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BROMSGROVE DISTRICT COUNCIL

MEETING OF THE CABINET

WEDNESDAY 22ND JULY 2026

AT 6.00 P.M.

PARKSIDE SUITE - PARKSIDE

MEMBERS: Councillors K.J. May (Leader), S. J. Baxter (Deputy Leader),
S. T. Nock, 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 17th June 2026 (Pages 5 - 28)**

4. **Minutes of the meeting of the Overview and Scrutiny Board held on 16th June 2026 (Pages 29 - 32)**

There are no outstanding recommendations contained in the minutes of the Overview and Scrutiny Board included in this agenda pack.

If there are any recommendations as a result of the pre-scrutiny of any Cabinet reports due to be considered at the Boards's meeting on 21st July 2026, these will be published in a supplementary papers pack to this agenda.

5. **Food Waste Collections Implementation** (Pages 33 - 48)
6. **Low Cost Housing Capital Receipts** (Pages 49 - 54)
7. **First Homes Policy Review** (Pages 55 - 68)
8. **Final Bromsgrove Home Choice Allocations Policy Approval** (Pages 69 - 142)
9. **Medium Term Financial Plan Scene Setting Report 2027/28** (Pages 143 - 152)
10. **Treasury Management Outturn Report 2025/26** (Pages 153 - 168)
11. **Quarter 4 Financial Monitoring and Outturn Report 2025/26** (Pages 169 - 194)
12. **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.**

J. Leach
Chief Executive

Parkside
Market Street
BROMSGROVE
Worcestershire
B61 8DA

14th July 2026

**If you have any queries on this Agenda please contact
Eve Davies**

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BROMSGROVE DISTRICT COUNCIL

MEETING OF THE CABINET

17TH JUNE 2026, AT 6.00 P.M.

PRESENT: Councillors K.J. May (Leader), S. J. Baxter (Deputy Leader),
S. T. Nock, K. Taylor and P. J. Whittaker

Officers: Mr. G. Revans, Mr. J. Walton, Mrs. R. Egan,
Mr. M. Bough, Mrs. H. Mole, Ms. A. Delahunty, Ms. R.
McElliott, Mrs. J. Bayley-Hill and Mrs E. Davies

1/26 **TO RECEIVE APOLOGIES FOR ABSENCE**

An apology for absence was received from Councillor S. A. Webb.

Cabinet was informed that Councillor K. Taylor would be arriving late for the meeting, however he would be in attendance.

2/26 **DECLARATIONS OF INTEREST**

There were no Declarations of Interest.

3/26 **TO CONFIRM THE ACCURACY OF THE MINUTES OF THE MEETING OF
THE CABINET HELD ON 20TH APRIL 2026**

The minutes of the Cabinet meeting held on 20th April 2026 were submitted for Members' consideration.

RESOLVED that the minutes of the Cabinet meeting held on 20th April 2026 be approved as a true and accurate record.

4/26 **MINUTES OF THE MEETING OF THE OVERVIEW AND SCRUTINY
BOARD HELD ON 14TH APRIL 2026**

It was noted that there were no outstanding recommendations from the meeting of the Overview and Scrutiny Board held on 14th April 2026.

RESOLVED that the minutes from the Overview and Scrutiny Board meeting held on 14th April 2026 be noted.

5/26

APPOINTMENTS TO THE SHAREHOLDERS COMMITTEE 2026/27

The Principal Democratic Services Officer presented a report concerning appointments to the Shareholders Committee for the 2026/27 municipal year.

The Committee was advised that, as the Shareholders Committee was a sub-committee of the Cabinet and formed part of the governance structure for Spadesbourne Homes Limited, it was the Cabinet's responsibility to appoint Members to serve on the Committee. This included the appointment of a Chairman and Vice-Chairman.

It was further noted that only members of the Cabinet were eligible to serve on the Committee. However, Group Leaders would continue to be invited to attend meetings of the Shareholders Committee and participate in debates if they so wished, although they would not have voting rights.

RESOLVED that

1) The following Members of the Cabinet be appointed to sit on the Shareholders Committee for the 2026/27 municipal year:

- Councillor K.J. May
- Councillor S.T. Nock
- Councillor K. Taylor
- Councillor S.A. Webb
- Councillor P.J. Whittaker

2) Councillor K.J. May be appointed as Chairman of the Committee for the 2026/27 municipal year; and

3) Councillor P.J. Whittaker be appointed the Vice Chairman of the Committee for the 2026/27 municipal year.

6/26

CABINET APPOINTMENTS TO OUTSIDE BODIES 2026/27

The Principal Democratic Services Officer presented the Cabinet Appointments to Outside Bodies 2026/27 report for Members' consideration.

It was noted that Council had made a number of appointments to Outside Bodies at the Annual Council meeting held on 20th May 2026. However, several appointments related to executive functions and, as such, these were to be determined by the Cabinet.

RESOLVED that

the nominations to Outside Bodies as listed in Appendix 1 to the minutes be approved.

7/26

SHARED HOMELESSNESS STRATEGY 2026-2031

The Housing Development and Strategy Manager presented a report on the Shared Homelessness Strategy 2026-2031.

The Committee was reminded that the draft Shared Homelessness and Rough Sleeping Strategy 2026–2031 had been approved for public consultation by the Cabinet on 25th March 2026. The consultation had subsequently been completed, and responses had been incorporated into the action plan where appropriate.

It was reported that the strategy included Local Outcomes Framework measures provided by the Ministry for Housing, Communities and Local Government (MHCLG). MHCLG had reviewed the strategy and confirmed that it was compliant, although a number of recommended actions had been suggested which had been incorporated into the action plan.

The framework utilised a range of national outcome indicators to assess performance, including:

- The rate of households with children in temporary accommodation (per 1,000 households)
- The number of families in Bed and Breakfast (B&B) accommodation for over six weeks
- The percentage of duties owed where homelessness was prevented or relieved
- The number of people sleeping rough on a single night
- The number of people sleeping rough over the month who were long-term rough sleepers

The Committee was informed that delivery of the strategy would be overseen by the Housing Strategy Team and would sit under the existing Worcestershire Housing Board Plan.

In respect of financial implications, it was confirmed that the Homelessness, Rough Sleeping and Domestic Abuse Grant would provide funding to support the development of services aligned with the strategy. A report detailing spending priorities for the subsequent three years had already been presented to Members.

It was highlighted that the Council had a statutory duty under the Homelessness Act 2002 to produce a homelessness strategy, alongside compliance with the Homelessness Reduction Act, the Domestic Abuse Act 2021 and the Renters Rights Act 2025.

With regard to Local Government Reorganisation, Members were reassured that the strategy had been developed to be adaptable for incorporation into either one or two unitary authorities.

An Equality Impact Assessment had been completed, which demonstrated a positive outcome. It was noted that officers would continue to monitor impacts.

The risks associated with the Cabinet not approving the strategy were outlined. It was reported that this would result in the Council not being legally compliant. Furthermore, it was considered likely that households threatened with homelessness, or those in housing need, would have limited options for support to sustain or secure suitable accommodation. This could lead to:

- Increased B&B costs
- Increased rough sleeping in the District
- Impacts on physical and mental health, educational achievement, ability to work and similar through increased homelessness

Following the presentation, Members discussed the report in detail and made the following comments:

- The Cabinet Member for Planning and Strategic Housing expressed thanks to the Housing Development and Strategy Manager for the report.
- It was noted that the action plan was extensive and Members queried whether this would pose a delivery challenge. Officers advised that a meeting was scheduled in the coming weeks to review the action plan and ensure that Bromsgrove District Council could deliver the relevant elements. Members were reassured that collaborative work with partner authorities was ongoing.
- Members queried the potential impact of the Renters' Rights Act 2025 on the strategy and whether a future review would be required. Officers advised that the Act had already begun to influence the housing sector prior to its enactment. Increased regulatory requirements had led to some landlords exiting the sector or selling properties, although it was anticipated that impacts would stabilise over time, particularly following the abolition of Section 21 evictions. It was hoped that landlords would become more willing to work with local authorities to manage tenancies, contributing to greater sector stability.
- The requirement for landlords to provide Energy Performance Certificates (EPCs) and the associated costs of improving energy efficiency were discussed. Officers advised that minimum energy efficiency standards were measured through EPCs. It was noted that ratings reflected typical energy costs and could be improved through measures such as the installation of solar panels.

RECOMMENDED that the Shared Homelessness and Rough Sleeping Strategy 2026-2031 be approved.

8/26

ECONOMIC DEVELOPMENT & REGENERATION SERVICE DELIVERY

The Assistant Director for Regeneration and Property Services presented a report on Economic Development and Regeneration Service Delivery for the Committee's consideration.

The report sought approval for the release of £510,000 from the Economic Growth Reserve to continue funding key economic development and regeneration activities until 2028.

The Committee was advised that the programme operated within the Local Enterprise Partnership (LEP) funding model. It was noted that funding from the UK Shared Prosperity Fund (UKSPF) was due to cease and that no replacement funding stream had yet been confirmed.

Members were informed that, should the funding not be released, Bromsgrove residents would receive a significantly reduced level of support, limited to that provided through the Worcestershire Growth Hub. It was confirmed that sufficient reserves were available and that funding would remain for other programmes.

In relation to Betaden, it was reported that officers were continuing to finalise the details of the Service Level Agreement (SLA), with some negotiations still outstanding. The original proposal had been that the Council would make a financial contribution in return for a guaranteed number of places on the programme. However, the number of places proposed significantly exceeded previous levels of take-up. It had subsequently been agreed that the Council would fund workshop places on a demand-led basis, whereby a fee would be payable for each business securing a place. The precise amount remained under negotiation.

Following presentation of the report, Members discussed the following points:

- The Leader emphasised the importance of the funding, particularly in the context of Local Government Reorganisation. It was noted that the Worcestershire Leaders Board had confirmed that it would provide funding to the Worcestershire Growth Hub and Betaden. It was further highlighted that approximately 6 per cent of young people were not in employment, a situation which had been affected by increases in National Insurance rates.
- Members queried how success would be measured. Officers advised that the SLAs would set out how businesses would be supported and that data

would be collected on how funding had been utilised. Progress updates would be reported back to the Cabinet.

- Clarification was sought regarding how the funding would be allocated and whether it would support businesses in employing additional staff. Officers advised that the Growth Hub employed staff to provide business support and guidance on available funding opportunities, some of which could be used towards staffing. Betaden provided programme and workshop places offering one-to-one business support. Careers Worcestershire utilised funding to employ staff who worked with young people to support them into employment, including assistance with the interview process where barriers such as transport or confidence issues existed.
- Members welcomed the support for new businesses and young people, particularly in helping school leavers into employment. It was queried how this aligned with apprenticeship schemes and whether signposting would be provided. Officers confirmed that, although the funding focused on youth employment, Careers Worcestershire also supported apprenticeship schemes, and appropriate signposting could therefore be provided.

[Councillor K. Taylor arrived at the meeting during consideration of this item at 6.33pm]

RESOLVED that:

- 1) Earmarked reserves be released to fund economic development and regeneration activities as follows:
 - a. Worcestershire Growth hub - £140,000
 - b. Careers Worcestershire - £300,000
 - c. Betaden - £70,000

9/26

ENFORCEMENT AND CIVIL PENALTY POLICY

The Strategic Housing Services Manager presented the Enforcement and Civil Penalty Notice Policy report.

The Committee was informed that this report followed on from the previous report presented to the Cabinet regarding the Renters' Rights Act 2025. The Private Sector Housing Enforcement and Civil Penalty Notice Policy had been reviewed and re-written in response to the Act as it required significant alteration due to new enforcement duties arising.

Members were advised that the policy aligned with national best practice, including the Association of Chief Environmental Health Officers (ACEHO)

model Enforcement and Civil Penalty Policy, and established a clear, consistent and legally robust framework for enforcement decision making and the application of civil penalties.

The policy applied to all private sector housing-related enforcement functions exercised by the Council, including private rented housing, owner-occupied housing, empty homes, Houses in Multiple Occupation and relevant site-based accommodation, where statutory powers applied.

It set out the Council's approach to enforcing statutory requirements relating to, among other matters:

- misuse of possession grounds
- unlawful rent practices, including rent bidding
- failure to provide prescribed tenancy information
- discriminatory letting practices
- compliance with the Private Rented Sector Database (once in force)

The implementation of the policy was expected to contribute to improved housing conditions, reduced health risks and increased tenancy security and within the District.

Members' attention was drawn to the matrix of civil penalties notices, which was based on national best practice. It took into account the size of a landlord's property portfolio and the number of offences.

In considering the report, Members commented on the following points:

- The complexity of the matrix. Officers acknowledged this and advised that the complexity was reflected in the level of detail contained within the policy. It was further noted that any appeals against decisions would be determined by a first-tier tribunal (Property Chamber).
- Concerns were raised that the listed costs for offences appeared severe at first glance. However, it was noted that the policy set out an initial informal approach for some offences, providing an opportunity for issues to be resolved before any formal enforcement action was taken. Officers clarified that the level of fines had been set by Government and that the Council had adopted a staged approach in line with national best practice. It was further explained that, where appropriate, an advisory and information-led approach would be taken in the first instance, although certain breaches, such as confirmed illegal evictions, would result in a civil penalty notice or prosecution.
- Members queried whether the policy provided protection for landlords in situations where tenants caused damage to properties. It was noted that the Renters' Rights Act 2025 was primarily focused on tenant protection. Officers clarified that the policy related specifically to enforcement

standards for property conditions and tenant protections, rather than landlord recourse. It was further explained that landlords retained the ability to take action through existing legal routes, including strengthened Section 8 provisions.

- Questions were raised regarding how the Council would identify unregistered landlords. Officers advised that landlords were not currently required to register. However, the Renters' Rights Act 2025 would introduce a national property database requiring registration. It was reiterated that the purpose of the policy was to ensure that tenants lived in safe and suitable accommodation.
- Whether the service had sufficient capacity to deliver against the requirements of the policy. Officers advised that the team had previously been expanded in anticipation of these changes. Whilst demand was high, this had not yet resulted in significant additional pressures. It was further noted that New Burdens funding had been provided by Government, which could support additional resources, such as IT systems or staff training, if required. Staffing levels would continue to be kept under review.
- If there had been any observable impacts arising from recent legislative changes, particularly in relation to homelessness. Officers confirmed that there had been a slight increase in cases linked to Section 21 notices, but this had not represented a significant change overall and Section 21 notices were now abolished.
- It was emphasised that the legislation was focused on tenant protection and that the Council had a duty to ensure that tenants were safeguarded. The policy was described as comprehensive in this regard.
- Members noted that landlords would need to ensure they maintained appropriate records and documentation, including photographic evidence of property condition, in order to demonstrate compliance where issues were raised by tenants.

RESOLVED that

- 1) Members approve the Private Sector Housing Enforcement and Civil Penalty Policy ("the Policy").

RECOMMENDED that

- 2) Delegated authority be granted to the Assistant Director Community & Housing Services, following consultation with the Portfolio Holder for Housing, to update the Policy in line with any legislative or government guidance updates.
- 3) The Scheme of Delegations be updated to reflect the adoption of the Policy and the new Enforcement powers under the Renters Rights Act 2025 in accordance with the wording set out in Appendix 2 to the minutes.

10/26

QUARTER 4 25/26 PERFORMANCE REPORT

The Business Improvement Manager presented a report outlining performance across Quarter Four.

Members were advised that the overall position remained stable for the quarter. The key highlights were outlined to the Committee, including that one hundred per cent of major planning applications had been determined, a reduction in the use of temporary accommodation and response times for fly-tipping incidents remained operationally stable. However, it was noted that recycling performance and the proportion of complaints responded to within the ten-day standard, recorded at eighty-five per cent, required improvement.

Following presentation of the report, Members discussed the following matters:

- Members suggested that this positive performance should be more effectively utilised within communications to residents in order to spread the positive message.
- The issue of sickness absence was discussed. Concerns were raised regarding the potential impact on particular service areas, and Members expressed a desire for future reports to distinguish between short-term and long-term sickness absence. It was also suggested that comparative data be provided against neighbouring authorities. Officers confirmed that long-term sickness absence had reduced and that the Council's targets were aligned with the national average, which was approximately seven point eight per cent. It was further acknowledged that Local Government Reorganisation may have had an impact on staff morale and stress levels.
- Performance in respect of business rates collection was noted to be strong.
- Members raised concerns regarding gym membership figures, which were below the target of 3,000 and stood at 2,264 in Quarter Three, with what appeared to be a downward trend. It was confirmed that a report regarding the performance of Sports and Leisure Management (SLM) Limited would be presented to the Overview and Scrutiny Board in July 2026, at which point further detail would be provided. SLM would be in attendance at the meeting.
- In relation to the apparent decline in gym membership figures, officers acknowledged that the way in which the data had been presented had created a potentially misleading impression of a sharp drop. It was suggested that future reporting should present this data more clearly to avoid misinterpretation. It was also noted that the targets set within the report reflected contractual arrangements and were considered ambitious, and these would be reviewed as part of the forthcoming report.

- Members discussed factors influencing gym membership retention, including seasonal variations. Officers advised that membership cancellations occurred at different intervals, commonly after a period of around three months, although some members retained memberships for longer periods. It was noted that SLM monitored membership retention. Members also highlighted the level of competition within the local area and queried whether this was impacting membership levels. Officers confirmed that local competition and the overall offer, including pricing and facilities, would be considered as part of the forthcoming review.

RESOLVED that the overview of Quarter 4 performance for the period January to March 2026 against the Council Plan priorities be noted.

11/26

VAT RECOVERY UPDATED POSITION

The Director of Finance and Section 151 Officer presented a report on the subject of the updated VAT recovery position.

Members were advised that, following the implementation of a new financial system in 2021, a number of issues had arisen, compounded by staff turnover and weaknesses in processes at that time. As a result, VAT returns had not been submitted to HMRC for the period April 2021 to October 2024 and HMRC had therefore been holding funds due to be returned to the Council. A chronology of events had been provided within the report.

It was reported that, once the issue had been identified, it had been agreed with HMRC that Error Correction Notices (ECNs) would be submitted in order to recover the funds. An initial sum of £472,000 had been received in December 2024, which was subsequently reversed through the ECN process. Further work had been undertaken to review the 'General Ledger' and identify additional amounts where VAT had not been appropriately accounted for. A final ECN, submitted on 12th June 2026, totalled £1.79 million, resulting in a net position of approximately £1.76 million due to Bromsgrove District Council from HMRC.

Members were advised that this recovery would have a positive impact on the Council's cash position. It was noted that the accounting for each of the affected years had already been reflected in the Council's accounts and therefore no additional reserves would be created. However, the improved cash position would reduce the need for borrowing and provide increased opportunities for investment. Confirmation from HMRC in relation to the final ECN was yet to be received.

In considering the report, Members had detailed discussion and commented on the following points:

- Reference was made to Redditch Borough Council's position, where a significantly larger sum had been identified. Officers explained that this reflected structural differences between the authorities, including

Redditch's larger budget, larger capital programme and the operation of a Housing Revenue Account, which all led to a higher volume of transactions and associated VAT. It was further noted that Bromsgrove was responsible for billing Redditch for a higher proportion of Shared Services provided between the authorities.

- Members queried the accuracy of the figure for Bromsgrove. Officers advised that, whilst the amount had been calculated based on the information available, it could not be formally confirmed until HMRC had completed its review.
- Concerns were raised regarding previous estimates that had suggested a significantly higher figure. It was noted that the situation was very complex and figures were continually changing until the claim had been submitted to HMRC.
- Discussion took place regarding the VAT treatment of shared services between Bromsgrove and Redditch. Officers explained that as a result of the arrangements i.e. Bromsgrove billing Redditch, the VAT position was offset in Bromsgrove but increased in Redditch. Bromsgrove was not charged VAT on the underlying costs e.g. salaries, but Redditch was charged VAT on the same services as they were purchasing a valuable service from Bromsgrove. This led to a higher recovery of VAT in Redditch than Bromsgrove.
- Members sought clarification on whether Bromsgrove had been disadvantaged by these arrangements. Officers outlined that this was not the case as this was about delayed recovery of VAT, not a benefit. It was noted that the complexity of VAT accounting within shared services made direct comparisons between the authorities difficult.
- Members questioned how the issue had not been identified at an earlier stage. Officers advised that the implementation of a new financial system, combined with staff turnover and a lack of specialist VAT expertise at the time, had contributed to the oversight.
- Further concerns were raised regarding the role of internal and external audit in identifying the issue. Officers clarified that internal audit operated on a risk-based approach and reviewed specific areas rather than providing continuous oversight of all processes. External audit provided assurance on the overall accounts, but delays in the production of accounts for the relevant period had limited this assurance.
- The financial implications of the delayed recovery, including the potential loss of investment income. Officers advised that, whilst this could be estimated, there was no mechanism to reclaim such losses from HMRC.
- The importance of strengthening financial controls and processes was emphasised. It was confirmed that Internal Audit had been tasked with undertaking a review of existing arrangements to provide assurance and identify any necessary improvements.
- Members acknowledged the need to focus on ensuring robust systems were in place going forward.

The Cabinet Member for Finance expressed thanks to the Director of Finance and Section 151 Officer for presenting the report. He noted that securing a net cash recovery represented a positive outcome for the Council's financial position and, as outlined in the report, reflected a

comprehensive retrospective review. It was reiterated that, as these adjustments had already been processed, they constituted a direct improvement to the Council's cash flow rather than impacting on reserves.

The Cabinet Member for Finance emphasised that, when making comparisons with Redditch Borough Council, it was important to recognise the differing structural profiles of the two authorities.

RESOLVED that

- 1) The actions being undertaken to resolve the outstanding VAT matters be noted.
- 2) An expected net cash gain position to be recovered by the council, including the further anticipated recovery of the current Error Correction Note, be noted.
- 3) The improvement of this on the cashflow position be noted and the corporate risk register duly updated to reflect the positive change to the council's cash holding position.
- 4) The Audit, Standards and Governance committee is requested to maintain oversight of the delivery of actions to satisfy any agreed penalty suspension conditions.

12/26

WINDSOR STREET DELIVERY OPTIONS

The Regeneration Programme Manager presented a report on delivery options for Windsor Street.

Members were reminded that, in November 2025, a report had been considered outlining options for the redevelopment of Windsor Street, with Cabinet resolving that the site should be developed for residential purposes in partnership with a Registered Social Landlord (RSL). It was reported that external funding had been secured to de-risk the project without requiring match funding from the Council.

Phase two had commenced recently and included a twelve-month monitoring period. Any overspend was being met from the Levelling Up contingency budget.

Members were advised that discussions had taken place with a number of RSLs. Of the five organisations approached, three had indicated that they were not interested in the site, while two had expressed an interest in acquiring the site to deliver one hundred per cent affordable housing. However, both RSLs had indicated a preference for outright acquisition rather than entering into a partnership arrangement.

On this basis, officers had explored the option of securing outline planning permission prior to disposal, which would also allow the Council to influence the design and reduce potential delays. It was noted that although this was not the original plan, it aligned with the strategic objectives of the site and

RSLs could submit proposals which would allow the Council to retain control over which scheme was selected.

The proposal therefore sought funding of £150,000 from reserves to progress an outline planning application. It was noted that this amount would be replenished upon disposal of the site, which was expected to generate a capital receipt and provide a return on investment.

In considering the report, Members had detailed discussion and commented on the following matters:

- It was highlighted that the proposed development would include affordable housing, which could comprise shared ownership as well as social housing.
- Members queried how the £150,000 figure had been determined. Officers explained that the estimate was based on comparable costs for preparing outline planning applications, including the requirement for surveys, supporting evidence, and external expertise. It was noted that costs could vary depending on the level of detail included within the application.
- Members discussed the level of detail to be included in the planning application, with the view that greater detail could provide enhanced control over the eventual scheme.
- It was suggested that RSLs could be invited to develop proposals that met the Council's requirements prior to submission of a planning application. Officers advised that, following soft market testing, ongoing dialogue with interested RSLs would continue to ensure that proposals reflected viability and local housing needs.
- Timeframes were queried. Officers advised that site remediation was expected to be completed by September 2026 and the twelve-month monitoring period would be completed by September 2027. The planning process was anticipated to take between six and twelve months.
- Members queried whether parts of the site could be used for temporary accommodation to reduce reliance on Bed and Breakfast provision. Officers advised that significant infrastructure would be required to make this feasible and that associated costs would be significant.
- An update was provided on site remediation works, including groundwater monitoring and mitigation measures. It was reported that remediation was being undertaken and monitored in accordance with Environment Agency requirements, with a barrier being installed on one area of the site to prevent further contamination spread.
- Clarification was provided following consultation with the Monitoring Officer, confirming that the Leader could be involved in decisions relating to the progression of a planning application in the Council's capacity as landowner, but not in the determination of the application itself.

RESOLVED that

- 1) The feedback received from Registered Providers be noted.
- 2) Delegated authority be given to the Assistant Director for Regeneration and Property, following consultation with the Portfolio Holder, to progress an outline planning application for the Windsor Street site for up to 50 residential units.
- 3) Subject to the granting of outline planning permission and completion of Phase 2 remediation works, that the Windsor Street site be disposed of to a Registered Provider.
- 4) Delegated authority be given to the Assistant Director for Regeneration and Property, following consultation with the Portfolio Holder to agree the terms of disposal and select the Registered Provider, following evaluation of proposals against the Council's objectives.
- 5) A budget of up to £150,000 be approved to meet the costs of progressing the outline planning application.

13/26

TO CONSIDER ANY URGENT BUSINESS, DETAILS OF WHICH HAVE BEEN NOTIFIED TO THE ASSISTANT DIRECTOR OF LEGAL, DEMOCRATIC AND PROCUREMENT SERVICES PRIOR TO THE COMMENCEMENT OF THE MEETING AND WHICH THE CHAIRMAN, BY REASON OF SPECIAL CIRCUMSTANCES, CONSIDERS TO BE OF SO URGENT A NATURE THAT IT CANNOT WAIT UNTIL THE NEXT MEETING

There was no Urgent Business on this occasion.

The meeting closed at 8.03 p.m.

Chairman

Appendix 1: Outside Bodies By Office (Cabinet appointments)

Organisation	Number of representatives and length of term	Appointed 2025/2026	Nominations 2026/2027
Bromsgrove Partnership (Local Strategic Partnership)	Leader Substitute – Deputy Leader	Cllr Karen May Sub: Cllr Sue Baxter	Cllr Karen May Sub: Cllr Sue Baxter
Local Councils Network	Leader Substitute – Deputy Leader	Cllr Karen May Sub: Cllr Sue Baxter	Cllr Karen May Sub: Cllr Sue Baxter
Local Government Association General Assembly	Leader Substitute – Deputy Leader	Cllr Karen May Sub: Cllr Sue Baxter	Cllr Karen May Sub: Cllr Sue Baxter
North Worcestershire Community Safety Partnership	Cabinet member	Cllr Peter Whittaker	Cllr Peter Whittaker
PATROL (Parking And Traffic Regulations Outside London) Adjudication Joint Committee	Portfolio Holder for Environmental Services Substitute:	Cllr Sue Baxter Sub: Cllr Peter Whittaker	Cllr Peter Whittaker Sub: Cllr Sue Baxter
West Midlands Employers	Portfolio Holder for Human Resources	Cllr Karen May	Cllr Karen May
West Midlands Employers Shareholder Board (established in 2024)	Leader, hold a cabinet role, or have a specific interest or expertise in the services of WME (2024-2028)	Cllr Karen May	Cllr Karen May

Organisation	Number of representatives and length of term	Appointed 2025/2026	Nominations 2026/2027
Worcestershire Health and Wellbeing Board	1 Rep for each council	Cllr Shirley Webb Sub: Cllr Sue Baxter	Cllr Shirley Webb Sub: Cllr Karen May
Worcestershire Local Enterprise Partnership (LEP)	One representative on behalf of the 3 North Worcestershire Councils – required by LEP constitution in 2025/26	Cllr Sharon Harvey (Redditch Borough Council) Sub: Cllr Karen May	Cllr Karen May (Bromsgrove District Council) Sub: Cllr Sue Baxter
Worcestershire Local Access Forum (Worcestershire County Council) BDC included on this forum from May 2025	1 representative from North Worcestershire District Councils. Term: 1 year (Note: Would be beneficial if the representative had a keen interest in countryside access and recreation issues.) No liability issues identified.	Councillor Robin Drew (Wyre Forest DC)	Cllr Karen May (Bromsgrove District Council) Sub: Cllr Matt Dormer

APPENDIX 2

COMMUNITY SERVICES			
1. Strategic Housing			
Subject	Detail	Delegated by:	Delegated to:
Discretionary Housing Assistance Grants.	To determine applications for Housing Assistance Grants under the Regulatory (Housing Assistance Grants) (England and Wales) Order 2002.	Cabinet/ Leader.	Strategic Housing Manager.
Home improvement Agency	To deal with day to day management of the Home Improvement Agency Service	Cabinet	Assistant Director of Community and Housing Services/ Strategic Housing Manager/Private Sector Team Leader
General regulatory and enforcement activity for private sector housing (including Houses of Multiple Occupation)	1. To exercise all local authority regulation and enforcement functions under the legislation listed below:- - Housing Act 1985 - Housing Act 1988 - Housing Act 2004 (and associated regulations) - Housing and Planning Act 2016 - Electrical Safety Standards in the Private Rented Sector and Social Rented Sector (England) Regulations 2020 - Environment Protection Act 1990 section 79(1)(a) - Building Act 1984 - Local Government (Miscellaneous Provisions) Acts 1976, 1982	1.	Strategic Housing Manager

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To sign housing-related notices for houses in multiple occupation under the Housing Act 2004.

To inspect conditions under the Housing Health and Safety Rating System - Housing Act 2004.

To issue interim and final orders

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APPENDIX 2

	• <u>Prevention of Damage by Pests Act 1949</u> • <u>Public Health Act 1961</u> 2. To institute legal proceedings <u>for offences under the legislation listed above.</u> 3. To impose a financial penalty for an offence as an alternative to bringing a prosecution.		
Housing Associations - Nominations.	To deal with the nomination where necessary of homeless applicants to housing association dwellings.	Cabinet/ Leader.	Strategic Housing Manager.
Housing Capacity Study.	To update the site details and housing figures in the Housing Capacity Study on an annual basis using data from the Housing Land Availability Study.	Cabinet/ Leader.	Strategic Housing Manager.
Housing Corporation Social Housing Grant.	To administer and approve applications and to authorise payment of local authority grant and Housing Corporation Grant under the Housing Corporation IMS System.	Cabinet/ Leader.	Strategic Housing Manager.
Housing Grants.	To determine applications for housing grants under the Housing Grants, Construction and Regeneration Act 1996.	Cabinet/ Leader.	Strategic Housing Manager.
Low Cost Housing.	1. To administer the Council's low cost housing scheme including the making of nominations and the sale of the Council's interest in dwellings.	1. Cabinet/ Leader.	1. Strategic Housing Manager. 2. Principal Solicitor.

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APPENDIX 2

	2. To take all necessary action including the institution of legal proceedings to recover deferred payments from the purchases of low cost homes who are in breach of covenants made in the purchase of low cost housing. 3. To revise fees in relation to low cost housing transactions.	2. Cabinet/ Leader. 3. Cabinet/ Leader.	3. Assistant Director of Legal, Democratic and Procurement Services, Assistant Director of Community and Housing Services and Financial Services Manager in consultation with the relevant Portfolio Holders.
Low-Cost Housing Capital Receipts <i>(New delegation agreed by Members in 2024/25)</i>	To approve individual proposals for new developments or the purchase of existing satisfactory dwellings and flipping Shared Ownership to affordable or social rented properties and the spend relating to these, as and when they were brought forward.	Council	The Assistant Director Community and Housing Services following consultation with the Portfolio Holder for Strategic Housing.
Mandatory Disabled Facilities Grant.	1. To determine applications for housing grants under the Housing Grants, Construction and Regeneration Act 1996. 2. To grant extensions of time of up to six months within which improvements are to be completed.	1. Cabinet/ Leader. 2. Cabinet/ Leader.	1. Strategic Housing Manager. 2. Assistant Director of Community and Housing Services.
Protection from Eviction Act.	<u>1. To institute legal proceedings in respect of illegal evictions and harassment under the provisions of the</u>	Cabinet/ Leader	<u>1 and 2</u> Assistant Director of Community & Housing Services in consultation

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APPENDIX 2

	Protection From Eviction Act 1977 and Housing Act 1988 (as amended by the Renters Right Act 2025). 2. To impose a financial penalty for an offence under section 1 of the Protection from Eviction Act (as amended) as an alternative to bringing a prosecution.		with Principal Solicitor.
Discrimination in the rental market	To take enforcement action under Chapter 3 of the Renters Rights Act 2025, including the imposition of financial penalties in accordance with the Councils Enforcement and Civil Penalties Notice Policy	Cabinet/ Leader	Assistant Director of Community and Housing Service
Stating the proposed rent and rental bidding	To take enforcement action under Chapter 6 of the Renters Rights Act 2025, including the imposition of financial penalties in accordance with the Councils Enforcement and Civil Penalties Notice Policy	Cabinet/Leader	Assistant Director of Community and Housing Service
Renters Rights Act 2025 – investigatory powers (Added following report on Renters Right Act in March 2026)	To exercise all powers in respect of entry, inspection, investigation, service of notices and other functions for the purposes of the following legislation: - Renters Rights Act 2025 sections 114 to 132 (investigatory powers) and section 110 (reporting to government)	Cabinet/ Leader	Assistant Director of Community and Housing Services] / [Housing Strategy Manager] / [Private Sector Housing Team Leader] / [Housing Strategy & Enabling Team Leader] / [Private Sector Housing Officer]

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Renters Rights Act 2025 Investigations (Added following report on Renters Right Act in March 2026)	To undertake investigations into potential offences under sections 33, 34, 39 and 56 of the Renters Rights Act 2025	Cabinet/ Leader	[Assistant Director ofCommunity and Housing Services] / [Housing Strategy Manager] / [Private Sector Housing Team Leader] / [Housing Strategy & Enabling Team Leader] / [Private Sector Housing Officer]	Formatted: Font: 12 pt Formatted: Font: 12 pt Formatted: Font: 12 pt Formatted: Font: 12 pt Deleted: Formatted: Font: 12 pt
Private Sector Housing Enforcement and Civil Penalty Policy	To update the Policy in line with any legislative or government guidance updates	Cabinet/ Leader	Assistant Director of Community and Housing Service following consultation with the Portfolio Holder for Housing	Formatted: Font: +Body (Aptos), Not Bold Formatted: Font: +Body (Aptos) Formatted: Font: 11 pt Formatted: Font: +Body (Aptos) Formatted: Indent: Left: 0 cm Formatted: Indent: Left: -0.1 cm, First line: 0 cm, Space After: 10 pt, Line spacing: Multiple 1.15 li, Tab stops: Not at 0.6 cm Formatted: Font: +Body (Aptos) Deleted: ¶ ¶ ¶ ¶ Formatted Table
Utilities - Restoration or Continuance of Services.	To deal in consultation with the relevant Portfolio Holder and generally in accordance with emergency procedures with applications received pursuant to the arrangements according to section 33 of the Local Government (Miscellaneous Provision) Act 1976 (Public Utility Services to Dwellings) and to take such action as may be necessary for the recovery of any payments made by the Council in pursuance of such arrangements.	Cabinet/ Leader.	Executive Director Finance or Assistant Director of Community and Housing Services	
Regulation of Mobile Home Sites	To institute legal proceedings under section 1 of the Caravan	Council	Strategic Housing Manager in	

APPENDIX 2

	Sites and Control of Development Act 1960 To take all steps to manage and regulate Mobile Home Sites, including the exercise of power of entry under the following legislation:- • Caravan Sites and Control of Development Act 1960 • <u>Caravan Sites Act 1968</u> • <u>Mobile Homes Act 2013</u>	Cabinet/Leader	consultation with the Principal Solicitor Strategic Housing Manager
Energy Efficiency (Private Rented Sector) (England & Wales) Regulations 2015	To implement enforcement powers under the Energy Efficiency (Private Rented Sector) (England & Wales) Regulations 2015	Cabinet	Assistant Director of Community and Housing Services
First Homes	To make amendments to Council's the First Homes Policy to reflect future Government guidance	Cabinet	Assistant Director of Community and Housing Services following consultation with the Portfolio Holder for Strategic Housing
Local Lettings Plan	To agree and adopt future Local Lettings Policies	Cabinet	Assistant Director of Community and Housing Services following consultation with the Portfolio Holder for Strategic Housing
Requisition for Information	To serve a requisition for information under section 16 of the Local Government (Miscellaneous Provisions Act 1976	Cabinet/Leader	Strategic Housing Manager
Boarding up of dangerous buildings	To serve notice under Section 9 of the Local Government	Cabinet/Leader	Strategic Housing Manager

APPENDIX 2

	(Miscellaneous Provisions) Act 1982		
Statutory Nuisance	To take all necessary action in relation to statutory nuisance under the Environmental Protection Act 1990.	Council	Strategic Housing Manager

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BROMSGROVE DISTRICT COUNCIL

MEETING OF THE OVERVIEW AND SCRUTINY BOARD

16TH JUNE 2026, AT 6.00 P.M.

PARKSIDE SUITE - PARKSIDE

PRESENT: Councillors S. Ammar, A. Bailes, J. Clarke, A. M. Dale, C.A. Hotham, B. Kumar, P. M. McDonald, S. A. Robinson, J. D. Stanley and H. D. N. Warren-Clarke

Observers:

Councillor K. J. May – Leader and Cabinet Member for Strategic Partnerships, Economic Development and Enabling

Councillor S. J. Baxter – Deputy Leader and Cabinet Member for Planning and Strategic Housing

Councillor S.T. Nock – Cabinet Member for Finance

Councillor K. Taylor - Cabinet Member for Local Government Reorganisation, WRS and Climate Change

Officers: Mr G. Revans, Ms H. Corredor, Ms R. Egan, Ms R. McElliott and Mrs S. Woodfield

1/26

ELECTION OF CHAIRMAN

The procedures for electing the Chairman were outlined, including the requirements for nominations to be proposed and seconded and the process to be followed in the event of multiple candidates. Members were advised that appointments would need to be made in accordance with the Council Procedure Rule 18.6 in the Council's constitution.

Nominations for the election of Chairman of the Overview and Scrutiny Board for the 2026/27 municipal year were then received for the following Members:

Councillor H.D.N. Warren-Clarke proposed that Councillor P.M. McDonald be appointed Chairman of the Board for the 2026/27 municipal year. This was seconded by Councillor A.M. Dale.

Councillor A. Bailes proposed that Councillor C. Hotham be appointed Chairman of the Board for the 2026/27 municipal year. This was seconded by Councillor S. Ammar.

Following a show of hands the results were tied and Officers confirmed that no Chairman had been elected for the 2026/27 municipal year.

Following the tied vote, Members discussed the appropriate procedure to follow. Officers advised that where no Chairman of the Board for the municipal year was elected, the item should be deferred to the next meeting. Some members questioned whether the meeting could proceed without a Chairman. The suggestion was also made that, under the Council's Constitution, an adjournment could take place to provide time to review options in the Constitution.

The item was subsequently deferred to the next Board meeting due to be held on 21st July 2026.

2/26

ELECTION OF VICE CHAIRMAN

Nominations were requested for the election of a Vice-Chairman of the Board for the 2026/27 municipal year.

Councillor P.M. McDonald proposed that Councillor A.M. Dale be appointed Vice-Chairman of the Board for the 2026/27 municipal year. This was seconded by Councillor B. Kumar.

Councillor C. Hotham proposed that Councillor A. Bailes be appointed Vice-Chairman of the Board for the 2026/27 municipal year. This was seconded by Councillor S. Ammar.

Following a show of hands the results were tied and no Vice-Chairman of the Board was elected for the 2026/27 municipal year. Members were informed that the appointment of a Vice-Chairman for the 2026/27 municipal year would therefore be included as an item on the agenda for consideration at the following meeting of the Board in July 2026.

Given that neither a Chairman nor Vice-Chairman of the Board for the 2026/27 municipal year had been elected at the meeting, Members were invited to nominate a Member to chair this meeting only.

Nominations for the election of a Chairman for this meeting only were then requested.

Councillor S.A. Robinson proposed that Councillor C. Hotham be appointed Chairman to Chair this meeting of the Board. This was seconded by Councillor J. Clarke.

Councillor H.D.N. Warren-Clarke proposed that Councillor P.M. McDonald be appointed Chairman to Chair this meeting of the Board. This was seconded by Councillor A.M. Dale.

Following a show of hands the results were tied and no Member was elected to Chair this meeting of the Board.

As there was no candidate appointed to Chair the meeting, Members were asked to consider whether they wished to proceed with the meeting in the absence of a Chairman, with the Executive Director

Agenda Item 4

Overview and Scrutiny Board
16th June 2026

guiding members through items on the agenda. However, there was no proposer for this resolution.

Instead, a proposal was made by Councillor J. Clarke to adjourn the meeting to allow Members time to review the constitution and discuss how to proceed. This was seconded by Councillor S. Ammar.

Following a show of hands the vote was tied and the proposal was therefore not carried.

Subsequently, a proposal was made by Councillor A.M. Dale to close the meeting. This was seconded by Councillor P.M. McDonald.

Following a show of hands the vote was again tied and the proposal was therefore not carried.

Due to the fact that no agreement had been reached on the election of a Chairman of the Board for the 2026/27 municipal year, the election of a Vice-Chairman of the Board for the 2026/27 municipal year and the election of a Chair for the meeting and in the absence of any agreement to proceed with the meeting, the meeting had to be abandoned without further business being conducted.

The meeting closed at 6.23 p.m.

Chairman

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Cabinet
2026

22nd July

Report title: Food Waste Collections Implementation

Relevant Portfolio Holder	Councillor Whittaker
Portfolio Holder Consulted	Yes
Relevant Assistant Director	Simon Parry
Report Author: Matthew Austin	Job Title: Environmental Services Manager Contact email: matthew.austin@bromsgroveandredditch.gov.uk Contact Tel: 01527 548206
Wards Affected	All
Ward Councillor(s) consulted	No
Relevant Council Priority	Environment
Key Decision	
If you have any questions about this report, please contact the report author in advance of the meeting.	

1. RECOMMENDATIONS

- 1.1. The Cabinet **NOTE** the progress made on food waste collection implementation.
- 1.2. The Cabinet **RESOLVE** that Authority be granted to the Assistant Director for Regeneration and Property Services to negotiate and finalise the terms of the lease for land at Howard Road and Crossgate Road.
- 1.3. The Cabinet **RECOMMEND** that:
- 1.4. An allocation of additional ongoing revenue of £186,155 for the expansion of the food waste collection service from 2027/28 is considered as part of the Medium-Term Financial Plan, with any decision deferred until the full financial implications are assessed alongside wider funding priorities through the budget process.

2. BACKGROUND

- 2.1. The Government has set a new statutory duty under the Environment Act 2021 to introduce a dedicated separate weekly collection of food waste from all households by 31st March 2026.
- 2.2. As the Council does not currently operate such a service, this will require additional resources to operate, and due to the current size restrictions of the Councils' depots, the Council is unable to add these

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to our existing arrangements without significant investment in additional land as well as an expansion of the Councils' Operators Licence with the Traffic Commissioner and Driver and Vehicle Standards Agency (DVSA).

- 2.3. For this reason, the decision was taken in January 2025 to externalise the Food Waste collection service, and plans prepared to carry out a joint tender between Bromsgrove District Council, Redditch Borough Council, and Wyre Forest District Council for an external organisation to provide this service on the Councils' behalf, utilising expected "new burdens" funding that had been promised from Central Government as part of the legislation being enacted.
- 2.4. Capital funding was provided by Central Government to support the purchase of vehicles and containers to operate the service with. Further revenue funding was promised under the "new burdens" principle, although confirmation of the value of this funding was delayed repeatedly, and the tender process was eventually started without the confirmation of revenue funding from Central Government due to the approaching statutory deadline. Funding was put in place within the Medium-Term Financial Plan (MTFP) to offset any potential shortfall that might arise from disparities in government funding models and the Councils' true costs.
- 2.5. In December 2025 it was identified that the promised revenue funding had instead been rolled into the general settlement fund for the Councils', with no identifiable allocation for the operation of food waste collections. This left a significant annual funding gap for provision of the service.
- 2.6. In light of this, Wyre Forest District Council (WFDC) has taken the decision not to implement Food Waste Collections until such a time as Government funding is provided, or Local Government Reorganisation (LGR) has been completed, and the new Unitary Authority can review this decision.
- 2.7. With insufficient funding in the Medium-Term Financial Plan, and the withdrawal of Wyre Forest District Council from the tender process, it was not possible to progress with award of the contract under procurement rules.
- 2.8. As a result of this, the Council is currently not compliant with its statutory duty.
- 2.9. Many other Local Authorities have publicly declared that they are unable to meet this duty as a result of not receiving expected additional funding

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22nd July

for the provision of food waste collections, and are reviewing how they can comply with this legal duty.

- 2.10. In total, 25% of Local Authorities have not implemented food waste collections by the required start date, and a number of Authorities have declared that until additional funding is provided to implement food waste, they will not be implementing this service, whilst others have announced delays in implementation, and/or a switch to a phased implementation to balance their financial and legal responsibilities.
- 2.11. A review of options for internal delivery has been undertaken to allow implementation of the service utilising the funds currently available within the MTFP in 2026/27, and this report presents details on the proposed implementation of a partial food waste collection service utilising the current funding built into the MTFP for ratification, and also details the additional revenue funding required in 2027/28 to support expansion of this service to achieve full compliance with our statutory duty.
- 2.12. This approach now replaces the previous route approval by Council in January 2025 for the outsourcing of the Domestic Food Waste Collection Service in favour of launching an in-house collection service as set out within this report.

3. OPERATIONAL ISSUES

- 3.1. Aside from the identified funding shortfall, the primary limiting factor on launching an in-house food waste collection service is having the physical space to operate a service from.
- 3.2. Having reviewed all Council owned land across Bromsgrove District and Redditch Borough Councils' portfolios, only one site belonging to RBC was identified as viable from a space and legal usage perspective, but this site had a limit on its usage that would require a significant payment linked to its Capital Value to allow it to be repurposed.
- 3.3. Having explored this option, this has been ruled out as not being cost effective prior to LGR.
- 3.4. Having engaged the services of a local land agent, we have identified a limited number of commercially available sites available for lease on the open market, although no single site met our needs to deliver the service.

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- 3.5. As such, two sites in close proximity to each other have been identified that collectively meet our needs, and Officers are making arrangements to lease these on a 5-year term with a break clause after 3 years to support flexibility alongside the timescales for LGR.
- 3.6. This site will be operated as a joint operational depot for the provision of Food Waste Collections across both Bromsgrove District and Redditch Borough in order to reduce the individual costs to each Authority of operating a depot and managing the service. This will also give opportunities for further operational efficiencies and increased resilience of the service in line with the Councils' existing joint services to residents.
- 3.7. Specialist food waste collection vehicles have been ordered to support provision of the Food Waste collection service to all residents, and are scheduled for manufacture and delivery by December 2026. The vehicles were ordered in expectation of a full roll-out of the service to all properties as part of the service tender process.
- 3.8. Food Waste Caddies have been ordered, with an expected delivery date in September 2026 for storage in advance of distribution to households ready for the commencement of collections.
- 3.9. When implementing a new food waste collection service, there are a number of variables relating to the "participation rate" and the "set out rate", which is related to how many residents use the service when it is available, and how regularly they may use it. This will impact on the volume of waste collected and the level of resource needed to provide the service.
- 3.10. Research carried out by WRAP (Waste and Resources Action Programme) suggests that an average performing food waste collection service will achieve a participation rate of 35%-55% with the set-out rate 10-15% lower than this (not all households take part every week).
- 3.11. The Councils' have had modelling carried out previously with external consultants *Circulogic*, as well as the government assessment of need that underpinned the Capital funding provided, and have used this alongside detailed route planning using our local knowledge to identify staffing requirements to deliver this service.
- 3.12. Food waste collections will be implemented in line with existing collection days across both Council areas to ensure ease of engagement by residents with the new service, and help improve the likely participation rates as well as simplify associated communication about services.

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- 3.13. To support engagement with the service, it is planned to provide one roll of food waste caddy liners to all households when the service is introduced. These are bags that fit inside the 7ltr kitchen caddy to help keep them clean and facilitate transfer to the collection caddy for disposal, which is the reason most often cited for not using food waste collection services elsewhere.
- 3.14. Provision of these liners has been demonstrated by the Waste and Resources Action Programme (WRAP¹) to increase uptake in the food waste service, and reduce odour associated with the service.
- 3.15. Although these are not included in the capital funding allocation from the Department of Environment, Food and Rural Affairs (DEFRA), the cost of providing the initial supply and on-going replacements to support residents' engagement with the service has been built into the service models, and will only be supplied on request to residents. This will ensure costs are proportionate to the number of households using the service in order to minimise the cost of this and secure the benefit of diverting food waste from the residual waste stream.
- 3.16. Whilst this is an investment in the service, it is expected to support higher participation in the service and increase the environmental benefits of operating the service by addressing the main concerns regarding hygiene of kitchen caddies and associated odour. This will especially support residents in communal and higher density housing areas by addressing the most often cited areas of uncertainty, and removing the barrier of residents feeling they need to invest in bags themselves.
- 3.17. In light of the financial limitations on how much of the service the Councils' can deliver in the 2026/27 and 2027/28 financial year with current budgets, Officers are currently working towards a two-phase implementation of the service. Phase One is planned to start in Quarter 4 2026/2027, with delivery to a proportion of local residents with a staggered rollout during January, February and March that will allow the Councils to ensure security of the new service and address any issues as they arise.
- 3.18. Overview of planned service implementation:

Start Date	Bromsgrove District Council
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¹ WRAP are a major UK-based environmental charity and global climate action NGO. They are best known for running campaigns like **Love Food Hate Waste** and orchestrating industry initiatives to increase recycling and reduce waste.

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Phase 1A	Q4 2026/27	3 Collection Rounds implemented (Approx. 50% households to receive service.)
Phase 1B	Q1 2027/28	1 Additional Collection Round implemented (Approx 66% households now receiving service, and scope for consolidation and further expansion within existing resources.)
Phase 2	Subject to additional funding	2 Additional Collection Rounds to be implemented to support 100% service provision.

- 3.19. Resident engagement with the new service will be monitored and allow for potential expansion of the service within the phase 1 resources during the first quarter of 2027/28. A reprofiling of the resources required for implementing Phase 2 may then also be possible.
- 3.20. Revenue funding has been provided by Central Government to support communicating the new service to residents. This funding will be used to provide an information pack to each household along with their caddies, as well as wider messaging through social media and via partner organisations such as Parish Councils and Housing providers.
- 3.21. Communal sites, and registered Social Landlords make up approximately 5% of households within the Council's area, and have specific challenges in managing waste. These often need a greater level of support to avoid a negative impact when introducing new services, as well as higher rates of waste contamination and lack of engagement with services.
- 3.22. As a result, it is planned to omit these sites from Phase 1 and plan for the more complex communal sites to be phased in as part of Phase 2 in the third and 4th quarter of the 2027/28 financial year, alongside more targeted resident engagement and education to support this as part of improving the Council's wider performance on recycling services.

4. FINANCIAL IMPLICATIONS

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- 4.1 In 2024/25, the Council received Capital funding totalling £1,013,896 through the Government's New Burdens Fund to support the implementation of food waste collections and fund the cost of vehicles and containers.
- 4.2 The Capital funding received is expected to fully meet the financial cost of containers and caddies required to operate the service to all residents. This is expected to be spent in full within the 2026/27 financial year as part of mobilisation for the new service, with unused assets to be stored securely for future use.
- 4.3 An annual revenue budget of £1,000,000 was allocated to the provision of Domestic Food Waste Collections from 2026/27 within the MTFP at Council in January 2025, in the expectation that additional funding would also be received from Central Government to support this "new burden".
- 4.4 The annual revenue cost of operating a full service that meets our statutory duties to provide a dedicated weekly food waste collection to every household is estimated at £1,186,155.
- 4.5 The table below summarises the modelled cost breakdown for the implementation of a food waste collection service to every household, and highlights the shortfall against the current approved funding within the MTFP.

4.6

	BDC
Staffing	£921,783
Maintenance	£112,000
Fuel	£77,550
Depot Operating Costs ²	£21,822
Depot Lease Costs	£45,000
Liners	£8,000
Total	£1,186,155
Variance to Current Budget	£186,155

- 4.7 As such, a partial implementation of the food waste collection service can be implemented, in line with approved funding contained within the budget.
- 4.8 Under these proposals, the service will support approximately 66% of households to receive a food waste collection service in 2026/27 and 2027/28 based on current funding within the MTFP.

² Estimate on Business Rates and Utilities.

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- 4.9 To extend the service to support every household in the Council's area and fully deliver against the Council's statutory duty under the Environment Act 2021, will require additional ongoing funding of £186,155 be added to the MTFP for Bromsgrove.
- 4.10 Whilst there is no additional funding factored into the MTFP to offset this funding shortfall, the Council is receiving payments from the Extended Producer Responsibility scheme (EPR)³, which started in 2025-26 providing local authorities with quarterly payments which "should be used to cover the net efficient costs your local authority incurs in the efficient management of household packaging waste"⁴.
- 4.11 In 2025/26 this funding was used to fund the existing dry recycling domestic waste collection service, and allow funds allocated from the MTFP for Waste collection to be used elsewhere within both authorities.
- 4.12 The MTFP has allocated Council funding for the provision of existing Domestic Waste collections in 2026/27 and 2027/28, and will receive further funding under the EPR scheme for 2026/27 of £1,766,905.34.
- 4.13 Whilst funding for 2027/28 has not been confirmed at this point, the Council has recently received details of proposed updates to the funding calculation to factor in additional recycling materials⁵ to the cost calculations that are now collected by our services as part of the Simpler Recycling requirements within the Environment Act 2021.
- 4.14 This funding is linked to the manufacture of recyclable packaging and will only fluctuate in line with the volume of packaging produced by the private sector. It is expected to remain a consistent funding stream moving forwards, although will be linked to our recycling quality in future, and could see deductions of up to 20% for poor performance from 2028. Full details of how this metric will be applied have not yet been provided.
- 4.15 £100,000 of this funding has already been allocated to support communication and engagement with residents on recycling quality related to the Council's existing green wheeled bin services, but the

³ Effectively a tax on packaging manufacturers to offset the costs of collecting and managing that waste by Local Authorities. Managed by a scheme administrator (PackUK) who share funds based on net efficient costs of collecting household packaging waste.

⁴ <https://www.gov.uk/guidance/payments-to-local-authorities-under-extended-producer-responsibility-for-packaging>

⁵ Foil and Plastic Tubes

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remaining funds could be utilised to release existing funding within the MTFP to meet the shortfall from 2027/28 onwards.

- 4.16 Whilst food caddies have been funded by Central Government for the initial launch of the service, and will provide an initial stock for replacement of lost/damaged caddies once the service has started, there will be a need for a future Capital Replacement budget to fund these.
- 4.17 This will be submitted as a budget bid at a later date once the Council has reviewed the volume of replacements required during Phase 1 implementation, so that the bid can truly reflect expected costs.

5. LEGAL IMPLICATIONS

- 5.1. The Environment Act 2021 sets out the legislative framework for Simpler Recycling which was launched in October 2023. The Council already meets many of the requirements, but is currently non-compliant regarding its statutory duties to provide a dedicated weekly food waste service to all households from April 2026.
- 5.2. The requirements under the Environment Act 2021 state that Waste Collection Authorities (WCA's) must collect segregated food waste at least once per week from 31 March 2026, with no qualification made for technical or economic practicability or the extent of any environmental benefit.
- 5.3. The Council has no statutory exemption via secondary legislation and is currently in breach of its obligations under the Environmental Protection Act 1990, as amended by the Environment Act 2021.
- 5.4. The statutory scheme does not provide for DEFRA and/or the Environment Agency as the frontline regulator to sanction WCAs directly for failure to comply with mandatory food waste collection requirements, and there is no provision for the prosecution of WCAs for non-compliance, leaving Judicial Review as the primary legislative risk.
- 5.5. The onus in this situation is on the authority to demonstrate it has taken all reasonable steps to perform the statutory duty, as Local Authorities cannot choose to be non-compliant with statutory legislation.
- 5.6. A Council cannot use a lack of funds as a justification to break the law, even if it causes severe financial strain, and this principle is well documented in case law.

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- 5.7. This report details the mitigation of this risk, and a proposed path to achieve full compliance at the earliest opportunity, which would be 2027/28 subject to the date of funding approval and associated recruitment that would be required to deliver Phase 2 of the service.

6. OTHER - IMPLICATIONS

6.1. Local Government Reorganisation

- 6.1.1. Proposals to implement a phased introduction of domestic food waste collections will ensure financial stability, and secure the capital assets to support a full collection service for our current residents.
- 6.1.2. Whilst it is hoped that the service will be able to identify sufficient productivity and efficiency savings to implement a full service before LGR has been completed, any unutilised assets such as vehicles and caddies will transfer to the new Unitary Authority that will be created.
- 6.1.3. As part of LGR, it is expected that opportunities to combine resources to support more efficient services will be considered. There may be additional sites identified to support operational services beyond those the Council have access to currently.
- 6.1.4. Should a North Worcestershire Unitary Council be adopted, the funds received by Wyre Forest District Council from Central Government are expected to transfer across to the new Unitary Authority, and will most likely support investment and expansion of the existing Bromsgrove and Redditch Service alongside further route optimisation to make full use of existing Council depots to operate efficient services.
- 6.1.5. Should a single combined Worcestershire model be adopted, funds received and not yet assigned to a dedicated food waste service in Wychavon District will support expansion of any existing schemes, as well as provide access to their Pershore depot. This may support provision of services to residents without the need for leasing of private land to operate a food waste collection service from.

6.2. Relevant Council Priority

- 6.2.1. Environment/Green, Clean & Safe

6.3. Climate Change Implications

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- 6.3.1. Food waste collections contribute to carbon reduction by diverting biodegradable waste from incineration and supporting anaerobic digestion processes which provide biogas and biomethane. These are used to generate electricity as well as support the national gas grid as a sustainable source of energy within the circular economy.
- 6.3.2. Waste composition analysis carried out in 2022 on a sample of residual waste bins showed that residents in Bromsgrove District produced an average of 2.17kg per household per week. The average across Worcestershire was 2.17kg. This is on a par with a national average of 3KG per week publicised by WRAP.
- 6.3.3. It is therefore expected that if 50% of households each presented their food waste for collection, the Council could expect to collect approximately 1,700 tonnes per year.
- 6.3.4. This will divert this waste from incineration within the existing residual waste service, to processing by anaerobic digestion which produces more sustainable energy generation as well as bio-digestate to return nutrients to the environment as part of the circular economy.
- 6.3.5. Diverting food waste from incineration to anaerobic digestion typically delivers a carbon saving of around 60–70 kg CO₂e per tonne⁶, which would result in a Carbon saving of 110 tonnes Carbon per year for the Council based on a 50% take-up of the service.

6.4. Community Impact

- 6.4.1. Implementing a food waste collection service is expected to deliver benefits to residents by reducing the carbon impact of their household waste on the environment.
- 6.4.2. By collecting food waste on a weekly basis, it will improve hygiene and support public health by removing putrescible waste more frequently than the existing fortnightly collection service within the residual waste stream.
- 6.4.3. A dedicated food waste collection can help residents identify avoidable food waste, and influence changes in behaviour and/or shopping habits. This reduces the volume of waste produced and also typically saves money on household food bills.

6.5. Equalities and Diversity Implications

⁶ based on WRAP's conversion factors for waste treatment options (CarbonWARM2)

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- 6.5.1. People with disabilities may require assistance in presenting their food waste caddy for collection. This will be provided as part of our existing assisted collection scheme, and will be publicised alongside the introduction of a new collection scheme as part of the information provided directly to every household when the caddies are delivered.
- 6.5.2. There could potentially be a negative impact on people from particular ethnic groups whose first language is not English and any subsequent misunderstandings about the correct food waste disposal instructions. Imagery will be used to help simplify the message as much as possible, and further assessment will be needed to identify the scale of this, and consider how to address these concerns through planned waste education and engagement with residents.
- 6.5.3. A full Equalities Impact Assessment will be carried out prior to the launch of the new service in order to identify any additional elements and implement mitigation measures to support this.

7. RISK MANAGEMENT

7.1. Lack of a suitable site to operate a service

- 7.1.1. Domestic Food Waste service cannot be operated without additional land and a formal extension to the Council's Operator's Licence.
- 7.1.2. Land has been identified and contract arrangements being progressed to secure and safeguard proposed timescales.

7.2. Operator's Licence requirements for operating a HGV fleet

- 7.2.1. The Council have now appointed a second Operators Licence Holder as part of the shared services with Redditch Borough Council, which increases the oversight capacity regarding the number of vehicles that the Councils can operate.
- 7.2.2. Whilst there is limited physical space to support increasing our capacity on existing sites, this increased oversight capacity will allow the Council to demonstrate how a satellite site can be operated as an extension to the existing Operator's licence.
- 7.2.3. Officers have commenced discussions with the Traffic Commissioner's office and DVSA to vary the existing licences, and/or set up a new licence as required for a satellite site. This typically can be approved within 6-8 weeks, although more complex arrangements can take up to 12 weeks.

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7.3. Planning permission delays

- 7.3.1. The Planning Team will be consulted regarding proposed sites for a new satellite depot as part of the Council's mobilisation process to ensure compliance with all planning requirements.
- 7.3.2. Should Planning permission be required to support a change of use or specific works to make changes to a proposed depot site, these will be mitigated through early submission and pre-application engagement with the Planning Team as per standard processes.

7.4. Vehicle delivery delays

- 7.4.1. Vehicles have been ordered and are currently scheduled for delivery in December 2026. This can vary if there are delays in the manufacturing process.
- 7.4.2. Close coordination with the manufacturer will seek to ensure that any delays are identified at the earliest stage possible, and opportunities explored with the manufacturer and hire companies for the provision of alternate vehicles to allow services to commence as planned.
- 7.4.3. Any costs associated with putting interim arrangements in place will be considered against available budgets to ensure the service remains viable given the high financial cost and risk associated with minimum lease periods.
- 7.4.4. Contingency plans will form part of the mobilisation plan to ensure that staff can be redeployed or used to support other related waste and recycling duties that support education and awareness of recycling quality and waste minimisation should this not be achievable, and the start date need to be delayed.

7.5. Food Waste Caddy procurement and delivery delays.

- 7.5.1. Food Caddies are available through procurement frameworks, and quoted timescales support delivery in readiness for us to distribute to residents during Quarter 3 of 2026/27 in advance of service commencement in Quarter 4 2026/27. Current timescales support a 3–4-week buffer to accommodate any potential delays in manufacture, although experience supports this as a low-risk issue.

7.6. Low take up of the service

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7.6.1. Food Caddies will be delivered with supporting information as a welcome pack regarding use of the service and the associated benefits. This will be supported by a wider Communications Plan based on dedicated resources developed by the Waste and Resources Action Programme (WRAP) to support Local Authorities in implementing Food Waste Collections across the UK.

7.6.2. Any underutilised capacity within the service will be able to support more targeted engagement in initial launch areas, and then be utilised to support expansion of the service.

7.6.3. Collection Data will be monitored to track participation and associated tonnages to target messaging and resources proactively to support usage of the service.

7.6.4. This data will also support wider service planning regarding the future of household collections for residents. Coupled with waste composition analysis of the residual waste stream, this will provide evidence to support consideration of ways to pressurise the waste stream to encourage more residents to make use of the service in low performing areas.

7.7. Inability to secure disposal at modelled disposal point

7.7.1. Route planning has been based upon access to the Severn Trent Green Power Site, which has not been contractually secured by Worcestershire County Council (WCC).

7.7.2. Once a decision has been confirmed on the scale of services to be implemented, this should give security to support WCC in completing the contract. Close communication during the mobilisation period will ensure that any changes to the disposal point can be factored in, and services adjusted where appropriate. This may impact on the number of properties the service can collect from in a week with the proposed resource, requiring additional staff/vehicles/salary costs to support the additional travelling time for disposal.

7.8. Pace of implementation and expansion to meet the Council's full statutory duties

7.8.1. Implementation of food waste collection services will be managed and monitored using a structured mobilisation plan as set out in Appendix 1. This will be regularly updated to reflect any amendments or delays, and reviewed by the Waste Project Board to ensure timescales are managed and achieve the successful delivery of services.

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7.9. Legal Sanctions

- 7.9.1. The Council has no statutory exemption from its statutory duty to provide food waste collections to all households, and is currently in breach of its obligations under the Environmental Protection Act 1990, as amended by the Environment Act 2021.
- 7.9.2. The statutory scheme does not provide for DEFRA and/or the Environment Agency as the frontline regulator to sanction WCAs directly for failure to comply with mandatory food waste collection requirements, and there is no provision for the prosecution of WCAs for non-compliance, leaving Judicial Review as the primary legislative risk.
- 7.9.3. Mitigation to date has been open dialogue with DEFRA regarding the impact of the withdrawal of promised Government revenue funding for the implementation of the service and the challenges facing implementation of the new service in this context.
- 7.9.4. Having a clear plan and timescale to launch a full service at the earliest opportunity will help demonstrate reasonability in meeting our statutory responsibilities and reduce the risk of a formal sanction through the Judicial Review process that could require us to implement the full service.

8. REPORT SIGN OFF

Department	Name and Job Title	Date
Portfolio Holder	Cllr Peter Whittaker	1/7/26
Lead Director / Assistant Director	Guy Revans Simon Parry	19/6/26 23/6/26
Financial Services	James Walton – S151 Officer Paul Earley - Maqsood Ahmed	29/6/26 23/6/26 23/6/26
Legal Services	Claire Felton	30/6/26

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Climate Change Team (if climate change implications apply)	Matt Eccles	18/6/26
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Low Cost Housing Capital Receipts

Relevant Portfolio Holder	Councillor Sue Baxter
Portfolio Holder Consulted	Yes
Relevant Head of Service	Judith Willis Assistant Director of Community and Housing Services
Report Author : Amanda Delahunty	Job Title Housing Development and Enabling Manager Contact email: a.delahunty@bromsgroveandredditch.gov.uk Contact Tel: 01527 881269
Wards Affected	No specific ward relevance
Ward Councillor(s) consulted	Not Applicable
Relevant Strategic Purpose(s)	Housing
Non-Key Decision	
If you have any questions about this report, please contact the report author in advance of the meeting.	

1. **RECOMMENDATIONS**

Cabinet is asked to RECOMMEND that

- 1) all low cost housing receipts are used by the Council to increase the supply of temporary accommodation by purchasing suitable dwellings.
- 2) delegated authority be granted to the Assistant Director Community and Housing Services following consultation with the Cabinet Member of Housing to purchase properties.

2. **BACKGROUND**

- 2.1 Bromsgrove District Council launched a low cost housing scheme approximately 28 years ago which provided an opportunity for those on lower incomes and first time buyers to purchase properties at a discounted rate owning 70% of the value, with the local authority owning the remaining 30% interest in the property. There is no rent charged on the 30% and therefore no management of the scheme required on a day to day basis as they are simply a type of low cost home ownership product. Through this scheme the Council currently holds a 30% share in each of the 111 remaining low cost housing properties.

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- 2.2 A report was taken to Cabinet on the 1st February 2017 and Members resolved that: “As and when these properties are offered for sale, so far as possible the Council’s share should also be sold and; That any Capital receipt be ring-fenced to provide funding to assist the Council in meeting its Strategic Purpose “Help me find somewhere to live in my locality”. The Strategic Housing Team manage the process of the sale on behalf of BDC.
- 2.3 A further report was taken to Cabinet on the 10th December 2024 which recommended that:
- i. the low cost housing receipts from the sale of these properties are used to purchase existing properties, flip shared ownership into social or affordable rented accommodation or invest in new build developments with Bromsgrove District Housing Trust (bdht) to increase the supply of affordable housing and temporary accommodation to meet the growing demand.
 - ii. delegated authority be granted to the Assistant Director Community and Housing Services following consultation with the Portfolio Holder for Strategic Housing to approve individual proposals for new developments or the purchase of existing satisfactory dwellings and flipping Shared Ownership to affordable or social rented properties and the spend relating to these, as and when they are brought forward.
- 2.4 Due to capacity issues this initiative has not been taken forward. The requirement for additional temporary accommodation is still needed in order to reduce the use of Bed and Breakfast (B&B) and therefore officers propose that this funding is used by the Council to purchase properties to be used as temporary accommodation.
- 2.5 It is anticipated that by utilising Low Cost Housing Receipts in a variety of ways, a new supply of temporary accommodation can be made available to support the Council to improve the quality of temporary accommodation and reduce the use of B&B’s, ensuring that the Government’s target that families do not occupy B&B accommodation for more the 6 weeks is achieved.

3. OPERATIONAL ISSUES

- 3.1 The additional resource required to implement this initiative will be absorbed by the Redditch Borough Council Housing Development Officer posts.

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- 3.2 It is proposed that officers will look at either purchasing properties from developers delivered through Section 106 requirements or with estate agents for the purchase of suitable open market dwellings. This work will be carried out by the Redditch Borough Council Housing Development Officers and time taken recharged to Redditch.
- 3.3 The management of the properties will be undertaken by a Registered Provider who has experience of dealing with Temporary Accommodation under a Service Level Agreement (SLA) following an appropriate procurement exercise. The management of the SLA will be carried out by the Housing Strategy Team alongside their management of the Housing Agency Agreement with Bromsgrove District Housing Trust.

4. FINCANCIAL IMPLICATIONS

- 4.1 The low cost housing receipts currently stand at £620,812.26 with a further two sales expected within 2026. These will be utilised to bring forward more temporary accommodation.
- 4.2 Purchases from the open market would be subject to an estate agent valuation and purchases from a developer under a section 106 affordable housing contribution would be subject to a RICS (red book) valuation. The expected associated costs with the purchase are £2,000 per property
- 4.3 These properties would provide an asset to the Council that are likely to increase in value over time based on the current housing market.
- 4.4 The cost of running the new temporary accommodation would be met within the existing temporary accommodation budget and rental income during occupation. The running costs of these properties is expected to be £6,500 per unit.

5. LEGAL IMPLICATIONS

- 5.1 The proposals detailed in this report will support the council in meeting its duties under the Housing Act 1996 and the Homelessness Reduction Act 2017. In addition, B&B accommodation is not deemed to be suitable for pregnant women and families with children, and for this reason is unlawful if used beyond 6 weeks as set out in the 2003 Bed and Breakfast Order. Longer term use of B&B accommodation puts the local authority at risk of legal challenge, reputational damage and/or a 'maladministration' finding by the Ombudsman.

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- 5.2 The Council is able to hold up to 1,000 properties without the requirement to implement a Housing Revenue Account.
- 5.3 The Housing Act 1985 Part 2 Section 9 permits a local authority to build/acquire new housing.

5 OTHER IMPLICATIONS

Local Government Re-organisation

- 6.1 Any assets held by the council will be transferred to the new unitary authority that will have responsibility to provide temporary accommodation.

Relevant Council Priority

- 6.2 Housing – this approach will ensure more good quality temporary accommodation is available.

Climate Change Implications

- 6.3 This initiative to increase the supply of temporary accommodation aligns with Bromsgrove District Council's commitment to environmental sustainability and climate change mitigation. The increasing frequency and severity of extreme weather events and the cost-of-living crisis, exacerbated by climate change, contribute to rising homelessness. By providing good quality temporary accommodation, this initiative will help protect vulnerable households from the direct and indirect impacts of climate change.

Equalities and Diversity Implications

- 6.4 The delivery of good quality temporary accommodation will have a positive impact on those who are homeless.

7. RISK MANAGEMENT

- 7.1 Unless the supply of temporary accommodation is increased across the District the council will be unable to meet its obligations in respect

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of homeless families and costs of extended periods in B&B accommodation and temporary accommodation will continue to rise.

- 7.2 Placing families in B&B accommodation where facilities are shared with vulnerable adults and with households not known to the placing authority creates additional safeguarding risks.

8. APPENDICES and BACKGROUND PAPERS

Background Papers

Cabinet Report 10th December 2024 : Bromsgrove Low Cost Housing Capital Receipts and Increasing the Supply of Temporary Accommodation Report

9. REPORT SIGN OFF

Department	Name and Job Title	Date
Portfolio Holder	Councillor Sue Baxter Cabinet Member for Planning, WRS and Strategic Housing	23.6.26
Lead Director / Head of Service	Judith Willis Assistant Director Community and Housing Services	19.6.26
Financial Services	James Walton, Section 151 Officer	23.6.26
Legal and Democratic Services	Nicola Cummings, Principal Solicitor – Governance and Jess Bayley-Hill, Principal Democratic Services Officer	24/06/26
Policy Team (if equalities implications apply)	Emily Payne	N/A

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	Engagement and Equalities Officer	
Climate Change (if climate change implications apply)	Matthew Eccles Climate Change Manager	23.6.26

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Review of the First Homes Policy

Relevant Portfolio Holder	Councillor Sue Baxter
Portfolio Holder Consulted	Yes
Relevant Head of Service	Judith Willis Assistant Director of Community and Housing Services
Report Author	Job Title: Amanda Delahunty Housing Development and Enabling Manager Contact email: a.delahunty@bromsgroveandredditch.gov.uk Contact Tel: 01527 881269
Wards Affected	No specific ward relevance
Ward Councillor(s) consulted	Not Applicable
Relevant Strategic Purpose(s)	Housing
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 Council's revised First Homes Policy is approved.

2. BACKGROUND

2.1 The Government introduced a new affordable housing product known as First Homes to be provided by all local housing authorities from 28th March 2022, as 25% of the affordable housing on Section 106 sites. First Homes are discounted market sale units with criteria set by legislation. They:

- a) must be discounted by a minimum of 30% against the open market value;
- b) are sold to a person or persons meeting the First Homes eligibility criteria;
- c) on their first sale, will have a restriction registered on the title at HM Land Registry to ensure this discount (as a percentage of current market value) and certain other restrictions are passed on at each subsequent title transfer; and,

- d) after the discount has been applied, the first sale must be at a price no higher than £250,000 (or £420,000 in Greater London).

3. OPERATIONAL ISSUES

- 3.1 The First Homes policy was approved by the Council in September 2022 for Section 106 developer led sites. Following the removal of the mandate from the NPPF the policy has been updated to remove the mandated elements.

- 3.2 An update to the National Planning Policy Framework (NPPF) guidance 2024 has offered an opportunity to review this approach:

“The requirement to deliver a minimum of 25% of affordable housing as First Homes, as set out in ‘Affordable Homes Update’ Written Ministerial Statement dated 24 May 2021, no longer applies. Delivery of First Homes can, however, continue where local planning authorities judge that they meet local need. Except where a Mayoral, combined authority or high-level joint plan is being prepared as a framework for strategic policies at the individual local authority level, in which case it may be most appropriate for the local authority plans to provide the requirement figure.”

- 3.3 The removal of the mandatory requirement allows Strategic Housing to flexibly negotiate with developers, appropriate affordable housing products on site. Bromsgrove Council has delivered three First Homes to date.

4. FINANCIAL IMPLICATIONS

- 4.1 There are no financial implications to the Council as a result of this policy.

5. LEGAL IMPLICATIONS

- 5.1 The NPPF has made the inclusion of First Homes optional for local authorities.

6. OTHER IMPLICATIONS

Local Government Re-organisation

- 6.1 There are no specific implications for Local Government Reorganisation.

Relevant Council Priority

- 6.2 Housing – the flexible application of this policy will provide more affordable home ownership options and help to reduce the pressure on the housing register.

Climate Change Implications

- 6.3 The revised First Homes Policy is expected to have a neutral to slightly positive climate impact. Greater reliance on Registered Providers may result in more consistent delivery of new homes built to modern energy-efficient standards, supporting overall low-carbon housing objectives.

Equalities and Diversity Implications

- 6.4 The re-alignment of the First Homes policy will help make more lower cost affordable home ownership models available, which is more likely to impact households from diverse backgrounds.

7. RISK MANAGEMENT

- 7.1 By re-aligning the First Homes policy, the Council is more likely to meet local housing needs rather than the needs of households from outside of the District.
- 7.2 By continuing to provide First Homes flexibly the Council is supporting the viability of Section 106 sites to ensure that Registered Providers are able to purchase the affordable housing element.

8. APPENDICES and BACKGROUND PAPERS

Appendices

Appendix 1 - The review Bromsgrove First Homes Policy

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9. REPORT SIGN OFF

Department	Name and Job Title	Date
Portfolio Holder	Councillor Sue Baxter Cabinet Member for Planning, WRS and Strategic Housing	23.6.26
Lead Director / Head of Service	Judith Willis Assistant Director Community and Housing Services	23.6.26
Financial Services	James Walton, Section 151 Officer	23.6.26
Legal and Democratic Services	Nicola Cummings, Principal Solicitor – Governance and Jess Bayley-Hill, Principal Democratic Services Officer	24/06/26
Policy Team (if equalities implications apply)	Emily Payne Engagement and Equalities Officer	N/A
Climate Change (if climate change implications apply)	Matthew Eccles Climate Change Manager	26.6.26



Bromsgrove District Council

First Homes

Policy

June 2026 Version 3

Introduction

This policy sets out the Council's approach to delivering First Homes in accordance with national guidance and in compliance with the Council's adopted Local Plan policies on the delivery of Affordable Housing. In due course, a new Local Plan will be adopted, containing the Council's refreshed Affordable Housing policies, which will include provisions for the delivery of First Homes.

First Homes are a specific type of discounted sale homes which meet the definition of Affordable Housing for planning purposes.

Background

The national guidance is set out in the Written Ministerial Statement and the National Planning Policy Guidance (NPPG), which were both published on 24 May 2021.

From the 28 June 2021 local authorities were required to deliver First Homes as a proportion (25%) of their usual Affordable Housing delivery through their local plan policies.

An update to the National Planning Policy Framework (NPPF) guidance 2024 has offered an opportunity to review this approach:

“The requirement to deliver a minimum of 25% of affordable housing as First Homes, as set out in 'Affordable Homes Update' Written Ministerial Statement dated 24 May 2021, no longer applies. Delivery of First Homes can, however, continue where local planning authorities judge that they meet local need. Except where a Mayoral, combined authority or high-level joint plan is being prepared as a framework for strategic policies at the individual local authority level; in which case it may be most appropriate for the local authority plans to provide the requirement figure.”

The main criteria of First Homes, as set out in national guidance, are:

- a. First Home must be discounted by minimum of 30% against the market value;
- b. after the discount has been applied, the first sale must be at a price no higher than £250,000. This does not apply to subsequent sales, and
- c. the discount is passed on to future purchasers, secured through a section 106 agreement.
- d. The home is sold to a person who meets the First Homes eligibility criteria.

The First Homes eligibility criteria require the purchaser (or all purchasers if a joint purchase):

- a. To be a first-time buyer, as defined by paragraph 6 of Schedule 6ZA of the Finance Act 2003.
- b. To have a household annual income of no more than £80,000, and
- c. Should have a mortgage or home purchase plan to fund a minimum of 50% of the discounted purchase price.

Subsequent sales must also be to a person or persons who meet the First Homes eligibility criteria.

The developer/owner will be expected to enter into a s106 agreement to secure the above provisions.

The discount

The minimum discount will be 30% of the open market value. A developer may choose to offer a higher discount if for example a 4 bedroom unit is being provided to ensure that the required £250,000 cap is adhered to.

The discount percentage will be applied to all future sales and will be secured in perpetuity through a s106 agreement as a planning obligation.

Any review of the First Homes policy and affordability may lead to the introduction of a higher discount as appropriate.

The vendor will need to provide a market value undertaken by a Valuer who is qualified by the Royal Institute of Chartered Surveyors.

The price cap

The cost of a First Homes dwelling to the first-time buyer shall be no more than £250,000 after the discount has been applied. The price cap applies to only the first sale and may be exceeded by future house price rises on subsequent sales.

Current Local Plan policy

The council will expects any First Homes provision, as included within the definition of Affordable Housing, to comply with the requirements BDP8 of the Bromsgrove District Plan Adopted-BDP-January-2017.pdf (bromsgrove.gov.uk)

The Council will expect proposals for major developments, i.e. BDP8.1 Contributions will not be sought from developments of 10 units or less, and which have a maximum combined gross floorspace of no more than 1000 sq m. Where there is a net increase of 11 or more dwellings affordable housing provision will be expected on-site and will be calculated against the net number of new dwellings as follows:

- Up to 40% affordable housing (or a higher % if proposed) on greenfield sites or any site accommodating 200 or more dwellings.
- Up to 30% affordable housing (or a higher % if proposed) on brownfield sites accommodating less than 200 dwellings.

Affordable Housing contribution

As stated above, the Affordable Housing contribution required by policy between 30% and 40% of all dwellings on major residential developments. The preferred tenure split is:

- Social Rent two thirds.
- Affordable Home Ownership one third.

The delivery of First Homes is no longer mandatory and the Council's preferred tenure for Affordable Home Ownership is Shared Ownership. The Council will consider other forms of Affordable Home Ownership, including First Homes.

Financial contribution

All Affordable Housing, including First Homes, is expected to be delivered on-site, unless it can be robustly justified as inappropriate, in which case a financial contribution in lieu, of equivalent value to what would have been provided on-site, may be acceptable. Any financial contribution made in lieu of affordable housing will be used towards the funding of additional affordable housing.

Marketing/Disposal/Monitoring

The First Homes will be marketed and sold by the Developer. The developer will need to ensure First Homes are advertised with all relevant information to ensure eligibility criteria can be met.

The developer will be responsible for paying for all advertising and processing of potential purchasers' applications to the Council. The developer selects the potential purchaser(s) and only one purchaser per plot/home is passed through at any one time to the Council for the eligibility check and authorisation processes. A prior declaration will need to be completed to confirm the potential purchaser is eligible. Fees will be introduced for the eligibility checks and authorisation processes per sale, as well as for monitoring the purchase and sales activities through initial and subsequent sales.

Any local eligibility criteria (local connection) will apply for a maximum of three months from when a home is first marketed. If a suitable buyer has not reserved a home after three months, the eligibility criteria will revert to the national criteria set out above, to widen the consumer base.

If, following six months of marketing and having taken all reasonable steps to sell the property (including, where appropriate, reducing the asking price) the property fails to sell it should be expected that the seller (either the developer or a future First Homeowner) compensates the Council for the loss of the affordable housing unit with a financial contribution.

This financial contribution should be the value of the discount the First Home was to be sold for, as a percentage of the final sale price (or, as much as possible of that value once the value of all lending against the property has been cleared) and net of any additional Stamp Duty liability incurred.

Re-sales of First Homes will be subject to the same discount and eligibility criteria and will need to accord with the same marketing and compensation (in the event of no sale) processes as required on the initial sale by the developer.

The above provisions and related terms for implementation will be secured through a Section 106 agreement.

Local connection requirement

In addition to the national eligibility criteria for First Homes owner occupiers, the Council will require all applicants and purchasers of First Homes to have a local connection to Bromsgrove District Council, as set out the Council's Home Choice Plus Allocations Policy.

In determining whether the household has a local connection the Council will agree a connection exists in the following circumstances, noting that if an applicant has no connection that meets the qualification criteria and claims a connection on the basis of special circumstances then the decision to allow them on the list can be made by a Senior Officer:

Local Connection

The Council will apply a local connection criteria for First Homes applicants as there are affordability issues in the District due to high house prices that are inaccessible to those with lower quartile and median incomes (see appendix 1). The local connection criteria is extracted from the Council's housing allocations policy which was consulted upon prior to implementation.

- Where the local connection arises due to residency the applicant(s) must have lived in the District (by choice) for a minimum period of two years.
- 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 the District, immediately prior to the application (please see further information below).
- Where the applicant(s) has a close (immediate) family member living in the 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 the District for three out of the last five years at the point of application

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).

Where the applicant is a member of the armed forces there are special arrangements.

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

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 social housing accommodation and we would like to extend this to apply for First Homes applications.

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 done so in the five years preceding their application for an allocation of housing accommodation;
- 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 local connection criteria extends 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.

This local connection requirement is subject to the time limit of three months from when the home is first marketed, after which it will revert to national eligibility criteria, as set out in paragraph 008 NPPG: First Homes.

Appendix 1 Application Process

	Pre-sale set-up	Customer reservation	Authority to Proceed and Authority to Exchange		Exchange and completion	
 Customer		Customer enquires and chooses to buy specific First Home Conveyancer selected	Completes application pack, including supporting evidence Pays reservation	Submits mortgage application Completes legal declarations with conveyancer	Customer pays deposit	Customer moves in
 Local authority	Local eligibility criteria set s.106 agreements		Local authority receives completed application pack, checks criteria are met and issues Authority to Proceed and conveyancer pack	Local authority receives conveyancer 's legal undertaking that the transaction is compliant and issues Authority to Exchange		Receives confirmation of completion and updates record
 Development	Homes identified Pre-sale valuations Marketing s. 106 agreements		Assists in completion of application pack and submits to local authority			
 Mortgage adviser		Assurance that customer can borrow (potentially with DIP)	Assists in completion of application pack			
 Mortgage lender				Mortgage application Lender values for mortgage offer and conveyancer confirms transaction at MV less the discount	Lender provides mortgage funds for legal completion	
 Conveyancer		Lender provides mortgage funds for legal completion		Conveyancer follows standard instruction pack Submits full legal declarations and undertaking to the local authority	Exchange of contracts	Final legal confirmations Registers restriction at HMLR Informs local authority

Bromsgrove Home Choice Housing Allocations Policy

Relevant Portfolio Holder	Councillor Sue Baxter
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:-

That the final Bromsgrove Home Choice Housing Allocations Policy be approved.

2. BACKGROUND

2.1 On the 19th November 2025 Cabinet resolved:-

- To consult on the draft Housing Allocations Policy for a period of six weeks commencing 27th November 2025;
- That the Council's Housing Register be referred to as 'Bromsgrove Home Choice'.
- 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.

2.2 Further, the report advised that:

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

- 2.3 Following the six week public consultation period the draft Bromsgrove Home Choice Affordable Housing Allocations Policy was reviewed and legal advice was sought on compliance.
- 2.4 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.

3. OPERATIONAL ISSUES

- 3.1 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. They will be able to retain their current effective date if they apply within three months of the new system going live.
- 3.2 It is proposed that subject to approval of the policy this will start 1st October 2026.
- 3.3 The changes proposed were supported by consultees. The only changes made to the policy were those recommended by legal experts and relate to clarifications regarding making sure the housing register is accessible to all equalities groups and assistance is available where required. In addition, it is considered to be best practice for members to have sight of the Equalities Impact Assessment and that monitoring is put in place to ensure that there is no adverse impact on equalities groups in particular those with disabilities.

4. FINANCIAL IMPLICATIONS

- 4.1 The new system to support this new Allocations Policy is being developed and additional resources to facilitate housing applicant re-registration have previously been approved.

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 has been obtained from a legal specialist to ensure that the policy meets all statutory requirements and the recommendations have been actioned.

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 The Equalities Impact Assessment (Appendix 2) demonstrates that the Allocations Policy generally has a positive equality impact, particularly for vulnerable households. However, it identifies risks around local connection, digital access, and financial thresholds, which are mitigated through exemptions, support mechanisms, and ongoing monitoring.

7. RISK MANAGEMENT

- 7.1 Expert legal advice was sought to ensure compliance and this should help to mitigate against any risks.

- 7.2 The Equalities Impact assessment has provided a monitoring framework to review and mitigate any adverse impacts on specific groups.

8. APPENDICES and BACKGROUND PAPERS

Appendix 1 – Bromsgrove Home Choice Housing Allocations Policy
Appendix 2 – Equalities Impact Assessment
Appendix 3 – Consultation Table

9. REPORT SIGN OFF

Department	Name and Job Title	Date
Portfolio Holder	Councillor Sue Baxter, Cabinet Member for Planning and Strategic Housing	23.6.26
Lead Director / Head of Service	Judith Willis Assistant Director Community and Housing Services	19.6.26
Financial Services	Deb Goodall, Assistant Director of Finance and Customer Services	23.6.26
Legal Services and Democratic Services	Nicola Cummings, Principal Solicitor – Governance and Jess Bayley-Hill, Principal Democratic Services Officer	24/06/26
Policy Team (if equalities implications apply)	Emily Payne, Engagement and Equalities Officer	23.6.26



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 and 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 tenant of housing accommodation held by a Housing Association/Registered Provider (via a Council's Nomination Rights Agreement with the Housing Association). 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), the Homelessness Reduction Act 2017 and the Domestic Abuse Act 2021 and takes into account the Allocation of Accommodation: Guidance for Local Authorities. 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 at [www. Bromsgrove.gov.uk](http://www.Bromsgrove.gov.uk) or a printed brochure will be made available upon request. The Council will provide advice and support free of charge and will publish details of properties that have been recently let to help service users to understand their likelihood of being rehoused through the scheme.

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 has been developed in line with the Council's responsibilities under the Equality Act 2010. In particular, the Council will have due regard to the need to eliminate unlawful discrimination, advance equality of opportunity, and foster good relations between people who share protected characteristics (including age, disability, gender reassignment, race, religion or belief, sex, sexual orientation, pregnancy and maternity, and marriage and civil partnership) and those who do not.

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. This includes the need to make provision for those who need to move suddenly because of a life-threatening illness or sudden disability, families in such severe overcrowding that it poses a serious health hazard, and those who require urgent rehousing due to violence / threats of violence, whether intimidated witnesses or as a result of serious anti-social behaviour or domestic violence.
- 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 an 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.
- Maintain an **accessible website** with clear navigation and housing service sections.
- Make **reasonable adjustments** for individuals with disabilities or specific needs. This may include access to interpreters, translation services, or assistance from staff. We are committed to ensuring that all customers can access our services fairly and without disadvantage
- 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, the 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 meet 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 continuously.
- 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) has been in permanent, paid employment for a minimum period of six months continuously, 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 continuously, 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 continuously at the point of application.
- Has a local connection as a result of special circumstances. This would include people with a reasonable preference under legislation without a local connection identified above and those who are exempt for example; due to being care leavers or members of the armed forces

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 a 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 Homelessness Reduction Act 2017, care leavers have a local connection with the area of the local authority that owes them leaving care duties. Where that authority is a county council, this will include all local housing authority districts within its area. For example, a young person leaving care with Worcestershire County Council will have a local connection with each of the six district housing authorities in Worcestershire.

In addition, a care leaver aged under 21 will have a local connection with any district where they were normally resident for a continuous period of at least two years as a result of being accommodated under Children Act duties, including some time before they reached the age of 16. This means that where a young person is placed in care in another local authority area (for example, Stratford-on-Avon District) for at least two years continuously, they may have a local connection with both that district and the districts within the area of the authority that owes them leaving care duties. This additional local connection ceases when the person reaches the age of 21.

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 qualify to

register and will be offered alternative housing options. Applicant(s) will also be offered the right to request a review of this decision. See Section 8 Review of Decisions.

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 must 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. See Armed Forces section below.
- Victims of domestic abuse as outlined in the Allocations Scheme.
- Social services care leavers as outlined in the Allocations Scheme. See Care Leavers section below.
- 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 or towards other people
- Allowing the condition of the property to deteriorate, unless good reason eg so unwell that property could not be kept in good condition.
- 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. See Section 8 Review of Decisions.

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 Council will not apply a local connection requirement as a qualifying criterion to applicants who fall within the scope of Regulation 2 of the Allocation of Housing (Qualification Criteria for Victims of Domestic Abuse and Care Leavers) (England) Regulations 2025. In accordance with those Regulations, a local connection test must not be applied to the following categories of applicant:

- An "eligible child" as defined by paragraph 19B of Schedule 2 to the Children Act 1989
- A "relevant child" as defined by section 23A(2) of the Children Act 1989

- A “former relevant child” as defined by section 23C(1) of the Children Act 1989, who is aged under 25

This means that such applicants cannot be excluded from qualifying for an allocation of social housing on the basis that they do not have a local connection to the district.

These provisions reflect national regulations introduced on 10 July 2025 to remove barriers to social housing for care leavers and other vulnerable groups.

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

The 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 online. Where an applicant is unable to use the online registration support to complete a registration form, it 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.

The Council will consider applications from prospective fosterers or adopters who would require an extra bedroom to accommodate a foster or adoptive child, and weigh up the risk that the application to foster or adopt may be unsuccessful against the wider benefits which would be realised if the placement was successful. The Council will work with children's services to meet the needs of prospective and approved foster carers and adopters, so that children's services can fulfil their duties under the Children Act 1989, s.22G, to ensure sufficient accommodation in the area to meet the needs of "looked after children eg 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.

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 Personal Independence Payment "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, and not intentionally homeless(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 the 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. See below.
- 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. See below.

- 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 issue 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 in the table above under the Definition of Household types section.

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.

Journeys exceeding **3 hours total per day** (return) are not considered reasonable but personal circumstances such as any disability will be taken into account when making this decision.

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 their physical or mental 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, such as a medical need that is adversely impacted by the current home, 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 and sustained 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 unless there are exceptional circumstances.

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 continuously.

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 mental or physical 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.org.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 applicants 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 or an age criteria such as those over the age of 55.
- 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 a property has been designated for older people or for young people specifically.
- 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

Bromsgrove District Council is committed to ensuring that its housing allocations service is fair, lawful, and accessible. In developing and implementing this policy, the Council will comply with the Equality Act 2010 and have due regard to its duties under the Public Sector Equality Duty to:

- eliminate unlawful discrimination, harassment and victimisation;
- advance equality of opportunity between persons who share a protected characteristic and those who do not; and
- foster good relations between different groups.

The Council will not treat any applicant less favourably on the grounds of age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex, or sexual orientation. The Council will also ensure that policies and practices do not place individuals at a disadvantage unless this can be objectively justified.

Reasonable adjustments will be made where required, particularly for applicants with disabilities, to ensure equal access to the housing register and allocation process.

This policy will be subject to regular Equality Impact Assessment and monitoring to ensure it does not have an unjustified adverse impact on any group.

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 it's 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. This may include access to interpreters, translation services, or assistance from staff to record your complaint. We are committed to ensuring that all customers can access our complaints process fairly and without disadvantage.

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 it's 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, 1DAWorcs 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

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Equality Impact Assessment – Bromsgrove Home Choice Allocations Policy

Title of Policy

Bromsgrove Home Choice Housing Allocations Policy (Version 1, 2026)

Service Area

Community and Housing Services

Officer Completing Assessment

Amanda Delahunty, Housing Development and Strategy Manager

Date Assessment Started

2nd June 2026

Decision Maker

Cabinet

Date Decision Made

TBC

Overview

The Bromsgrove Home Choice Allocations Policy sets out how the Council allocates social and affordable housing through a banding system based on housing need, local connection, and statutory requirements.

The policy aims to:

- Ensure a **fair, transparent and accessible system** for allocating housing
- Prioritise households in **greatest housing need**, in line with “reasonable preference”
- Support **sustainable communities** and efficient use of housing stock
- Meet legal duties under the **Housing Act 1996, Homelessness Reduction Act 2017, and Equality Act 2010** The policy introduces structured eligibility criteria (including local connection), a **banding system**, and provisions for additional preference (e.g., homelessness, disability, domestic abuse, armed forces).

Current service users' needs will continue to be met through:

- Prioritisation of high-need groups
- Reasonable adjustments
- Assisted access and advocacy

The proposal is designed to ensure compliance with the **Public Sector Equality Duty (PSED)** and ensure equitable access to housing.

Who is the proposal likely to affect?

Group	Yes	No
All residents	☒	☐
Specific groups	☒	☐
All Council employees	☐	☒
Specific employee groups	☐	☒
Other	☒	☐

Details – Who could be affected and how

The policy affects:

- Individuals applying for **social housing**
- Households experiencing **homelessness or housing need**
- Vulnerable groups including:
 - Disabled people
 - Older people
 - Young people (including care leavers)
 - Victims of domestic abuse
 - Ethnic minority groups
 - Low-income households

Impact occurs through:

- Eligibility rules (e.g., **local connection requirement**)
- Priority banding determining access to housing
- Restrictions or demotions (e.g., Band 4 for behaviour or financial thresholds)

- Access to the **bidding-based choice system**

Some groups may experience **positive impacts** through targeted prioritisation (e.g., homelessness, disability), while others may face **barriers** (e.g., those without local connection or digital access).

Evidence and Data Used

- Housing demand and register data (local authority records)
- National legislation:
 - Housing Act 1996
 - Homelessness Reduction Act 2017
 - Equality Act 2010
- Internal performance and lettings data
- Demographic data for Bromsgrove
- Policy provisions include:
 - Prioritisation for homelessness, medical need, overcrowding
 - Exemptions (e.g., care leavers, domestic abuse victims)

Data gaps:

- Limited equality monitoring data on outcomes
- Limited evidence on digital exclusion impact
- Ongoing need to assess cumulative impacts across policies

Engagement and Consultation

Engagement includes:

- Consultation with housing partners / registered providers
- Input from homelessness services
- Feedback from applicants and service users
- Ongoing case management and reviews

Key findings:

- Applicants value fairness, transparency, and clarity
- Vulnerable groups require support to access and bid
- Barriers identified:
 - Digital access
 - Understanding the system
 - Local connection restrictions

The policy includes mitigations such as:

- Assisted applications and advocacy
- Translation and interpretation services
- Partner support (e.g., voluntary agencies)

Public Sector Equality Duty

1. Eliminate discrimination

- Policy explicitly states no less favourable treatment based on protected characteristics
- Reasonable adjustments provided (e.g., assisted applications, interpreters)
- Exemptions for vulnerable groups (e.g., domestic abuse, care leavers)

2. Advance equality of opportunity

- Priority given to:
 - Homeless households
 - Disabled applicants
 - Those in overcrowded or unsuitable housing
- Additional preference for vulnerable and disadvantaged groups
- Banding structure aligns need with access

3. Foster good relations

- Promotes balanced communities via Local Lettings Plans
- Transparent system reduces perceptions of unfairness
- Encourages community contribution incentives

Impact Assessment by Protected Characteristic

Protected Group	Impact	Justification	Mitigation
Age	Young people may struggle (16–18); older people prioritised in some cases	Legal tenancy limits; specialist housing	Advocacy support; tailored housing
Disability	Positive – priority for medical need;	Necessary to meet need	Ongoing assessment;

	reasonable adjustments		adaptations
Gender Reassignment	Neutral (no direct targeting)	Inclusive policy wording	Monitoring outcomes
Marriage/Civil Partnership	Neutral	Joint applications allowed	None required
Pregnancy/Maternity	Positive – pregnancy recognised for housing need	Reflects housing demand	Continued prioritisation
Race	Potential barrier via local connection or immigration status	Legal requirement	Translation; exceptions; monitoring
Religion/Belief	Neutral	No direct impact	Monitor access
Sex	Neutral	Equal treatment	Monitor outcomes
Sexual Orientation	Neutral positive – inclusive definitions	Same-sex couples recognised	Monitor outcomes

Other Groups (Non-protected)

- **Low-income households** – positively prioritised
- **Homeless households** – highest priority (Band 1)
- **People without local connection** – potential disadvantage
- **Digitally excluded applicants** – barriers to access
- **Armed Forces Personnel** – positively prioritised by legislation

Monitoring

The Council will:

- Monitor allocations by protected characteristics
- Track banding outcomes and refusals
- Review equality impacts regularly
- Use feedback to inform policy revisions

Action Plan

Action	By Whom	By When	Completion
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Agenda Item 8

Strengthen equality monitoring data	Strategic Housing Team	Ongoing	
Review impact of local connection criteria	Strategic Housing Team	Annual review	
Improve accessibility / digital inclusion support	Housing Options Service	Ongoing	
Enhance consultation with vulnerable groups	Strategic Housing Team	Ongoing	
Update EIA following policy changes	Strategic Housing Team	At review	

Sign Off

Role	Name	Signature	Date
Lead Officer	Amanda Delahunty	AD	2.6.26
Equality Officer	Emily Payne	EP	2.6.26

Appendix 3 Bromsgrove Housing Allocation Policy Table of Proposed Changes

	Current Policy	Proposed Change	Consultation Response
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.	96.4% were happy with the name change to Bromsgrove Home Choice Plus 92.4% were happy with the banding changes.
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	93.1% were supportive of this change.

		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 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.	The approach to assist with move on from supported accommodation 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.	94.2% agreed with this change.

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.	93.1% agreed with this change
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.	86.1% agreed with this change. There were concerns that people fleeing domestic abuse would be adversely affected by this change, but victims/survivors of domestic abuse would be dealt with under homelessness legislation therefore this change would not affect them.
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	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.	95.3% agreed with this change

	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.	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.	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;	92.4% agreed with this change.

	The savings etc. of all adult members of the household should be taken into account for this criteria.	• 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	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	90.1% agreed with this change.

	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	▪ Eligible and interested in older persons accommodation ▪ In social housing and seeking a transfer	
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	settled accommodation • Households who have insecurity of tenure (those in tied accommodation or lodging with family members) • In social housing and seeking a transfer		
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Report MTFP SCENE SETTING 2027/28

Relevant Portfolio Holder	Councillor Simon Nock, Portfolio Holder for Finance
Portfolio Holder Consulted	Yes
Relevant Assistant Director	Debra Goodall
Report Author	Job Title: Debra Goodall, Assistant Director of Finance and Customer Services Contact email: debra.goodall@bromsgroveandredditch.gov.uk Contact Tel:
Wards Affected	ALL
Ward Councillor(s) consulted	No
Relevant Council Priority	
Key Decision NO – Information only	
If you have any questions about this report, please contact the report author in advance of the meeting.	

1. RECOMMENDATIONS

The Cabinet RESOLVE that:-

- 1) The budget process outlined in this report is followed for the 2027/28 annual budget and the Medium Term Financial Plan (2027/28 to 2030/31), subject to the impact of Local Government Reorganisation and vesting day on 1 April 2028.**
- 2) The current pressures of £1.037m as set out in paragraph 2.12 are noted for consideration as part of the budget process for 2027/28.**

2. BACKGROUND

- 2.1 The next budget to be set will be the 2027/28 to 2030/21 Medium Term Financial Plan (MTFP). This budget is the second year of a three-year settlement from Government running from 2026/27 to 2028/29.
- 2.2 The report will set out
 - The budget setting timetable for this Council
 - Budget assumptions for the 2027/28 annual budget
 - Present risks, issues and concerns that will need to be addressed in the budget
 - The impact of the three-year Local Government Finance Settlement (2026/27 – 2028/29) which has a number of import

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implications for the Council's financial planning and Medium Term Financial Plan.

- Impact of Local Government Reorganisation on the Medium Term Financial Plan

Proposed Budget Timetable

2.3 The following is the proposed budget timetable for 2027/28:

2026	
10 Jun to Jul	Budget Review Meetings held with Assistant Directors
22 Jun	MTFP Scene Setting Report to Senior Leadership Team (SLT)
1 July	MTFP Scene Setting Report considered at Cabinet Briefing
tbc	MTFP Scene Setting Report considered at Finance and Budget Working Group
22 July	MTFP Scene Setting Report approved at Cabinet
24 Aug	MTFP Stage 1 including provisional budget and fees and charges to SLT
tbc	MTFP Stage 1 including provisional budget and fees and charges approved at Cabinet Briefing
Oct/Nov	Chancellor's budget statement (date not yet announced)
16 Nov	Finance and Budget working group / Overview and Scrutiny Committee review MTFP Stage 1 including provisional budget and fees and charges
18 Nov	MTFP Stage 1 including Provisional Budget and Fees and Charges approved for consultation by Cabinet
23 Nov	MTFP Stage 1 Provisional Budget (including WRS and Fees and Charges) - updates to SLT
9 Dec	MTFP Stage 1 Provisional Budget (including WRS and Fees and Charges) reviewed by Cabinet Briefing
17 Dec	Updated provisional Local Government Settlement expected (tbc)
2027	
4 Jan	MTFP Stage 1 Provisional Budget (including WRS and Fees and Charges) following Consultation Responses reviewed by Finance and Budget Working Group
6 Jan	MTFP Stage 1 Provisional Budget (including WRS and Fees and Charges) following Consultation Responses reviewed by Cabinet
tbc	Budget approved by SLT
tbc	Budget considered by Cabinet
tbc	Budget reviewed by Finance and Budget working group

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tbc	Local Government Finance Settlement confirmed
tbc	Budget reviewed by Overview and Scrutiny Committee
tbc	MTFP Stage 2 (including Capital Strategy, Investment Strategy and Treasury Management Strategy) approved by Cabinet
tbc	Budget approved by Cabinet
tbc	Budget and Council Tax Resolution approved by Council

Budget assumptions for the 2027/28 annual budget

- 2.4 The base assumptions to be used in developing the budget are set out in the following paragraphs.
- 2.5 Pay award for next year will be budgeted at 2% in line with HMT inflationary targets.
- 2.6 There will also be an additional 1% cost of living increment built in as contingency in the case of a higher than budgeted pay settlement.
- 2.7 Controllable fees and charges will be uplifted by the maximum amount permissible for each area. This will be a minimum of 2% - services will need to review and set their Fees and Charges accordingly.
- 2.8 Council Tax – it is assumed that Council tax will be increased in line with Government assumptions on Core Spending Power (CSP) which will mean increases just below the referendum limit overall years of the MTFP. It is expected that the referendum limit for district councils will be at the greater of £5 in cash terms or less than 3%.
- 2.9 Unavoidable growth from contract inflation and new burden pressures will be included in the first iteration of the budget.
- 2.10 Where supplementary estimates during the current year (2026/27) have been agreed by Council, and where these have an impact on future base budgets, these will be captured and listed as unavoidable growth previously agreed and included in base budgets.

Current risks, issues and concerns to be addressed in the budget

- 2.11 Meetings were held between the s151 Officer, Deputy s151 Officer, Assistant Directors and relevant Finance Business Partners to assess the robustness of the Council's revenue and capital budget position on a service by service basis. The key outputs from these meetings are included at Appendix 1 and proposed approaches to managing the key pressures is set out below.

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- 2.12 The following are pressures that will need to be considered in the formulation of this year's budget and as part of the in-year 2026/27 position:

Pressure	Impact £'000
The actual pay for 2026/27 award was 3.3% - 0.3% above the assumption built in at budget setting	56
There are currently base budget efficiencies and savings that have not been delivered	927
Members are entitled to join the LGPS from May 2026. This was not budgeted for until 2027/28 (This is the maximum cost if all Members join)	54
Total	1,037

Impact of the Second Year of the Provisional Local Government Settlement (2027/28)

- 2.13 The 2027/28 financial year represents the second year of the Government's three-year Local Government Finance Settlement. The implications of this are outlined in the table below:

Reduced funding certainty beyond 2028/29	Whilst the three-year settlement provides a degree of short-term stability, it does not extend beyond 2028/29. For Bromsgrove District Council, the changes reflect the application of the new needs-based funding formula and stability is largely provided by transitional funding phased in over three years. While this provides some short-term stability, this protection is temporary, and the Council will need to continue to plan for a lower underlying funding baseline in future years with a potential loss of funding of £0.754m after 2028/29.
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Funding assumptions are fixed but still include risks	The second year broadly assumes: • Continuation of baseline funding. This includes continuation of no new additional core funding uplift beyond inflation for district councils. When combined with ongoing service pressures and demand, this places continued pressure on Bromsgrove's revenue budget and reinforces the need for prudent financial planning. • Stability of Core Spending Power assumptions • Continuation of Council Tax Flexibility. District Council retain the ability to increase council tax within referendum limits. For Bromsgrove, this means that ongoing financial sustainability remains reliant on maximising allowable council tax increases alongside income generation and savings, as no additional local tax-raising powers have been introduced. However, these remain subject to national policy changes including: • Revisions to grant allocations • Changes to New Homes Bonus or other legacy streams • New Burdens funding may not fully meet costs
Inflation and cost pressures not fully reflected in settlement funding	The settlement does not fully compensate for: • Pay Inflation (settlement for 2026/27 has been agreed at 3.3%) • Contract inflation and increases in fuel costs • As a result, real-term funding reductions are expected and

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	will require ongoing efficiencies.
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Impact of Local Government Reorganisation

- 2.14 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 and smaller unitaries are expected to engage in reorganisation discussions, with elections for new governance models anticipated in May 2027. Work has taken place to produce a 'two unitary' bid to Government, with the outcome expected to be announced in July 2026.
- 2.15 The Medium Term Financial Plan covers the period 2027/28 – 2030/31. This coincides with the timetable for Local Government Reorganisation, with vesting day expected to be 1 April 2028.
- 2.16 This creates uncertainties around funding allocations from this date and whether they will transfer directly to the successor authority. Consideration will also need to be given to the treatment of reserves, balances and ongoing commitments and how they will be transferred over to the new organisation.

3. FINANCIAL IMPLICATIONS

- 3.1 The Financial Implications are outlined in the main body of this report.

4. LEGAL IMPLICATIONS

- 4.1 The Council is required to set a balanced budget each year. Prudent use of reserves to smooth the impact on the local taxpayer is permitted.

5. OTHER - IMPLICATIONS

Local Government Reorganisation

- 5.1 The Medium Term Financial Plan period runs from 2027/28 to 2030/31. If vesting day happens on 1 April 2028, consideration needs to be given to the financial position after this date and the impact on any successor authority.

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Relevant Council Priority

- 5.2 Financial resilience and good governance underpin the council's ability to meet all of its priorities.

Climate Change Implications

- 5.3 None directly as a result of this report.

Equalities and Diversity Implications

- 5.4 No adverse impacts as a result of the content of this report

6. RISK MANAGEMENT

- 6.1 The financial position of the Council is included in the corporate risk register for the Council.

7. COMMUNITY IMPLICATIONS

- 7.1 There are no Community implications as a result of this report.

7. APPENDICES and BACKGROUND PAPERS

Appendix 1 – Budget Review

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Appendix 1 – Budget Review

All Assistant Directors have input into a budget review to assess the sustainability of the Council's underlying financial position. The following represent key findings which will be addressed as part of the MTFP and Budget Processes:

Budget Process

Across most areas of the Council there is a consistent desire for a clear, agreed, and transparent budget baseline. Assistant Directors are often unable to confidently articulate what their budget is, how it has changed from prior years, or what assumptions (inflation, growth, savings, income) underpin it. Budgets are described as historic, fragmented, and to date have not formally been signed off, meaning there is no single version of the truth. This creates a fundamental risk to accountability, as services cannot be held to deliver against a baseline they do not fully understand or recognise. The priority is to establish a standardised, organisation wide budget framework, based on simple, accessible summaries for each area, clear year-on-year reconciliation, and a formal sign-off process to confirm ownership and understanding. This will be completed over the summer period.

The budget process will need to incorporate workforce, budget management and income issues (identified below) and this may necessitate a revised in-year budget strategy alongside a more formulaic review of the 2027/28 budget and Medium Term Financial Plan.

Workforce and Staffing

Workforce costs are a major and unstable driver of financial performance, with repeated evidence of reliance on agency staff, recruitment delays, and unresolved structural issues in staffing models. At the same time, savings assumptions are being met through vacancy turnover rather than planned action, creating a false sense of financial control. This combination drives both cost volatility and operational risk, with services either overpaying (via agency) or under resourced, or possibly both. Without intervention, this will continue to undermine both service delivery and financial sustainability. Next steps will require active workforce planning aligned to budget strategy, including reducing agency reliance, improving recruitment timelines, and identifying structural changes to staffing establishments that deliver permanent and sustainable savings.

Budget Management

There are clear difficulties in how budgets are actively managed once set, including unclear cross subsidies, outdated recharge mechanisms, inconsistent use of reserves, and limited visibility of contract and funding risks. Implications may include services subsidising others without explicit agreement, historic cost splits that no longer reflect demand, and reserves being held without a clear deployment strategy. This creates a situation where underlying financial issues are hidden rather than

addressed, increasing long term risk. The proposed approach is to move toward active and transparent financial management, where service costs are fully understood, subsidies are explicit and agreed, recharges are regularly reviewed and evidenced, and reserves are strategically planned to support transformation and risk mitigation.

Income

Income assumptions across several services are misaligned with reality, often due to historic targets not being updated for changes in demand, pricing decisions, or external factors. In some cases, decisions or revisions (e.g. fee reductions) have not been fully reflected in budgets, which will create persistent structural deficits. This reduces the credibility of budgets and creates ongoing in year pressures that may not be fully resolved operationally. The necessary approach will be to establish a robust income strategy, where income targets are reset to reflect current conditions, regularly reviewed, and clearly linked to policy decisions, with a structured approach to addressing gaps through pricing, demand management, or service redesign.

Finance Systems

While appropriate and robust financial data exists, it is often not readily accessible or usable by budget holders. The TechOne system is widely seen as difficult to use, leading to heavy reliance on finance teams to produce spreadsheets and interpret information. This is inefficient and introduces human error risk and reduces the capacity of the finance team to advise and add value. Capacity and capability levels vary, and training is not embedded. This limits transparency, slows decision making, and reduces accountability at a service level. The response will be to develop a fit-for-purpose reporting and systems environment, focused on simple dashboards, consistent outputs, and improved usability. Alongside this, a structured training programme would enable budget holders to independently access and interrogate their financial information.

Alignment

Across the organisation, there is evidence that known financial issues are not always being addressed due to communication, capacity, or constrained decision making, possibly linked to timing within the financial cycle. Opportunities to reset budgets earlier in the year are missed, and reporting cycles (e.g. quarter one not reaching committee until months later) reduce the ability to act in a timely way. This results in a reactive rather than proactive approach, with structural issues persisting. There is a clear need for earlier, evidence based decision making, supported by improved forward planning, clearer escalation routes for unresolved issues, and better alignment between financial reporting cycles and strategic decision points. A revised, in year budget strategy would seek to address many of these current issues and create the conditions for stronger alignment in the future.

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Treasury Management Outturn Report 2025/26

Relevant Portfolio Holder	Councillor Nock – Portfolio Holder for Finance and Governance
Portfolio Holder Consulted	Yes
Relevant Head of Service	Debra Goodall
Report Authors	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
Key Decision	
If you have any questions about this report, please contact the report author in advance of the meeting.	

1. SUMMARY

The purpose of this report is to set out the annual outturn for 2025/26 on the Council's Capital and Treasury Management Strategies, including all prudential indicators.

2. RECOMMENDATIONS

Cabinet are asked to:

- **Recommend the Council's Treasury performance for the financial year 25/26.**
- **Recommend 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 report includes the requirement in the 2021 Code, mandatory from 1st April 2023, of reporting the treasury management prudential indicators. The non-treasury prudential indicators are incorporated in the Authority's normal quarterly revenue report.

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- 3.3 The Authority's treasury management strategy for 2025/26 was approved in February 2025. The Authority has invested and borrowed substantial sums of money and is therefore exposed to financial risks including the loss of invested funds and the revenue effect of changing interest rates. The successful identification, monitoring and control of risk remains central to the Authority's treasury management strategy.

External Context

- 3.4 **Economic background:** The financial year was largely dominated by two periods of significant uncertainty and volatility. The first being the US trade tariff 'Liberation Day' in April 2025 and the second was the US/Israel war with Iran at the end of February 2026.
- 3.5 After the initial fallout from US trade tariffs, the following months saw some improvements as equity markets made gains and bond yields eased modestly. However, in the UK this trend in bond yields reversed somewhat as an uncertain economic outlook together with concerns around the government's fiscal position and autumn Budget saw 'term premia' rise as investors demanded a higher return for holding gilts.
- 3.6 The Budget itself was more muted than had been expected. Despite a weak economic outlook, this helped UK markets perform better with gilt yields trending downwards, inflation easing, and expectations for cuts in Bank of England (BoE) Bank Rate increasing.
- 3.7 The end of February 2026 saw the start of the war between US/Israel and Iran. The conflict caused oil and other commodity prices to rise sharply as the shipping lanes in the region became effectively closed, restricting global oil supply. At the end of the period, the economic outlook remained highly uncertain in terms of its impact on inflation as well as countries' fiscal and monetary policy conditions around the globe.
- 3.8 Prior to the start of the war, headline UK consumer price inflation (CPI) inflation had generally been trending downwards, albeit the 3% in February 2026 was unchanged from January. Core CPI also stayed put at 3.1%. Inflation was expected to fall further over the coming months to the BoE's 2% target, but the war changed this. Inflation is now expected to rise again, but how quickly and by how much depends on the duration of the war and how long commodity prices are elevated.
- 3.9 The Office for National Statistics (ONS) reported the UK economy expanded by 0.1% in Q4 2025. This followed previous modest gains of 0.2% in Q2 and by 0.1% in Q3. Of the subsequent monthly figures, the ONS estimated that GDP showed no growth in January 2026. As this is from before the war started the impact on growth will not be seen formally in the data for a couple more months.

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- 3.10 While the most recent labour market figures were slightly better than expected, the general trend has been one of persistent weakness. In the three months to January 2026, the unemployment rate rose to 5.2% (from 5.1%), while the employment rate held at 75.1%. Despite inflation being expected to rise in the coming months, labour market conditions remain loose and so any upward pressure on wages from general inflation is likely to be tempered by the weaker labour market environment.
- 3.11 After cutting Bank Rate to 3.75% in December 2025, the BoE's Monetary Policy Committee (MPC) voted 5-4 to hold rates in February 2026 and then unanimously to do so again in March. Until the war started, financial markets were expecting Bank Rate to be cut to 3.5% at the March meeting. However, the conflict in the Middle East quickly changed this. The MPC noted the risks to both inflation and growth and indicated they could move rates either up or down depending on the conditions. Financial markets quickly responded to this by pricing in rate hikes.
- 3.12 Following the March MPC meeting, Arlingclose, the authority's treasury adviser, revised its central interest rate view and now predicts Bank Rate will be held at 3.75%. However, the conflict makes the outlook for rates highly uncertain. In the short-term the risks are to the upside with the chance of higher Bank Rate should the MPC decide it wishes to quickly quash potential second-round effects from higher inflation. Further out, if Bank Rate is hiked quickly, the pace and magnitude of subsequent cuts could take it far lower than was previously anticipated as policymakers add significant stimulus to a much weaker economic growth outlook.
- 3.13 The US Federal Reserve had been cutting rates over the period, reducing Fed Funds Rate target range by 0.25% at its December meeting to 3.50%-3.75%. At the three subsequent meetings, the rate was held at the same range. Policymakers noted that while inflation was elevated, economic activity had been expanding but the war with Iran made the path of monetary policy highly uncertain. Despite this, the Fed still suggested that further rate cuts were likely in 2026 and 2027.
- 3.14 The European Central Bank (ECB) has kept its key interest rates on hold since June 2025, maintaining the deposit rate at 2.0% and main refinancing rate at 2.15%. At its March 2026 meeting, the ECB noted the war in the Middle East had significantly increased uncertainty, creating upside risks for inflation and downside risks for growth, leading it to revise up its forecasts accordingly.
- 3.15 **Financial markets:** After declining sharply early in the financial year following the announcement of US tariffs, sentiment in financial markets had improved but equity and bond markets remained volatile throughout. However, the latter part of the period was dominated by the US/Israel war with Iran, which saw equity markets fall sharply, and

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bond yields rise as concerns over the inflationary impact from sharply higher oil and other commodity prices outweighed the flight-to-quality into government bonds often seen in conflicts.

- 3.16 Equity markets had been registering gains after the declines during the April sell-off, but the war reversed this and markets saw another sharp drawdown. Both the FTSE 100 and 250 fell by around 10% over the month from the start of the conflict to the end of the financial year.
- 3.17 The period saw significant volatility in gilt yields. The 10-year UK benchmark gilt yield started the year at 4.65% and ended at 4.86%. However, over this time the 10-year yield hit a low of 4.23% and a high of 4.95% in the space of a month. It was a similar picture for the 20-year gilt which started at 5.18% and ended at 5.45% with a low and high of 4.92% and 5.55% respectively. The Sterling Overnight Rate (SONIA) averaged 4.01% over the 12 months to 31st March.
- 3.18 **Credit review:** Arlingclose maintained its recommended maximum unsecured duration limit on most of the banks on its counterparty list at 6 months. The other banks remain on 100 days.
- 3.19 Earlier 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. Fitch later upgraded Clydesdale Bank and HSBC, but downgraded Lancashire CC and Close Brothers.
- 3.20 Moody's affirmed OP Corporate's rating at Aa3 In May 2025. Later in the period, Moody's upgraded Transport for London, Allied Irish Banks, Bank of Ireland, Toronto-Dominion Bank, DZ Bank, Nordea and HSBC and downgraded Close Brothers. In the last quarter of 2025 S&P upgraded Clydesdale Bank, Allied Irish Banks and Bank of Ireland, and assigned Warrington Council a BBB+ rating.
- 3.21 After spiking in April 2025 following the US trade tariff announcements, UK credit default swap (CDS) prices had trended down before picking up modestly in October and November. After declining again in December and into the new calendar year, they rose sharply once again when the war in the Middle East started. They were still elevated at the end of the period, but prices for all banks on Arlingclose's counterparty list remained within limits deemed satisfactory for maintaining credit advice at current durations.
- 3.22 Overall, European banks' CDS prices have generally been flatter and lower compared to the UK, as have Singaporean and Australian lenders while some Canadian bank CDS

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prices have remained elevated since the beginning of the period in part due to ongoing trade tensions with the US.

- 3.23 Financial market volatility is expected to remain, and CDS levels will be monitored for signs of ongoing credit stress. As ever, the institutions and durations on the Authority's counterparty list recommended by Arlingclose remain under constant review.

Local Context

- 3.24 On 31st March 2026, the Authority had net investing of £1.91m arising from its revenue and capital income and expenditure. The underlying need to borrow for capital purposes is measured by the Capital Financing Requirement (CFR), while balance sheet resources are the underlying resources available for investment. These factors are summarised in Table 1 below.

Table 1: Balance Sheet Summary

	31.3.25	31.3.26
	Actual	Actual
	£m	£m
General Fund & Regeneration CFR	31.26	31.09
Total CFR	31.26	31.09
External borrowing**	0	-15.00
Internal borrowing	31.26	16.09
Less: Usable reserves	-11.27	-14.18
Less: Working capital	-3.10	-3.10
Net borrowing	16.89	-1.91

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

- 3.25 The treasury management position at 31st March and the change during the year is shown in Table 2 below.

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Table 2: Treasury Management Summary

	31.3.25 Balance £m	Movement £m	31.3.26 Balance £m	31.3.26 Rate %
Long-term borrowing				
- PWLB				
- LOBOs				
- Other				
Short-term borrowing	0	-15.00	-15.00	5.30%
Total borrowing	0	-15.00	-15.00	
Long-term investments				
Short-term investments	4.20	-4.20	0.00	5.00%
Cash and cash equivalents				
Total investments	4.20	-4.20	0.00	
Net borrowing	4.20	-19.20	-15.00	

Borrowing Strategy and Activity

- 3.26 As outlined in the treasury strategy, the Authority's chief objective when borrowing has been to strike an appropriate risk balance between securing lower interest costs and achieving cost certainty over the period for which funds are required, with flexibility to renegotiate loans should the Authority's long-term plans change being a secondary objective. The Authority's borrowing strategy continues to address the key issue of affordability without compromising the longer-term stability of the debt portfolio.
- 3.27 Gilt yields slightly decreased over most of the period; reflecting expectations of lower interest rates, a tepid economy and to some extent an improvement in the UK governments fiscal position following tax rises in the autumn budget. Subsequent to the war in the Middle East however, gilt yields saw a rapid rise to above the yield at the beginning of the financial year.
- 3.28 The PWLB certainty rate for 10-year maturity loans was 5.38% at the beginning of the period and 5.72% at the end. The lowest available 10-year maturity certainty rate was 5.13% and the highest was 5.88%. Rates for 20-year maturity loans ranged from 5.71% to 6.37% during the period, and 50-year maturity loans from 5.46% to 6.24%. The cost of

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short-term borrowing from other local authorities has been similar to or a little above Base Rate for most of the period, with interest rates between 4.0% and 4.5%. However, as is commonly seen, rates rose higher towards the end of the financial year, with rates of 5.0% - 7.0% being seen.

3.29 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.

3.30 **Loans Portfolio:** At 31st March the Authority held £15m of loans, as part of its strategy for funding previous and current years' capital programmes. Outstanding loans on 31st March 2026 are summarised in Table 3 below.

Table 3: Borrowing Position

	31.3.25 Balance £m	Net Movement £m	31.3.26 Balance £m	31.3.26 Weighted Average Rate %	31.3.26 Weighted Average Maturity (years)
Public Works Loan Board		10.00	10.00	4.29	1
Banks (LOBO)					
Banks (fixed-term)					
Local authorities (long-term)					
Local authorities (short-term)	0	5.00	5.00	5.3%	0.25
Total borrowing	0	15.00	15.00		

Treasury Investment Activity

3.31 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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- 3.32 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 £0.5 and £14.0 million due to timing differences between income and expenditure. The investment position is shown in table 4 below.

Table 4: Treasury Investment Position

	31.3.25	Net	31.3.26	31.3.26
	Balance	Movement	Balance	Weighted Average Maturity
	£'000	£'000	£'000	days
Banks & building societies (unsecured)				
Banks & building societies (secured deposits)				
Government	0.00	0.00	0.00	0
Local authorities and other govt entities				
Corporate bonds and loans				
Money Market Funds	4.20	-4.20	0.00	26
Total investments	4.20	-4.20	0.00	

- 3.33 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.
- 3.34 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.
- 3.35 Bank Rate reduced from 4.50% to 4.25% in May 2025, followed by a further reduction to 4.00% in August 2025 and to 3.75% in December 2025. Short term interest rates have largely followed these levels. The rates on DMADF deposits ranged between 3.9% and

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4.45% and money market rates between 3.4% and 4.2%.

Non-Treasury Investments

- 3.36 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).
- 3.37 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

- 3.38 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
<i>Government (incl. local authorities)</i>	15.00	10.00	-5.00
Total borrowing	15.00	10.00	-5.00
<i>Short-term Investments</i>	0.00	0.00	0.00
Total treasury borrowing	15.00	10.00	-5.00

MRP Regulations

- 3.39 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

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after 7th May 2024 sufficient MRP must be charged so that the outstanding Capital Financing Requirement (CFR) in respect of the loan is no higher than the principal outstanding less the Expected Credit Loss (ECL) charge for that loan.

- 3.40 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

- 3.41 The Director of Finance and Section 151 officer reports that all treasury management activities undertaken during the year 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	31.3.26 Actual	Complied? Yes/No
Any single organisation, except the UK Government	£4m each	£0m	Yes
UK Central Government	Unlimited	£0m	Yes
Unsecured investments with banks and building societies	£2.5m in total	£0m	Yes
Loans to unrated corporates	£1m in total	£0m	Yes
Money Market Funds	£20m in total	£0m	Yes
Foreign countries	£5m per country	£0m	Yes
Real Estate Investment Trusts	£2.5m in total	£0m	Yes

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

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Table 7: Debt and the Authorised Limit and Operational Boundary

	2025/26 Maximum	31.3.26 Actual	2025/26 Operational Boundary	2025/26 Authorised Limit	Complied? Yes/No
Borrowing	50.00	15.00	50.00	55.00	Yes
PFI and Finance Leases	1.50	0	1.50	1.50	Yes
Total debt	51.50	15.00	51.50	56.50	

- 3.43 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

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

Liability Benchmark

- 3.45 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 Actual	31.3.26 Actual	31.3.27 Forecast	31.3.28 Forecast
Loans CFR	31.26	31.09	36.26	37.71
Less: Usable Reserves	-11.27	-14.18	-10.42	-10.02
Less: Working Capital	-3.10	-3.10	-3.10	-3.10
Net loans requirement	16.89	13.81	22.74	24.59
Plus: Liquidity allowance	0.20	0.20	0.20	0.20
Liability benchmark	17.09	14.01	22.94	24.79
Existing borrowing	0	15.00	10.00	5.00

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- 3.46 Following on from the medium-term forecast above, the long-term liability benchmark assumes capital expenditure funded by borrowing of £11.10m, minimum revenue provision on new capital expenditure based on a 40 year asset life and income, expenditure and reserves all increasing by inflation of 2% p.a. This is shown in the chart below together with the maturity profile of the Authority's existing borrowing.

Maturity Structure of Borrowing

- 3.47 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	31.3.26 Actual	Complied?
Under 12 months	100%	0%	100%	Yes
12 months and within 24 months	100%	0%	0%	Yes
24 months and within 5 years	100%	0%	0%	Yes
5 years and within 10 years	100%	0%	0%	Yes
10 years and above	100%	0%	0%	Yes

- 3.48 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

- 3.49 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
Limit on principal invested beyond year end	£1.0m	£0.5m	£0m
Actual principal invested beyond year end	0	0	0
Complied?	Yes	Yes	Yes

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

Additional indicators

Security:

- 3.51 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	31.3.26 Actual	Complied?
Portfolio average credit rating	A	-	Yes

Liquidity:

- 3.52 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.

	2025/26 Target	31.3.26 Actual	Complied?
Total cash available within 3 months	£2.5m	£2.5m	Yes
Total sum borrowed in past 3 months without prior notice	Nil	Nil	Yes

Interest Rate Exposures:

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

Interest rate risk indicator	2025/26 Target	31.3.26 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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3.54 For context, the changes in interest rates during the year were:

	1/4/25	31/3/26
Bank Rate	4.50%	3.75%
1-year PWLB certainty rate, maturity loans	4.82%	5.04%
5-year PWLB certainty rate, maturity loans	4.94%	5.28%
10-year PWLB certainty rate, maturity loans	5.38%	5.72%
20-year PWLB certainty rate, maturity loans	5.88%	6.23%
50-year PWLB certainty rate, maturity loans	5.63%	6.04%

3.55 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.

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.

Local Government Reorganisation

4.4 The level of debt and investments the Council holds will transfer over to the new unitary on vesting day.

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Relevant Council Priority

- 4.5 Financial resilience and good governance underpin the council's ability to meet all of its priorities.

Climate Change Implications

- 4.6 None directly as a result of this report.

5. RISK MANAGEMENT

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

6. COMMUNITY IMPLICATIONS

There are no Community implications as a result of this report.

7. APPENDICES

None

8. BACKGROUND PAPERS

MTFP 2025/26 – February 2025 which contains the years Capital Strategy, Treasury Management Strategy and MRP Policy.

AUTHOR OF REPORT

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Financial Outturn Report 2025/26

Relevant Portfolio Holder	Councillor Simon Nock
Portfolio Holder Consulted	Yes
Relevant Head of Service	Debra Goodall
Report Authors	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
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 set out the Council's Revenue and Capital Outturn position for the financial year April 2025 to March 2026. The Outturn Report is a management report that complements the quarterly financial monitoring reports, produced in a consistent format to aid review.

2. RECOMMENDATIONS

Cabinet is asked to RESOLVE that:

- 2.1. The 2025/26 revenue outturn position is an overspend of £5,480 which will be funded by an allocation from General Fund Balance.
- 2.2. The General Fund Opening Balance of £13.382m will be reduced to £13.150m as a result of this overspend and the net transfer to Ward Budget Reserves previously agreed with members
- 2.3. The 2025/26 capital outturn position is £16.943m spend against a total approved programme of £21.877m. The net balance of £4.934m will be carried forward and included within the 2026/27 capital programme.
- 2.4. The Ward Budget allocation for 2025/26 of £62,000 had approved allocations at £55,402 as at 31 March 2026, resulting in £6,598 which is transferred to General Fund reserves.
- 2.5. The balance of Earmarked Reserves as at 31 March 2026 is £14.169m.
- 2.6. There is an updated procurement position set out in Appendix D, with any new items over £200k to be included on the forward plan.

3. KEY ISSUES

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Financial Implications

- 3.1 This report sets out the draft financial outturn revenue and capital performance of the Council for 2025/26 against budget.
- 3.2 The £15.3m full year revenue budget included in the table below is the budget that was approved by Council in February 2025. The budgets were revised during the year to allow for efficiency and salary savings.
- 3.3 The Finance team have undertaken a detailed review of the 2025/26 accounts since year end including:
- Accruals and prepayments,
 - Grants are applied to known expenditure and remaining balances are carried forward,
 - Reserves are applied to known expenditure,
 - Shared service recharges between Redditch Borough and Bromsgrove District Councils where a shared service arrangement exists and
 - Transfers between the Collection Fund and the General Fund.

Revenue Position

- 3.4 The revenue outturn position is a £5,480 overspend as shown in Table 3 below. This shows a favourable net £308,203 movement since the position reported at Q3. The movement from Q3 to Outturn is summarised in Table 4 at paragraph 3.5. Two key, year-end amendments making up this movement were staff capitalisation and VAT adjustments; these are shown in tables 1 and 2 below.

A salary capitalisation exercise is completed at the end of year to identify staffing costs that should be correctly charged to the capital programme. In future years, an estimate of potential capitalisation will be built into projected spend as part of the quarterly monitoring. As at 31 March 2026, the Council recharged a proportion of time spent (salary) against the capital projects undertaken during the year (reducing revenue spend and increasing charges to the capital programme) as follows:

Table 1 – Staff Capitalisation

BDC services	Net amount
Business Transformation & Organisation Development	- 105,192.00
Community and Housing Services	- 47,288.00
Corporate Services	- 18,045.00
Environmental Services	- 196,855.00
Legal and Democratic Services	- 72,716.00
Regeneration & Property Services	- 309,580.00

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Grand Total (reduced revenue expenditure)	- 749,676.00
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There was also an impact on the outturn position of VAT adjustments as a result the Error Correction Notices submitted over the year, and shown in the following table:

Table 2 – VAT Correction

BDC services	Net amount
Business Transformation and Organisational Development	- 8,189.95
Community and Housing GF Services	45,242.21
Corporate Services	60.50
Environmental Services	19,246.58
Worcester Regulatory Services	7,010.57
Regeneration & Property	167,842.48
Legal & Democratic services	10,359.86
Planning and Leisure Services	164,746.96
Grand total increased revenue expenditure	406,319.21

The subsequent Outturn position is as per Table 3 below:

Table 3 Overall Outturn Position

Service Description	2025-26 Approved Budget	2025-26 Revised Budget	2025-26 Actual Spend	Full Year Outturn Variance	Projected Variance at Q3	Change in variance
Business Transformation and Organisational Development	2,197,136	1,994,442	1,825,546	-168,896	(23,514)	(145,382)
Community and Housing GF Services	1,402,751	1,273,820	1,170,328	-103,492	285,783	(389,275)
Corporate Services	885,935	2,082,097	1,196,982	-885,115	(864,151)	(20,964)
Environmental Services	4,266,050	4,153,738	5,070,184	916,446	883,792	32,654
Financial and Customer Services	2,387,557	2,346,975	3,215,544	868,569	674,151	194,418
Legal, Democratic and Elections Services	1,178,898	1,160,541	1,074,565	-85,976	58,320	(144,296)
Planning and Leisure Services	1,250,320	1,009,686	1,195,708	186,022	(7,339)	193,361
Regeneration & Property	1,099,949	640,297	575,156	-65,141	176,832	(241,973)
Regulatory Client - Commissioning Role	646,139	653,139	707,142	54,002	99,359	(45,357)
Grand Total	15,314,735	15,314,735	16,031,155	716,420	1,283,233	(566,813)
Service Description	2025-26 Approved Budget	2025-26 Revised Budget	2025-26 Actual Spend	Full Year Projected Variance Q2	Projected Variance at Q3	Change in variance
Corporate Financing	(15,314,735)	(15,314,735)	(16,025,675)	-710,940	(969,550)	258,610
Grand Total	(15,314,735)	(15,314,735)	(16,025,675)	(710,940)	(969,550)	258,610
TOTALS	0	0	5,480	5,480	313,683	(308,203)

- 3.5 The overall variance of £5,480 results from an overspend of £716,420 against service spending, offset by an underspend of £710,940 from corporate financing due to additional grant funding and investment income received. Against a budget of £15.314m, the service overspend represents a variance of 4.68%. The service spending moved from Q3 £1.283m to £0.716m at year end, a positive movement of £0.567m mainly due to the

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net impacts of the capitalisation recharge (-£0.750m) and VAT correction (+£0.406m) noted above plus the allocation of grant funding at year end. A small increase in spend of £0.046m across all service areas between quarters has delivered what is, overall, an insignificant overspend of £5,480. The movement between Q3 and Outturn is summarised in the following table:

Table 4 Movement from Quarter 3 to Outturn

	Service Expenditure (£)	Corporate Financing (£)	Net position (£)
Position at Q3	1,283,233	-969,550	313,683
Capitalisation of salary costs (Q4)	-749,676	0	-749,676
Impact of VAT Error Correction Notice in year	406,319	0	406,319
Variances to Q3 projections at Q4 (see supplementary tables below)	46,544	-11,390	35,154
Allocation of grants from Corporate Financing to Services	-270,000	270,000	0
Position at Outturn	716,420	-710,940	5,480

- 3.6 The following paragraphs set out the year end variances for each service area against the 2025/26 revenue budget:

Business Transformation & Organisational Development – outturn position £169k underspend

Supplementary Table 3.6a

Key Variances	Variance (£'000)	Explanation
Capitalisation (Table 1)	-105	Staffing charged to the capital programme as part of £0.75m adjustment at year end.
VAT Impact (Table 2)	-8	Minor VAT adjustments.
Training	-60	Training savings were realised this year. This is a one-off and will not be repeated in 2026/27
Street Naming and Numbering	-47	Additional income was raised from street naming and numbering. Street naming and numbering income is restricted by the number of new properties developed in the area, so the total received each year varies.

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Apprenticeship Budget	+61	Corporate contributions to the apprenticeship levy were over-committed in the year. There was a pressure bid put in 25/26 to increase the budget to avoid overspend in the 26/27 financial year.
Other Variances	-10	Other minor variances across the service
Outturn Position	-169	

Community and Housing Services - outturn position £103k underspend

Supplementary Table 3.6b

Key Variances	Variance (£'000)	Explanation
Capitalisation (Table 1)	-47	Staffing charged to the capital programme as part of £0.75m adjustment at year end.
VAT Impact (Table 2)	+45	£17.2k relates to the social prescribing contract which PSTax have advised is VATable, £11.4k relates to Domestic Abuse Services, £7.9k relating to Static Temporary Accommodation and £6.1k Homelessness Services (all found to be contracts where VAT should be standard rated) and other minor adjustments.
CCTV Infrastructure	-72	Income from Wyre Forest District Council for CCTV has increased by £12k against the original budget of £42k. This is due to additional cameras being monitored. CCTV infrastructure is moving to more modern wireless transmission leading to increased costs. Transition from fibre to wireless will continue through to August 2026 resulting in a lower cost over that period. The 25/26 fibre cost was £20k below budget. Some of the planned upgrades have yet to be completed which will create a pressure in the 2026/27 budget that will need to be reviewed.
CLG Homelessness	-71	The Communities and Local Government (CLG) Homelessness

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		underspend of £71k is for the new MRI housing management system for housing register, homelessness and Choice Based Lettings. The supplier invoiced Bromsgrove District Housing Trust (BDHT) rather than BDC and we are waiting for a revised invoice.
Climate Change	-23	The Climate Change budget of £37k has ongoing commitments of £14k for an annual contract. The resulting underspend of £23k will be reviewed as part of the 27/28 MTFP process.
Homelessness	+66	This is primarily due to rising demand associated with bed and breakfast accommodation. A Low-Cost Housing Capital Receipts Report is being considered as a separate item on this agenda. This seeks approval for all low-cost housing receipts to be used by the Council to increase the supply of temporary accommodation by purchasing suitable dwellings. This should reduce the cost of Bed and Breakfast in future years.
Other variances	-1	Other minor variances across the service
Outturn Position	-103	

Corporate Services – outturn position £885k underspend

Supplementary Table 3.6c

Key Variances	Variance (£'000)	Explanation
Capitalisation (Table 1)	-18	Staffing charged to the capital programme as part of £0.75m adjustment at year end.
VAT Impact (Table 2)	0	Minor VAT adjustment rounds to zero.
Vacancy Management, Inflation and Utilities	-956	There are savings of £956k due to achievement on vacancy management, corporate efficiencies other savings in inflation and utility budgets across the whole Council. These savings are one off.

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Local Government Reorganisation	+22	Communication costs of £7k relating to Local Government Reorganisation (LGR) which is a one off charge. Additional cost due to a Local Government Reorganisation appraisal report of £59k, which was partially offset by LGR grant income of £37k. Any LGR costs in future years will be met from the LGR reserve.
Postages	+21	There are £21k additional postage costs relating to the cost of this across the whole council and the cost of this has been reflected within the MTFP for 2026.
Other Variances	+46	There is an adverse variance relating to other costs of £46k.
Outturn Position	-885	

Environmental Services – outturn position £916k overspend

Supplementary Table 3.6d

Key Variances	Variance (£'000)	Explanation
Capitalisation (Table 1)	-197	Staffing charged to the capital programme as part of £0.75m adjustment at year end.
VAT Impact (Table 2)	+19	VAT adjustment largely relating to the Place Team (£12.8k relating to annual grass cutting and abandoned vehicles contracts for which income was not treated as VATable) and £5.1k of taxable Trade Waste Operations and other minor adjustments.
Waste Management Fleet	+977	The majority of the service overspend is due to additional spend above budget on Waste Management of £977k (£574k fleet maintenance and £403k Vehicle Hire). Fleet maintenance costs have increased due to several factors, including an ageing fleet, rising material costs, and difficulties recruiting HGV mechanics. This has led to some maintenance being outsourced, alongside increased vehicle hire costs to cover vehicles off the road for repair. A large-scale fleet replacement programme saw new

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		refuse vehicles delivered in the winter 2025, together with recruitment into the HGV Mechanic roles and this has already delivered significant reductions in maintenance and hire costs. Q4 performance provides clear evidence that this approach is working, and this trend is expected to continue through 26/27. Un-budgeted hire costs are expected to reduce to a minimum in 26/27 as a result of the new fleet, with Commercial Waste the only area reliant on hire vehicles whilst waiting on delivery of additional vehicles approved in December 2025 as part of service expansion. Hire costs have been built into the MTFP for this from 2026/27 accordingly.
Staffing Costs	+508	A mixture of vacant posts long and short term sickness has created an underspend of £349k. This has been offset by agency costs of £597k and £260k of overtime. Recruitment activity has continued through the end of last financial year and into 2026/27 to fill all vacant posts, alongside active management of sickness absence in accordance with Council policies. Overtime is expected to reduce now that the workshop is fully staffed.
Commercial Waste disposal	-287	There was additional income of £456k generated on Commercial Services which were offset by additional Trade Waste disposal costs of £109k and fuel costs of £60k, for which a business case to formally expand the service and adjust budget lines for 2026/27 has now been approved. Whilst the service generated a positive income, it was impacted by higher staffing and vehicle maintenance/hire costs that have been accounted for in the over-spends summarised above and resulted in a small overspend on the Commercial service in 25/26, although this was £10k less than forecast in the expansion report approved in

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		December 2025. The service is forecast to generate an additional surplus of £159k in 26/27 after all operational costs have been accounted for – subject to world events and fluctuations in associated fuel costs.
Garden Waste	-118	The Garden Waste service achieved additional income of £118k from increased subscriber numbers. The bin replacement programme provided an opportunity to positively promote the service and encourage customers to confirm or take up subscriptions, resulting in stronger than expected growth. While this level of increase is unlikely to continue at the same rate in future years, the programme has helped strengthen the customer base.
North Worcestershire Water Management Group Land Drainage service	+64	Aside from Waste Management, there is a £64k pressure relating to the Wyre Forest Contract within the North Worcestershire Water Management Group Land Drainage service. This reflects a budget shortfall identified during the year, arising from differences between the budget provision set and the actual cost of delivering the contractual arrangement. The budget position will be reviewed as part of future budget setting to ensure it is aligned with the ongoing cost of the service.
Other Variances	-50	Other minor savings of £50k in total.
Outturn Position	916	

Financial & Customer Services - outturn position £869k overspend

Supplementary Table 3.6e

Key Variances	Variance (£'000)	Explanation
Insurance Property Valuations	+50	An unbudgeted cost of £50k for Insurance Property valuations for the Insurance tender exercise for Bruton Knowles.
Agency Costs	+431	There is a nationwide staffing shortage of qualified finance personnel and there was a net overspend of £431k on

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		Agency staff to cover vacancies for which active recruitment campaigns for permanent staff had been unsuccessful. A review of the structure aims to recruit any interim posts on a permanent basis.
Housing Subsidy Loss	+382	The housing subsidy budget was re-aligned by £382k relating to changes in the level of Housing Subsidy collected within year.
VAT reconciliation exercise	+105	Additional costs of £105k on VAT support from PS Tax as part of the support for the completion of the VAT returns to HMRC.
	-99	A VAT receipt of £99k due to historical leisure services review and recalculation relating back several years represented a one-off windfall.
Outturn Position	869	

Legal, Democratic and Election Services – outturn position £86k underspend

Supplementary Table 3.6f

Key Variances	Variance (£'000)	Explanation
Capitalisation (Table 1)	-73	Staffing charged to the capital programme as part of £0.75m adjustment at year end.
VAT Impact (Table 2)	+10	Minor VAT adjustments
External Legal Costs	+13	One-off cost of 13k for external advice training and software to ensure compliance with the Procurement Act 2023
Land Charges	+10	Land Charges search costs
Software Costs	+10	Additional spend on upgrading Modern.Gov software
Shared service adjustment	-56	Roles in the team relate directly to HRA and therefore charged in full to Redditch Borough Council but not currently reflected that way in the budget. This will be corrected as part of 2027/28 budget setting.
Outturn Position	-86	

Planning and Leisure Services – outturn position £186k overspend

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Supplementary Table 3.6g

Key Variances	Variance (£'000)	Explanation
VAT Impact (Table 2)	+165	VAT adjustment of which £123k relates to Development Management Planning Fees (Pre Application Planning Fees which are VATable), £32.7k relates to VATable Building Control fees and other minor adjustments.
Parks and Events	-30	There was £30k of additional income in Parks and Events coming from Allotments due to increased lettings.
Development Management	-59	There was over achieved income of £59k in Development Management. Development Management income is dependent on external factors which makes it difficult to forecast.
Building Control	+50	Building Control under achieved income by £50k. Building Control income is dependent on external factors which makes it difficult to forecast.
Agency Costs	+31	Agency costs of £31k covering vacancies that the service is struggling to fill due to the current job market, and Planning is an area which is difficult to fill all vacancies.
Other Variances	+29	Other minor variances across the service
Outturn Position	186	

Regeneration and Property Services – outturn position £65k underspend

Supplementary Table 3.6h

Key Variances	Variance (£'000)	Explanation
Capitalisation (Table 1)	-310	Staffing charged to the capital programme as part of £0.75m adjustment at year end.
VAT Impact (Table 2)	+168	VAT adjustment of which £166.2k relates to Off Street Car Parking Income which is VATable but treated as non-VATable when imported into the TechnologyOne system.
Town Centre - Revenue	-24	£24k savings from staffing due to a vacancy within the team,

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Parkside Business Rates	-26	£26k savings on Business Rates as spend at Parkside was lower than budgeted. Will be reviewed in 2026/27 and for 2027/28 MTFP.
Parkside	-51	£51k other savings on Parkside, including underspend on maintenance, and increased income generated by room hire. The budget for income has been increased for 26/27 as additional maintenance works are to be carried out in 26/27
Multi-Storey Car Park	-27	£27k saving on budgeted costs for Multi-Storey Car Park. The Multi-storey Car Park is currently closed resulting in savings on Business Rates. Will be reviewed in 2026/27 and for 2027/28 MTFP.
Enforcement Income	-7	£7k additional Enforcement income due to an increase of income in the last quarter. Will be reviewed in 2026/27 and for 2027/28 MTFP.
Software	+17	£15k of additional costs relating to Computer Aided Design software. Will be reviewed in 2026/27 and for 2027/28 MTFP.
Car parking	+145	There were several overspending areas in the year including: maintenance of £29k, additional £47k costs associated with Permit and £11k staffing recharge from Wychavon for parking enforcement staffing. The Car Parking income budget was not revised in 2025/26 leading to an income shortfall of £58k. Together these issues delivered an overspend of £145k, some of them one-off, and a pressure bid of £82k has been drawn up for consideration in 2026/27.
Other Variances	+50	Other minor variances across the service
Outturn Position	-65	

Regulatory Client – outturn position £54k overspend

Supplementary Table 3.6i

Key Variances	Variance (£'000)	Explanation
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VAT Impact (Table 2)	+7	Minor VAT adjustments.
Management Costs	+36	Additional management costs of WRS amounting to £36k.
Licensing Income	+48	Loss of Licensing income of £48k as a result of lower than anticipated licencing volumes. This is a re-occurring year on year pattern and will be addressed in the 2027/28 budget setting process
Aqueduct Stables	-23	Underspend of £23k due to a credit relating to Aqueduct Stables
Other Variances	-14	Other variances split across areas
Outturn Position	54	

Corporate Financing – outturn position £711k underspend

Supplementary Table 3.6j

Key Variances	Variance (£'000)	Explanation
Grant Income	-163	Additional s31 grant income received to support genera expenditure
Investment Income	-191	Additional investment income of cash balances, above budget.
Interest payable	-281	Reduced borrowing costs compared to budget.
Grant income brought forwards	-200	Revenue Grants Received in 24/25 now recognised in 25/26.
Fees and Charges	+125	Underachievement of fees and charges. This needs to be reviewed during the MTFP process.
Other Variances	-1	Other minor variances across the service
Outturn Position	-711	

Capital Position

- 3.6 A capital programme for 2025/26 of £17.352m was approved by Council in February 2025.
- 3.7 Many of these schemes were already in partial delivery before the 2025/26 financial year. Net unspent budget was carried from 2024/25 to supplement the 2025/26 capital programme as shown in table 5 below.

Table 5 Capital Programme 2024/25 to 2029/30

Year	Original Budget (£)	Carried Forward from previous year (£)	Revised Budget (£)
2024/5	6,376,987	14,890,949	21,267,936
2025/6	17,351,727	4,524,714	21,876,441
2026/7	3,222,841		
2027/8	2,469,459		
2028/9	2,310,531		
2029/30	2,373,749		

3.8 Included in this funding the Council have the following Grant Funded Schemes which were 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’) are funded via £14.5m of Levelling Up funding, UKSPF funding, £2.425m of monies held in trust by Birmingham City Council on behalf of the former Greater Birmingham and Solihull Local Enterprise Partnership (GBSLEP) and up to £2.1m funded by the Council.
- For the Nailers Yard Scheme:
 - Construction is progressing on site. The revised completion date is end of September/beginning of October 2026 (previously 26th January 2026) due to culvert works and delays relating to S278 external works. The cost of the scheme has increased as a result of this.
 - GJS Dillon have received several enquiries for the commercial building. The Council is about to sign a lease for 1.5 floors of office space and is in advanced discussion with another tenant for the ground floor food and beverage unit. Both leases are expected to be signed by 1st September 2026. Bruton Knowles are instructed as property management agents for the commercial building. The operator of the Pavilion building will be Rubicon Leisure Ltd. The service level agreement has been drafted and is expected to be signed in August 2026.
- For the Windsor Street Scheme:

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- Brownfield Solutions have completed phase one ground water monitoring on site. Phase two works commenced in June 2026 which involve barrier injection works to reduce the levels of PFAS and PFOS further. This will be completed by the end of September 2026 followed by 12 months of groundwater monitoring.
 - Cabinet agreed the delivery option for residential use on the site in November 2025 and their preferred option was to deliver the site in partnership with a Registered Social Landlord (RSL). The regeneration team undertook soft market testing with RSLs to gauge interest in the site.
 - Following soft market testing with five RSLs actively seeking to develop residential schemes in Bromsgrove, a report was presented to Cabinet including their feedback with recommendations on 17 June 2026. Following the Cabinet approval, next steps would be to progress an outline planning application for the Windsor Street site. This would include the procurement of a planning consultant to support the preparation, coordination and submission of the application, alongside the commissioning of any necessary surveys and technical reports. Progressing the application at this stage would help to establish the principle and scale of development, reduce planning risk and support the timely disposal of the site in line with the approved Cabinet resolution. A budget of up to £150,000 was approved to meet the costs of progressing the outline planning application
- Public Realm work is now fully completed, and the underspend is approximately £925k.

The final business case for GBS LEP funding was signed off by Birmingham City Council on 20th January 2026. The grant funding agreement for £2.425m is in place and a claim was submitted for Q1 funding in July 2026.

In December 2025, the Government announced that the UK Shared Prosperity Fund (UKSPF) would be extended by 6 months. No additional funding has been provided but the 2025/26 allocation of £917,878, made up of a mix of capital (£286,083) and revenue (£631,795), now needs to be spent by 30 September 2026. The funds are being spent in line with the approved UKSPF Investment Plan.

- 3.9 The outturn spend on capital as at 31 March 2026 was £16.943m against a revised capital budget of £21.876m. Details of spend and variances are provided in **Appendix A**. The net underspend of £4.934m will be carried forward to 2026/27. Within this figure certain schemes have overspent by £1.653m offsetting a larger underspend of £6.587m across remaining schemes. A review of the capital programme in 2026/27 will be completed to ensure the revised programme is fully funded.

Earmarked Reserves

- 3.10 The level of earmarked reserves held by the Council at the beginning of the 2025/26 financial year was reported to Council in February 2025 as part of the 2025/26 – 2027/28 Medium Term Financial Plan (MTFP). This is shown at Appendix B and was £11.266m

as at 31 March 2025 (and therefore as at 1 April 2025). This figure was adjusted in year for the actual 2024/25 Outturn position (which was only estimated based on Q3 monitoring information at the time of the MTFP). All reserves were thoroughly reviewed for their requirement in 2025/26 and additional reserves were set up for inflationary pressures such as utility increases. At the 31 March 2026 the net position has improved, and the Council currently holds £14.169m of Earmarked Reserves for the 2026/27 financial year. Details are provided in Appendix B.

General Fund Balance

- 3.11 The General Fund Balance brought forward as at 1 April 2025 was £13.382m and as at the 31 March 2026 was £13.150m to accommodate the reported overspend of £5,480 and movement of funds to a Wards Reserve as previously agreed. The General Fund Balance movement is shown in Table 6 below and in Appendix B.

Table 6 General Fund Balance

GENERAL FUND	£m
Opening Balance	13.382
Movement in Year	
Ward Budgets – three year allocation (2025/26-2027-28)	(0.234)
Ward Budgets Underspend 2025/26	0.007
Year End Outturn	(0.005)
Closing Balance	13.150

Financial Performance

- 3.12 Council Tax collection rate data for the financial year 2025/26 is set out in the following tables. Overall, collection at 97.95% was below 0.05% below target of 98.0% although collection continues after year-end impacting on future-year collection rates.

Nationally, Council Tax collection rates have fallen compared to 2024/25 and since their post pandemic high in 2022/23. In 2025/26, average collection rates nationally were 95.6% and for Shire Districts were 97%.

Figure 1 Council Tax Collection Rate (April to March 2025/26)

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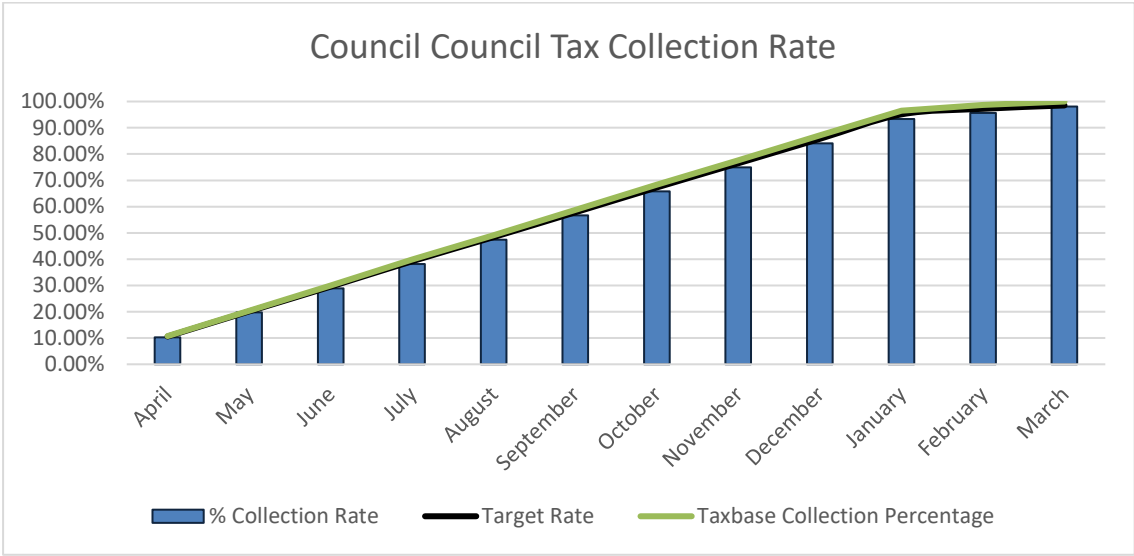


Figure 2 Monthly Council Tax Variance to target (April to March 2025/26)

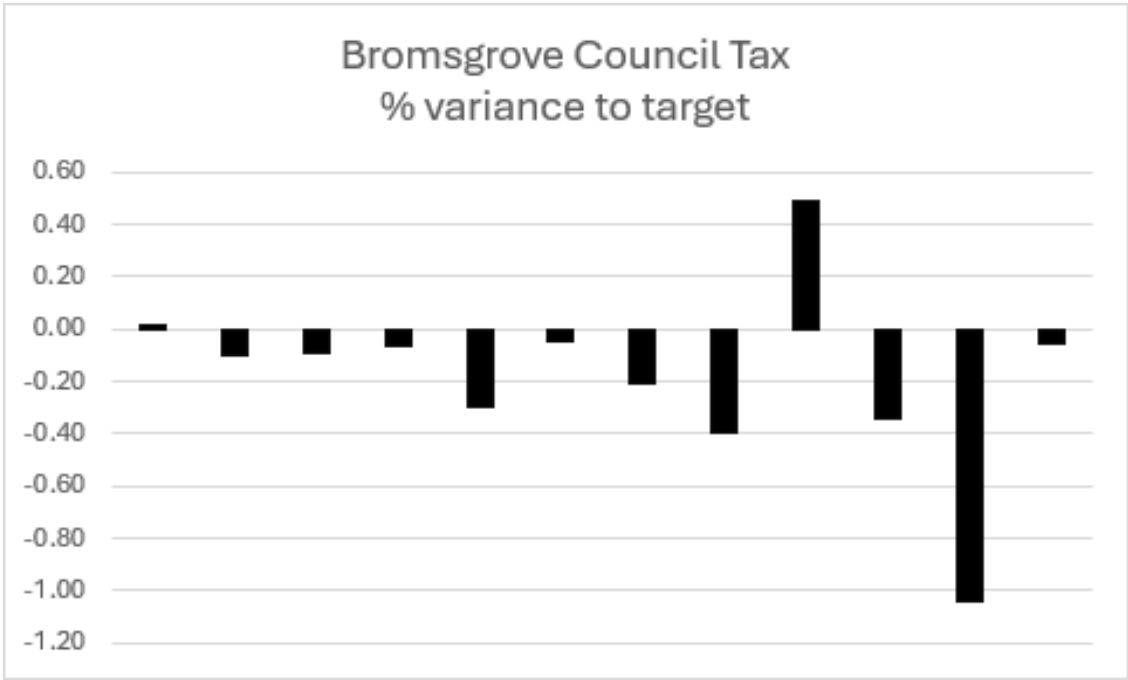
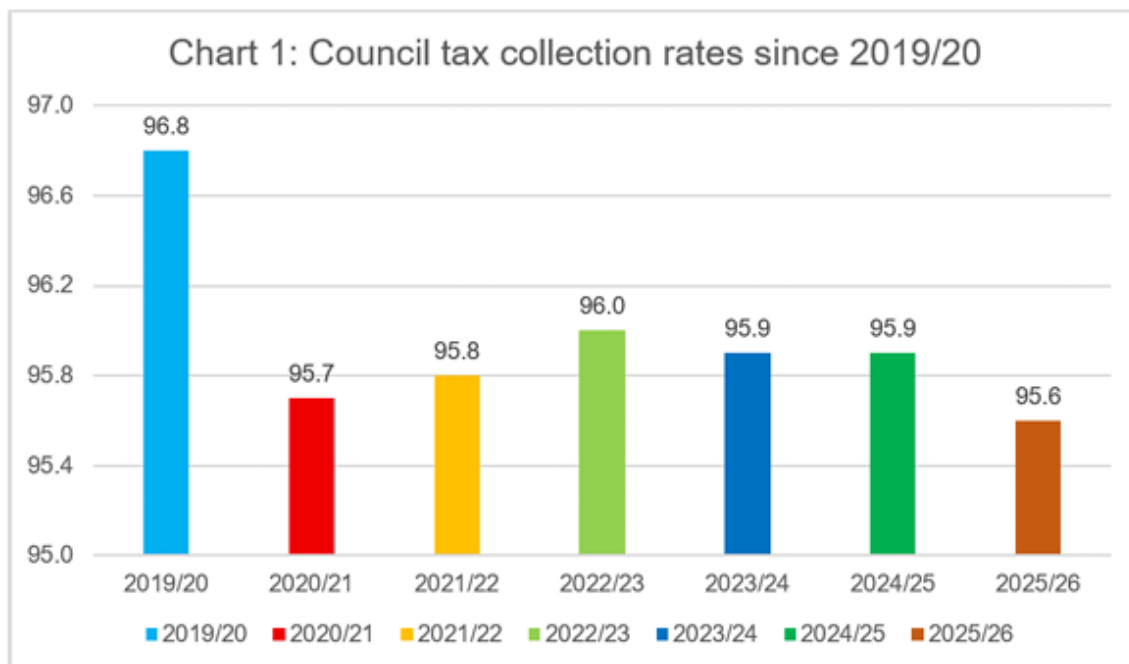


Figure 3 National Council Tax Collection Rates

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- 3.13 Non-Domestic Rates collection rate data for the financial year 2025/26 is set out in the following tables. Overall, collection at 97.5% was below 0.5% below target of 98.0% although collection continues after year-end impacting on future-year collection rates.

Nationally, Non-Domestic Rates collection rates have fallen compared to 2024/25, their post pandemic high. In 2025/26, average collection rates nationally were 96.8% and for Shire Districts were 97.3%.

Figure 4 Non-Domestic Rates Collection Rate (April to March 2025/26)

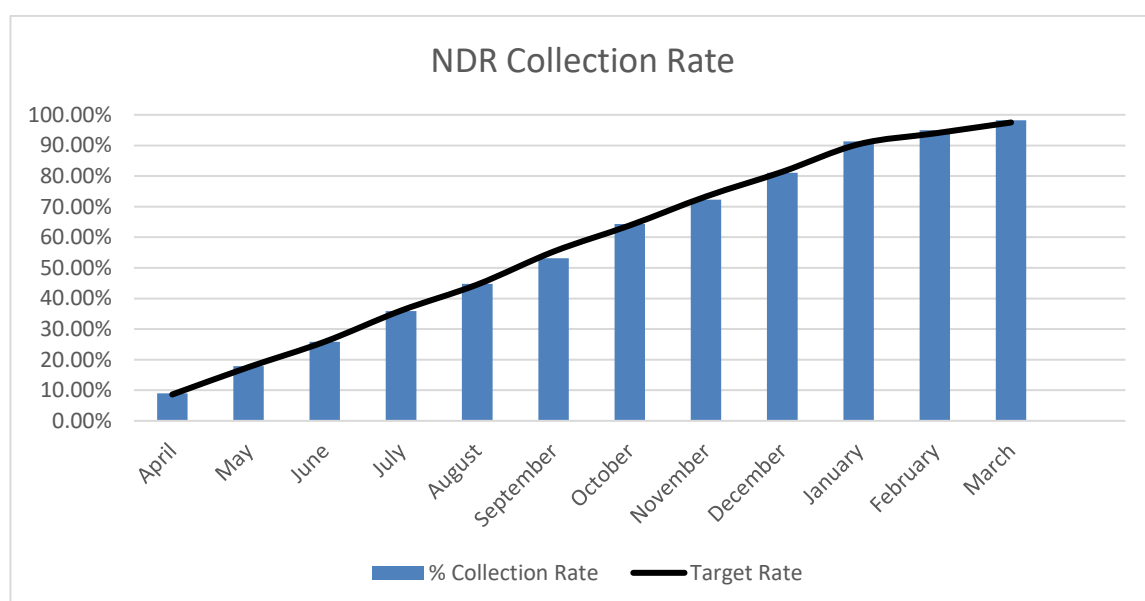


Figure 5 Monthly Non-Domestic Rates Variance to target (April to March 2025/26)

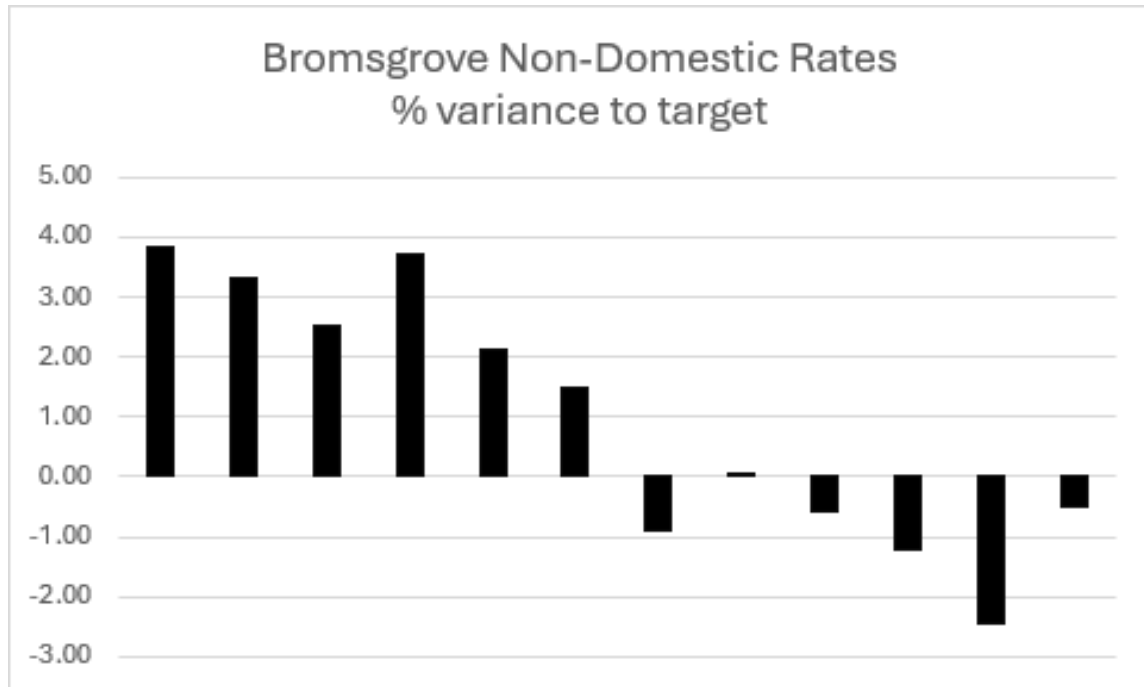
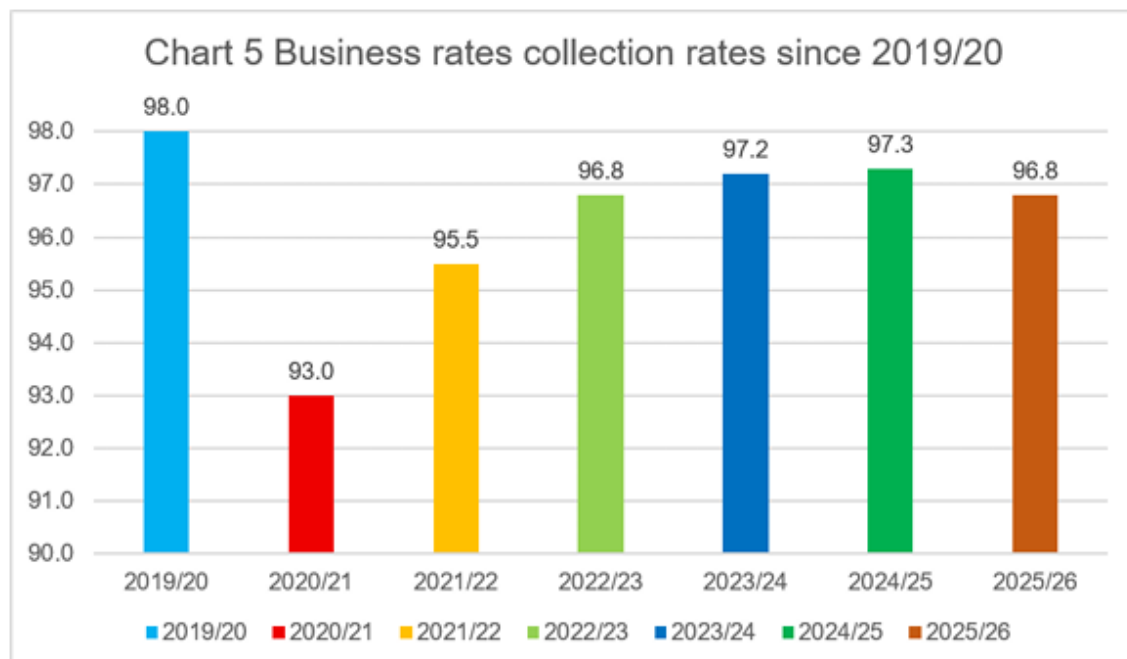


Figure 6 National Business Rates Collection Rates



4. Legal Implications

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- 4.1 No Legal implications have been identified.

5. Strategic Purpose Implications

Relevant Strategic Purpose

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

Climate Change Implications

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

Local Government Reorganisation

- 5.3 The end of year position will be taken into account in financial monitoring for the 2026/27 financial year, in budget setting for the 2027/28 financial year and a review of the Medium Term Financial Plan will take the Council through to Vesting Day on 1 April 2028. The level of debt and investments the Council holds will transfer over to the new unitary on vesting day.

6. Other Implications

Customer / Equalities and Diversity Implications

- 6.1 None as a direct result of this report.

Operational Implications

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

7. RISK MANAGEMENT

- 7.1 Items identified in the Financial Outturn report for 2025/26 link to several Corporate Risks as listed below. Many of the Council's Corporate Risks have an indirect link to the council's financial position. The mitigations to these risks are set out in the Risk Report, of which the Quarter 4 Report was reported to Audit, Standards and Governance Committee on 8 June 2026:

- COR002 - Financial Resilience of the Council and ability to manage financial shocks
- COR026 - Risk of Cash Flow Strain

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- 7.2 In future monitoring reports, financial risk will be reviewed with regular reporting against direct and indirect financial risk drivers.

8. APPENDICES

Appendix A – Capital Outturn
Appendix B – Reserves Position
Appendix C – Ward Budgets
Appendix D – Procurement Pipeline

AUTHOR OF REPORT

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Appendix A - 2025/26 Capital Outturn

Capital Project	Description	2025/26 Total (Original) (£)	Carried Forward from 24/25 (£)	2025/26 Total (Incl C/F's) (£)	25/26 Spend (£)	Variance (£)
200072	Market Hall	9,228,000	2,327,322	11,555,322	10,041,973	1,513,349
200073	Ex-Fire Station/Windsor Street		-54,247	-54,247	130,822	-185,069
200082	CCTV Digital Upgrade (UKSPF)		33,668	33,668		33,668
200083	Centres Public Realm Improvement Programme (UKSPF)		0		18,833	-18,833
200084	Shop Frontage Improvement & Empty Shop Grants (UKSPF)		-53,605	-53,605		-53,605
200086	(UKSPF Funding BDC 2024/2025)	918,000	20,000	938,000		938,000
200006	Burcot Lane	0	-927,642	-927,642		-927,642
200008	Funding for DFGs	1,285,847	157,052	1,442,899	1,015,059	427,840
200009	Home Repairs	50,000	165,602	215,602	0	215,602
200010	Energy Efficiency Installation		212,190	212,190	0	212,190
200019	Fleet Replacement new line	1,265,000	1,908,318	3,173,318	2,278,305	895,013
200022	Replacement Parking Machines	100,000	-5,866	94,134	5,000	89,134
200026	Rubery Redevelopment Works		-1,504	-1,504		-1,504
200030	Wheelie Bin Purchase	120,000	-168,671	-48,671		-48,671
200033	Bus Shelters	18,000	16,345	34,345		34,345
200045	Greener Homes		-6,125	-6,125		-6,125
200069	Cisco Network Update	34,877	0	34,877		34,877
200070	Server Replacement	18,500	169,549	188,049	139,276	48,773
200071	Laptop Refresh	5,000	31,249	36,249	20,263	15,986
200075	Sanders Park		-103,763	-103,763	24,727	-128,490
200102	Fleet Replacement cost	15,000	9,400	24,400		24,400
200103	Wheelie Bin Increases		85,000	85,000		85,000
200076	Play Area, POS and Sport improvements at		30,582	30,582		30,582
200079	Footpaths	75,000	-42,980	32,020	75,811	-43,791
200104	Buildings	100,000	162,426	262,426	2,945	259,481
200105	Initial Play Audit Requirements		451,000	451,000		451,000
	Updated Play Audit Requirements (Dec 24)	166,242	0	166,242		166,242
200106	New ongoing Cyber security budget	25,000	25,000	50,000		50,000
200107	Artrix - Landlord Obligations	20,000	2,414	22,414		22,414
	Wild Flower Machinery		62,000	62,000		62,000
	Food Waste Collection - fund for Vehicles and	902,511	0	902,511		902,511
	Replacement Wheeled Bins	2,200,000	0	2,200,000	2,439,611	-239,611
	Parkside - Requirement for a firewall	9,750	0	9,750		9,750
	Laptops for new Starters	25,000	0	25,000		25,000
	Salary Capitalisation	750,000	0	750,000	750,000	0
200016	New Finance Enterprise system	20,000	20,000	40,000		40,000
	Grand Totals	17,351,727	4,524,714	21,876,441	16,942,625	4,933,816

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Appendix B - Earmarked Reserves

	Balance at 31/3/25	Transfers in 2025/26	Transfers out 2025/26	Balance at 31/3/26	Transfers in 2026/27	Transfers out 2026/27	Balance at 31/3/27	Transfers in 2027/28	Transfers out 2027/28	Balance at 31/3/28
General Fund Reserve	13,382	7	(239)	13,150		(34)	13,109			13,109
General Fund Earmarked Reserves:										
Artrix Holding Trust	29	10		39			39			39
Building Control Other	7		(7)	0			0			0
Building Control Partnerships	82			82			82			82
Building Levy	0			0	112		112			112
Community Services - CAB	181		(57)	124			124			124
Community Services - Climate Change	196			196			196			196
Council Tax Hardship Fund	79	79		158			158			158
Covid-19 (Collection Fund)	1,604		(1,604)	0			0			0
Covid-19 (General Covid Grant)	766		(766)	0			0			0
DCLG Homeless Grant	267			267			267			267
Disabled Facilities Grant	30			30			30			30
DWP Grant (Benefits)	128			128			128			128
Economic Growth Development	911			911			911			911
Election Services	85			85			85			85
ELF funding	138			138			138			138
Environmental Vehicles	27			27			27			27
EPR Funding Allocation	0	2,577		2,577			2,577			2,577
ERP Systems	116			116			116			116
Finance Contingency	330			330			330			330
Finance Revenues Reserve	0			0			0			0
Financial Services - Business Rate Retention	3,640		(2,640)	1,000			1,000			1,000
Housing Schemes	455		(455)	0			0			0
Housing Welfare Reform	112			112			112			112
ICT Refresh Reserve	81			81			81			81
Innovation	0	60		60			60			60
Leisure/Community Safety	115			115			115			115
Local Neighbourhood Partnerships	16			16			16			16
Local Plan Enquiry	487	83		570			570			570
Replacement Reserve (Inc. Recycling)	0			0			0			0
Localising Council Tax	107			107			107			107
Utilities Reserve	0			0			0			0
Regeneration Reserve	0			0			0			0
Other	81		(81)	0			0			0
Pension Reserve	200			200			200			200
Planning & Regeneration	599		(64)	535			535			535
Regeneration & Property	0	124		124			124			124
Regulatory Services (Partner Share)	86	4		90			90			90
Rubery Local Fund	0	100		100			100			100
Shared Services (Severance Costs)	311		(311)	0			0			0
Shopmobility Donations	0	1		1			1			1
Social Prescribing	0	57		57			57			57
Ukrainian Support	0	785		785			785			785
Ward Budget Initiative	0	234	(78)	156		(78)	78			78
New Reserves - MTFP 2026										
Risk and Resilience Reserve	0	2,500		2,500			2,500			2,500
LGR Reserve	0	1,000		1,000			1,000			1,000
Community Investment Fund	0	1,250		1,250			1,250			1,250
Particulate Monitoring	0	102		102			102			102
Total General Fund	11,266	8,966	(6,063)	14,169	112	(78)	14,203	0	0	14,203

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Appendix C - Ward Budgets

Activity	Spend	Balance
Cllr Alan Bailes	2,000.00	0.00
Cllr Ruth Lambert	1,978.80	21.20
Cllr Sam Ammar	2,000.00	0.00
Cllr Ester Gray	2,000.00	0.00
Cllr Peter McDonald	2,000.00	0.00
Cllr Harrison Rone-Clarke	1,500.00	500.00
Cllr Anita Dale	2,000.00	0.00
Cllr Webb	2,000.00	0.00
Cllr Hunter	2,000.00	0.00
Cllr Rachel Bailes	2,000.00	0.00
Cllr Sue Baxter	2,000.00	0.00
Cllr J Clarke	2,000.00	0.00
Cllr Stephen Colella	2,000.00	0.00
Cllr J Elledge	1,840.00	160.00
Cllr Derek Forsythe	500.00	1,500.00
Cllr D Hopkins	683.00	1,317.00
Cllr Charlie Hotham	2,000.00	0.00
Cllr Helen Jones	2,000.00	0.00
Cllr B Kumar	1,900.00	100.00
Cllr M Marshall	2,000.00	0.00

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Cllr Karen May	1,999.73	0.27
Cllr Bernard McEldowney	2,000.00	0.00
Cllr D Nicholl	2,000.00	0.00
Cllr Simon Nock	2,000.00	0.00
Cllr S Peters	500.00	1,500.00
Cllr J Robinson	2,000.00	0.00
Cllr S Robinson	2,000.00	0.00
Cllr J Stanley	500.00	1,500.00
Cllr Kit Taylor	2,000.00	0.00
Cllr Peter Whittaker	2,000.00	0.00
Cllr S Evans	2,000.00	0.00
GRAND TOTAL	55,401.53	6,598.47

The Wards budget was approved by Council for three years from 2025/26 (£2,000 per ward (£62,000) in total) plus £16,000 per annum administration costs = £78,000 per year and therefore £234,000 to 2027/28). Total costs charged to the Wards Reserve for 2025/26 are £78,000 incorporating the £55,401.53 spend in the table above, the £6,598.47 underspend returned to General Fund Balance and £16,000 cost of Administration.

Appendix D - Procurement Pipeline

Title	Council	Contract Description	Department	Value	Current Contract Expiry Date	Procurement Start Date	Contract Start Date	Contract Length (years)	Extension	Planned Procurement Route
Microsoft Licensing	Bromsgrove	Microsoft Licensing for Azure, Windows and Office365 etc.	Business Transformation	438,000		13/02/2026	01/07/2026	3	N/A	A Framework
Sanders Park, Bromsgrove	Bromsgrove	To appoint a tenant for the catering and management of the Cafe in Sanders Park.	Leisure	321,000		23/03/2026	01/08/2026	10years 2months	No	A Tender