidence to suggest emergency rehousing is required. This will be assessed through an application on the grounds of homelessness.
- If homeowners are accepted onto the housing register, they will need to evidence they are in the process of selling their home prior to any offer being made. Those deemed to have sufficient financial resources to resolve their own housing needs will be placed in Band 4, the reduced banding.

Homeowners that do not fulfil any of the reasonable preference categories will be assessed as having no housing need and therefore will not qualify to join the housing register.

Home owners and people with sufficient financial resources available to them to meet their housing needs will be placed in Band 4.

Currently households who qualify for reasonable preference will be deemed to have sufficient financial resources to resolve their own housing need through home ownership or private renting where their earnings exceed;

- For singles and couples with no children, a gross household income (including benefits) of more than £47,000 per annum, or

- Households with children with a gross income (including benefits) of over £60,000.

Those with savings / capital / assets / equity of £50,000 or more unless they are in receipt of a pension (or fixed income where they would be unable to obtain a mortgage) where they would be allowed savings/capital/assets/equity of up to £95,000. The savings etc. of all adult members of the household will be taken into account for this criteria.

Applicants will be asked to provide income and asset/savings/capital details at the point of application and if, at that stage, they exceed the threshold their banding will be the reduced to Band 4 (where they have a reasonable preference housing need). The income and assets/capital/savings details will also be considered at the point of offer to ensure the applicant is still on the correct banding and they are therefore eligible for the offer.

The financial resources of an armed forces applicant will be disregarded where it is a lump sum that was received as compensation for an injury or disability sustained on active service.

Financial thresholds may also be determined by Registered Providers and applicants should contact individual organisations where they believe income or capital may be an issue at the point they are made an offer of accommodation.

Applicants who are registering for shared ownership purposes only, will not be adversely affected by the financial resources element of the Band 4 as it does not apply to shared ownership schemes.

Where applicant(s) have an exceptional need that can only be met through the provision of affordable housing then Band 4 won't be applied.

2. Deliberately worsening housing circumstances

Where there is evidence that an applicant has deliberately worsened their circumstances or deliberately moved into another property that is unsuitable and as a result qualify for higher priority on Bromsgrove Home Choice, their priority will be reduced to Band 4. This would include circumstances where an applicant surrendered their tenancy, where it was reasonable to occupy and / or against the advice of the Housing Advice / Options Officer or where they moved to a property that was smaller than their requirements.

Where there is evidence that an applicant has deliberately worsened their circumstances in order to qualify for higher priority on Bromsgrove Home Choice, this priority will be reduced to Band 4. This may include the following;

- Unsuitable property choice – e.g. with stairs if need ground floor.
- Overcrowding – e.g. moved in with others / moved others in by choice.
- Causing disrepair – including not allowing access.
- Giving up a suitable tenancy.
- Adaptations – apply to move within 5 years and still meets need.
- Refused support which could have maintained tenancy.

Officers will consider the particular applicants circumstances and particularly issues of vulnerability or where poor advice has been given before reducing the persons banding.

3. Housing related debts

Where households have housing related debts these will be assessed by the Council. The officer must establish that the debts have arisen from a deliberate act or omission that leads to non-payment.

The applicants will be encouraged to make affordable arrangements to pay and they will be placed within the Band 4 until an affordable arrangement has been reached with whom they owe the money to, and the applicant has shown they are maintaining regular payments. The Local Authority will expect the debtor to demonstrate they have taken reasonable steps to resolve the issue prior to reducing the banding given. For this circumstance to apply the debt must not be more than six years old (as after this the debt cannot be recovered unless it has been secured through a court order / money judgement order in which case the six year timescale does not apply).

Band 4 will apply to those with rent arrears, recharges, former tenancy arrears, rent deposit debt, mortgage arrears etc where the debt is £500 or they owe the equivalent of 6 or more weeks target rent (whichever amount is the smaller). The Housing Association/Registered Provider will need to notify the Local Authority of the arrears and any arrangements made with the applicant. Where the applicant can demonstrate a regular payment history (complying with the agreement) for three months or more and the debt is less than £500 the Local Authority will move the applicant back to the higher banding. The Local Authority will exercise its discretion, depending on individual circumstances where there are mitigating factors or an urgent need to move such domestic abuse cases.

4. Anti – social behaviour and other tenancy breaches

Where there has been a breach of tenancy such as anti-social behaviour, or due to the property condition, the applicant will be placed within Band 4. The Local Authority will expect the landlord where the problems occurred, to demonstrate they have taken reasonable steps to resolve the issue prior to reducing the banding given.

Band 4 will apply to applicants who are guilty of anti-social behaviour or tenancy breaches where formal legal action has been commenced e.g. injunction, ASBO, CBO or Notice etc. This would include anyone found guilty of sub-letting a social housing tenancy and waste /neglect of the property. The officer must consider any particular support needs the applicant might have and whether this is having an impact on their behaviour before we reduce the applicants banding. The officer should only consider recent tenancy breaches / anti social behaviour.

The officer can reinstate the higher banding where the tenancy breach is resolved or the applicant can demonstrate changed behaviour over a reasonable timescale.

5. No bidding or refuses offers of accommodation

Where applicants in band 1,2 and 3 have failed to place bids, or have placed successful bids but refused properties, and there is evidence that properties that would meet their needs have been advertised on Bromsgrove Home Choice, their banding will be reviewed within the set time period for their original band above and they will be placed in Band 4.

‘Successful bids’ means where the applicant(s) has been offered the property and invited to view it (where applicable).

The officer must consider the households’ vulnerability and any issues that may have affected their behaviour at the time e.g. domestic abuse, mental health problems.

How will Band 4 be applied

Applicants will be assessed according to their current housing need but demoted Band 4. This decision will be reassessed by the Council after a period of six months, or at the applicant's request at any time (please note review requests where there has not been any change of circumstances will not be considered) but is unlikely to be removed if their circumstances remain the same.

Band 5

(Local Connection)

(Please note applications in this banding will be closed after one year where no bids have been placed)

This applies to all applicants who live, work or have a local connection as defined by s199 Housing Act 1996, to Bromsgrove District and do not meet any of the reasonable preference criteria, as set out above, and have a low housing need.

Where the household has a low level housing need due to medical, disability or welfare conditions / issues, the banding will only be awarded where the condition / issue will be improved by a move to alternative accommodation.

Examples of applicant(s) accepted onto the waiting list and awarded Band 5 include the following;

- Eligible and interested in shared ownership.
- Eligible and interested in older peoples accommodation.
- Households with low level medical or welfare issues.
- Households that are newly forming.
- Households who are suffering financial hardship.
- Households who are sharing facilities with other non-related households.
- Households residing in an institution or supported housing scheme e.g. hospital with no access to settled accommodation.
- Households who have insecurity of tenure (those in tied accommodation or lodging with family members).
- In social housing and seeking a transfer.

Bromsgrove Home Choice does not recognise insecurity of tenure where the applicant is in an assured shorthold tenancy in the private rented sector unless there is another issue arising such as threat of homelessness or disrepair.

Band 6

(No Local Connection)

(Please note applications in this banding will be closed after one year where no bids have been placed)

This applies to all applicants who do not meet any of the reasonable preference criteria, as set out above, and have a low housing need.

Where the household has a low level housing need due to medical, disability or welfare conditions / issues, the banding will only be awarded where the condition / issue will be improved by a move to alternative accommodation.

Examples of applicant(s) accepted onto the waiting list and awarded Band 5 include the following;

- Eligible and interested in shared ownership.
- Eligible and interested in older peoples accommodation.
- In social housing and seeking a transfer.

Applicants with no connection to the local authority who do not meet any of the reasonable preference criteria, or the criteria for low level housing need as set out above, will no longer qualify to join the housing register.

Time Limited Bands

All bands are awarded on a time limited basis, i.e. for 3, 6 and 12. At the end of the time limit, if an applicant has not been successfully housed, the Council will reassess the application and contact the applicant to confirm their circumstances and/or bidding pattern. Applicants in Band 5 will be closed after 12 months if there are no bids. Please see the Reviews / Complaints Section for more information.

Local Connection for Banding Purposes

To determine the relevant local connection of a household, who meet the eligibility criteria for registering, the Council would use the following;

- has lived in Bromsgrove District by choice for a certain time (for six months out of the last 12 months or for three years out of the last five years).
- has close family living in Bromsgrove District, who have been permanently resident for at least the previous five years.
- has permanent paid employment in Bromsgrove District.
- has a local connection as a result of special circumstances

Waiting Time

New applicants are placed into a Band 6, while their housing need is assessed and their waiting time will be from the date of registration (the effective date); this will be the date the form is received.

If an applicant is moved up into a higher band (following assessment) then the date they moved into that band will override the registration date (effective date). Please note it can take up to four weeks to assess a banding.

If the applicant remains in or moves down to a Band 6 then the registration date (effective date) will apply.

Removing Applicant from Band 4

Where an applicant is promoted from the Band 4 to a reasonable preference band, the band start date should be back-dated to the date they were originally placed in Band 4.

Please note that even once an applicant has been promoted from Band 4 to a reasonable preference band, housing associations may still refuse to accommodate them due to their own allocations policies. Applicants demoted to Band 4 should be encouraged to pursue other housing options such as private rented accommodation wherever possible.

The decision to promote an applicant from Band 4 should be undertaken as part of a full review of the applicant's circumstances to ensure that the applicant is awarded the correct banding.

Change of Circumstances

All applicants are required to notify the relevant Bromsgrove Home Choice immediately of any change to their circumstances which may affect their priority for housing. Applicants will need to provide proof of their change before it is assessed.

Applicants who have had a change of circumstances and have not informed Bromsgrove Home Choice may have their application status changed to 'application pending' whilst an investigation takes place in order to determine eligibility. The applicants' banding will be reassessed at the point that they submit the change of circumstances (not at the point when the circumstances change) and this will then determine their band start date. If an applicant does not respond to contact from Bromsgrove Home Choice within one month, their application will be closed.

Applicants should notify the Bromsgrove Home Choice of any change in their circumstances. For example:

- A change of address, for themselves or any other person on their application.
- Any additions to the family or any other person they would wish to join the application.
- Any member of the family or any other person on the application who has left the accommodation.
- Any confirmed pregnancy.
- Changes of name.
- Changes in financial circumstances, including change of employment.
- Accommodation issues.
- Medical or other housing needs.

Most changes of circumstances can be completed online but evidence will still be required.

Additional Preference – Community Contribution

The Council wants to encourage applicants who can, to work and/ or volunteer to raise levels of aspiration and ambition and promote sustainable communities. The following criterion applies to either the applicant or joint applicant. The responsibility will be on the applicant or joint applicant to provide the evidence to be awarded this banding.

We will award an additional waiting time of six months if any of the following circumstances apply (please note households only qualify for one six months waiting time period regardless of how many of the below are relevant).

We will verify all claims of community contribution at the point of registration, at review and at the offer stage.

Applicants in Employment

This applies where applicants work for a minimum of 16 hours per week (permanent and not of a casual nature) and have been in employment for six out of the last nine months.

Applicants Volunteering

This applies to applicants volunteering for a minimum of 20 hours per month and for a continuous period of at least six months, at the point of application, at review and the same at the point of offer.

Volunteering must be for a not for profit organisation registered with the charity commission or otherwise recognised by the Local Authority.

Applicants in Education and Training

This applies to applicants, who have been studying or training, which includes attending higher and further education or who are accessing a vocational course of study or engaging in a programme of work related courses. This must be for a continuous period of at least six months, up to the point of application and the same at point of offer.

Training which is compulsory in order to qualify for out of work benefits will not be taken into account in awarding this additional preference.

Applicants who are full time carers

This applies to applicants who are unable to satisfy the criteria outlined above, but who care for someone on a full time basis and have done so for a minimum period of six months (before applying) and are in receipt of carers allowance (due to disability or frailty).

Applicants with a disability

We recognise that it may not be possible for some applicants to achieve any of the community contribution due to severe disability (e.g. where you are awarded the support element of Employment Support Allowance or higher rate Disability Living Allowance / Personal Independence Payment) and in these circumstances additional waiting time will be awarded.

Applicants owed the prevention duty

Where the applicant is owed the prevention duty having made a homeless application, we will therefore award an additional six months waiting time for an applicant under the prevention duty, in Band 2 in order to prevent their homelessness. If the applicant already

qualifies for one or more other community contributions the waiting time will be in addition, up to a maximum of 12 months.

Members of the Armed Forces and their spouses / civil partners

By Armed Forces, we mean the “regular forces” and the “reserved forces” as defined by section 374 of the Armed Forces Act 2006(a). The “regular forces” means the Royal Navy, the Royal Marines, the regular army or the Royal Air Force. The “reserve forces” means the Royal Fleet Reserve, the Royal Navy Reserve, the Marine Reserve, the Army Reserve, the Territorial Army, the Royal Air Force Reserve or the Royal Auxiliary Air Force.

Members of the Armed Forces who have been served with a cessation to occupy accommodation will be given housing advice and the appropriate banding and, if required, considered under the Homeless legislation (Housing Act 1996, Part VII and other relevant legislation).

Bromsgrove Home Choice recognises the contribution made by members of the armed forces and supports the principles of the Worcestershire Community Covenant.

The Housing Act 1996 (Additional Preferences for Armed Forces) (England) Regulations 2012 require Local Authorities to give additional preference to a person with an urgent housing need and are in one of the reasonable preference categories.

The regulations are;

that local housing authorities must frame their allocation scheme to give additional preference to the following persons if they fall within one or more of the statutory reasonable preference categories and are in urgent housing need:

- a) serving members of the regular forces who are suffering from a serious injury, illness or disability which is wholly or partly attributable to their service
- b) former members of the regular forces
- c) bereaved spouses or civil partners of those serving in the regular forces where;
 - (i) the bereaved spouse or civil partner has recently ceased, or will cease to be entitled, to reside in Ministry of Defence accommodation following the death of their service spouse or civil partner, and
 - (ii) the death was wholly or partly attributable to their service
- d) existing or former members of the reserve forces who are suffering from a serious injury, illness, or disability which is wholly or partly attributable to their service

If an “Armed Forces” applicant is able to meet the local connection criteria (or is exempt from this) and does not have sufficient resource to meet their own housing need, the Bromsgrove Home Choice Allocations Policy will award the applicant an additional six months in waiting time at the point that need has been assessed or date of registration (if need hasn’t changed over time).

If the applicant meets the criteria outlined above, also meets the community contribution criteria for one or more of the reasons then they will be awarded an additional six months e.g. a total of 12 months.

6. Applying for a Property and Lettings

Looking for available Properties

Once applicants have been registered with Bromsgrove Home Choice and been notified of their registration number, they can start to look for a property of their choice.

Advertising

All Housing Association landlords are committed to advertising their available properties as widely as possible. Properties will be advertised on a weekly basis on the Bromsgrove Home Choice website. Applicants will be able to view available properties on line at www.bromsgrovehomechoice.co.uk

Adverts will provide information about the location, property type and size, rent level, and eligibility criteria.

How to Bid

Applicants will be able to express an interest in a property using the website. Officers can provide assistance to applicant who are unable to access the website and do not have any other trusted adults who can act on their behalf.

When to bid for a Property

Vacant properties will be advertised from each Tuesday morning. Applicants can bid any time during that week until 12 midnight on the following Monday. This is called the weekly bidding cycle. The time that a bid is placed during the week does not make a difference to the shortlist position – it is not a ‘first come first served’ system.

Number of Properties an applicant can bid for

Applicants can make 3 bids each week as long as they match what the advert criteria asks for. Bids must be on separate properties that they are eligible for. Applicants can withdraw their bid if they change their mind and re-bid on a different property at any time throughout the bidding cycle.

Multiple Bidding

Applicants will be able to bid for a maximum of three vacancies during any given advertising period. If an applicant appears at the top of more than one shortlist in a bidding cycle, they will be contacted to discuss which property they wish to consider. The selected Housing Association will then confirm the preferred property and further the application will be skipped if it appears on the top of any other shortlists. If the Housing Association has considered the applicant for a property but later decides not to offer it to them, the Provider will inform the applicant of the reasons for this directly, but the applicant will retain their banding and be able to continue bidding. Please see the section on “Reasons why an applicant may not be offered a property”.

Applications from employees, Board Members and Co-optees

Staff, Board Members and Co-optees will be dealt with by a senior officer but treated and assessed as any other applicant to the Housing Register.

Homeless Households

Applicants who have been accepted as homeless (where a duty is owed under the HRA 2017) will be allocated an appropriate banding and applicants will be expected to try to secure suitable accommodation as soon as possible once they have received their rehousing (s.184, Housing Act Part VII) acceptance letter. Bromsgrove Home Choice would expect them to be bidding for as many suitable properties as available (up to three bids per week)

Failure to bid each and every week on all suitable properties (up to a maximum of 3) may result in the Local Authority, placing bids on an applicant's behalf to make sure its duties to the applicant as a homeless household are fulfilled. The Local Authority may also remove bids that an applicant has placed if they are not suitable e.g. where a victim of domestic abuse selects a property near to the perpetrator.

If applicants choose to only bid on one property when there are three suitable properties advertised, the local authority bid on the two remaining properties to ensure that the applicant is re-housed as soon as possible.

All bids in this banding must be on suitable properties (e.g. suitable size, location and type).

When a successful bid is made for a property the applicant will be notified of this and, subject to rights of review under Part VII of the Housing Act 1996, this will constitute an offer of housing under Part VI as a discharge of the Council's homelessness duty. If this offer is subsequently refused and the applicant requests a review of the suitability of accommodation, then the application will be suspended and no further bids made until the outcome of the review has been determined.

Should the applicant be rejected by the Housing Association under its, own allocations criteria, the homelessness duty will not be discharged and the applicant(s) will remain eligible for a further offer.

Eligibility for types of dwelling

Housing Association / Registered Provider partners will use their individual policies to determine an applicant's eligibility for a size and type of dwelling. Generally, the Housing Association will use the overcrowding standard to determine the appropriate size of property. However, in exceptional circumstances they may deviate from the overcrowding definition to advertise and allocate their housing stock.

Examples are:

- Where applicants require larger accommodation on health grounds. This will be considered on a case by case basis, taking into account the advice of a qualified medical advisor – this will be determined at the point of registration (please see section on overcrowding within the banding).
- Pregnant households (with no other children) will be recognised as a family by Bromsgrove Home Choice at 25 weeks, this will allow the applicants to apply for family sized accommodation.
- Where the applicant has been approved (or is going through the approval process) as a foster carer / to adopt by Children's Services, and so will need a larger property than normally required by the household (please see section on overcrowding within the banding).

- Where the applicant or a member of the household needs the support of a carer who will need to sleep in the home and cannot reasonably be expected to share a bedroom with another member of the household. See paragraph below for more information about including a carer in a housing application (please see section on overcrowding within the banding).
- Where the landlord or Local Authority wants to deliberately under-occupy a property and a Local Letting Plan is in place.
- Where there is little or no demand for a particular vacancy and it is therefore difficult to let (at the point of advertising the property).
- Where no suitable applicants can be identified to make the best use of larger accommodation.

Selection process

Applicants must note that individual Housing Associations will apply their own allocation policies and the suitability of the property will be considered by the Housing Association, in accordance with its allocation policy, at the point of allocation.

All eligible bids for each property are placed in order of housing need. Priority is decided first by band and then by date within the band and then by effective date.

A bid for a property will not be considered if the applicant's household does not meet the size, age or disability requirements for that property unless there are exceptional circumstances which need to be taken into account.

Partner landlords advertising properties will select and may interview the top applicant/s before an offer is made. A property will not always be offered to the applicant at the top of the shortlist if there are reasons why this applicant is not eligible or would not be suitable. Please see the 'Reasons why you may not be offered a property' section below for more details.

Successful applicants may be given the opportunity to view the property prior to tenancy sign-up.

If the applicant chooses to refuse the property, the reasons for the refusal will be recorded by the partner landlord advertising the property and their banding may be reassessed.

If an applicant is matched to a property they will not be able to bid for other properties until they have decided to either accept or refuse the offer.

If the applicant is at the top of the shortlist the landlord will check the application to ensure the banding is correct and there aren't any other factors that would limit offers of accommodation e.g. change of circumstances.

Reasons why you may not be offered a property

Housing Associations may choose not to allocate you a property due to their own allocations policy, please contact the relevant Housing Association/Registered Provider for more information.

Restrictions on offers through the advert

Landlords may apply restrictions in order to identify suitable applicants in particular circumstances and these will always be specified in the advert. Where a property is advertised with certain restrictions, the letting will be made to the bidder who meets the criteria with the earliest band start date in the highest band as with usual lettings.

Some properties may be restricted for bidding as follows;

- Under agreements pursuant to Section 106 of the Town and Country Planning Act 1990 (as amended) imposing conditions on who is able to bid – normally a restriction to households with a local connection.
- Housing Associations may adopt specific lettings criteria in relation to particular developments or areas in order to address identified problems and to create sustainable and balanced communities. In these circumstances a local lettings policy would apply.
- Partner Housing Associations will also be entitled to advertise properties with preference given to their existing tenants in order to facilitate transfers.

Refusing Offers of Accommodation

Households are expected to take reasonable care when bidding for a property to ensure it meets their needs. If, however, an applicant decides to refuse an offer of accommodation, the property will be offered to the next suitable applicant. An application may be reassessed if an offer of a property is refused. The Local Authority will take into consideration suitability of the property and reasonableness of the offer in any reassessment undertaken.

If an applicant in a time limited band refuses an offer of accommodation the application including the banding will be reassessed and may be placed in the reduced priority Band 4.

Refusals by Households to whom the full homeless duty is owed

If a homeless applicant refuses an offer of suitable accommodation, the local authority may decide that its duty under the Homeless Legislation is discharged, subject to the statutory review process and their banding will be reassessed.

Homeless applicants have the right to request a review of certain decisions made by the local authority in respect of their homeless application. This includes the decision to bring to an end the full homeless duty by making a suitable offer of settled accommodation. The applicant has this right whether they refuse or accept the offer of accommodation. If the review finds in favour of the homeless applicant, the applicant will retain their Band 1 (provided they are still homeless) and will be able to place bids on alternative properties. However, if the reasonableness and suitability of the offer is upheld, the homeless duty will be ended and the applicant's banding will be reassessed. Homeless applicants are therefore advised to accept an offer and then request a review if they believe it to be unsuitable.

Exempt Allocations – Accommodation provided for lettings that are not covered by this Scheme.

The following exempt allocations are covered by s160, Housing Act 1996;

The following are not allocations under this Policy:

- Succession to a tenancy on a tenant's death pursuant to s89 Housing Act 1985 and s17 Housing Act 1988 (this will be dealt with by the landlord under the relevant legislation and policies).
- Assignment of a tenancy by way of mutual exchange.
- Transfer of the tenancy by a court order under family law provisions or under the Civil Partnership Act 2004.
- An introductory tenancy (including assured shorthold) becoming an assured / secure tenancy.
- Transfers initiated by Council / Housing Associations (e.g. decant to alternative accommodation to allow for major works).
- Rehousing due to being displaced from previous accommodation by a Council or being rehoused by a Council pursuant to the Land Compensation Act 1973.

The following allocations are deemed to be exempt as, although they may consider this allocation policy to some extent, they also require different decision making processes and criteria in making assessments and rehousing the applicant:

- A person being granted a family intervention tenancy.
- Provision of non-secure temporary accommodation in discharge of any homelessness duty or power.
- Supported accommodation.
- Where a Housing Association needs to directly match a property (more details regarding this are included later in this policy).
- Some Extra Care and Very Sheltered accommodation.
- Changes to joint tenancies which will include the granting of a new tenancy through changes from a sole to a joint tenancy and from a joint to a sole tenancy. The individual Housing Association will decide whether to allow a Joint Tenancy depending on the circumstances of the case.
- Households requiring a move through the Witness Protection Scheme or similar, at the formal request of the appropriate authority.
- Some adapted properties may be held on a separate register specifically for people with disabilities.

Local Lettings Plans

Bromsgrove Home Choice reserves the right to apply additional criteria for example specific local connection criteria, offers of family sized accommodation to smaller households or employment- while still meeting the statutory obligations for Reasonable Preference when using Local Letting Plans. The Local Authority partners may, in the interests of promoting balanced and sustainable communities, agree with participating Housing Associations local lettings plans for specific areas, estates, or blocks. This is to ensure that lettings plans are tailored to the needs of an area and protect the interests of existing residents and the wider community.

All local lettings plans will be published on the Council's website.

The principles in applying Local Lettings Plans (LLPs)

- Local Lettings Plans may be developed to meet the particular needs of a local area.
- There must be a clear reason for having LLPs (this may take the form of recurring antisocial behaviour issues, high child densities or a concentration of older residents) and will be subject to reconsideration.
- LLPs must be developed and approved in accordance with an agreed procedure that must have specific aims and will be reconsidered on a regular basis.

The decision to implement a local lettings plan will be developed and approved by the Local Authority Senior Officer in partnership with the housing provider. Any decision to implement a local lettings policy will always take into account the implications for equal opportunities and the need to ensure that the Council is able to meet the allocation needs of those owed a reasonable preference.

Where a property is advertised in accordance with a Local Lettings Plan (LLP), the letting will be made to the highest bidder who meets the eligibility criteria of the LLP

Examples of possible Local Lettings Plans:

The following are examples of local letting policies that could be employed, covering an area, estate, or block:

- Age restrictions.
- Where the property forms part of a rural housing scheme on an exception site.
- Restrictions on lettings to vulnerable households where there are already a concentration of supported tenants/residents.
- Lettings to childless households where there are high concentrations of children and young people living on a specific estate or scheme.

Direct Matching for urgent cases with reasonable preference

Where possible all lettings should be made through Bromsgrove Home Choice to ensure fairness and transparency in the system and to give customers confidence.

Where applicants have got reasonable preference but their circumstances mean they have an extremely urgent housing need they may require a direct match. Examples of this would be those with critical health or social needs where an immediate move is necessary for their health and wellbeing; or those in fear of extreme incidences of domestic violence, harassment, hate crime, or extreme neighbour nuisance / antisocial behaviour where there is a genuine risk to their health and well being; and these can only be achieved through direct matching.

The direct matching might also occur because of the type of accommodation e.g. because it has adaptations and requires a specific applicant, or to support a move through witness mobility schemes or similar.

There may be direct matching that takes place for tenants within the Housing Associations which are outside of the allocations scheme, these are often known as management moves.

This would apply in circumstances such as tenants who are required to decant from their premises due to re-designation, demolition or refurbishment or where Successors left in a property too large for their needs or where a non-successor has exceptional needs / would be deemed to be owed a duty under Part 7 Housing Act 1996 for example.

There may also be a requirement to direct match an existing social housing tenant to a larger property to facilitate their approval as a registered foster parent.

7. Administration of the Scheme

Delegation of Authority

The Bromsgrove Home Choice Scheme operates alongside the separate allocation policies and activities of partner Housing Associations.

The Council may delegate or contract out functions to Housing Association partner organisations but will not abrogate any of its legal duties and powers to any Housing Association partner.

The administration of the scheme is undertaken by the Council in partnership with Bromsgrove District Housing Trust and they are also responsible for updating and improving the scheme in line with good practice and legislation, consulting with partners and customers and ensuring the scheme is followed.

Certain functions within the scheme can only be undertaken by a senior officer or manager and, where this is the case, this has been highlighted throughout the allocations policy.

Reassessment of Bandings

Applications to the Bromsgrove Home Choice Scheme will be reassessed on a regular basis. The timescale for this is determined by their banding.

Bandings will be reassessed when it is apparent there has been a change of circumstances.

An applicant will be notified of the reassessment. Failure to respond to appropriate correspondence in relation to the reassessment within one month will result in the application being closed. If good reason can be shown why there was a failure to respond to the reassessment, then the application may be reinstated with the original band start date.

When the date is reached for reassessing the banding, the Local Authority will contact the applicant for confirmation of their circumstances. This contact may take the form of a letter, telephone call or email. If the applicant's circumstances have changed, they will be assessed and banded accordingly.

If the Local Authority considers that an applicant has not been using their priority and bids appropriately, a senior officer will review the application, and banding may be altered to Band 4 unless good reason can be shown as to why bids have not been placed.

Band 4 - Reduced Priorities

The process for reducing priority to Band 4

Any applicant whose priority is reduced to Band 4 will be provided with written notification of the decision that will contain the following information:

- The reasons for the decision to reduce priority.
- The Band that their housing circumstances would have warranted and the Band that they have been placed in as a result of the decision (Band 4).
- What they have to do before they can be considered again for any higher Band warranted by their housing needs.
- That the applicant has a right to request a review.

Closing of Applications

Applications will be closed if applicants:

- Request their application to be closed.
- Do not respond to a request to provide updated information about their registration, or
- Do not make a bid within 1 year of applying to join the Scheme.
- Circumstances have changed and they are no longer eligible under this allocations policy.
- Have not informed Bromsgrove Home Choice that they have moved and given a forwarding address.

When an applicant is re-housed through Bromsgrove Home Choice, their application will be automatically closed and they will need to complete a new registration form if they want to remain on the Housing Register.

In all other circumstances where they have moved, they will need to complete a change of circumstances and be reassessed.

Re-joining the Housing Register

Where a household wishes to re-join the Bromsgrove Home Choice housing register at a later date, their new date of application will be the date they re-register.

Equality and Diversity

Our aim is to implement and maintain services which ensure that no potential or current applicant is treated less favourably on the grounds of gender, marital status, race, nationality, ethnic or national origin, disability, age or sexual orientation, nor is disadvantaged by the application of a rule, condition, or requirement, which has a discriminatory effect which cannot be justified by law. Allocations will only be made to those persons who are eligible.

This policy will be subject to periodic equality impact assessments.

Confidentiality

The fact that a person is an applicant on the Allocation Scheme will not be disclosed (without their consent) to any other member of the public.

Data protection and Information Sharing

All information held is subject to the Data Protection legislation. Bromsgrove Home Choice will advise all applicants joining the scheme about how their data will be used. The application and any information relating to it will be able to be viewed by the housing association landlord who has advertised the property. The information is shared under the Council's legal duty for the purposes of allocating housing.

False statements or withheld information

It is a criminal offence for applicants and/or anyone providing information to this Scheme to knowingly or recklessly make false statements or knowingly withhold reasonably requested information relevant to their application (s171 Housing Act 1996). This includes but is not limited to information requested on the housing registration form, in response to correspondence at the renewal of the application, or relating to any other reassessment of the application. An offence is also committed if a third party provides false information whether or not at the instigation of the applicant. This would apply at any stage of the application process.

Where there is suspicion or an allegation that a person has either provided false information or has withheld information, the application will be placed under pending status during the investigation and will be excluded from this Allocation Scheme until an outcome is reached.

If the outcome of any investigation is that they did not provide false information or there was no withholding of information or such was not found to be withheld knowingly, then the application will be reinstated from the date of registration meaning the relevant applicant should not suffer prejudice.

However, where the investigation shows that false information was provided on the application form the application will be re-assessed. The applicant may also be liable to prosecution.

Ground 5 in Schedule 2 to the Housing Act 1985 (as amended by the 1996 Act, s.146) enables the landlord to seek possession of a property where it has been granted as a result of a false statement by either the tenant or a person acting at the tenant's instigation.

If it is determined that an applicant directly, or through a person acting on his or her behalf, has given false information or withheld required information it will result in an applicant being removed from the Scheme and deemed Ineligible.

Monitoring Bromsgrove Home Choice

The Council will monitor the outcomes being achieved through this policy and provide relevant data to inform future reviews of the policy.

8. Reviews of decisions

Information about decisions and reviews

The Local Authority makes the decision regarding the start dates and banding of every applicant.

An applicant to the Bromsgrove Home Choice scheme has a right to request a review from the Local Authority, or its agent, if unhappy with any decision (finding of fact) including decisions to exclude from registration, the level of priority awarded or the way in which the application has been dealt with. Applicants will be able to appoint an advocate, and once appointed,

Bromsgrove Home Choice will deal directly with the advocate. The applicant should request an internal review within 21 days of the date of the decision letter.

Applicants have the following further and specific rights to information about decisions and rights of review of decisions:

- the right, on request, to be informed of any decision about the facts of their case which has been, or is likely to be, taken into account in considering whether to make an allocation to them.
- the right, on request, to review a decision mentioned above, or a decision to treat them as ineligible due to immigration controls or unacceptable behaviour serious enough to make them unsuitable to be a tenant.
- the right to be informed of the decision on the review and grounds for it.

The applicant will be notified of the outcome of the review including the reasons if the original decision is confirmed. We will aim to determine the review within 56 days of the request or such longer period as may be agreed with the applicant. Once the review has been decided upon there is no further right of review on the same matter unless there is a material change of circumstance.

The applicant will also have the right to seek judicial review, make a formal complaint through the Local Authority's complaints procedure (please see below) or to the Local Government Ombudsman.

Reviews will be carried out by a senior member of staff within the Council or its agent and an officer who was not involved in the original decision.

Where the complaint concerns an issue with the letting of a property, the applicant should address their complaint directly to the relevant Registered Provider and follow that organisation's complaint procedure.

Complaints

An applicant who is not satisfied with the service that they receive may register a complaint with Bromsgrove Home Choice by telephone, e-mail or in person. All complaints will be acknowledged and investigated. Please see the organisation's individual complaints procedure for details on how to complain and the length of time to consider your complaint. You can ask someone else or an organisation such as Citizen's Advice Bureau to make a complaint on your behalf.

For those whose first language is not English, assistance can be made available.

9. Feedback on let properties

Bromsgrove Home Choice will publish details of the number of bids for each property on the website giving details of the successful applicant's band and their band start date.

This feedback will help applicants determine their prospects of success in obtaining housing.

Lettings are monitored by property type and household to demonstrate how the Council meets its aims and objectives.

Appendix 1 – Bromsgrove Home Choice Advice and Contact Points

Bromsgrove District Housing Trust

Bromsgrove District Housing Trust, Buntsford Court, Buntsford Gate,
Bromsgrove, 1DA Worcs B60 3DJ
0800 0850 160 customer_services@bdht.co.uk
www.bdht.co.uk

Appendix 2 – Bromsgrove Home Choice Partners' Contact Details

Name	Address	Phone Number	Email	Website
Anchor Trust	Milestone Place 100 Bolton Road Bradford West Yorkshire BD1 4DH.	0845 140 2020	Online form via their website	www.anchor.org.uk
Bromford Housing Group	Shannon Way Ashchurch Tewkesbury Gloucestershire GL20 8ND	0330 1234 034	customerservices@bromford.co.uk	www.bromford.co.uk
Bromsgrove District Housing Trust	Buntsford Court Buntsford Gate Bromsgrove Worcestershire B60 3DJ	0800 0850 160	info@bdht.co.uk	www.bdht.co.uk
Community Housing Group	3 Foley Grove Foley Business Park Stourport Road Kidderminster DY11 7PT	0300 003 5454	information@communityhousing.co.uk	www.communityhousing.co.uk
Citizen	Lakeside 4040 Solihull Parkway Birmingham B37 7YN	0300 790 6555	info@citizenhousing.org.uk	www.citizenhousing.org.uk
GreenSquare Accord	2nd Floor 10 Brindleyplace Birmingham B1 2JB	0300 111 7000	info@greensquareaccord.co.uk	www.greensquareaccord.co.uk

Housing 21	Tricorn House 51–53 Hagley Road Birmingham B16 8TP	0370 192 4000	enquiries@housing21.co.uk	www.housing21.co.uk
Midland Heart Ltd	20 Bath Row Birmingham B15 1LZ	0345 602 0540	Online form via their website	www.midlandheart.org.uk
Orbit Heart of England	PO Box 6406 Coventry CV3 9NB	0345 850 0500	Online form via their website	www.orbitcustomerhub.org.uk
Platform	1700 Solihull Parkway Birmingham Business Park, Solihull B37 7YD	0333 200 7304	Online form via their website	www.platformhg.com
Rooftop Housing Group	70 High Street Evesham Worcestershire WR11 4YD	01386 420800	enquiries@rooftopgroup.org	www.rooftopgroup.org
Sanctuary Housing	Sanctuary House Chamber Court Castle Street Worcester Worcestershire WR1 3ZQ	0800 131 3348	Online form via their website	www.sanctuary-group.co.uk
Stonewater	Suite C, Lancaster House Grange Business Park Enderby Road Whetstone Leicester LE8 6EP	01234 889494	Online form via their website	www.stonewater.org

Stonham Housing Association	2 Gosforth Park Way, Gosforth Business Park, Gosforth, Newcastle upon Tyne, NE12 8ET	0345 141 4663	Online form via their website	www.homegroup.org.uk
Southern Housing	41 Poplar Road Kings Heath Birmingham B14 7AA	0300 303 1066	hello@southernhousing.org.uk	www.southernhousing.org.uk

Appendix 2 - Bromsgrove Home Choice Choice-Based Lettings (CBL) Implementation Risk Register

No.	Risk Description	Category	Likelihood	Impact	Overall Risk Rating	Mitigation / Control Measures	Mitigation Status
1	New CBL policy does not align with statutory duties or housing strategy	Strategic / Policy	Medium	High	High	Legal review; ensure alignment with housing strategy; consultation with legal/policy teams	Planned
2	Unintended disadvantage to vulnerable or digitally excluded applicants	Strategic / Customer	High	High	High	Provide assisted bidding; monitor uptake; targeted comms	In Progress
3	Staff do not fully understand or apply new policy consistently	Operational	Medium	High	High	Comprehensive training; procedural guidance; supervision	In Progress
4	System implementation delays impact go-live	Operational / IT	Medium	High	High	Detailed plan; supplier monitoring; contingency	In Progress
5	Data migration errors cause loss/corruption of data	IT / Data	Medium	High	High	Rigorous cleansing; testing; data backup	Planned

6	Cybersecurity or data breach	IT / Data	Low	High	Medium	Penetration testing; GDPR compliance; access controls	Planned
7	Applicants confused by new bidding or banding process	Customer	High	Medium	High	Clear communications; FAQs; feedback monitoring	Planned
8	Negative public perception or media coverage	Reputational	Medium	High	High	Proactive media plan; monitor complaints	Planned
9	Budget overspend due to underestimated costs	Financial	Medium	High	High	Budget monitoring; approval process; contingency fund	In Progress
10	Supplier underperformance or contract breach	Financial / Governance	Low	High	Medium	Strong contract management; SLAs; escalation	Planned
11	Staff resistance to change	Change Management	Medium	Medium	Medium	Staff engagement; change champions; communication	In Progress
12	Insufficient testing causes post-launch issues	IT / Operational	Medium	High	High	Comprehensive UAT; pilot phase; feedback loop	Planned
13	Weak monitoring and reporting	Governance	Medium	Medium	Medium	Set KPIs; regular reviews; audit checks	Planned

14	Timeline slippage due to competing priorities	Project Delivery	Medium	Medium	Medium	Realistic timeline; escalation to board	In Progress
15	Failure to maintain transparency or audit trail	Governance	Low	High	Medium	System logging; documentation; audits	Planned

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Appendix 3 Bromsgrove Housing Allocation Policy Table of Proposed Changes

	Current Policy	Proposed Change
Name and Banding Changes	The current policy is known as Home Choice Plus. Housing Applicants are banded according to their housing need in Priority, Gold Plus, Gold, Silver Plus, Silver, Reduced Band, Bronze Plus and Bronze.	It is proposed that the new policy and system will be named the Bromsgrove Home Choice. The Bandings will be changed to Band numbers 1 to 6. Band 1 being the band for those who are homeless and therefore in the most extreme housing need.
Community Contribution	Community contribution currently applies to all bands and awards 6 months additional waiting time of six months for those who are employed, volunteering, in education or training or unable to do any of the above due to caring responsibilities or disability.	Additional waiting time will not apply for those in Priority Band that will in the future be known as Band 1. The Community Contribution additional waiting time will not be applied for those in Band One as they are already in the most extreme housing need and should be prioritised based on their time in that band. By allowing community contribution in the past, some households have been left in temporary accommodation for longer than necessary. The Government does not consider Bed and Breakfast (B&B) suitable temporary accommodation for families and pregnant women and requires that those whose households includes dependent children or a pregnant woman must not be housed in B&B accommodation unless there is no other suitable accommodation available, and only for a maximum of six weeks. This change will support the Council to achieve this directive.
Move on from Supported Accommodation	Currently the Council provides reasonable preference, Gold Plus banding, to those moving	The approach to assist with move on from supported accommodation

	on from supported accommodation to ensure that those who are placed into general needs accommodation are more likely to be able to sustain their tenancy and also to ensure that supported accommodation does not get silted up with households who are ready to move.	is being strengthened so that those who are confirmed by the support provider as ready to move-on from supported accommodation into independent living are placed into Band 2 only where Bromsgrove District Council referred that person into the supported accommodation in the first place, and at that time made an agreement with the landlord to support with move on.
Lower levels of disrepair	Currently properties that are suffering from disrepair (regardless of tenure) that is not deemed to be severe or a threat to the health and safety of the occupier will be awarded this band.	The awarding reasonable preference for lower levels of disrepair that do not constitute a Category 1 hazard will be removed. It will be left for the Council's Private Sector Housing Team to work with landlords to improve the standard of properties.
Those in Reasonable Preference but without a Local Connection to Bromsgrove	Currently those applicants in reasonable preference who do not have a local connection to the District are awarded either Silver Plus or Silver Banding.	It is proposed that those in a reasonable preference for housing as defined under the Housing Act 1996 but without a local connection be placed into what was known at the Reduced Banding, but under the new policy will be Band 4.
Home Owners in a reasonable preference for housing as defined under the Housing Act 1996	Currently owner occupiers and people with sufficient financial resources available to them to meet their housing needs will be placed in reduced band if they have; a) a gross household income (including benefits) of more than £38,000 per annum b) savings / capital / assets / equity of £50,000 or more unless they are in receipt of a pension (or fixed income where	Home Owners in a reasonable preference for housing as defined under the Housing Act 1996. Homeowners that own or part own a freehold or leasehold property in the UK or abroad will be unable to join the housing register. It is proposed that discretion to this ruling will be applied where exceptional circumstances apply.

	they would be unable to obtain a mortgage) where they would be allowed savings/capital/assets/equity of up to £95,000. The savings etc. of all adult members of the household should be taken into account for this criteria.	Homeowners that do not fulfil any of the reasonable preference categories will be assessed as having no housing need and therefore will not qualify to join the housing register.
Increase in minimum income threshold before the reduced banding, Band 4 is applied	Currently those with sufficient financial resources available to them to meet their housing needs will be placed in reduced band if they have; a) a gross household income (including benefits) of more than £38,000 per annum b) savings / capital / assets / equity of £50,000 or more unless they are in receipt of a pension (or fixed income where they would be unable to obtain a mortgage) where they would be allowed savings/capital/assets/equity of up to £95,000. The savings etc. of all adult members of the household should be taken into account for this criteria.	It is proposed that the maximum income a household can earn before being placed into the reduced banding in respect of having sufficient resources to solve their own housing need, is increased. Households who qualify for reasonable preference will be deemed to have sufficient financial resources to resolve their own housing need through home ownership or private renting where their earnings exceed; • For single people and couples with no children, a gross household income (including benefits) of more than £47,000 per annum (which is the equivalent of two adults over 21 years of age working full time and earning the minimum wage) or • Households with children with a gross income (including benefits) of over £60,000. These applicants will be placed into the reduced banding, Band 4.

No local connection and low housing need	This applies to all applicants do not meet any of the reasonable preference criteria, and have low housing need but no local connection. Where the household has a low level housing need due to medical, disability or welfare conditions / issues, the banding will only be awarded where the condition / issue will be improved by a move to alternative accommodation. include the following; • Eligible and interested in shared ownership • Eligible and interested in older peoples accommodation • Households with low level medical or welfare issues • Households that are newly forming • Households who are suffering financial hardship • Households who are sharing facilities with other non-related households • Households residing in an institution or supported housing scheme e.g. hospital with no access to settled accommodation • Households who have insecurity of tenure (those in tied accommodation)	As there is little prospect of anyone being housed where they have no local connection and only a low housing need, Band 6, will be restricted to those who are: ▪ Eligible and interested in shared ownership ▪ Eligible and interested in older persons accommodation ▪ In social housing and seeking a transfer
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	or lodging with family members) • In social housing and seeking a transfer	
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CABINET 2025

19th November

BUSINESS RATES RETENTION (BRR) POOL 2026/27

Relevant Portfolio Holder	Councillor Sue Baxter – Portfolio Holder for Finance
Portfolio Holder Consulted	Yes
Relevant Head of Service	Debra Goodall
Report Author	Debra Goodall, Assistant Director of Finance and Customer Service Debra.goodall@bromsgroveandredditch.gov.uk
Wards Affected	All Wards
Ward Councillor(s) consulted	No
Relevant Strategic Purpose(s)	All
Non-Key Decision	
If you have any questions about this report, please contact the report author in advance of the meeting.	

1. RECOMMENDATIONS

The Cabinet **RECOMMEND** that:-

- 1) The Council approves joining the Herefordshire and Worcestershire Business Rates Pool for 2026/27
- 2) Authority for the decision on the financial arrangements be delegated to the Section 151 officer following consultation with the Portfolio Holder for Finance.

2. BACKGROUND

- 2.1 This report provides an update on the Medium-Term Financial Plan 2026/27 – 28/29 in respect of the Business Rates Pool for 2026/27.
- 2.2 Under the Local Government Finance Act 2012, local authorities are permitted to form business rates pools to manage Business Rates income collectively. Pooling allows councils to:
 - Retain a greater share of business rates growth locally
 - Reduce the levy payable to central government
 - Share risks and rewards across a wider base
 - Support regional economic development through collaborative investment
- 2.3 The Ministry of Housing, Communities and Local Government has invited Councils to indicate their preferred pooling arrangements for the

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financial year, 2026-27, with the deadline for submission of proposals for 2026-27 pools being 24th November 2026. Therefore, the Council needs to make an urgent decision as to the option of joining the Herefordshire and Worcestershire Pool. The Council was previously part of the Herefordshire and Worcestershire Pool so this would be a continuation. The other option the council has is:

- to not be in a Business Rates Pool and return a higher proportion of business rates growth (levy) to Central Government.

- 2.4 It is understood from other Districts across Herefordshire and Worcestershire that they will be entering the Pool for 2026-27, subject to a review of the figures across the area showing a positive benefit, enabling volatility risks to be shared with other councils and also additional financial benefits in terms of levy on business rates growth that was retained locally rather than paid over to the Government.

3. OPERATIONAL ISSUES

- 3.1 The Council therefore needs to determine whether it wishes to continue to participate in a Herefordshire and Worcestershire wide pool for the year 2026/27 only.
- 3.2 As a general principle the Herefordshire and Worcestershire Pool and other Pools locally operate on the principle that no council is worse off in the Pool than outside the Pool. This means that the amounts paid into the Pool by councils are limited to the levy amount that they would have otherwise paid to the Government. However, in the event of significant losses, as in the case of the revaluation of GP surgeries, then the amount available from the Pool may be less than would be available from the Government National safety net facility.
- 3.3 The most significant factor in the Council's decision regarding Pool membership from 1 April 2026 is our view on the probability of further significant business rate losses in Bromsgrove. Based on current appeals outstanding we have no reason to suspect there will be such losses. We have already made reasonable provision for outstanding appeals and we are not aware of any changes which would lead to further significant losses.
- 3.4 There will be provision within the governance arrangements to ensure there is protection for Pool Members to ensure that there is no detriment to their position comparative to had they not joined the pool.

4. FINANCIAL IMPLICATIONS

- 4.1 The arrangements for the business rates pool will continue to mitigate some but not all of the financial risk of the current business rates system. Work is currently ongoing at this point in time to assess whether the pooling arrangements (if approved) remain of overall financial benefit to this Council.
- 4.2 The precise impact on Council finances cannot be known as this will vary depending on a range of factors including whether business rates grow or contract, future appeals and mandatory reliefs.

Based on the information available to date, if the Council's position together with the overall position of the wider Herefordshire and Worcestershire family will be best protected by joining the proposed pool then it is recommended that the Council do so.

- 4.3 The proposed pool is only concerned with the money which is generated through the levy which would have been paid to central Government if the Pool members were not in the pool. The Pool is designed to continue to protect member authorities from the ups and downs that are likely to arise in Business Rate income in the future. These will have a direct impact on the amount of funding for the Council. It may be shown that by remaining in a pool, the Council can better protect against these variations and thus provide some protection to its base funding.

5. LEGAL IMPLICATIONS

- 5.1 Any legal implications in relation to the business rates pool have already been assessed as part of previous work undertaken when the pool was originally established.

6. OTHER - IMPLICATIONS

Local Government Reorganisation

- 6.1 There are no implication at this stage arising from Local Government Reorganisation or Devolution

Relevant Council Priority

- 6.2 The Strategic purposes are included in the Council's corporate plan and guides the Council's approach to budget making ensuring we

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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

- 6.3 There are no climate change implications as a direct result of this report.

Equalities and Diversity Implications

- 6.4 None as a direct result of this report.

7. RISK MANAGEMENT

- 7.1 The Government is currently in the process of making changes to business rates, due to apply from 2026/27 onwards and work is ongoing to assess the impact of this.

8. APPENDICES and BACKGROUND PAPERS

None

AUTHOR OF REPORT

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E Mail: Debra.goodall@bromsgroveandredditch.gov.uk

BROMSGROVE DISTRICT COUNCIL

CABINET 19 November 2026

Medium Term Financial Plan Budget Update and Consultation Report

Relevant Portfolio Holder	Councillor Sue Baxter Portfolio Holder for Finance and Governance
Portfolio Holder Consulted	Yes
Relevant Head of Service	Debra Goodall
Report Author	Debra Goodall – Assistant Director of Finance and Customer Services debra.goodall@bromsgroveandredditch.gov.uk Contact telephone:
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

- 1.1 The purpose of this report is to update on the processes the Council will follow to set the annual budget for 2026/27 and for the Medium-Term Financial Plan (MTFP) up to financial year 2028/29.
- 1.2 The Council will set its budget in two stages this year. The initial stage will be published in the Autumn as part of this report. A second stage will be considered in January once final settlement figures are known with final budget approval sought in February.
- 1.3 The report also sets out the Consultation being carried out on the Budget 2026/27.

2. RECOMMENDATIONS

Cabinet are asked to Resolve that:

- The updated budget position for the Council is noted in respect of the 2026/27 annual budget and for the Medium-Term Financial Plan up to 2028/29.
- The key assumptions listed in this document are confirmed as accurate for the purpose of projecting an initial budget position.
- A further report in February will include additional information from the Local Government Settlement to give a final financial position for the Council.

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Cabinet is asked to Recommend to Council that:

- The Consultation on the Budget 2026/27 is noted.

3. KEY ISSUES

Introduction

- 3.1 The Council sets a 3-year Medium Term Financial Plan every year, with the final Council Tax Resolution being approved by Council in February. This year's process takes account of the following factors:
- The starting point from the 2026/27 MTFP is deficit positions of £1.030m and £399k respectively as the starting points for 2026/27 and 2027/28.
 - The cost-of-living crisis continues and this is still impacting our most vulnerable residents.
 - Five years accounts (2020/21 to 2024/25) where the Council has/will receive a disclaimer opinion (like many other Councils). In plain terms, a disclaimer means that we have been unable to form an opinion. In this instance, the reason for this will be the limitation of scope imposed by statute (not by the local authority). A disclaimer due to the backstop does not of itself indicate a local authority failing.
 - Business Rates and Council Tax Income – The impact of the introduction of Fairer Funding on the Council.
 - Inflation still not reducing towards the Government target of 2%. Despite reducing in early 2024, it has started to increase again and recently has been at a level of around 3.8%.
 - Core Spending Power assessment by the government assumes no councils will be worse off in real terms, but previously the assumption of a maximum allowable increase in Council Tax was offset by reductions in formula grant, meaning that the spending power of the Council remained flat, even though there was an increase in Council Tax. It is assumed that this will be the situation going forward.
 - Government Grants and New Homes Bonus – it is anticipated that these will either be abolished under FF2.0 or rolled into the funding-formula revenue support grant (RSG) and it is assumed that unless notified differently, these grants will not be separate items from next year onwards.
 - Due to an impending business rates reset, it is prudent to assume no growth in the base funding for business rates.

As such, it is prudent to split the budget process into two stages.

- Having an initial stage which seeks to close as much of the deficit as possible using information known at the end of December.

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- Having a second stage after the Christmas break, for which approval will be sought in February, that takes account of the Local Government Settlement whose final detail will not be known until early January.

3.2 This report will set out:

- The starting position for the 2026/27 MTFP
- The emerging national picture including expected settlement dates.
- Council Priorities
- Strategic Approach
- The Council's Base Assumptions including Inflation and Grants
- Fees and Charges update
- Impact on Reserves and Balances
- Capital Programme update
- Robustness Statement

The Starting Position for the 2026/27 MTFP

3.3 The Council set a three-year MTFP 2025/26 to 2027/28 in February 2025. The position reflected a balanced budget for 2025/26 with a deficit position of £1.030m in 2026/27 and deficit of £399k in 2027/28.

The emerging national picture including expected Settlement Dates

3.4 The settlement will be underpinned by the outcomes of the **Fair Funding Review**, which aims to redistribute resources more equitably based on assessed local need. Key elements of the new funding framework include:

- **Revised Needs-Based Formula:** Incorporating updated demographic and service demand data across areas such as adult social care, children's services, and housing.
- **Resource Adjustment Mechanism:** Reflecting councils' ability to raise income locally, particularly through council tax and retained business rates.
- **Area Cost Adjustments:** Accounting for regional variations in service delivery costs.

3.5 The Government has also signalled its intention to implement **transitional protections**, although not all councils will benefit from these. Some authorities may experience reductions in their Core Spending Power, particularly where previous funding levels were above the newly assessed need.

3.6 In parallel, the **English Devolution White Paper**, published in late 2024, sets out a roadmap for local government reorganisation. This includes the creation of **Strategic Authorities** and a move towards **universal coverage** of devolved governance structures across England. Councils in two-tier areas

BROMSGROVE DISTRICT COUNCIL

and smaller unitaries are expected to engage in reorganisation discussions, with elections for new governance models anticipated in May 2027.

- 3.7 Bromsgrove has 3 years of accounts that have a Disclaimer Opinion issued by the External Auditor and a further 2 that are expected to be given a Disclaimer Opinion by February 2026. Although issues highlighted in previous years MTFP reports have been resolved, it is unclear how these “Disclaimer Opinions” will impact on Councils and indeed upon the 2024/25 Audit process. There is a backstop date for Accounts for 2024/25 to be signed off by the Auditors by 27th February 2026.
- 3.8 The Chancellors Statement is expected on 26 November 2025 which is later than in previous years. The provisional Local Government Finance Settlement is still anticipated in mid-December. This will set out the detail of funding allocations for individual councils.
- 3.9 This gives the following timetable for the 2026/27 process:
- 5 November – Consultation proposal report to Cabinet Working Group
 - 5 November – MTFP Budget Update to Cabinet Working Group
 - 11 November – Publication of Agenda including Consultation
 - 14 November – MTFP Budget and Consultation to Finance and Budget Working Group
 - 14 November – Submission of Departmental pressures and savings to Finance
 - 19 November – MTFP Budget Update to Cabinet
 - 19 November – Consultation proposal report to Cabinet
 - 20 November – Consultation launches
 - 21 November – Submission of Fees and Charges to Finance
 - **26 November – Chancellors Statement**
 - 24 & 26 November – Stage 1a Departmental pressures and savings to SLT & CLT
 - 1 & 3 December – Draft Budget and Fees and Charges to SLT & CLT
 - 3 December – Stage 1 MTFP Budget Update Council Report
 - 10 December – Stage 1a MTFP Budget and Fees and Charges to Cabinet Working Group
 - **w/e 19 December – Provisional Local Government Settlement**
 - 31 December – Consultation finishes
 - 5 January – Final Budget approved by SLT
 - 7 January – Stage 1a MTFP Budget and Fees and Charges to Cabinet
 - 7 January – Consultation outcome to Cabinet
 - 28 January – Stage 2 MTFP approved by Cabinet Working Group
 - **w/c 2 Feb or 9 Feb – Local Government Finance Settlement**
 - 11 Feb – Updated Stage 2 MTFP approved by Cabinet
 - 18 Feb – Final Budget and Council Tax Resolution approved by Council

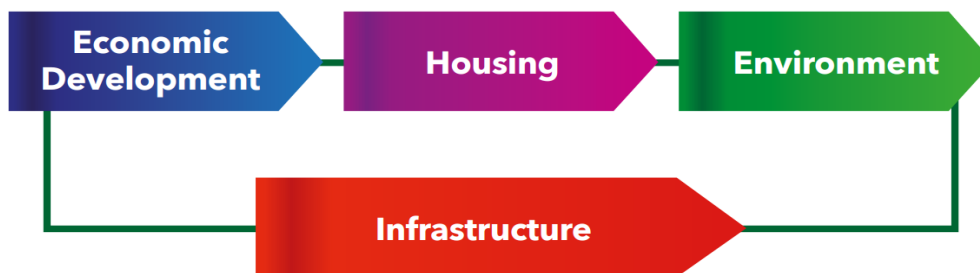
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Council Strategic Priorities

3.10 The Council Plan provides an overarching vision for the District with the four priorities as follows:

- Economic Development
- Housing
- Environment
- Infrastructure

'We aspire to create a welcoming environment that prioritises quality of life, where residents and businesses feel a deep sense of belonging and connection.'



3.11 The council's vision, priorities and themes are connected using a 'green' thread:

"A green thread runs through the Council plan. Climate change and carbon reduction are key issues within the plan and the relevant measures identified to evaluate performance will help the Council to understand both activities and progress in this area".

3.12 Opportunities and Challenges highlighted in the plan include:

The opportunities include:

- The location of Bromsgrove for business; with Worcestershire, regionally and beyond.
- The entrepreneurial and community spirit within Bromsgrove District.
- Keeping businesses in the district when they grow.
- The amazing natural environment of the district.
- The creative options provided through new technologies to enhance our services and our customers experiences.

The challenges include:

- The ongoing financial challenge- to both the organisation but also our communities and residents through the real pressures presented by cost of living and the housing market.
- Continuing to support those who are most vulnerable, and manage the increasing costs.
- Keeping businesses in the District when they grow.

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- Understanding the different community needs across the district
- The need for enhanced digital and physical connectivity.

3.13 The council cannot deliver all priorities on its own. In some cases, it can support, influence, or work collaboratively with other partner agencies to persuade them to take a particular course of action/undertake a particular project. Considerable support and input from partner organisations will be needed for priorities to be successfully achieved.

Strategic Approach

3.14 The Council has come into the 2026/27 budget process with a number of issues it needs to manage. These include:

- A deficit balance of £1.030m in 2026/27 budget as a start-point position.
- An expected reduction in funding from the Fairer Funding Review, although this is yet to be confirmed – or yet whether there will be any phasing in of this.
- The requirement to fund the 2025/26 pay award even though it was over the 3% assumed in the Council's budget.
- Increases in Council Tax are limited at 2.99% or £5, which is lower than the present rates of inflation.

3.15 As set out later in the Robustness Statement, in compiling Stage 1 of the budget, assumptions have been made based on the best information held now. Issues the Council is facing are not unique, they are being faced by almost all Councils. A further update will be given later once the departmental pressures have been received and assessed and the Chancellor's Statement has been received. Stage 2 of the budget will adjust for any funding that the Government will provide and also look at other options to close any deficit should the Government settlement not bridge any resultant gap. Initiatives that will be assessed in Stage 2 (as more time is required to analyse these individual options) include:

- Ensuring Grants are maximised.
- Ensuring Agency work reflects the income provided for its delivery.
- Reviewing the effectiveness of the Council's largest Contracts.
- Reviewing recharging mechanisms between the Councils for appropriateness
- Reviewing services for any potential savings opportunities without impacting on service delivery
- Review of vacant posts
- Maximising service income opportunities
- Further capitalisation of salaries
- Review of specific reserves to see whether these are still required
- Rationalisation of support services as we embrace technology
- Positioning our services ready for Local Government Reorganisation

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The Council's Base Assumptions including Inflation and Grants

- 3.16 It is important to set out the base assumptions under which the budget is constructed. These assumptions can then be stress tested for various scenarios to test the robustness of the overall budget.
- 3.17 Tax Base and Corporate Financing underlying assumptions are as follows:
- Council Tax – Figures assume the full 2.99% allowable increase in year one and 1.99% over the following years of the 3-year MTFP and no increase in numbers of properties.
 - Business Rates Increases – business rates have previously assumed growth in the base based on the combined Herefordshire pooling figures. Figures are currently being reviewed for the impact of the fairer funding review and the business rates reset – at present it is prudent to assume no increase / growth.
 - Government Grants and New Homes Bonus – it is anticipated that these will either be abolished under FF2.0 or rolled into the funding-formula revenue support grant (RSG) and it is assumed that unless notified differently, these grants will not be separate items from next year onwards. It is anticipated that any increase in Council Tax will be offset by a corresponding reduction in grants as in 2024/25.
- 3.18 The Council has £14.5m of Levelling Up Funding to be spent which is match funded by £1.6m of Council funding. There is also a contribution of £2.425m which has been requested from monies held in trust by Birmingham City Council on behalf of the former Greater Birmingham and Solihull Local Enterprise Partnership (GBSLEP). The Council has £0.9m of UK Shared Prosperity Fund to spend by April 2026. This is both revenue and capital in nature.
- 3.19 There are significant pressures mounting on the Council. At Quarter 2 the overall revenue financial position is a £336k overspend position with savings of £1.213m of which £319k is yet to be delivered.
- 3.20 The total savings target for the year is £1.213m. This is made up of £250k of Departmental Efficiencies from the 2025/26 MTFP, £511k staff turnover rate (based on 5% of staffing budgets) and an ongoing savings budget pressure of £400k.
- 3.21 There has been an announcement that Councillors will be able to rejoin the Local Government Pension Scheme at some point in the future. It has not been made clear when this will come into effect, but it has been confirmed

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that this will be an additional pressure on Councils going forward and no additional funding will be provided.

3.22 Corporate changes to be included in Stage 1 2026/27 are:

- The additional 0.2% Pay Award increase from 2025/26 which was above the assumed increase in the budget of 3%, amounting to £28k going forward.
- The Pay Award is assumed at 2% at a cost of £389k
- A further 1% Cost of Living of £195k
- Cost of Councillors rejoining the LGPS. The date of this has yet to be confirmed.
- Until more information is understood in the detailed Local Government Settlement in December, it is assumed that Grant levels will remain at present levels but with a reduction down to offset any increase from council tax or business rates (excluding the adjustments for fairer funding). Therefore, no assumptions have been made for any increase on Council Tax at this stage.
- No allowance will be made for inflation on contracts.
- The Capital Programme at the moment is unchanged. Work is currently ongoing to prioritise the Departmental and Member bids received earlier in the year.
- Initial outcome from the Fairer Funding Review of a reduction in support grant and retained business rates of £620k with assumed dampening over three years.
- Analysis will be undertaken on Benchmarking data as well – as this will inform areas where further savings, if required, will be initially looked at.

3.23 Departmental pressures are due to be returned by the 14th November. Whilst departments have been instructed to manage pressures in the first place internally, it is likely that there will still be a number of pressures that will be required to be considered from a whole Council viewpoint. There are also likely to be political pressures as well.

3.24 To meet strategic priorities, it is likely that the Council will require more funding. For stage 2 it needs to review a number of areas as set out in 3.15.

Fees and Charges update

3.25 For 2026/27 detailed work will be undertaken as part of the budget setting process to maximise income from Fees and Charges where appropriate.

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Impact on Reserves

- 3.26 The Council currently holds General Fund Balances of £13.38m and Earmarked Reserves of £11.27m. The forecast position for reserves as outlined in the position presented to Council in February is attached as per **Appendix B**.
- 3.27 The level of reserves and balances presently held suggest that although significantly more is held than the suggested 5% recommended level for the General Fund, that any calls on this amount for a significant emergency situation would reduce levels by possibly 50%.
- 3.28 As such, the strategy must be to continue to keep the Council financial sustainability in the medium and long term by setting balanced ongoing budgets. To remain in this position there may be the need for investment, efficiencies and possibly the requirement to fund redundancy (both from reserves and balances). These requirements will be outputs from the Council having to implement changes to the way it operates to continue to be a viable entity going forward and in the context of a future potential North Worcestershire Unitary.

Capital Programme

- 3.29 The Council over the past number of years has not spent its capital programme allocations in year. As in previous years, a review will be carried out of
- All schemes that have not started
 - Schemes that have started
 - To assess deliverability and links to strategic priorities.
- 3.30 Carry forward positions as set out in the Q2 Monitoring Report are £14.891m for the Council. Significant amounts of this relate to Grant Funded schemes
- 3.31 **Appendix A** sets out the present capital programme as agreed at Council in February. Spend to date at Q2 is £4.873m.
- 3.32 The table below highlights the present Capital programme position to 2029/30 rolling forward the “Rolling Budgets” for an additional year.

Year	Total Programme	Revised Total	Council Funded	Grant Funded
2024/5	6,376,987	21,267,936	10,996,671	10,271,265
Carry Fwd	14,890,949			
2025/6	17,351,727		8,017,369	9,334,358
2026/7	3,222,841		2,422,841	800,000
2027/8	2,469,459		1,669,459	800,000
2028/9	2,310,531		1,510,531	800,000
2029/30	2,373,749		1,573,749	800,000

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- 3.33 Over the summer, work was undertaken to identify additional capital bids for the period 2026/27 – 2027/28. The assumption is that any capital work undertaken would need to have been completed by 2028/29, in line with Local Government Reorganisation deadlines. Work is currently being undertaken to assess the submissions in line with Council priorities.

An Initial Risk Assessment

- 3.34 As set out the Strategic Approach and Robustness Statement sections we are budgeting in a time of extreme uncertainty.
- 3.35 As per the Risk Reports that are reported to both Cabinet and Audit, Standards and Governance Committees these are:
- Resolution of the approved budget position.
 - Financial stabilisation position
 - Decisions made to address financial pressures and implementing new projects that are not informed by robust data and evidence.
 - Adequate workforce planning.
- 3.36 The core risks of implementation
- Any savings proposal must pass the S151 Officers tests for robustness and delivery. If items are not deliverable or amounts not obtainable, they cannot be included.
 - Implementation of savings to time and budget – there must be full implementation processes documented to ensure implementation within timescales.
 - Non delivery is a high risk - Savings tracking and ensuring implementation happens based on the plans and the assumptions will become part of the Council's core processes
 - Loss of key personnel will be crucial in a number of proposals and mitigation plans will need to be drawn up
 - Capacity to deliver plans
 - Change of corporate direction/priorities
 - As per the of the explanatory note issued by Government on 24 July 2025, Government intends to issue planned directions under section 24 of the 2007 Act. These are anticipated to require written consent from successor councils for land disposals worth more than £100,000, entering of contracts of more than £1,000,000 for capital and entering of contracts of more than £100,000 for non-capital (whole life costs). While these directions have not yet been issued, Government have been clear that they expect councillors and statutory officers to be mindful of their responsibilities.

Robustness Statement

- 3.37 For stage 1, the opinion of the Section 151 Officer is that the 2026/27 budget estimates to date contain considerable risk due to the level of uncertainty in

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the Council's operating environment, making it problematic to develop meaningful assumptions.

- 3.38 The budget assumptions have been formulated having regard to several factors including:
- Funding available and savings delivery targets
 - Inflation
 - Risks and Uncertainties
 - Priorities
 - Service Pressures not yet being available to include within the figures
 - The Chancellors Statement not yet having taken place
 - Assumptions around the Fairer Funding being unclear at this point in time
 - Commercial Opportunities
 - Local Government Review and impact / restrictions
- 3.39 The MTFP highlights that the current financial position is challenging and will potentially require some form of intervention or further substantial savings and this will become clearer with the Provisional Local Government Settlement in December. Whilst a balanced budget for 2025/26 was approved in February 2025, the Council is currently forecasting a £0.330m overspend in 2025/26 and also has savings at risk of £1.213m as at Quarter 1 of which £319k has yet to be delivered.
- 3.40 Given all the uncertainty which encapsulates this MTFP, the assumptions have been based on the best available information to the Council at this time. Work will continue in validating all assumptions, robustly challenging estimates, ensuring the delivery of existing saving plans. Updates continue to be provided as additional information is received and also included in Stage 2 of the MTFS and balanced budget setting process.

Consultation on the Budget

- 3.41 It is proposed that we run a budget consultation exercise from 20th November, closing at 9am 2nd January 2026. The results would then be fed into the January Cabinet meeting to aid decision making on the budget setting process.
- 3.42 The survey will be primarily online, utilising the SmartSurvey platform, which will be accessible via our website and a QR code on promotional materials. A paper version will be made available on request and from Customer Services. We will promote the survey widely, through an official press release, emails to Councillors and partners and direct contact with our Community Panel. We will also promote at the Bromsgrove Market, which was effective during the recent LGR consultation exercise. We will also share with specific internal services that have community contacts, including the Partnership Team, Community Safety and Events. We are also proposing a focus group in early December to allow greater community engagement with the budget setting

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process and enable deeper discussion of the survey questions and the budget bids.

4. Financial Implications

These are included in Section 3 of the report.

5. Legal Implications

- 5.2 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 Council's statutory function.

6. Strategic Purpose Implications

Relevant Strategic Purpose

- 6.1 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.
- 6.2 The survey directly covers the existing priorities and explores what other areas respondents feel should be prioritised by the Council

Climate Change Implications

- 6.3 The green thread runs through the Council plan. The budget 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.

7. Other Implications

Customer / Equalities and Diversity Implications

- 7.1 The implementation of the revised fees and charges will be notified in advance to the customer to ensure that all users are aware of the new charges and any concessions available to them.
- 7.2 Initial Equalities Impact Assessments will be taken where required.
- 7.3 In order to ensure that the survey is as accessible as possible, the survey will be delivered both using the SmartSurvey online platform and through a paper version. The Policy Team will respond to any requests for support. We will also promote the survey through our community partners to ensure the

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greatest reach and directly contact Sixth Forms and youth groups to encourage young people to engage with the survey.

Operational Implications

- 7.4 Monitoring will be undertaken to ensure that income targets are achieved.

8. RISK MANAGEMENT

- 8.1 There is a risk that if fees and charges are increased that income levels will not be achieved, and the cost of services will increase. This is mitigated by managers reviewing their fees and charges annually. The Council must deliver a balanced budget and items impacting on distinct groups require and equalities review to be undertaken.

9. APPENDICES

Appendix A – Capital Programme
Appendix B – Reserves
Appendix C – Budget Consultation

10. BACKGROUND PAPERS

None.

AUTHOR OF REPORT

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Appendix A – Capital Programme

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Cap Proj	Description	Department	Funding detail	Caried Fwd to 24/5	2024/25 Budget £	2024/25 Total £	Spend 24/5	2025/26 Total £	2026/27 Total £	2027/28 Total £	2028/29 Total £	2029/30 Total £	Council 24/25 £	Council 25/26 £	Council 26/27 £	Council 27/28 £	Council 28/29 £	Council 29/30 £	3rd Party 24/25 £	3rd Party 25/26 £	3rd Party 26/27 £	3rd Party 27/28 £	3rd Party 28/29 £	3rd Party 29/30 £	
200072 200073	Large Schemes Levelling Up Fund Fund - Government Funded	Planning, Regeneration & Leisure Services	Grant Funding					0	0	0	0	0													
	Market Hall (LUF)	Planning, Regeneration & Leisure	Levelling Up Fund	12,337,104		6,109,104	1,921,799	9,228,000	0	0	0	0		3,000,000						6,109,104	6,228,000				
	Ef - Fire Station	Planning, Regeneration & Leisure	Levelling Up Fund	1,209,674		1,209,674	77,300	0	0	0	0	0								1,209,674					
	- Council Funded		Borrowing					0	0	0	0	0													
	UK Shared Prosperity Fund - Capital Element	Planning, Regeneration & Leisure Services	Grant Funding					0	0	0	0	0													
	- Revenue Element	Planning, Regeneration & Leisure Services	Grant Funding					0	0	0	0	0								0	0				
	- Remainder (to be allocated)	Planning, Regeneration & Leisure Services	Grant Funding	627,001	1,784,215	2,411,216		918,000	0	0	0	0								0	0				
								0	0	0	0	0								1,784,215	918,000				
								0	0	0	0	0													
	Schemes Agreed to Continue Burcot Lane	Financial & Customer Services	Public works loan board and grant homes england	0	0	0	-915,914	0	0	0	0	0		0	0										
						0	0		0	0	0	0	0		0	0									
		CCTV	Community & Housing GF Services	Capital ReceiptsBorrowi					0	0	0	0	0		0	0									
		Funding for DFGs	Community & Housing GF Services	Grant income wDC	13,432	1,130,316	1,143,748	567,033	1,285,847	800,000	800,000	800,000	800,000							1,130,316	1,285,847	800,000	800,000		800,000
		Home Repairs Assistance	Community & Housing GF Services	Long Term Debtors	115,602	50,000	165,602		50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000						
		Energy Efficiency Installation	Community & Housing GF Services	Capital ReceiptsBorrowi	102,190	110,000	212,190		0	0	0	0	0		110,000	0									
	New Finance Enterprise system	Financial & Customer Services	Capital Receipts		20,000	20,000		20,000	20,000	20,000	20,000	20,000		20,000	20,000	20,000	20,000	20,000							
	Fleet Replacemnet new line			0	2,180,000	2,180,000	13,860	1,265,000	820,000	0	0	0		2,180,000	1,265,000	820,000	0	0							
	Replacement Parking machines and Upkeep of Sites	Environmental Services	Capital ReceiptsBorrowi	12,745	125,000	137,745	85,003	100,000	100,000	100,000	100,000	100,000		125,000	100,000	100,000	100,000	100,000							
	Wheelie Bin Purchase	Environmental Services	Capital ReceiptsBorrowi	0	60,000	60,000	88,272	120,000	120,000	120,000	120,000	120,000		60,000	120,000	120,000	120,000	120,000							

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Cap Proj	Description	Department	Funding detail	Caried Fwd to 24/5	2024/25 Budget £	2024/25 Total £	Spend 24/5	2025/26 Total £	2026/27 Total £	2027/28 Total £	2028/29 Total £	2029/30 Total £	Council 24/25 £	Council 25/26 £	Council 26/27 £	Council 27/28 £	Council 28/29 £	Council 29/30 £	3rd Party 24/25 £	3rd Party 25/26 £	3rd Party 26/27 £	3rd Party 27/28 £	3rd Party 28/29 £	3rd Party 29/30 £	
New	Buildings	Legal and Property	Borrowing	100,000	100,000	200,000	780	100,000	100,000	100,000	100,000	100,000		100,000	100,000	100,000	100,000	100,000	100,000						
200045	Greener Homes	Community & Housing GF Services	Grants & Contributions	0	0	0	6,125	0	0	0	0	0													
200026	Rubery Redevelopment works					0	821		0	0	0	0								0	0				
200082	New Digital Service	Community & Housing GF Services	Borrowing	33,668	0	33,668		0	0	0	0	0		0	0										
200033	Bus Shelters	Environmental Services	Borrowing	18,000	18,000	36,000	19,180	18,000	18,000	18,000	18,000	18,000		18,000	18,000	18,000	18,000	18,000	18,000						
200069	Cisco Network Update	Business transformation & Organisational Development	Borrowing	0	0	0		34,877	50,000	50,000	50,000	50,000		0	34,877	50,000	50,000	50,000	50,000						
200070	Server Replacement Est(Exact known Q2 2022)	Business transformation & Organisational	Borrowing	-7,951	177,500	169,549		18,500	60,000	60,000	60,000	60,000		177,500	18,500	60,000	60,000	60,000	60,000						
200071	Laptop Refresh	Business transformation & Organisational	Borrowing	13,458	150,000	163,458	18,152	5,000	30,000	30,000	30,000	30,000		150,000	5,000	30,000	30,000	30,000	30,000						
200075	Sanders Park	Planning, Regeneration & Leisure Services	S106	0	0	0	8,550	0	0	0	0	0		0	0										
	Fleet Replacement Costs			9,400	0	9,400		15,000	0	0	0	0			15,000										
	Wheely Bin Increases			85,000	0	85,000		0	0	0	0	0													
	Wild Flower Machinery			62,000	0	62,000		0	0	0	0	0													
2000105	Initial Play Audit Requirements			87,000	364,000	451,000		0	0	0	0	0		364,000											
	Updated Play Audit Requirements (Dec 24)							166,242	159,841	226,459	67,531	155,749			166,242	159,841	226,459	67,531	155,749						
	Movement of ICT Cyber Capital Works Forward			50,000	-50,000	0		0	0	0	0	0		-50,000											
	New ongoing Cyber security budget				25,000	25,000		25,000	25,000	25,000	25,000	25,000		25,000	25,000	25,000	25,000	25,000	25,000						
	Play Area, POS and Sport improvements at Lickey End Recreation Ground in accordance with the S106 Agreement	Planning, Regeneration & Leisure Services	S106 19/0137/FUL	22,626	37,956	60,582	30,000	0	0	0	0	0													

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Cap Proj	Description	Department	Funding detail	Carried Fwd to 24/5	2024/25 Budget £	2024/25 Total £	Spend 24/5	2025/26 Total £	2026/27 Total £	2027/28 Total £	2028/29 Total £	2029/30 Total £	Council 24/25 £	Council 25/26 £	Council 26/27 £	Council 27/28 £	Council 28/29 £	Council 29/30 £	3rd Party 24/25 £	3rd Party 25/26 £	3rd Party 26/27 £	3rd Party 27/28 £	3rd Party 28/29 £	3rd Party 29/30 £
	Food Waste Collection - fund for Vechicles and containers							902,511	0	0	0	0												
	Replacement Wheeled Bins							2,200,000	0	0	0	0								902,511				
	Parkside - Requirement for a firewall							9,750	0	0	0	0		2,200,000										
	Laptops for new Starters							25,000	25,000	25,000	25,000	0		9,750										
	Salary Capitalisation							750,000	750,000	750,000	750,000	750,000		25,000	25,000	25,000	25,000							
	ANPR Machines in 3 Car							100,000						750,000	750,000	750,000	750,000	750,000						
	Artrix - Landlord Obligations				20,000	20,000	17,587	20,000	20,000	20,000	20,000	20,000	20,000	20,000	20,000	20,000	20,000	20,000						
	Total			14,890,949	6,376,987	15,039,936	1,993,474	17,451,727	3,222,841	2,469,459	2,310,531	2,373,749	3,424,500	8,117,369	2,422,841	1,669,459	1,510,531	1,573,749	10,271,265	9,334,358	800,000	800,000	800,000	800,000

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Appendix B – Reserves Position

	Balance as at 31 March 2022 £000	Transfers In 2022/23 £000	Transfers Out 2022/23 £000	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	14,235	7,881	(9,012)	13,104	1,747	(1,330)	13,521	1,200		(344)	14,377		(252)	14,125		(1,115)	13,010		(484)	12,526
General Fund:																				
Building Control Other	7	0	0	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	82	0	0	0	82	0	0	82	0	0	82	0	0	82
Community Services	271	50	0	321	0	(125)	196	0	0	0	196	0	0	196	0	0	196	0	0	196
Economic Regeneration	1,348	0	0	1,348	50	0	1,398	(600)	0	0	798	0	0	798	0	0	798	0	0	798
Election Services	51	34	0	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	27	0	0	0	27	0	0	27	0	0	27	0	0	27
Financial Services	4,705	0	0	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	864	0	0	0	864	0	0	864	0	0	864	0	0	864
ICT/Systems	197	0	0	197	0	0	197	0	0	0	197	0	0	197	0	0	197	0	0	197
Leisure/Community Safety	151	0	(36)	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	16	0	0	0	16	0	0	16	0	0	16	0	0	16
Other	67	0	0	67	0	0	67	0	0	0	67	0	0	67	0	0	67	0	0	67
Planning & Regeneration	133	330	0	463	0	0	463	0	0	0	463	0	0	463	0	0	463	0	0	463
Regulatory Services (Partner Share)	73	12	0	85	0	0	85	0	0	0	85	0	0	85	0	0	85	0	0	85
Replacement Reserve (Inc. Recycling)	0	0		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	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	766	0	0	0	766	0	0	766	0	0	766	0	0	766
Covid-19 (Collection Fund)	4,789	0	(3,185)	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	0	79	0	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 Allocation											0	1,004	(100)	904		(450)	454		(450)	4
Artrix Holding Trust	0	17	0	17	0	0	17	0	0	0	17	0	0	17	0	0	17	0	0	17
Total General Fund	13,858	522	(3,221)	11,159	480	(625)	11,014	(1,200)	234	(78)	9,970	1,104	(612)	10,462	0	(528)	9,934	0	(450)	9,484

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Bromsgrove District Council Budget Consultation for 2026-27

Every year Bromsgrove District Council must agree a budget that balances the money we spend on services with the money we have available to us. The council gets all its income from council tax, business rates, money it can raise itself and specific grants it can bid for. All the time demand for services is increasing.

Bromsgrove District Council is facing financial pressures across many of its services. This is due to continued uncertainty over government funding and the cost of living crisis. The Council will support the District through these challenging times and will continue to deliver its plans for change and use your views to help us balance our budget.

The information from this survey will be used by Councillors as they set the budget and council tax for 2026/27.

The survey is open to anyone who is a resident of Bromsgrove District or who has a business based here.

The survey should take approximately 5 minutes to complete. The closing date for responses is 9:00am on Friday 2 January 2026.

Thank you in advance for your taking your time to complete this survey.

Our Engagement Privacy Statement it is at the end of the survey.

Agenda Item 9

1. Are you a resident of Bromsgrove District and/or have a business based here?

Please tick all that applies

☐ Resident of Bromsgrove District

☐ Have a business based here

2. Please tell us where you live, or your business is based.

Please note if you live and have a business in the district, please only tell us where you live.

Alvechurch South	☐	Cofton	☐	Perryfields	☐
Alvechurch Village	☐	Drakes Cross	☐	Rock Hill	☐
Aston Fields	☐	Hagley East	☐	Rubery North	☐
Avoncroft	☐	Hagley West	☐	Rubery South	☐
Barnt Green & Hopwood	☐	Hill Top	☐	Sanders Park	☐
Bromsgrove Central	☐	Hollywood	☐	Sidemoor	☐
Belbroughton & Romsley	☐	Lickey Hills	☐	Slideslow	☐
Catshill North	☐	Lowes Hill	☐	Tardebigge	☐
Catshill South	☐	Marlbrook	☐	Wythall East	☐
Charford	☐	Norton	☐	Wythall West	☐

3. How important are the current Bromsgrove District Council priorities to you?

Economic Development – Developing the local economy, supporting businesses, skills, town & district centres

Environment – Waste & recycling, environmental enforcement, biodiversity & wildlife habitats, climate change mitigation & carbon reduction, air quality

Housing – Affordable & balanced housing provision, supporting vulnerable residents & those at risk of homelessness, environmentally sustainable and efficient homes

Infrastructure – Delivering the Local Plan, parks & open spaces, active travel

Further information can be found in the Bromsgrove District Council Plan found on the council's website.

	Extremely important	Very important	Somewhat important	Not so important	Not at all important
Economic Development	☐	☐	☐	☐	☐
Environment	☐	☐	☐	☐	☐
Housing	☐	☐	☐	☐	☐
Infrastructure	☐	☐	☐	☐	☐

Comment:

4. Which services do you think it is important for the Council to invest in?

Please note that Highways are not included as this is a Worcestershire County Council function

Please pick your top 3 most important.

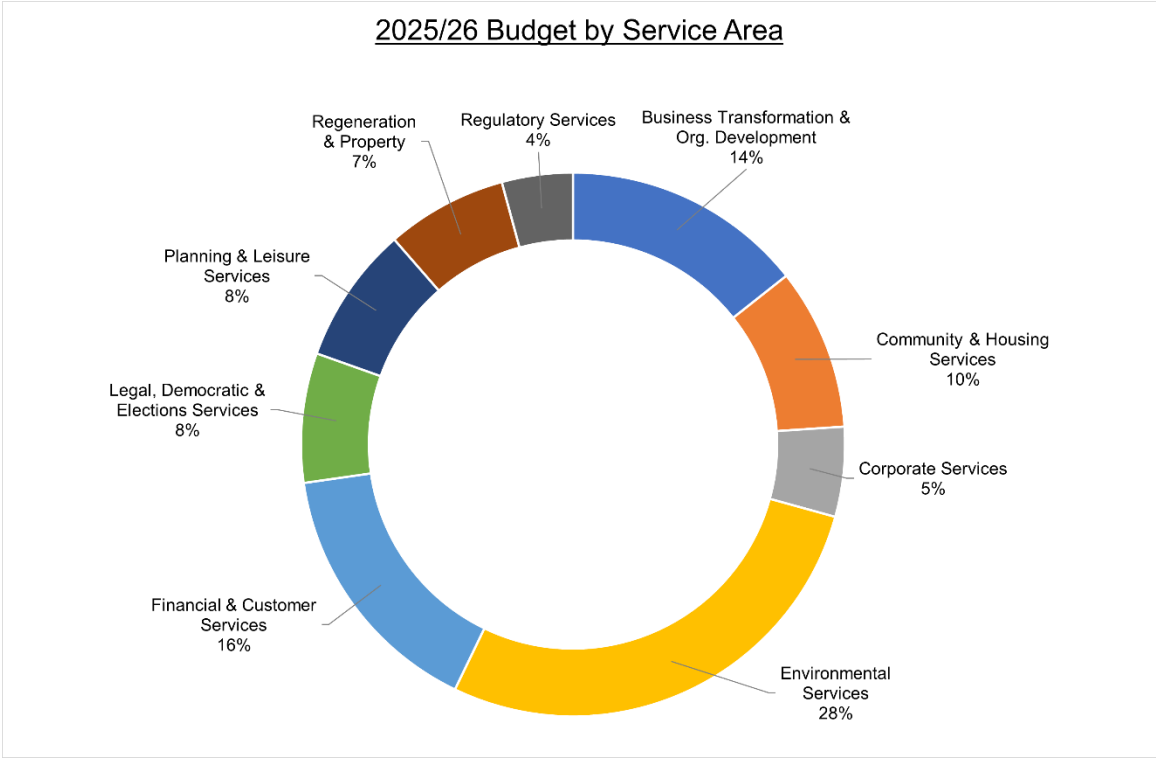
- ☐ Community and Voluntary Sector
- ☐ Community Parks and Open Spaces
- ☐ Community Safety
- ☐ Environmental Sustainability
- ☐ Events and Arts Activities
- ☐ Local Economic Development and Employment
- ☐ Maintenance of the Landscape and Environment
- ☐ Strategic Housing
- ☐ Waste and Recycling
- ☐ Welfare and Financial Support

☐ Other (please specify):

Budget Management

Please use the following list when considering the next section:

- **Business Transformation & Org. Development** – includes: ICT, human resources, corporate policy, equalities, transformation and training
- **Community & Housing** - includes: homelessness, community safety, shopmobility, community transport and CCTV
- **Corporate Services** - includes: Communications, marketing, graphic design and reprographics
- **Environmental Services** - includes: Grounds maintenance, bereavement services, waste & recycling and street cleansing
- **Financial & Customer Services** - includes: Financial monitoring, budgeting, accounts, housing benefit, council tax, business rates and customer services
- **Legal, Democratic & Election Services** - includes: Legal services, land charges, democratic services, member support and elections
- **Planning & Leisure Services** - includes: Building control, planning, tourism, recreation grounds (incl. play areas, playing fields etc.), allotments, events, art projects and sports development
- **Regeneration & Property** - includes: Business development, public toilets, economic development, street lighting, car parking, public building maintenance
- **Regulatory Services** - includes: Licensing, taxis, dog wardens and pest control



5. How important are the following council services to you when considering how Bromsgrove District Council manages its budget?

	Extremely important	Very important	Somewhat important	Not so important	Not at all important
Business Transformation & Org. Development	☐	☐	☐	☐	☐
Community & Housing Services	☐	☐	☐	☐	☐
Corporate Services	☐	☐	☐	☐	☐
Environmental Services	☐	☐	☐	☐	☐
Financial & Customer Services	☐	☐	☐	☐	☐
Legal, Democratic & Elections Services	☐	☐	☐	☐	☐
Planning & Leisure Services	☐	☐	☐	☐	☐
Regeneration & Property	☐	☐	☐	☐	☐
Regulatory Services	☐	☐	☐	☐	☐

6. Do you support fees and charges (this excludes parking) rising by 4% to keep them in line with inflation and rising staffing costs?

- ☐ Strongly agree
- ☐ Agree
- ☐ Neither agree nor disagree
- ☐ Disagree
- ☐ Strongly disagree

7. In order to maintain services, what level of increase to Bromsgrove District Council's proportion of Council Tax do you support?

For reference, the proportion of Council Tax that Bromsgrove retains for a band D property is approximately 12% of the total bill.

	1.99% increase	2.99% increase
Strongly agree	☐	☐
Agree	☐	☐
Neither agree nor disagree	☐	☐
Disagree	☐	☐
Strongly disagree	☐	☐

8. Please let us know your suggestions for investing in the District to increase prosperity and enhance appeal for residents and businesses alike.

9. Please let us know any other comments on the budget or ideas for reducing costs or increasing income to ensure Council services remain sustainable.

About you

Answering these questions is optional.

Any answers are completely anonymous and confidential.

The reason why we ask you these questions is so we can:

- Make our council services open to everyone in the district
- Treat everyone fairly and appropriately when they use our services
- In consultations, make sure that we have views from all across the district

The Equality Act 2010 makes these aims part of our legal duties. Your answers help us check that we have met the law and help improve our services.

10. What is your current housing status?

- | | |
|--|--|
| ☐ Owner | ☐ Mortgaged |
| ☐ Part rent/part buy | ☐ Private renting |
| ☐ Council tenant | ☐ Social housing |
| ☐ Living with relatives | ☐ Prefer not to say |
| ☐ Other (please specify): | |

11. Which of the following best describes your age?

- | | |
|--|------------------------------------|
| ☐ 16-19yrs | ☐ 20-29yrs |
| ☐ 30-39yrs | ☐ 40-49yrs |
| ☐ 50-59yrs | ☐ 60-69yrs |
| ☐ 70-79yrs | ☐ 80+ years |
| ☐ Prefer not to say | |

12. The Equality Act 2010 defines disability as ‘a physical or mental impairment that has a substantial and long-term adverse effect on your ability to carry out normal day-to-day activities’.

Do you have any long-standing health condition or disability?

☐ Yes ☐ No ☐ Prefer not to say

13. Which of the following best describes your gender?

☐ Female ☐ Male
☐ Prefer not to say ☐ Other (please specify):

14. Is the gender you identify with the same as your sex registered at birth?

☐ Yes ☐ No ☐ Prefer not to say

15. Which best describes your ethnicity?

☐ White English/Welsh/Scottish/Northern Irish/British	☐ Any other White background
☐ Mixed or Multiple ethnic groups	☐ Asian or Asian British
☐ Black, African, Caribbean or Black British Arab	☐ Prefer not to say
☐ Other ethnic group (please specify):	

16. Which of the following best describes your religion or belief?

- | | | |
|--|--|---|
| ☐ Atheist | ☐ Buddhist | ☐ Christian (incl. Catholic) |
| ☐ Humanist | ☐ Hindu | ☐ Jewish |
| ☐ Muslim | ☐ Pagan | ☐ Sikh |
| ☐ No religion/belief | ☐ Prefer not to say | |
| ☐ Other (please specify): | | |

17. Which of the following best describes your sexual orientation?

- | | |
|--|--|
| ☐ Bisexual | ☐ Heterosexual |
| ☐ Lesbian or Gay | ☐ Prefer not to say |
| ☐ Other (please specify): | |

Thank you for taking the time to complete our Budget Survey. The information from this survey will be used by Councillors as they set the budget and council tax for 2026/27.

Please return your survey by 9am on Tuesday 2 January 2025 to:

**Policy and Performance
Parkside
Market Street
Bromsgrove
Worcestershire
B61 8DA**

Bromsgrove District Council Engagement Privacy Statement

What information do we collect?

We collect some or all the following information for us to understand the demographics of our customers.

- Age
- Gender
- Disability
- Race
- Religion/Belief
- Sexual orientation
- Postcode

Why we collect your data

We want to deliver the best service to our customers; therefore, we need to use information to manage the quality of our services. The information we collect will be used to understand the demographics of our customers and to improve customer satisfaction and to improve services.

How we collect your data

We are collecting your information via the use of a customer satisfaction survey. This will be used to improve services, however as this is an anonymous survey, it will not be linked back to you as an individual.

When we'll share your data

We will share this data with the Team responsible for delivering the service. However, due to the anonymity of the survey, no personal data will be submitted, therefore it will not be linked back to you as an individual.

Know your rights

No personal data is submitted as part of this customer satisfaction survey that can be linked back to you as an individual. However, if you have any queries or concerns regarding data protection matters, please email information.manage@bromsgroveandredditch.gov.uk Information regarding all your rights can be found [here](#)

How long do we keep your information for?

We will retain the survey responses for 5 years from when the survey closes, unless we have stated it will be earlier.

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Quarter 2 Finance and Performance Report 2025/26

Relevant Portfolio Holder	Councillor Baxter – Portfolio Holder for Finance and Governance
Portfolio Holder Consulted	Yes
Relevant Head of Service	Debra Goodall
Report Authors	Debra Goodall – Assistant Director of Finance and Customer Services debra.goodall@bromsgroveandredditch.gov.uk
Wards Affected	All Wards
Ward Councillor(s) consulted	No
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.	

SUMMARY

Regular budget monitoring, reporting forms the basis of good governance and best practice in budget management. Councillors and committees should be able to rely on the information provided to assist in sound decision making around budgets and spending plans for the Council.

1. RECOMMENDATIONS

The Cabinet is asked to RESOLVE that the following are noted:

- 1) The current Revenue position of £336k unfavourable variance.
- 2) The current Capital spending of £4.872m against a revised budget of £21.876m as set out in Appendix A.
- 3) The current savings delivery is £894k against an annual target of £1.213m for 2025/26. This is included in the above Revenue position
- 4) The Earmarked Reserves balances of £11.266m as set out in Appendix B.
- 5) The Ward Budget allocation position to date is 18 approved allocations at £15,968.80, leaving a balance of £46,031.20 to be allocated before year end as set out in Appendix C.
- 6) There is an updated procurements position set out in appendix D, with any new items over £200,000 to be included on the forward plan.
- 7) The position on Council Tax and Business Rates be noted.
- 8) The position on benefits processing be noted.
- 9) The Q2 position on Corporate Performance Indicators be noted.

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

10) That the Balance Sheet Monitoring Position for Q2 is noted – which is the Treasury Monitoring Report and required to be reported to Council.

2. EXECUTIVE SUMMARY

- 2.1 This Quarter 2 Financial and Performance Monitoring Report provides a comprehensive overview of Bromsgrove District Council's finance and performance for the period April to September 2025. It outlines the Council's revenue and capital positions, savings delivery, procurement pipeline, and progress on key strategic projects, along with performance against key indicators.
- 2.2 As of the end of Q2, the Council is forecasting a **£336k revenue overspend** for the full financial year. This compares to a £344k revenue overspend forecast in 2024/25 at Quarter 2. The £336k is primarily driven by costs relating to Waste Management due to the aging fleet and associated agency costs, offset by increased income in waste services and additional costs within Finance relating to agency cover for vacancies and consultancy costs for VAT support. There have also been increased costs relating to Lifeline Services and a shortfall in parking income. These costs have been offset by vacancy management and underspends in Corporate Financing.
- 2.3 There has been an adverse movement of £163k relating to an increase in fleet costs (Environmental Services) of £184k, increased agency staff costs and external professional fees (Finance and Customer Services) of £124k offset by increased street naming and numbering income (Business Transformation and Organisational Development) of £73k, increased UKSPF grant funding of £23k and reduced activity in Parks and Events and Planning Policy (Planning and Leisure Services) of £42k and other variations of £7k.
- 2.4 The Council has delivered **£894k of its £1.213m savings target**, leaving a balance of £319k to deliver. Further work is ongoing to meet the full-year goal. Capital expenditure to date stands at **£4.872m** against a revised budget of **£21.876m** proposed to support ongoing commitments. This budget includes £14.891m of carry forwards from 2024/25.
- 2.5 Key capital projects include the **Levelling Up-funded Windsor Street and Nailers Yard schemes**. The Windsor Street scheme is nearing completion of phase one remediation works, and discussions are being held with the Environment Agency regarding any required remediation works under phase two. The Nailers' Yard scheme construction stage is now progressing with a revised completion date of 6th May 2026.

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- 2.6 The Council's **collection rates** for Council Tax and Business Rates remain strong, with Q2 performance close to or exceeding national averages. Benefits processing times are within expected parameters, despite increased complexity in cases retained by the Council.
- 2.7 The report also includes updates on **ward budget allocations, earmarked reserves, and treasury management performance**, with no new borrowing undertaken and **£7m in short-term investments** held at quarter-end.
- 2.8 The Council continues to monitor its financial position closely, with regular engagement between service managers and finance officers to address emerging risks and ensure delivery of strategic priorities.

3. **BACKGROUND**

- 3.1 The purpose of this report is to set out the Council's draft Revenue and Capital Outturn position for the first half of the financial year (April – September 2025) and associated performance data. This report presents:
- The Council's forecast yearly outturn revenue monitoring position for 2025/26 based on data to the end of Quarter 2 including delivery of the savings targets and fees and charges income as set out in the MTFP.
 - The position in respect of balance sheet monitoring as requested by the Audit, Governance and Standards Committee including the Treasury Management Report.
 - The spending as of Q2 of Ward Budget Funds.
 - The updated procurement pipeline of Council projects to be delivered over the next 12 months in order to properly resource plans for the delivery of these projects.
 - The Council's performance against the strategic priorities outlined in the Council Plan Addendum, including operational measures to demonstrate how the council is delivering its services to customers is the subject of separate report elsewhere on the agenda.

4. **DETAILED PERFORMANCE**

Financial Performance

- 4.1 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 2, the projected revenue

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outturn position for the full 2025/26 financial year and explains key variances against budget.

- 4.2 The £15.3m full year revenue budget included in the table below is the budget that was approved by Council in February 2025.

Service Description	2025-26 Approved Budget	2025-26 Revised Budget	2025-26 Revised Q2 Budget	Q2 Adjusted Spend	Full Year Projected Forecast	Full Year Projected Variance Q1	Full Year Projected Variance Q2
Business Transformation and Organisational Development	2,197,136	2,052,948	954,380	952,766	2,010,663	30,996	-42,285
Community and Housing GF Services	1,471,273	1,398,392	672,398	601,340	1,547,078	217,223	148,686
Corporate Services	817,413	1,409,860	1,001,154	524,196	803,734	-616,735	-606,126
Environmental Services	4,266,050	4,266,050	2,133,025	2,178,082	4,626,495	175,970	360,445
Financial and Customer Services	2,387,557	2,338,838	1,218,481	1,241,829	2,656,001	192,996	317,163
Legal, Democratic and Elections Services	1,178,898	1,152,334	560,814	605,798	1,246,713	78,161	94,379
Planning and Leisure Services	1,250,320	1,107,643	482,483	527,136	1,156,462	90,723	48,819
Regeneration & Property	1,099,949	942,531	417,555	507,219	1,112,233	192,533	169,704
Regulatory Client	646,139	646,139	323,070	376,901	722,838	42,759	76,699
Starting Well	0	0	0	202	0	0	0
Grand Total	15,314,735	15,314,735	7,763,360	7,515,469	15,882,217	404,626	567,484
Service Description	2025-26 Approved Budget	2025-26 Revised Budget	2025-26 Revised Q2 Budget	Q2 Adjusted Spend	Full Year Projected Forecast	Full Year Projected Variance Q1	Full Year Projected Variance Q2
Corporate Financing	-15,314,735	-15,314,735	-7,657,368	-2,591,642	-15,546,000	-231,265	-231,265
Grand Total	-15,314,735	-15,314,735	-7,657,368	-2,591,642	-15,546,000	-231,265	-231,265
TOTALS	0	0	105,992	4,923,827	336,217	173,361	336,219
						Change	162,858

+

Table 1 – Approved and working budget by service area

Budget Variances

- 4.3 The draft position is set out in the above table.
- 4.4 Overall, the Council is currently forecasting a full year revenue overspend of £336k at Quarter 2 as explained in the Executive Summary. 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 2025/26. This includes service projections as follows:

Business Transformation £42k underspend

- 4.4.1 Business Transformation & Organisational Development are forecasting an underspend of £42k due to increased street naming and numbering income of £53k and salary

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savings of £17k. This is offset by an overspend of £28k for Apprenticeship Levy due to increased planned training requirements across the Council.

Community and Housing GF Services £149k overspend

- 4.4.2 Community & Housing Services are forecasting a £149k overspend. There is £153k increased charges from BT which is an uncontrollable charge. There are additional charges relating to equipment in Lifeline Services of which at least £60k income will be offset in the next six months – a clearer picture will be available at Q3. There is also £50k in additional Bed & Breakfast costs in line with national trends offset by £27k underspend related to CCTV and other net variations of £31k.

Corporate Services £606k underspend

- 4.4.3 Corporate Services is forecasting a £606k underspend due to £639k on vacancy management and savings efficiency targets across the whole council and other net variations of £5k offset by £21k additional Postage costs across the whole council and £7k of communication costs relating to Local Government Reorganisation.

Environmental Services £360k overspend

- 4.4.4 Environmental Services are forecasting a £360k overspend due to an overspend on Waste Management of £414k. There is £495k additional costs on maintenance of the aging fleet – these costs should reduce with the introduction of the new fleet. There are also agency costs of £156k, the cesspool service of £35k, a reduction in salary and other additional costs of generating extra income and other charges relating to staffing from Redditch of £339k in total. All of these costs were offset by increased income of £516k on various collection services and other net movements of £95k. Aside from waste management there were other net variations representing a £54k underspend.

Financial and Customer Services £317k overspend

- 4.4.5 Finance & Customer Services are forecasting an overspend of £317k due to £90k on VAT support from Lavat Consulting on the VAT returns to HMRC, £50k to Bruton Knowles for Insurance Property valuations for the Statement of Accounts, £179k on Agency staff due to cover for vacancies and other net variations of £2k. A review of resourcing arrangements is taking place.

Legal, Democratic and Elections Services £94k overspend

- 4.4.6 Legal, Democratic and Property Services are forecasting a £94k overspend due to £31k Landlord costs on the Artrix charged to Legal in error, £50k Ward Budget was included in Democratic Services in error which now changes recharges to Redditch Council,

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increased Civica license costs of £13k which are expected to be reimbursed. Adjusting the these, the actual uncontrollable overspend for the service is £1k.

Planning and Leisure Services £49k overspend

- 4.4.7 Planning and Leisure Services are forecasting a £49k overspend due to £85k additional staffing costs as a result of increased costs of agency staff due to maternity cover. There has been £68k underachieved income in Development Control and Arts and Development as the income target is higher than can be achieved – this will be addressed as part of the 2026/27 budget setting process. There have also been additional salary costs of £23k in Building Control. This is offset by savings in salary on Parks and Events of £63k and Planning Policy of £67k due to a planned review on Leisure services.

Regeneration & Property £170k overspend

- 4.4.8 Regeneration and Property are forecasting a £170k overspend due to an overspend on the carpark service which analyses as a shortfall in car parking revenue of £82k as a result of the first half hour being free, £27k due to unforeseen rental costs, £27k of additional MiPermit charges, £43k overspend on recharges to Wychavon DC due to higher shared service costs, £3k overspend on enforcement and £4k on other minor expenses offset by a £9k underspend on multi-storey car parks. Other overspends include £20k on utility costs and overtime in Public Conveniences, additional fleet costs of £49k and other net variances of £7k. This has been offset by a reduction in establishment costs due to a number of posts being funded from the use of additional UK Shared Prosperity Fund Administration Grant income of £51k and savings within Property Services of £32k due to lower than anticipated staff costs.

Regulatory Client £77k overspend

- 4.4.9 Regulatory Client are forecasting a £77k overspend due to £47k underachieved income in Taxi Licensing as a result of lower than anticipated licencing volumes default works overspend of £27k. This is a re-occurring year on year pattern and will be addressed in the 2026/27 budget setting process. There have also been other net variations of £3k.

Corporate Financing £231k underspend

- 4.4.10 Corporate Financing is showing additional income of £231k due to £170k Grant Income, £150k Investment Interest Income, £36k savings on Interest Payable offset by £125k in underachieved Fees & Charges Income.

Savings Targets

- 4.4.11 The Council had £1.213m of savings targets in 2025/26. The Council has delivered £894k of these savings in Q2. A review is currently being undertaken of vacant posts. Savings against target are shown in the table below:

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	2025/26 £m	Adjusted 2025/26 £m	Total 2025/26 £m	Savings identified as at Quarter 2 £m	
Service Reviews	(0.405)	0.405	0		Consolidated corporately
Finance Vacancies	(0.100)	0.100	0		Consolidated corporately
Environmental Services Partnership	(0.050)		(0.050)	0	Work ongoing
2023/24 Items	(0.555)	0.555	(0.050)	0	
In year corporate target		(0.913)	(0.913)	(0.668)	£0.343m from vacancy management and £0.055m from efficiencies. Expected to be met in full.
Directorate savings		(0.250)	(0.250)	(0.226)	There is an expected outturn of £226k in savings.
2025/26 Items	0	(1.163)	(1.163)	(0.894)	
Total Savings	(0.555)	(1.163)	(1.213)	(0.894)	

4.5 Cash Management

Borrowing

- As of the 30th September 2025, there were no short-term borrowings. The Council has no long-term borrowings.

Investments

- On 30th September 2025 there were £7m short-term investments held.

Capital Monitoring

4.6 A capital programme of £17.352m was approved in the Budget for 2025/26 in February 2025. This has been fully reviewed as part of the MTFP using actual data as at the end of December 2024. The table below and detail in **Appendix A** set out the Capital Programme schemes that are approved for the MTFP time horizon. At this stage, additional grants of £3.916m had been received, resulting in a total capital budget of £21.268m. At Quarter 2, additional grants of £4.524m have been received in year revising the total capital budget for 2025/26 to £21.876m.

4.7 Many of these schemes are already in partial delivery in the 2025/26 financial year. By approving this list, the Council also agreed sums not spent in 2024/25 (and 2023/24 by

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default if schemes originated earlier than 2024/25 as sums have been carried forward through to the 2024/25 MTFS Report) to be carried forward into 2025/26. The table also splits amounts by funding source, Council or third party.

Year	Total Programme	Revised Total	Council Funded	Grant Funded
2024/5	6,376,987	21,267,936	10,996,671	10,271,265
Carry Fwd	14,890,949			
2025/6	17,351,727		8,017,369	9,334,358
2026/7	3,222,841		2,422,841	800,000
2027/8	2,469,459		1,669,459	800,000
2028/9	2,310,531		1,510,531	800,000
2029/30	2,373,749		1,573,749	800,000

4.8 Included in this funding the Council also have the following Grant Funded Schemes which are being delivered in 2025/26:

- The two Levelling Up schemes – Windsor Street (formerly project titled as ‘Old Fire Station’) and Nailers’ Yard (formerly known as ‘Market Hall’) which are funded via £14.5m of Government Funding, and the Council is funding £1.6m of works. A contribution of £2.425m has also been requested from the monies held in trust by Birmingham City Council on behalf of the former Greater Birmingham and Solihull Local Enterprise Partnership (GBSLEP)
- For the Nailers’ Yard Scheme:
 - Construction is progressing on site. Pavilion – Main roofing installation is now complete and rooflights are being installed with PV panels. Commercial building – Steel Frame System is now complete, roofing hot melt works complete with slab/gravel done to main roof. Cladding well underway to gable end and 3rd floor areas, windows and curtain wall being installed on 3 elevations and 1st fix dry lining plus M&E commenced on 2nd and 3rd floors.
 - The revised completion date is 6th May 2026 (previously 26th January 2026) due to culvert works. The cost of the scheme has increased as a result of this. An urgent decision was made on 21st August 2025 whereby BDC committed a further £500k to the Levelling Up Programme.
 - GJS Dillon have received several enquiries for office space and two enquiries for the GF food and beverage unit. They have prepared the service charge schedules for the commercial building. Heads of terms are due to be issued to an incoming tenant that wishes to let one and a half floors. The next stage will be to instruct Bruton Knowles to undertake the property management role of the commercial building.
- For the Windsor Street Scheme

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- Brownfield Solutions have completed phase one ground water monitoring on site. There are six wells in total, with monthly testing taking place. The results have been submitted to the Environment Agency. They will advise the Council if the presence of PFAS/PFOS chemicals (per and polyfluorinated alkyl substances) across the site within the soils and groundwater are at an acceptable level and the site can be redeveloped. If they are not, a further six-month remediation strategy will be undertaken through to May 2026.
- The project is slightly delayed due to waiting for feedback from the Environment Agency. By May 2026, the Council will have a clean site that is ready to be redeveloped.
- Cabinet will agree the delivery option for residential use on the site in November. Following this, the regeneration team will progress this option whilst phase 2 remediation is ongoing.

- Public Realm work is now fully completed, and the underspend is approximately £925k

The Council can claim up to £2.425m from the monies held in trust by Birmingham City Council (BCC) on behalf of the former Greater Birmingham and Solihull Local Enterprise Partnership (GBSLEP) and an application has now been submitted to BCC. 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.

- UK Shared Prosperity Schemes total £917,878 (although it should be noted that these grants funded schemes are a mix of capital - £286,083 and revenue - £631,795) need to be completely spend by the end of the 2025/26 financial year.

- 4.9 The outturn spend is £4.872m against the revised capital budget totals £21.876m and is detailed in **Appendix A**. It should be noted that as per the budget decision carry forwards of £14.891m will be rolled forward from 2024/25 into 2025/26 to take account of slippage from 2024/25.

Earmarked Reserves

- 4.10 The updated position, taking account of the now submitted draft accounts for 2024/25, 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 30th September 2025, based on the present MTFP that was approved by Council on the 19th February, the Council holds £11.266 million of General Fund Reserves.

Ward Budgets

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- 4.11 This report is the half year 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 rules of the Scheme which were approved by Council. As of the 30th September there have been applications from 18 Members approved totalling £15,968.80. There are still 13 Members who have not allocated any funding and overall, £46,031.20 is still to be allocated. This year's funding allocations must be spent by the 31st March. Full detail is set out in **Appendix C**.

Balance Sheet Monitoring Position

- 4.12 There has been the request from Audit Committee that the Council include Balance Sheet Monitoring as part of this report.
- 4.13 This initial balance sheet reporting is set out as the Q2 Treasury Report which is attached as **Appendix D**. This report sets out the Council's debt and borrowing position for Q2 2025/26. 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

- 4.14 The Procurement pipeline is shown in **Appendix E**. The Council's Procurement Pipeline includes details of contracts expected to be repurchased 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 10 contracts that are over the key decision threshold of £200k
 - There are 5 contracts procured by Redditch Borough Council on behalf of Bromsgrove District Council.

Collection Fund

- 4.15 The Council acts as collecting authority for itself, other major preceptors and the parishes for Council Tax. The Council also collects business rates on behalf of central government, the County Council and for itself. The Council's own precept accounts for about 11% of monies collected from Council tax and about 40% of business rates collected after paying government levies, additional tariff to central government and 10% across to Worcestershire County Council.
- 4.16 The Council aims to collect 98.5% of Council Tax receipts (national average is 95.8%) which equates to a total sum of £87.505 million. Performance against this target for this financial year is shown in the table below:

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	Target %age (cumulative)	Actual %age (cumulative)	Amount collected (cumulative) £ millions
Quarter 1	28.89	28.80	25.605
Quarter 2	57.78	56.58	50.261
Quarter 3			
Quarter 4	98.5		

- 4.17 Due to the use of ten monthly collections the percentage for each quarter is not a simple 25%. Government reforms are proposing enforcing a move to monthly collections (in twelfths).
- 4.18 The Council aims to collect 98.0% of business rate receipts (national average is 95.8%) which equates to a total sum of £31.132m.. Performance against this target for this financial year is shown in the table below:

	Target %age (cumulative)	Actual %age (cumulative)	Amount collected (cumulative) £ millions
Quarter 1	25.84	28.34	9.082
Quarter 2	51.68	56.82	18.051
Quarter 3			
Quarter 4	98.0		

Benefits

- 4.19 Benefit claim statistics are summarised in the table below:

New claims	Qtr 1	Qtr 2		Qtr 1	Qtr 2
Average processing time	20 days	16 days	Number processed this quarter	95	83
Changes to claims					
Average processing time	10 days	9 days	Number processed this quarter	1215	1095

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- 4.20 Recent changes to benefits has meant that many of the simpler claims have been transferred to DWP, leaving the more complex cases with local authorities – this has impacted on average processing time. DWP expect new claims to be processed within a 30-day timeframe.

Performance

- 4.21 Corporate Performance Indicators are included as Appendix F to this report.

5. Financial Implications

- 5.1 These are contained in the main body of the report.

6. Legal Implications

- 6.1 No Legal implications have been identified.

7. Strategic Purpose Implications

Relevant Strategic Purpose

- 7.1 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

- 7.2 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.

8. Other Implications

Customer / Equalities and Diversity Implications

- 8.1 None as a direct result of this report.

Operational Implications

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

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9. RISK MANAGEMENT

- 9.1 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 1 Report is reported to Audit, Governance and Standards Committee in July:

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

10. APPENDENCES

Appendix A – Capital Outturn
Appendix B – Reserves Position
Appendix C – Ward Budget Position
Appendix D – Treasury Management Position
Appendix E – Procurement Pipeline
Appendix F – Quarter 2 Corporate Performance Indicators

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Appendix A - Capital Outturn

Capital Project	Description	2025/26 Total (Original) £	2025/26 Total (Incl C/F's) £	25/26 Spend £
	Large Schemes			
	Levelling Up Fund			
200072	- Market Hall	9,228,000	11,555,322	3,782,273
200073	- Ex-Fire Station/Windsor Street	0	-54,247	113,508
	UK Shared Prosperity Fund			
200086	(UKSPF Funding BDC 2024/2025)	918,000	938,000	0
200082	CCTV Digital Upgrade (UKSPF)	0	33,668	0
200084	Shop Frontage Improvement & Empty Shop Grants (UKSPF)	0	-53,605	0
200026	Rubery Redvelopment Works	0	-1,504	0
	Other Schemes			
200006	Burcot Lane	0	-927,642	0
200008	Funding for DFGs	1,285,847	1,442,899	631,200
200009	Home Repairs Assistance	50,000	215,602	0
200010	Energy Efficiency Installation	0	212,190	0
200019	Fleet Replacement new line	1,265,000	3,173,318	114,356
200022	Replacement Parking Machines	100,000	94,134	5,000
200030	Wheelie Bin Purchase	120,000	-48,671	108,403
200033	Bus Shelters	18,000	34,345	0
200045	Greener Homes	0	-6,125	0
200069	Cisco Network Update	34,877	34,877	0
200070	Server Replacement	18,500	188,049	67,038
200071	Laptop Refresh	5,000	36,249	20,263
200075	Sanders Park	0	-103,763	24,727
200102	Fleet Replacement cost	15,000	24,400	0
200103	Wheelie Bin Increases	0	85,000	0
200076	Play Area, POS and Sport improvements at Lickey End Recreation Ground in accordance with	0	30,582	0
200079	Footpaths	75,000	32,020	3,274
200104	Buildings	100,000	262,426	2,945
	Updated Pay Audit Requirements	166,242	166,242	0
200105	Initial Play Audit Requirements	0	451,000	0
200106	New ongoing Cyber security budget	25,000	50,000	0
200107	Artrix - Landlord Obligations	20,000	22,414	0
200101	Wild Flower Machinery	0	62,000	0
200001	Barnt Green Millenium Park - Toilet	0	0	0
Project codes are being set up	Replacement Wheeled Bins	2,200,000	2,200,000	0
	Parkside - Requirement for a firewall	902,511	902,511	0
	Laptops for new Starters	9,750	9,750	0
	Laptops for new Starters	25,000	25,000	0
	Salary Capitalisation	750,000	750,000	0
200016	New Finance Enterprise system	20,000	40,000	0
		17,351,727	21,876,441	4,872,987

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Appendix B - Earmarked Reserves

		Transfers In	Transfers Out		Transfers In	Transfers Out	
	Balance as at 31 March 2023 £000	2023/24 £000	2023/24 £000	Balance as at 31 March 2024 £000	2024/25 £000	2024/25 £000	Balance as at 31 March 2025 £000
General Fund:							
Building Control Other	7	0	0	7	0	0	7
Building Control Partnerships	82	0	0	82	0	0	82
Commercialism	0	0	0	0	0	0	0
Community Services	321	0	(125)	196	0	0	196
Economic Regeneration	1,348	50	0	1,398	0	0	1,398
Election Services	85	0	0	85	0	0	85
Environmental Services	27	0	0	27	0	0	27
Financial Services	4,705	430	(500)	4,635	89	0	4,724
Housing Schemes	864	0	0	864	0	0	864
ICT/Systems	197	0	0	197	0	0	197
Leisure/Community Safety	115	0	0	115	0	0	115
Local Neighbourhood Partnerships	16	0	0	16	0	0	16
Other	67	0	0	67	14	0	81
Planning & Regeneration	463	0	0	463	136	0	599
Regulatory Services (Partner Share)	85	0	0	85	1	0	86
Shared Services (Severance Costs)	311	0	0	311	0	0	311
Covid-19 (General Covid Grant)	766	0	0	766	0	0	766
Covid-19 (Collection Fund)	1,604	0	0	1,604	0	0	1,604
Shopmobility Donations	0	0	0	0	0	0	0
Council Tax Hardship Fund	79	0	0	79	0	0	79
Artrix Holding Trust	17	0	0	17	12	0	29
Total General Fund	11,159	480	(625)	11,014	252	0	11,266

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Appendix C - Ward Budget Spending Q2 - Funds Allocated to 30 September

Councillor Ward Fund Balances – 25/26

Activity	Spend	Balance £2,000
Cllr Alan Bailes	300.00	1,700.00
Cllr Ruth Lambert	1,978.80	21.20
Cllr Sam Ammar	1,300.00	700.00
Cllr Esther Gray	800.00	1,200.00
Cllr Peter McDonald	1,450.00	550.00
Cllr Harrison Warren-Clarke	0	2,000.00
Cllr Anita Dale	0	2,000.00
Cllr Shirley Webb	2,000.00	0
Cllr Rob Hunter	0	2,000.00
Cllr Rachel Bailes	0	2,000.00
Cllr Sue Baxter	500.00	1,500.00
Cllr James Clarke	0	2,000.00
Cllr Stephen Colella	0	2,000.00
Cllr Jane Elledge	0	2,000.00
Cllr Derek Forsythe	500.00	1,500.00
Cllr David Hopkins	683.00	1,317.00
Cllr Charles Hotham	750.00	1,250.00
Cllr Helen Jones	0	2,000.00
Cllr Bakul Kumar	1,200.00	800.00
Cllr Mick Marshall	1,000.00	1,000.00
Cllr Karen May	657.00	1,343.00
Cllr Bernard McEldowney	1,350.00	650.00

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Activity	Spend	Balance £2,000
Cllr David Nicholl	250.00	1,750.00
Cllr Simon Nock	250.00	1,750.00
Cllr Stephen Peters	500.00	1,500.00
Cllr Joshua Robinson	0	2,000.00
Cllr Siobhan Robinson	0	2,000.00
Cllr Justin Stanley	500.00	1,500.00
Cllr Kit Taylor	0	2,000.00
Cllr Peter Whittaker	0	2,000.00
Cllr Samuel Evans	0	2,000.00
Overall Totals	15,968.80	46,031.20

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Appendix D - Q2 Treasury Management Position

1. SUMMARY

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

2. RECOMMENDATIONS

Cabinet are asked to:

- 1) Note the Council's Treasury performance for Q2 of the financial year 25/26.
- 2) 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 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 first quarter was dominated by the fallout from the US trade tariffs and their impact on equity and bond markets. The second quarter, still rife with uncertainty, saw equity markets making gains and a divergence in US and UK government bond yields, which had been moving relatively closely together.
- 3.4 From late June, amid a UK backdrop of economic uncertainty, concerns around the government's fiscal position and speculation around the autumn Budget, yields on medium and longer-term gilts pushed higher, including the 30-year which hit its highest level for almost 30 years.
- 3.5 UK headline annual consumer price inflation (CPI) increased over the period, rising from 2.6% in March to 3.8% in August, still well above the Bank of England's 2% target. Core inflation also rose, from 3.4% to 3.6% over the same period, albeit the August reading was down % from 3.8% the previous month. Services inflation also fell from July to August, to 4.7% from 5.0%.

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- 3.6 The UK economy expanded by 0.7% in the first quarter of the calendar year and by 0.3% in the second quarter. In the final version of the Q2 2025 GDP report, annual growth was revised upwards to 1.4% y/y. However, monthly figures showed zero growth in July, in line with expectations, indicating a sluggish start to Q3.
- 3.7 Labour market data continued to soften throughout the period, with the unemployment rate rising and earnings growth easing, but probably not to an extent that would make the more hawkish MPC members comfortable with further rate cuts. In addition, the employment rate rose while the economic inactivity rate and number of vacancies fell.
- 3.8 The BoE's Monetary Policy Committee (MPC) cut Bank Rate from 4.5% to 4.25% in May and to 4.0% in August after an unprecedented second round of voting. The final 5-4 vote was for a 25bps cut, with the minority wanting no change. In September, seven MPC members voted to hold rates while two preferred a 25bps cut. The Committee's views still differ on whether the upside risks from inflation expectations and wage setting outweigh downside risks from weaker demand and growth.
- 3.9 The August BoE Monetary Policy Report highlighted that after peaking in Q3 2025, inflation is projected to fall back to target by mid-2027, helped by increasing spare capacity in the economy and the ongoing effects from past tighter policy rates. GDP is expected to remain weak in the near-term while over the medium-term outlook will be influenced by domestic and global developments.
- 3.10 Arlingclose, the authority's treasury adviser, maintained its central view that Bank Rate would be cut further as the BoE focused on weak GDP growth more than higher inflation. One more cut is currently expected during 2025/26, taking Bank Rate to 3.75%. The risks to the forecast are balanced in the near-term but weighted to the downside further out as weak consumer sentiment and business confidence and investment continue to constrain growth. There is also considerable uncertainty around the autumn Budget and the impact this will have on the outlook.
- 3.11 Against a backdrop of uncertain US trade policy and pressure from President Trump, the US Federal Reserve held interest rates steady for most of the period, before cutting the Fed Funds Rate to 4.00%-4.25% in September. Fed policymakers also published their new economic projections at the same time. These pointed to a 0.50% lower Fed Funds Rate by the end of 2025 and 0.25% lower in 2026, alongside GDP growth of 1.6% in 2025, inflation of 3%, and an unemployment rate of 4.5%.
- 3.12 The European Central Bank cut rates in June, reducing its main refinancing rate from 2.25% to 2.0%, before keeping it on hold through to the end of the period. New ECB projections predicted inflation averaging 2.1% in 2025, before falling below target in 2026, alongside improving GDP growth, for which the risks are deemed more balanced and the disinflationary process over.

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- 3.13 **Financial markets:** After the sharp declines seen early in the period, sentiment in financial markets improved, but risky assets have generally remained volatile. Early in the period bond yields fell, but ongoing uncertainty, particularly in the UK, has seen medium and longer yields rise with bond investors requiring an increasingly higher return against the perceived elevated risk of UK plc. Since the sell-off in April, equity markets have gained back the previous declines, with investors continuing to remain bullish in the face of ongoing uncertainty.
- 3.14 Over the period, the 10-year UK benchmark gilt yield started at 4.65% and ended at 4.70%. However, these six months saw significant volatility with the 10-year yield hitting a low of 4.45% and a high of 4.82%. It was a broadly similar picture for the 20-year gilt which started at 5.18% and ended at 5.39% with a low and high of 5.10% and 5.55% respectively. The Sterling Overnight Rate (SONIA) averaged 4.19% over the six months to 30th September.
- 3.15 **Credit review:** Arlingclose maintained its recommended maximum unsecured duration limit on the majority of the banks on its counterparty list at 6 months. The other banks remain on 100 days.
- 3.16 Early in the period, Fitch upgraded NatWest Group and related entities to AA- from A+ and placed Clydesdale Bank's long-term A- rating on Rating Watch Positive. While Moody's downgraded the long-term rating on the United States sovereign to Aa1 in May and also affirmed OP Corporate's rating at Aa3.
- 3.17 Then in the second quarter, Fitch upgraded Clydesdale Bank and also HSBC, downgraded Lancashire CC and Close Brothers while Moody's upgraded Transport for London, Allied Irish Banks, Bank of Ireland and Toronto-Dominion Bank.
- 3.18 After spiking in early April following the US trade tariff announcements, UK credit default swap prices have since generally trended downwards and ended the period at levels broadly in line with those in the first quarter of the calendar year and throughout most of 2024.
- 3.19 European banks' CDS prices has followed a fairly similar pattern to the UK, as have Singaporean and Australian lenders while Canadian bank CDS prices remain modestly elevated compared to earlier in 2025 and in 2024.
- 3.20 Overall, at the end of the period CDS prices for all banks on Arlingclose's counterparty list remained within limits deemed satisfactory for maintaining credit advice at current durations.
- 3.21 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

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institutions and durations on the Authority's counterparty list recommended by Arlingclose remain under constant review.

Local Context

- 3.22 On 30th June 2025, the Authority had £16.89m net borrowing 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

	31.6.25	31.9.26
	Actual	Actual
	£m	£m
General Fund CFR	31.26	31.26
Total CFR	31.26	31.26
Less: External borrowing**	0	0
Internal borrowing	31.26	31.26
Less: Usable reserves	-11.27	-11.27
Less: Working capital	-3.10	-3.10
Net borrowing	16.89	16.89

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

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

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- 3.23 The treasury management position at 30th June and the change over the quarter is shown in Table 2 below.

Table 2: Treasury Management Summary

	30.6.25 Balance £m	Movement £m	30.9.25 Balance £m	30.9.25 Rate %
Long-term borrowing				
Short-term borrowing	0	0	0	
Total borrowing	0	0	0	
Short-term investments				
Cash and cash equivalents	3.5	3.5	7.0	
Total investments	3.5	3.5	7.0	
Net investments	3.5	3.5	7.0	

Borrowing Strategy and Activity

- 3.24 As outlined in the treasury strategy, the Authority's chief objective when borrowing has been to strike an appropriately risk balance between securing lower interest costs and achieving cost certainty over the period for which funds are required, with flexibility to renegotiate loans should the Authority's long-term plans change being a secondary objective. The Authority's borrowing strategy continues to address the key issue of affordability without compromising the longer-term stability of the debt portfolio. At the present time short term interest rates are higher than long term interest rates.
- 3.25 Policy interest rates have risen substantially since 2021 although they have largely plateaued over the last year. Over the last quarter gilt yields have risen slightly overall, having had a number of peaks and troughs. There has been downward pressure from lower inflation figures, but also upward pressure from unexpectantly positive economic data. Data from the US continues to impact global markets including UK gilt yields.
- 3.26 The PWLB certainty rate for 10-year maturity loans was 5.10% at the beginning of the period and 4.80% at the end. The lowest available 10-year maturity rate was 4.70% and the highest was 5.10%. Rates for 20-year maturity loans ranged from 5.30% to 5.50% during the period, and 50-year maturity loans from 5.10% to 5.30%. The cost of short-term

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borrowing from other local authorities has been similar to Base Rate during the period at 4.0% to 4.5%.

3.27 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.

3.28 **Loans Portfolio:** At 30th June the Authority held no loans, with no movement from 30th June 2025 as per table 3 below, as part of its strategy for funding previous and current years' capital programmes.

Table 3: Borrowing Position

	31.6.25 Balance £m	Net Movement £m	30.9.25 Balance £m
Public Works Loan Board			
Banks (LOBO)			
Banks (fixed term)			
Local authorities (long-term)			
Local authorities (short-term)	0	0	0
Total borrowing	0	0	0

Treasury Investment Activity

3.29 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.

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- 3.30 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 £3.5 and £11.5 million due to timing differences between income and expenditure. The investment position is shown in table 4 below.

Table 4: Treasury Investment Position

	31.6.25 Balance £m	Net Movement £m	31.9.25 Balance £m	31.9.25 Income Return %	31.9.25 Weighted Average Maturity days
Banks & building societies (unsecured)					
Banks & building societies (secured deposits)					
Covered bonds (secured)					
Government	0.0	0.0	0.0	0.0	0.0
Local authorities and other govt entities					
Corporate bonds and loans					
Money Market Funds	3.5	3.5	7.0	2.9%	30
	3.5	3.5	7.0		

- 3.31 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.
- 3.32 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.
- 3.33 Bank Rate was reduced to 4.00% in August 2025 and remained at that level through the

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rest of the quarter. Short-term interest rates largely followed this trend, staying close to the Bank Rate. The rates on DMADF deposits have been constant at 4.21%.

Non-Treasury Investments

- 3.34 The definition of investments in the Treasury Management Code now covers all the financial assets of the Authority as well as other non-financial assets which the Authority holds primarily for financial return. Investments that do not meet the definition of treasury management investments (i.e. management of surplus cash) are categorised as either for service purposes (made explicitly to further service objectives) and or for commercial purposes (made primarily for financial return).
- 3.35 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

- 3.36 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	7.0	0.0	7.0			
				n/a	n/a	n/a

MRP Regulations

- 3.37 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.

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- 3.38 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

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

Table 6: Investment Limits

	2025/26 Maximum	30.9.25 Actual	2025/26 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	7.0m		Yes
Foreign countries	£5m per country			
Real Estate Investment Trusts	£2.5m in total			

- 3.40 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 2025/26 Maximum	30.9.25 Actual	2025/26 Operational Boundary	2025/26 Authorised Limit	Complied? Yes/No
Borrowing	0m	0m	55,000	60,000	Yes
PFI and Finance Leases	Nil	Nil	1,000	1,000	Yes
Total debt	0m	0m	56,000	61,000	

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- 3.41 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

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

Liability Benchmark

- 3.43 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

	31.3.25	31.3.26	31.3.27	31.3.28
	Actual	Forecast	Forecast	Forecast
Loans CFR	31.26	34.54	36.26	38.12
Less: Usable Reserves	-11.27	-11.14	-10.42	-9.86
Less: Working Capital	-3.10	-3.10	-3.10	-3.10
Net loans requirement	16.89	20.30	22.74	25.16
Plus: Liquidity allowance	0.20	0.20	0.20	0.20
Liability benchmark	17.09	20.50	22.94	25.36
Existing borrowing	0	6.20	11.10	12.95

- 3.44 Following on from the medium-term forecast above, the long-term liability benchmark assumes capital expenditure funded by borrowing of £12.95m, 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

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delivered through the use of internal resources and the Council has no long-term borrowing.

Maturity Structure of Borrowing

- 3.45 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:

	Upper Limit	Lower Limit	30.9.25 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

- 3.46 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

- 3.47 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:

	2025/26	2026/27	2027/28	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

- 3.48 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.

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Additional indicators

Security:

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

	2025/26 Target	30.9.25 Actual	Complied?
Portfolio average credit rating	A	UK Govt	Yes

Liquidity:

- 3.50 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.

	30.6.25 Actual	2025/26 Target	Complied?
Total cash available within 3 months	Nil	Nil	Yes
Total sum borrowed in past 3 months without prior notice	Nil	Nil	Yes

Interest Rate Exposures:

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

Interest rate risk indicator	2025/26 Target	30.9.25 Actual	Complied?
Upper limit on one-year revenue impact of a 1% <u>rise</u> in interest rates	500,000	0	Yes
Upper limit on one-year revenue impact of a 1% <u>fall</u> in interest rates	500,000	0	Yes

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

	<u>30/06/25</u>	<u>30/09/25</u>
Bank Rate	4.25%	4.00%
1-year PWLB certainty rate, maturity loans	4.50%	4.58%
5-year PWLB certainty rate, maturity loans	4.70%	4.95%
10-year PWLB certainty rate, maturity loans	5.27%	5.53%
20-year PWLB certainty rate, maturity loans	5.88%	6.14%
50-year PWLB certainty rate, maturity loans	5.71%	5.98%

3.53 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

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- 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.

6. APPENDICES

None

7. BACKGROUND PAPERS

MTFP 2025/26 – February 2025 which contains this year's Capital Strategy, Treasury Management Strategy and MRP Policy.

AUTHOR OF REPORT

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Appendix E - Procurement Pipeline

Title	Council	Contract Value £
Fleet Replacement	Bromsgrove	2,846,000
Wheeled Bin Purchase, Delivery and Collection for Recycling of Existing V	Bromsgrove	2,200,000
Refuse and Recycling Products	Bromsgrove	700,000
Replacement Parking Machines	Bromsgrove	517,000
Microsoft Licenses	Bromsgrove	483,000
PROVIDE Kennelling of Dogs	Bromsgrove	450,000
Planning/GIS/Gazeteer	Bromsgrove	400,000
Supply of HVO Fuel	Bromsgrove	300,000
Air Quality Analysers	Bromsgrove	250,000
Data Access Services	Bromsgrove	200,000
Domestic Food Waste Collection Contract	Joint	23,000,000
Hybrid Mail Solution - Sending Letters	Joint	2,500,000
Corporate Building Electrical Contract	Joint	2,500,000
Food Caddy Purchase and Delivery	Joint	1,300,000
Public Space CCTV Maintenance	Joint	400,000
Lifeline Call Handling	Joint	200,000
eFinancials RTU Extension	Joint	208,598

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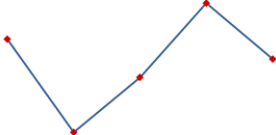
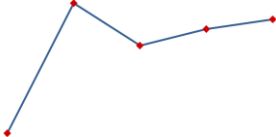
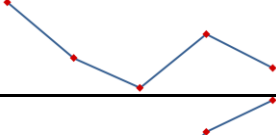
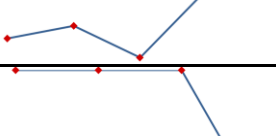
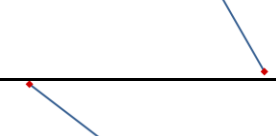
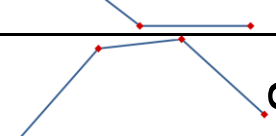
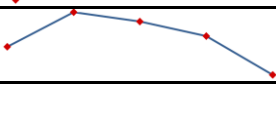
Economic Development

Measure name	Type	Q2 24/25	Q3 24/25	Q4 24/25	Q1 25/26	Q2 25/26	Target	Average	Aim	Trend
Business grant funding awarded	£	£86,574.86	£92,420.66	£175,836.56	£0.00	£2,599.39			⬆️	
Business grant funding- % spent	%	32.20%	37%	70.30%	0%	2.20%			⬆️	
There were no grants awarded during Q1; this is common at the start of funding periods as new programmes are launched. At Q2, 28% of the total grant pot has been committed. A new grant will be launched in Q3 (Innovation Lighthouse) which accounts for 33.5% of the total funding.										

Environment

Measure name	Type	Q2 24/25	Q3 24/25	Q4 24/25	Q1 25/26	Q2 25/26	Target	Average	Aim	Trend
% household waste recycled or composted	%	45.83	41.34	36.79	53.36	44.79%		44%	⬆️	
# of flytips	#	545	484	568	635	668			⬇️	
Continued issues with Birmingham bin strikes increasing fly tips on northern borders										
Average time taken to remove fly-tipping reported	# days	3	5.7	4	3	3	5		⬇️	
No. of households supported by energy advice service (AoE)	#	291	320	240	377	382			⬆️	

Housing

Measure name	Type	Q2 24/25	Q3 24/25	Q4 24/25	Q1 25/26	Q2 25/26	Target	Average	Aim	Trend
% of major planning applications determined within 13 weeks (or agreed extension)	%	88.8	78.5	84.6	92.8	86.6	60%		⬆️	
% of minor planning applications determined within 8 weeks (or agreed extension)	%	84.5	88.5	87.2	87.7	88	70%		⬆️	
No. of planning enforcement actions taken- cases opened	#	57	29	14	41	24				
No. of planning enforcement actions taken- cases closed	#	25	31	16	48	63				
% of Building Control applications determined within 5 weeks (or 8 weeks on agreement)	%		100	100	100	97	85		⬆️	
Number of threatened with homelessness preventions	#	9	8	8	12	7				
No. of households in temporary accommodation- snapshot	#		23	33	34	26			⬇️	
Cost of B & B placements	£	£22,468.14	£50,241.62	£42,711.24	£31,132.64	Not available			⬇️	

Infrastructure

Measure name	Type	Q2 24/25	Q3 24/25	Q4 24/25	Q1 25/26	Q2 25/26	Target	Average	Aim	Trend
% of green flags awarded	%		50	50	50	50	75		⬆️	

Community Safety

Measure name	Type	Q2 24/25	Q3 24/25	Q4 24/25	Q1 25/26	Q2 25/26	Target	Average	Aim	Trend
# crimes recorded (excluding ASB)	#	1346	1329	1275	1396	Not available*			⬇️	
ASB	#	342	208	238	301	Not available*			⬇️	

*there is a lag with this date as it is obtained using verified figures from Police.uk and they are not currently available.

Organisational Priorities

Measure name	Type	Q2 24/25	Q3 24/25	Q4 24/25	Q1 25/26	Q2 25/26	Target	Average	Aim	Trend
% of media enquiries responded to within agreed timescales	#		100	100	100	100	100		⬆️	
Council Tax Collection Rate	%	56.65%	84.14%	98.12%	28.80%	56.58%	56.63%		⬆️	
Business Rates Collection Rate	%	53.13%	81.06%	98.18%	28.34%	56.82%	55.32%		⬆️	
Housing Benefit: Speed of processing new claims	# days	18.3	17	11.7	19.7	12		20	⬇️	
Housing Benefit: Speed of processing change of circumstances	# days	10.7	9.3	4.7	9.7	8.3		8	⬇️	
Housing Benefit: Local Authority error rate	%	0.32	0.31	0.26	0.48	0.16	0.48		⬇️	
# complaints received	#	12	11	17	11	33				
Average working days to respond to complaints	# days	6.25	6.6	16.6	18.2	4.7	10			
% complaints answered within 10 days	%	83.3	72.7	68.8	75	96.8	95%		⬆️	
Staff turnover rates	%	9.40%	8.50%	9.80%	10.20%	9.10%		13.40%	⬇️	
Sickness absence- long term	# days per FTE	3.24	5.03	6.4	2.88	3.19		7.8	⬇️	

SLM Leisure Data

Measure name	Type	Q2 24/25	Q3 24/25	Q4 24/25	Q1 25/26	Q2 25/26	Target	Average	Aim	Trend
Total no. of visits including EA cards and non-card holders	#	101,511	92,060	102,739	96,589	Not available			⬆️	
EA cards added this period	#	1,970	1,292	1,951	1,709	Not available			⬆️	
Total EA cards to date	#	76,661	77,953	79,904	81,613	Not available			⬆️	
No. gym members	#	2,723	2,716	2,749	2,460	Not available			⬆️	
Swimming lessons - children enrolled on scheme	#	1,270	1,236	1,242	1,206	Not available			⬆️	
Swim lesson occupancy	%	74	74	73	72	Not available			⬆️	
RIDDOR reportable events	#	0	0	0	0	Not available			⬇️	

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Windsor Street Site

Relevant Portfolio Holder	Councillor Karen May
Portfolio Holder Consulted	Yes
Relevant Assistant Director	Rachel Egan, Assistant Director Regeneration & Property
Report Author	Rebecca McElliott Job Title: Regeneration Project Manager email: Rebecca.mcellriott@bromsgroveandredditch.gov.uk
Wards Affected	Central
Ward Councillor(s) consulted	No
Relevant Council Priority	Economic Development Housing
Key Decision – No	
If you have any questions about this report, please contact the report author in advance of the meeting.	
This report contains exempt information as defined in Paragraph 3 of Part I of Schedule 12A to the Local Government Act 1972, as amended – Appendix 3 and Appendix 4.	

1. RECOMMENDATIONS

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

- 1) The Windsor Street site be redeveloped for residential use.
- 2) Subject to a further report to Cabinet outlining the detail of the collaboration agreement arrangements, the Council seek to enter into partnership with a Registered Social Landlord to develop the site.
- 3) The Assistant Director for Regeneration and Property and the Assistant Director for Legal, Democratic and Procurement Services be delegated authority to progress the preferred option, including reviewing administrative and contractual requirements, following consultation with the Leader, and to report back to Cabinet on the outcomes at a later date.

2. BACKGROUND

- 2.1 Windsor Street is a key redevelopment site in the heart of Bromsgrove Town Centre. Once a derelict site left vacant since 2014 after Worcestershire County Council and the Fire Service moved to new premises, it faced persistent challenges with vandalism and anti-social

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behaviour. Thanks to intervention from Bromsgrove District Council, the site will now be fully remediated and made ready for exciting redevelopment opportunities, helping to revitalise this central part of the town. A plan of the site can be found at Appendix 1.

- 2.2 Previous attempts to redevelop the site had been unsuccessful, due to both concerns around abnormal costs for decontamination and regarding the scale and design of the proposals which were not valid in planning terms. As a result, the public sector, through Bromsgrove District Council, have taken the lead by acquiring the site and looking to de-risk and provide for a viable development to be delivered. The site is identified in various adopted plans and strategies as offering a key redevelopment opportunity to provide new housing stock in a sustainable location in the heart of Bromsgrove Town Centre.
- 2.3 Bromsgrove District Council made a successful application to the Levelling Up Fund (LUF) for £14.5m. In the LUF application, it was stated that the project could enable the delivery of up to 60 high quality residential units in the town centre to help rebalance the residential market and subsequently increase footfall and time spent in the town centre, strengthening the local economy. The total budget attributed to the Windsor Street site is £3,490,000.
- 2.4 In addition to the LUF funds, a further £84,000 was awarded from the UK Shared Prosperity Fund (UKSPF), £100,000 from the One Public Estate (OPE) programme and an additional £722,000 was secured from the Brownfield Land Release Fund (BLRF).
- 2.5 The Council has been able to secure the future of the site and bring it forward for redevelopment without any funding needing to be supplied by the authority so far. The works have been solely funded by external funding partners.
- 2.6 Thomas Lister Surveyors were commissioned to review potential future uses of the site. They concluded that the redevelopment of the site for retail purposes is not likely to be commercially attractive and that office demand would be met by the Nailers Yard development. This advice, combined with the fact that BLRF funding must be used to accelerate the release of housing sites, means that the project team have only considered residential use on the site. If the site does not deliver housing, the BLRF funding (£722k) and OPE funding (£100k) would have to be repaid by the Council.

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3. CURRENT POSITION

- 3.1 As of November 2025, Brownfield Solutions have completed phase one of the remediation strategy. This included groundwater monitoring following the removal of contaminated soil. These results have been submitted to the Environment Agency (EA) for technical review. Once they have completed their review, feedback will be provided to the Council.
- 3.2 Once feedback is received from the EA, the Council will likely have to undertake phase two remediation which will include localised work in the remaining areas of the site that are still above the levels of contamination that the EA is willing to accept. This is in the south-east area of the site. There is an allowance within the existing budget to undertake phase 2 remediation works.
- 3.3 The project is currently delayed due to the technical review by the Environment Agency. As phase 2 remediation is likely to take 6 months, if it commences in November 2025, then it will be completed by May 2026. This will not impact the delivery of housing on the site as a planning application will need to be prepared and submitted to the Local Planning Authority.

4. DELIVERY OPTIONS

- 4.1 In early 2022, ONE Creative produced a feasibility study to consider the residential potential on the site. They considered three options which were refurbishing the existing buildings on site, delivering fifty apartments within two four storey buildings and delivery of twenty-nine two and three bed family homes. An indicative layout of the third option can be found at Appendix 2.
- 4.2 Option one is no longer deliverable as the existing buildings could not be retained due to asbestos. The second option was discounted because the Council's Conservation Officer had reservations as to the appropriateness of the scale and massing of the building adjacent to the grade II listed Chapel. In addition, Spadesbourne Homes Ltd have recently delivered 39 one-bedroom units at the Burcot Lane development which has reduced the demand for this type of accommodation. The strategic housing team have advised that the development should provide family accommodation of 2, 3 and 4-bedroom homes in line with current housing need.
- 4.3 There are four potential delivery options that have been considered as well as a do-nothing option for comparison. Thomas Lister was asked to provide a development appraisal for three options – dispose with

outline planning permission to a private developer (A), dispose with outline planning permission to a Registered Social Landlord (RSL) (B) and develop through Spadesbourne Homes Ltd (C). The only difference between options A and B is that a sale is likely to be under value to an RSL. Therefore, these have been considered as one option below (A). Option B looks at redeveloping the site through Spadesbourne Homes Ltd. Following conversations with Group Leaders, the decision was also taken to explore a partnership option, which is listed as options C and D below but was not considered by Thomas Lister in the original development appraisal.

Option A – outline planning permission and disposal

- 4.4 Option A would involve the Council securing outline planning consent before marketing the site on the open market and inviting offers based on the consented scheme. The expected gross development value (GDV) can be found at Appendix 4. It would cost an estimated £100,000 to obtain outline planning permission. This is included and not in addition to the GDV.
- 4.5 Securing outline planning permission before disposing of the site will significantly increase its value and attractiveness to potential developers, by reducing risk and uncertainty. It allows them to proceed with confidence knowing the principle of development is approved, even if details are not finalised.
- 4.6 It will be necessary for the Council to market the site with a restriction that any purchaser must deliver housing. Otherwise, BLRF and One Public Estate (OPE) funding will have to be paid back as a condition of the grant funding is that the site would be released for housing. There may be an impact on the sale price achieved for the site as any restriction can reduce value.
- 4.7 There have been three recent planning applications for the site submitted by external applicants when the site was under Worcestershire County Council and the Fire Service ownership (not Bromsgrove District Council), one of which was withdrawn. Both applications (Ref 15/0836 and Ref 16/0191) were schemes for retirement living with alternative designs. They were both refused and upheld at appeal for the following reasons –
 - a) *The effect on the character and appearance of the area, including on the setting of a number of listed buildings and on the setting of the Bromsgrove Town Conservation Area (the BTCA).*
 - b) *The effect on highway safety in relation to parking, access and servicing.*

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- 4.8 Given that previous planning applications were refused on the grounds above, it is unlikely that any scheme for apartments would be accepted because of the effect on the character and appearance of the area.
- 4.9 Option A is the option with the lowest level of risk to the Council and the least financial input but has the lowest level of control for the Council. This option would enable housing to be delivered on the site with a capital receipt being realised as soon as the site is disposed of but there would be no ongoing revenue for the Council. It is unlikely that more than 30% affordable homes would be delivered on the site.
- 4.10 Selling the site to an RSL below market value has legal implications due to the Council's duty to achieve best value.

Option B – Develop through Spadesbourne Homes Ltd and retain market value properties (dispose of affordable units)

- 4.11 Option B is based on the Council bringing forward the development through the council-owned housing company, Spadesbourne Homes Ltd. There were lessons learned from the Burcot Lane redevelopment project which include –
 - a) Carrying out due diligence early to identify where any infrastructure is in the ground. Utility maps are often incorrect, and the developer (Spadesbourne) would be liable for undertaking any works that require relocation of services.
 - b) The major delay in the development was the disposal of properties within Allen Court due to different tenure types. Any future development that included flats, should only be one tenure type e.g. market rent or social housing within each building.
 - c) Whilst providing properties for sale assists in cross subsidy, the developer (Spadesbourne) is required to provide a 2-year defect liability period from date of purchase and the construction contractor only has a one-year defect liability period from handover to Spadesbourne. This one year also includes the timeframe for sales to be achieved. Therefore, this risk must be costed as part of the overall project budget.

The project team would ensure that these factors are considered if option B was the preferred delivery option for the site at Windsor Street.

- 4.12 The Council would have full control in this scenario and as such it can therefore specify quality, build and design standards to ensure that the aspirations for this site are fully met. However, as the sole funder of the project, the Council has 100% of the financial exposure relating to the

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project. Any cost overruns not covered in the contractor agreement will be the sole responsibility of the Council. The Council is also responsible for managing all risks relating to delivery and must bear the consequences should a certain risk materialise.

- 4.13 In order to test this option, an investment model has been produced by Thomas Lister which models the potential investment returns that might be generated through the Council delivering the scheme and then retaining income through the rental of the market properties, whilst disposing of the affordable element to an RSL partner. This mirrors the approach taken by the Council at Burcot Lane.
- 4.14 For the purposes of the investment model, an indicative value has been included at Year 3 of the appraisal, following completion of the scheme when it is assumed that the affordable units would be sold to an RSL partner. The estimated value of these properties can be found at Appendix 4. The payback period for the investment is identified as being year 46.

Option C – Partnership with private developer

- 4.15 Option C considers the Council forming a partnership with a private developer to deliver housing on the site. There are different types of partnership arrangements that could be put in place, including:
 - a) A Joint Venture (JV) whereby the Council and partner form a separate entity to develop a specific site. This often involves the Council contributing land and the developer contributing capital and expertise.
 - b) Development agreement whereby the Council forms a contract with a developer to deliver housing on the site, with the developer taking on the construction and management responsibilities.
 - c) Strategic partnership whereby the Council and a developer form a long-term partnership to deliver housing projects, potentially with a focus on affordable housing.
- 4.16 Establishing a joint venture structure can be time consuming and costly, as such the scheme must be of the appropriate scale to justify this route. Establishing a strategic partnership would require the Council to have multiple redevelopment sites available. Given that the site will deliver up to 50 units, a development agreement by way of contract is the most likely partnership arrangement that would be formed.
- 4.17 One of the benefits of a partnership with a private developer is the potential increased access to funding and expertise. A partnership can pool land, funding, and other resources to make a development site

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more viable. Collaboration can also lead to the delivery of more affordable housing units and risks can be shared, such as financial and development. The Council can leverage their local knowledge and land assets whilst a developer can bring their financial resources, construction expertise, and market knowledge.

- 4.18 Setting up a partnership can incur higher procurement and transaction costs. Any partnership arrangement will require careful legal structuring to define roles, responsibilities and profit-sharing arrangements. These complex legal agreements must be carefully drafted by a legal specialist. Prior to undertaking a procurement exercise, it is imperative that the Council ensure its goals align with the developer commercial objectives.
- 4.19 Given that the site is only circa 0.7 hectares, it is unlikely that many private developers would express an interest as the minimum requirement is often above 50 units.
- 4.20 It is unlikely that a private developer would seek to deliver more than 30% affordable units on the site as their focus tends to be on maximising profit.

Option D – Partner with a Registered Social Landlord (RSL)

- 4.21 This option is similar to option C but would see the Council collaborate with a RSL to deliver housing on the site.
- 4.22 If partnering with an RSL, it is likely that there would be an opportunity to apply for funding to support the delivery of additional affordable housing at 50% rather than 30%. The affordable properties could be owned and managed by a RSL (if BDC decided to partner with one) and the other 50% could be privately owned/let by Spadesbourne Homes Ltd. There is an option to dispose of the market value properties, but this would not provide an ongoing revenue stream for the Council.
- 4.23 The Overview and Scrutiny Board considered the options on 9th September 2025, and the preferred option was to deliver housing on the site in partnership with a Registered Social Landlord (RSL).

The project manager has also met with Homes England to discuss potential funding opportunities. Construction would not be expected to start on site until early 2027.

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- 4.21 For option C and D, the Council would retain some control over the site with the risk and financial input being shared between the partners (to be agreed at beginning). These options could take the longest in terms of timescale to deliver as the Council would be required to find a partner before any redevelopment could take place. This process is likely to take between three and six months depending on the type of relationship.

5. SUMMARY

- 5.1 Each of the options are summarised in the table below. Members should consider what level of risk they are willing to accept and weigh that up with the level of control that they would like to retain over the site. Consideration should be given to how the scheme would be financed for each option and the timescale for delivery. Overview and Scrutiny committee confirmed their preferred option would be to deliver the site in partnership with a Registered Social Landlord. This is also the preferred option of the Cabinet Member and would provide the Council with the ability to ensure that the site is developed to meet local housing needs.

Option	Financial	Risk	Timescale	Control	Strategic objectives
Do nothing	Pay back BLRF and OPE grants (£722k plus £100k) Costs to secure site	Minimal – BDC would have to return OPE and BLRF funding Reputational damage for returning funding and leaving site vacant	N/A	N/A	No Strategic objectives would be met

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		Ongoing security of the site			
Obtain outline planning permission and dispose	Planning permission (included within appraisal)	Low	Approximately 12 months to obtain outline permission and disposal	Least amount of control	Financial stability, the Council can reinvest the capital receipt in capital projects aligned to strategic priorities but unlikely to deliver more than 30% affordable housing
Develop through Spadesbourne Homes Ltd	100% of costs payable by Council	High (all risk with Council)	18 months for full planning permission and procurement of contractor	Total control	Option to increase social housing. High quality, energy efficient homes could be delivered
50/50 partnership with private developer	50% of the total project costs - part of this can be site value	Medium (shared with partner)	3-6 months to secure partner followed by 12 months for planning permission and procurement of contractor	Shared with partner	Private developer – unlikely to achieve above 30% affordable housing
50/50 partnership with RSL	50% of the total project costs – part of this can be site value	Medium (shared with partner)	Same as above	Shared with partner	Could achieve minimum 50% affordable housing. High quality, energy efficient homes could be delivered

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6. FINANCIAL IMPLICATIONS

- 6.1 For option A, the Council will need to budget for further planning and design costs of approximately £100k which have been included within the appraisal. This budget recognises that the site would be marketed following the Council securing outline planning consent. Sales, marketing and legal costs have also been included within the Thomas Lister Report (see Appendix 3). This would need to be reflected as part of the Medium-Term Financial Plan 2026/27.
- 6.2 With regard to Options B, C and D, the Council will need to provide a long-term lease to Spadesbourne Homes Ltd for the properties. The Council could also consider providing a loan to Spadesbourne Homes Ltd to cover the capital investment required with a payback period as outlined in Option B (Appraisal) at an appropriate cost of borrowing.
- 6.3 For option A, the Council will receive a capital receipt following the disposal of the site. The estimated capital receipt can be found at Appendix 4 (exempt).
- 6.4 Options B, C and D would require the Council to provide capital investment to fully develop the site. For the purposes of the Thomas Lister investment model (see Appendix 3), it has been assumed that the affordable element of the scheme (30%) in option B would be sold to an RSL partner (after 3 years). Net rental income over the 47-year model has been calculated, noting that the Council would also still have ownership of the assets developed. Whilst the return is the greatest of the four options, the returns will not be realised for a number of years and require significant upfront capital investment.

7. LEGAL IMPLICATIONS

- 7.1 There will be different legal implications arising going forward dependent on which of the Options listed is taken forward. At this stage it is difficult to be more definitive and whichever option is selected will give rise to the need for further consideration of the legal implications and scoping work.
- 7.2 For Option B further work would be needed to review the governance arrangements and articles of Spadesbourne Homes Ltd to establish that these would be suitable for purpose in terms of the project referenced in the report. This would also apply if a variant of Option C or D was selected involving Spadesbourne Homes Ltd.
- 7.3 The Council is under a duty to achieve best value for the disposal of land in its ownership in accordance with section 123 of the Local Government Act 1972. It is possible for there to be exceptions to this

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requirement if a disposal at an undervalue would achieve improvement to economic, social or environmental wellbeing of an area.

- 7.4 There would be legal implications arising from an arrangement to work in partnership with an RSL or developer under Option C and D as referenced in the main body of the report at paragraph 4.18.

8. OTHER - IMPLICATIONS

Relevant Council Priority

- 8.1 Redevelopment of the Windsor Street site is one of the key projects within the Council Plan and Centres Strategy. As a brownfield site, its redevelopment will meet housing needs whilst protecting the Green Belt. Transforming an underutilised site into residential use will increase footfall and support local businesses, contributing to a more vibrant town centre. This approach is part of the Council's broader strategy to regenerate the town centre, making it a more attractive place to live, work, and visit.

Local Government Reorganisation

- 8.2 The government intends to issue directions under section 24 of the Local Government Act requiring written consent from successor Councils for land disposals worth more than £100,000, entering contracts of more than £1 million for capital and entering contracts of more than £100,000 for non-capital (whole life costs). The timeline for the date of these has not yet been confirmed but in the meantime, the government expects councillors and statutory officers to be mindful of their responsibilities and for Councils to work together in sharing information and making decisions that are in the best interests of the whole area.
- 8.3 If the Council decided to pursue option B, C or D, there is no guarantee that a future unitary authority would not dispose of the non-affordable properties on the site at market value. The affordable properties (between 30% and 50%) would have been transferred to an RSL and therefore protected from any sale. This would need to be addressed in a further report to Cabinet.

Climate Change Implications

- 8.4 The redevelopment of the site has positive climate change implications as it involves the redevelopment of a brownfield site, encourages sustainable urban living and land remediation will improve soil and

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water quality. New housing will be built to modern energy efficiency standards, reducing operational carbon emissions.

Equalities and Diversity Implications

- 8.5 Increasing the supply of housing (including affordable) in the district helps households on low incomes by providing them with good quality housing. It is important that the preferred option considers the potential for bringing appropriate housing stock to the market.

9. RISK MANAGEMENT

- 9.1 Key risks associated with each option have been captured within the above SWOT analysis and summary table. A full risk register would need to be developed to fully capture and consider the risks for each option as each involve a different level of risk.

10. APPENDICES and BACKGROUND PAPERS

1. Site Plan
2. Indicative Layout
3. Development Appraisal (Thomas Lister report – Exempt)
4. Financial Implications (Exempt)

11. REPORT SIGN OFF

Department	Name and Job Title	Date
Portfolio Holder	Cllr Karen May	31/10/25
Lead Director / Assistant Director	Rachel Egan	28/10/25
Financial Services	Bob Watson	24/10/25
Legal Services	Nicola Cummings, Principal Solicitor - Governance	24/10/25

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Policy Team (if equalities implications apply)	Rebecca Green	24/10/25
Climate Change Team (if climate change implications apply)	Matthew Eccles	24/10/25

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Appendix 1 – Site Plan



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Appendix 2 – Indicative Layout



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of the Local Government Act 1972.

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