



## **BROMSGROVE DISTRICT COUNCIL**

### **MEETING OF THE CABINET**

**WEDNESDAY 3RD MARCH 2010 AT 6.00 P.M.**

**THE COUNCIL HOUSE, BURCOT LANE, BROMSGROVE**

**MEMBERS:** Councillors R. Hollingworth (Chairman), G. N. Denaro (Vice-Chairman), Dr. D. W. P. Booth JP, J. T. Duddy, Mrs. J. Dyer M.B.E., Mrs. M. A. Sherrey JP, R. D. Smith, M. J. A. Webb and P. J. Whittaker

### **AGENDA**

1. To receive apologies for absence
2. Declarations of Interest
3. To confirm the accuracy of the minutes of the meeting of the Cabinet held on 3rd February 2010 (Pages 1 - 4)
4. Minutes of the meeting of the Overview Board held on 2nd February 2010 (Pages 5 - 10)
  - (a) To receive and note the minutes
  - (b) To consider any recommendations contained within the minutes
5. Minutes of the meeting of the Scrutiny Board held on 25th February 2010 (to follow) (Pages 11 - 12)
  - (a) To receive and note the minutes
  - (b) To consider any recommendations contained within the minutes
6. Minutes of the meeting of the Performance Management Board held on 15th February 2010 (Pages 13 - 18)
  - (a) To receive and note the minutes
  - (b) To consider any recommendations contained within the minutes

7. Minutes of the meeting of the Shared Services Board held on 1st March 2010 (to follow) (Pages 19 - 20)
  - (a) to receive and note the minutes
  - (b) to consider any recommendations contained within the minutes
8. To receive verbal updates from the Leader and/or other Cabinet Members on any recent meetings attended in an ex-officio capacity (Pages 21 - 22)
9. Older People Task Group Report (Pages 23 - 28)
10. Bromsgrove Rovers FC/Victoria Ground Update (Pages 29 - 34)
11. Treasury Management Strategy and Investment Strategy 2010/2011 to 2012/2013 (Pages 35 - 40)
12. Bromsgrove Low Cost Housing Scheme (Pages 41 - 48)
13. Supporting People Strategy for Worcestershire 2010/2013 (Pages 49 - 60)
14. Homelessness Grant Funding - Outturn for 2009/2010 and Proposed Use For 2010/2011 (Pages 61 - 72)
15. Hardship Relief Policy (Pages 73 - 76)
16. Improvement Plan Exception Report (January 2010) (Pages 77 - 88)
17. Performance Report (January 2010) (Pages 89 - 92)
  - Appendix For Agenda Item 9 - Older People Task Group (Pages 93 - 148)
  - Appendix For Agenda Item 11 - Treasury Management Strategy And Investment Management Strategy 2010/2011 To 2012/2013 (Pages 149 - 170)
  - Appendix For Agenda Item 13 - Supporting People Strategy For Worcestershire 2010/2013 (Pages 171 - 300)
  - Appendix For Agenda Item 15 - Hardship Relief Policy (Pages 301 - 304)
  - Appendices For Agenda Item 17 - Performance Report (January 2010) (Pages 305 - 316)
18. To consider any other business, details of which have been notified to the Head of Legal, Equalities and Democratic 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

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

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

<u>Item No.</u>	<u>Paragraph</u>	
20	3	"

20. Write Offs Report - Council Tax and Business Rates (Pages 317 - 322)

K. DICKS  
Chief Executive

The Council House  
Burcot Lane  
BROMSGROVE  
Worcestershire  
B60 1AA

22nd February 2010

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# Agenda Item 3

## BROMSGROVE DISTRICT COUNCIL

### MEETING OF THE CABINET

WEDNESDAY, 3RD FEBRUARY 2010 AT 6.00 P.M.

PRESENT: Councillors R. Hollingworth (Chairman), G. N. Denaro (Vice-Chairman), Dr. D. W. P. Booth JP, Mrs. J. Dyer M.B.E., Mrs. M. A. Sherrey JP, R. D. Smith, M. J. A. Webb and P. J. Whittaker

Observers: Councillors S. R. Colella, D. L. Pardoe, C. B. Taylor and E. C. Tibby

Officers: Mr. H. Bennett, Ms. J. Pickering, Mrs. C. Felton, Ms. D. Poole, Mr. D. Mellors, Mr. R. Goundry and Ms. R. Cole

#### 144/09 APOLOGIES FOR ABSENCE

An apology for absence was received from Councillor. J. T. Duddy.

#### 145/09 DECLARATIONS OF INTEREST

No declarations of interest were received.

#### 146/09 MINUTES

The minutes of the meeting of the Cabinet held on 6th January 2010 were submitted.

**RESOLVED** that the minutes be approved as a correct record.

#### 147/09 PERFORMANCE MANAGEMENT BOARD

The minutes of the meeting of the Performance Management Board held on 18th January 2010 were submitted. It was noted that in relation to Minute No 66/09 (Selby Benchmarking Visit), items (a) to (l) were in fact recommendations to Cabinet rather than resolved items. In relation to recommendation (d), the Executive Director – Finance and Corporate Resources felt the production of a five year Medium Term Financial Strategy would be difficult to achieve at present due to the number of assumptions which would need to be made.

#### **RESOLVED:**

- (a) that recommendations (a) to (c) and (e) to (i) together with (k) and (l) contained at Minute No 66/09 be approved, that recommendation (d) relating to the production of a five year Medium Term Financial Strategy be recognised as a longer term aim and that consideration of recommendation (j) relating to the Community Engagement Programme

be deferred pending consideration by the Community Involvement in Local Democracy Task Group;

- (b) that the recommendation contained at Minute 67/09 relating to the Town Centre be approved and that it be noted the review was already underway;
- (c) that the remainder of the minutes be noted; and
- (d) that this Council's thanks be expressed to Selby District Council for the assistance and information provided both during and following the recent benchmarking visit.

148/09 **SCRUTINY BOARD**

The minutes of the meeting of the Scrutiny Board held on 19th January 2010 were submitted.

**RESOLVED** that the minutes be noted.

149/09 **JOINT OVERVIEW AND SCRUTINY BOARD**

The minutes of the meeting of the Joint Overview and Scrutiny Board held on 19th January 2010 were submitted.

**RESOLVED** that the minutes be noted.

150/09 **LOCAL DEVELOPMENT FRAMEWORK WORKING GROUP**

The minutes of the Local Development Working Party held on 19th January 2010 were submitted.

**RESOLVED** that the minutes be noted.

151/09 **LOCAL STRATEGIC PARTNERSHIP**

The minutes of the meeting of the Bromsgrove Local Strategic Partnership held on 10th December 2009 were submitted.

**RESOLVED** that the minutes be noted.

152/09 **VERBAL UPDATES FROM THE LEADER AND/OR OTHER CABINET MEMBERS ON ANY RECENT MEETINGS ATTENDED IN AN EX-OFFICIO CAPACITY**

The Leader reported on three meetings he had recently attended

- West Midlands Leaders Board
- Shenstone Group
- Worcestershire Partnership

153/09 **AIR QUALITY MANAGEMENT AREAS**

The Cabinet considered a report on the possibility of designating locations at Redditch Road, Stoke Heath, Bromsgrove and Kidderminster Road, Hagley as Air Quality Management Areas (AQMA).

It was reported that under the Environment Act 1995 all Local Authorities were required to undertake an Air Quality Assessment in order to determine whether air quality objectives set by Central Government were likely to be met. Where the results of the assessment and review process indicated the likelihood that there would be difficulties in attaining the objectives, the Local Authority was under a statutory obligation to declare an AQMA. The detailed assessments undertaken at the two locations referred to had indicated that the air quality objective for nitrogen oxide was being exceeded.

It was noted that following designation of the AQMAs there was a requirement to prepare an action plan setting out measures to ensure that the air quality objectives within the areas covered by the AQMA were not exceeded.

Following discussion it was

**RESOLVED:**

- (a) that an AQMA be declared in Redditch Road, Stoke Heath, Bromsgrove in respect of nitrogen dioxide because the air quality objectives are unlikely to be met;
- (b) that an AQMA be declared in Kidderminster Road, Hagley in respect of nitrogen dioxide because the air quality objectives are unlikely to be met;
- (c) that the AQMA be designated within the relevant areas under section 83(1) of the Environment Act 1995 by means of an official order;
- (d) that the AQMAs include as a minimum, all those areas identified as having exceedences of air quality objectives as shown in figures 1 and 2 of the Detailed Assessment report and that the boundary be set at the 36g/m<sup>3</sup> contour line;
- (e) that an Air Quality Steering Group be established, to include relevant officers from District and County Councils and local members, together with representatives from outside bodies and local community groups, to develop and implement an Air Quality Action Plan to address the relevant air quality objectives;
- (f) that the Air Quality Steering Group be chaired by a senior officer from Bromsgrove District Council;
- (g) that a provisional Air Quality Action Plan be completed within 18 months of declaration of the AQMAs; and
- (h) that a further assessment of existing and likely future air quality in the AQMAs be undertaken within 12 months of designation.

154/09 **INTEGRATED FINANCIAL AND PERFORMANCE MONITORING QUARTER**  
**3 2009/2010**

Consideration was given to a report on the Council's performance and financial position as at 31st December 2009.

**RESOLVED:**

- (a) that it be noted that 47 percent of Performance Indicators for which data was available were improving or stable;
- (b) that it be noted that 61 percent of Performance Indicators for which data was available were achieving their year to date target;
- (c) that it be noted that 78 percent of Performance Indicators for which data was available were predicted to meet their target at year end;
- (d) that the successes and areas for potential concern as set out in the Council Summary be noted;
- (e) that the current financial position on Revenue and Capital as detailed in the report be noted;
- (f) that the release of previously approved earmarked reserves of £687,000 as set out in Appendix 5 of the report be noted;
- (g) that the budget virements between £15,000 and £100,000 as listed in Appendix 6 of the report be noted;
- (h) that it be noted that although complaints increased by 12 percent compared to quarter 2, the number of complaints had decreased by 30 percent when compared to quarter 3 last year; and
- (i) that it be noted that compliments had increased from quarter 2 and had increased by more than 50 percent in comparison with quarter 3 the previous year.

**RECOMMENDED:**

- (a) that the virements in excess of £100,000 as set out in Appendix 6 of the report be approved;
- (b) that £150,000 be added to the Capital Programme in respect of the CCTV improvements as agreed on 16th September 2009 as part of the Shared Service arrangements.

155/09 **IMPROVEMENT PLAN EXCEPTION REPORT (DECEMBER 2009)**

Consideration was given to the Improvement Plan Exception report for December 2009 together with the corrective action being taken.

**RESOLVED:**

- (a) that the revisions to the Improvement Plan Exception report together with the corrective action being taken be noted;
- (b) that it be noted that for the 93 actions highlighted for December within the plan 75.3 percent were on target (green), 5.4 percent were one month behind (amber) and 4.3 percent were over one month behind (red). In addition it was noted that 15 percent of actions had been reprogrammed or suspended with approval.

The meeting closed at 7.20 p.m.

Chairman

## **BROMSGROVE DISTRICT COUNCIL**

### **MEETING OF THE OVERVIEW BOARD**

**TUESDAY, 2ND FEBRUARY 2010, AT 6.00 P.M.**

PRESENT: Councillors S. R. Colella (Chairman), Mrs. M. Bunker (Vice-Chairman), Mrs. J. M. L. A. Griffiths, D. L. Pardoe, Mrs. C. J. Spencer and L. J. Turner

Observers: Councillor Mrs. M. A. Sherrey JP

Officers: Ms. J. Pickering, Mr. M. Carr, Ms. P. Ross and Mrs. A. Scarce

#### 41/09 **APOLOGIES FOR ABSENCE**

An apology for absence was received from Councillor Mrs. R. L. Dent.

#### 42/09 **DECLARATIONS OF INTEREST AND WHIPPING ARRANGEMENTS**

No declarations of interest or whipping arrangements were received.

#### 43/09 **MINUTES**

The minutes of the meeting of the Overview Board held on 3rd November 2009 were submitted.

**RESOLVED** that the minutes be confirmed as a correct record.

#### 44/09 **OLDER PEOPLE TASK GROUP REPORT**

The Chairman invited Councillor Mrs. M. Bunker, Chairman of the Older People Task Group to introduce the report.

The Chairman of the Older People Task Group firstly thanked those involved in the Task Group, both Members and Officers and Ms. A. Sowton (Bromsgrove & Redditch Network, BARN) who was co-opted onto the Task Group, for their assistance. She then went on to give details of the work carried out which included presentations from a variety of sources including Bromsgrove District Housing Trust (BDHT), Age Concern and an Independent Financial Advisor.

The Task Group Chairman said they had contacted various partner agencies but had been disappointed that they had not received a response from the Parish Councils, as it was felt that they would be a useful contact to assist in making information available to the relevant residents.

Members were advised that Wythall Parish Council were in fact arranging a "Seniors Information Day" in September 2010 and would be writing to all

relevant agencies inviting them to attend in order to promote the services they provided and invited the Portfolio Holder for Vulnerable & Older People (including Lifeline) to attend. The Portfolio Holder agreed that this was an excellent idea and the Board discussed in more detail the use of Older People's Champions and how Parish Councillors could be supportive in this particular area.

The Chairman of the Task Group gave details of the success which was achieved by promoting and publicising events being held with partner agencies to celebrate UK Older People's Day. Positive feedback had been received from residents and the Council's Community Services had successfully participated in this event.

The Task Group had identified the need to provide clear information on key services in a variety of formats and the need to establish a single point of contact for information on what services were available and how to access those services easily. The recommendations within the report highlighted the importance of this and the need to raise awareness of the extensive range of existing services. The creation of an A-Z Directory would be an integral part of communicating this information and it was important that it was done in a format that was "user friendly" and it was hoped that paper copies would be available, not just electronic versions. Members then discussed the various ways in which this information could be made available. The Head of Financial Services confirmed that £8,000 had been made available for 2010/11 and a further £10,000 for the following year. The Portfolio Holder advised that, example A-Z Directories from other councils were being looked at as a template on which to base the Council's own. A working group would be formed to ensure that this was moved forward and updates would be provided to the Board on a regular basis.

Members congratulated the Chairman of the Older People Task Group on completion of an impressive piece of work and the comprehensive topics covered in it. It was a piece of work which should be publicised and used to encourage other Members to participate in Task Groups as this showed that they could make a difference and every opportunity should be used to promote this.

It was agreed that the recommendations should be transferred to the recommendation tracker with a timetable set to ensure that the recommendations were implemented.

The Board discussed, in detail, with the Chairman of the Older People Task Group the origin of the Task Group and if the Chairman felt there was a need to carry out further investigations. The Chairman explained that the Assistant Chief Executive had, during the course of the Task Group, contacted Worcestershire County Council (WCC) in respect of the Older People's Strategy for Worcestershire, which was currently being revised. She confirmed that the Older People Task Group Report covered Levels 1 and 2 and that it would be appropriate for the Board to investigate Levels 3, 4 and 5 which dealt with dependency created by older age. Officers confirmed that

this had in fact been included in the Board's Work Programme, with an initial presentation to the meeting on 27th April 2010.

Having considered the findings and recommendations contained within the report which related to the Overview investigation undertaken by the Older People Task Group, it was

**RESOLVED:**

- (a) that the report and recommendations contained within it are approved;  
and
- (b) that the report be submitted to Cabinet.

45/09 **REVIEW OF PROCUREMENT ARRANGEMENTS**

The Board received a report on the current procurement arrangements and practices in place across the Council to support the delivery of Value for Money. The Head of Financial Services gave background information and advised Members that the Council had had a procurement advisor since 2006. The officer was shared with Redditch Borough Council in the delivery and advice of procurement activities across both councils.

Members were informed that a procurement code and strategy had been developed to ensure a consistent approach and to provide appropriate levels of internal control when procuring goods and services. It was anticipated that a significant element of the Government efficiency targets would be delivered through collaborative procurement and improved practices within local authorities. The Office of Government Commerce (OGC) had revealed in its annual statement that the public sector had achieved a record £1.4bn savings from procurement collaboration schemes.

Members were advised that the Use of Resources Framework included a focus on procurement and specifically identified improvement to Value for Money that could be delivered through procurement opportunities. The Council had scored 2 (out of 4) on these areas. Officers were preparing a self assessment in relation to the use of resources for 2009/10 which would include the improvements to procurement and identify areas of concern. In addition, a County wide exercise had been undertaken, funded by the Regional Improvement Agency, to identify the supplier base across the County. It was anticipated that this information could be used to drive collaborative working and encourage renegotiation with suppliers. The report in relation to this information would be available shortly.

After detailed discussion, Members agreed that it would be a useful exercise, for both Members and officers, for the Board to consider the procurement arrangements and strategy in more detail.

**RESOLVED:**

- (a) that the Board note the current arrangements in place in relation to procurement and relevant regulations; and
- (b) that a detailed review of the procurement arrangements be included in the Overview Board Work Programme for the year 2010/11.

46/09 **IMPLEMENTATION OF THE CIVIL PARKING ENFORCEMENT PROPOSALS - VERBAL UPDATE**

The Board were advised that due to the new appointments of Heads of Service, the Head of Street Scene and Community was unable to attend the meeting. It was hoped that the new Head of Environmental Services would be in a position to take up some of his role over the next few weeks and Members were asked to bear with the Management Team during this transitional period.

Members were advised that a brief update had been received from the Transport and Engineering Officer in the absence of the Head of Street Scene and Community.

**RESOLVED:**

- (a) that the Head of Environmental Services be asked to attend the Overview Board meeting on 30th March 2010 to provide a verbal update; and
- (b) that the Overview Board receive a written report on the Implementation of the Civil Parking Enforcement Proposals at the Overview Board meeting on 27th April 2010.

47/09 **COMMUNITY INVOLVEMENT IN THE DEMOCRATIC PROCESS TASK GROUP MEMBERSHIP AND TERMS OF REFERENCE**

The Board considered a report on the Community Involvement in the Democratic Process Task Group. At the Overview Board meeting on 3rd November 2009 Councillor L. J. Turner had been appointed Chairman of the Community Involvement in the Democratic Process Task Group. Members were advised that the Task Group had already had an informal meeting in order to prepare a project plan. A formal meeting would be held on 4th February 2010 to approve the project plan and the Chairman gave details of witnesses they anticipated would attend the meetings and the topics to be covered. The Chairman of the Task Group gave a brief outline of the anticipated objectives.

**RESOLVED:**

- (a) that the membership of the Task Group be agreed;
- (b) that the terms of reference of the Community Involvement in the Democratic Process Task Group as set out in the report be agreed;
- (c) that the Task Group commence its investigation as soon as possible and report back to the Overview Board on 30th March 2010; and
- (d) that the Task Group be re-named "Community Involvement in Local Democracy".

48/09 **OVERVIEW BOARD QUARTERLY RECOMMENDATION TRACKER**

The Board considered the Quarterly Recommendation Tracker and was advised that officers were modifying the template of this document to incorporate more clarified information. Members agreed it would be useful to include the Portfolio Holder's details, the date when the item came before the



Overview Board and a timescale to cover implementation and the outcomes of each recommendation. This would enable Members to monitor more closely the outcomes from recommendations and take any action necessary to ensure these were implemented and to see what had been achieved. Members were advised that the information would also be included in the Overview & Scrutiny Board Annual Report.

The Board discussed the recommendations agreed by the Overview Board at its meeting on 3rd November 2009, on the Communications Strategy Review 2009, "that a simple easy to read breakdown of BDC's responsibilities and service provision be provided periodically at key times of the year to residents to communicate how BDC allocates spending according to residents' priorities and BDC budget allocations, emphasising value for money". Members were advised that it was difficult for the Council to make amendments to the information provided in this way. The Head of Financial Services informed the Board that a full page "advertisement" was usually put in the local press and the information was also contained within Together Bromsgrove. As Members were concerned that this was not published until later in the year, the Head of Financial Services undertook to check this with the relevant department and, if necessary, ask if it would be possible to bring the date forward.

Members drew attention to the recommendations of the Anti-Social Behaviour and Alcohol Free Zones Task Group, agreed by the Board on 3rd February 2009, particularly the recommendation "Maximise use and effectiveness of CCTV" and requested details of the outcome of the implementation of this decision.

**RESOLVED:**

- (a) that the Overview Board Quarterly Recommendation Tracker be noted and updated;
- (b) that officers make enquiries in respect of the implementation of the Anti-Social Behaviour and Alcohol Free Zones Task Group recommendations and report back to the Overview Board at the meeting to be held on 30th March 2010; and
- (c) that a new template for the Quarterly Recommendation Tracker be submitted to the Overview Board meeting on 30th March 2010 for approval.

49/09

**FORWARD PLAN OF KEY DECISIONS - 1ST FEBRUARY TO 31ST MAY 2010**

The Board considered the Forward Plan of Key Decisions 1st February to 31st May 2010 and expressed concern that several items which had been placed late on the Forward Plan did not give the Overview Board sufficient time to consider them before being presented to Cabinet. The Head of Financial Services advised Members that she understood their concerns but explained that in some cases circumstances changed and Cabinet needed to take action as quickly as possible.

The Board was also concerned that there was an element of slippage on some items on the Forward Plan and asked for clarification as to why this had

occurred. The Head of Financial Services advised that this was, in some cases due to the implementation of the Shared Services Management Team structure and asked Members once again to bear with the Management Team during this transitional period.

Members discussed possible items on the Forward Plan to investigate such as the Economic Development Strategy. However, officers confirmed that the Economic Development Strategy was in fact an item that was already included on the Scrutiny Board Work Programme.

50/09 **WORK PROGRAMME**

The Board gave consideration to the Work Programme and discussed future topics. Officers confirmed that at the meeting to be held on 30th March 2010 Members would be given the opportunity to investigate both the planning policy (in light of the Planning Peer Review) and the licensing policy of the Council. The Head of Financial Services confirmed that this would be dealt with by the Executive Director (Planning, Regeneration, Regulatory and Housing Services).

Members agreed that by planning the work programme in advance it gave the relevant departments the opportunity to provide a comprehensive response to assist Members in the decision making process.

As there were very few items programmed in for the Overview Board meeting to be held on 2nd March 2010, after discussion, Members agreed that this meeting time should be used as a meeting for the Community Involvement in Local Democracy Task Group.

**RESOLVED** that the Overview Board Work Programme be agreed.

The meeting closed at 7.55 p.m.

Chairman

# Agenda Item 5

THE ENCLOSURES FOR THIS ITEM WILL FOLLOW ON A  
SUPPLEMENTARY AGENDA

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## BROMSGROVE DISTRICT COUNCIL

### MEETING OF THE PERFORMANCE MANAGEMENT BOARD

MONDAY, 15TH FEBRUARY 2010 AT 6.00 P.M.

PRESENT: Councillors C. B. Taylor (Chairman), Mrs. M. Bunker (Vice-Chairman), S. R. Colella, Mrs. J. M. L. A. Griffiths, Ms. H. J. Jones and L. J. Turner

Observers: Councillor G. N. Denaro (present from Minute No. 73/90 to 76/09)

Officers: Mr. H. Bennett, Mr. J. Godwin, Mr. H. Moseley and Ms. A. Scarce

#### 73/09 APOLOGIES FOR ABSENCE

An apology for absence was received from Councillor Mrs. A. E. Doyle.

#### 74/09 DECLARATIONS OF INTEREST

Councillor Mrs. J. M. L. A. Griffiths declared an interest in Minute No. 76/09 (Annual Artrix Performance Report) as she was a member of the Artrix Operational Trust.

#### 75/09 MINUTES

The minutes of the meeting of the Performance Management Board held on 18th January 2010 were submitted.

**RESOLVED** that, subject to the discussions set out in Minute No. 66/09 (Selby Benchmarking Visit), being amended to read as recommendations and not resolved items, the minutes be approved as a correct record.

#### 76/09 QUARTER 3 INTEGRATED FINANCE & PERFORMANCE REPORT

The Board considered the report on the Council's performance and financial position at 31st December 2009. It was noted that the predicted overspend had been significantly reduced to £77,000 and that officers were continuing to reduce the potential impact of this on the Council.

Members were advised that the significant increase in printing charges was being addressed and this should be reflected in the next quarterly report. The Portfolio Holder confirmed that the investment interest received from the Debt Management Office at a current level of 0.28% was being reviewed and it was anticipated that this would also be reflected in the next quarterly report.

The Board discussed in detail the Bonfire Event and the cost of this to the Council. The Head of Leisure and Cultural Services gave a brief breakdown of the cost of this event and advised Members that an Overview & Scrutiny Proposal Form had been submitted to the Scrutiny Board in respect of this, which would be considered at the Scrutiny Board meeting to be held on 25th February 2010.

Members enquired whether it was possible to split the funding that was provided for the Christmas Light Switch On into each area. The Arts Development & Special Events Officer responded that that price was not currently sub-divided in this way.

The Board was advised that there was potential to recover some of the loss in respect of the Burcot Room when the Worcestershire Enhanced Two Tier programme was up and running.

Members also discussed the following items in some detail:

- Sickness level which continued to be better than target, as a result of the focus by the Board.
- Dolphin Centre and fitness suite membership/usage.
- Transfer of management of the Dolphin Centre.

**RESOLVED:**

- (a) that it be noted that 47% of performance indicators for which data is available are improving or stable;
- (b) that it be noted that 61% of performance indicators for which data is available are achieving their year to date target;
- (c) that it be noted that 78% of performance indications for which data is available are predicated to meet their target at the year end;
- (d) that the successes and areas of potential concern as set out in the Council summary be noted;
- (e) that the current financial position on Revenue and Capital as detailed in the report be noted;
- (f) that the release of previously approved earmarked reserves of £687k, as set out in Appendix 5 be noted;
- (g) that the budget virements listed in Appendix 6 be noted;
- (h) that it be noted that Cabinet had requested at the full Council to approve the addition of £150k to the Capital Programme for the CCTV improvement as agreed as part of the Shared Services arrangements on 16th September 2009; and
- (i) that it be noted that although complaints increase by 12% compared to quarter 2, the number of complaints is nonetheless a 30% decrease compared to quarter 3 last year. In addition it be noted that compliments increased in quarter 3 compared to quarter 2 and are more than 50% up on the same quarter last year, as set out in Appendix 7.

The Board considered a report on the performance of the Artrix Arts Centre which also updated them on the current progress being made in establishing a Service Level Agreement (SLA) with the Artrix's Operating Trust.

The Head of Leisure and Cultural Services gave background information on the Centre and confirmed that he expected the SLA to be signed in mid March 2010 and in place with effect from 1st April 2010. The aim of the SLA was to establish a framework whereby the operation of the Artrix Centre would be focused on the key objective and priorities of the Council and a key set of performance measures had been established to monitor the delivery of the Centre based on these.

Members discussed the Centre's success, the financial agreement, other funding the Centre received and the SLA in detail. The Head of Leisure and Cultural Services confirmed that the funding provided by the Council is paid quarterly in advance and that the Council was invoiced for this by the Centre. Members were also advised that the financial agreement with the Centre was for a 10 year period and would be reviewed at year 8 (2013). It was anticipated that from 2015 the funding would begin to be gradually scaled back and that eventually the Centre would, hopefully, become self sufficient.

A Member of the Board shared the Artrix Operational Trust's concerns which had been discussed at a recent meeting in respect of the proposed new Blue Light Campus. The Trust had been informed about a new road, specifically for Blue Light use, which would bypass the A38 and take the vehicles into School Drive, and would be very close to the Centre. The Trust was very concerned about the impact that this would have on performances at the Centre, particularly from the sound of the sirens, which could potentially be very damaging to the Centre. The Head of Leisure and Cultural Services advised that he understood that this only related to the Fire Service. The Board discussed this in detail and agreed that urgent clarification of the situation was needed.

The Board discussed the programme of events and the use of the Centre by local groups and the community involvement. The Head of Leisure and Cultural Services advised that in the recent Place Survey when residents had been asked how satisfied they were with theatres/concert halls, only 39% had been satisfied. It was anticipated that through further promotion of the Centre that this would be increased in the future. Members were informed that the Centre had a successful partnership with North East Worcestershire College and project support from Worcestershire County Council and the Arts Council of England, was open 7 days a week and only had 2 full time members of staff. Members recognised that it relied largely on volunteers and provided a wide variety of activities, including workshops and live performances.

Members asked whether there was a potential role for work to be undertaken with vulnerable young people or young people not in employment, education or training (NEETS). The Director of Policy, Performance and Partnerships advised that currently this would not be practical but if the Centre was in a stable financial position this may be possible in the future. It was confirmed

that the SLA included outreach work within the school environment and the Centre would be looking at the possibility of working within the community.

**RECOMMENDED** that the relevant Portfolio Holder and Executive Director make an urgent consideration of the Blue Light Campus impact on the Artrix performances.

**RESOLVED** that the current performance of the Artrix Centre and the progress made with the proposed Service Level Agreement be noted.

78/09 **COMPREHENSIVE AREA ASSESSMENT - ORGANISATIONAL ASSESSMENT**

The Board considered the Audit Commission's Organisational Assessment of the Council report and agreed that it was very positive. Members commented on the following issues:

- Maximising involvement by all councillors – this had been addressed through the Overview and Scrutiny Boards
- Not done enough to meeting the needs of the growing number of older people – this has subsequently been addressed through the Older People Task Group.

Members then discussed the Overview & Scrutiny process and the positive work that the Boards were now doing and the work being carried out through the task groups. Concerns were discussed around the workload that the task groups put on officers and Members felt it was important that the appropriate support was provided wherever possible.

The Board asked for further information on the outcome of the survey to 4,000 people receiving benefits and the current position regarding the watercourse and flooding group. The Director of Policy, Performance and Partnerships undertook to investigate the position on these matters and report back to Members.

The Director of Policy, Performance and Partnerships advised Members that the next Organisational Assessment would be completed by the Audit Commission at the close of the Municipal year and the results published in December 2010.

**RESOLVED** that the report be noted.

79/09 **IMPROVEMENT PLAN EXCEPTION REPORT (DECEMBER 2009)**

The Board considered the Improvement Plan Exception Report as at 31st December 2009. It was confirmed that Member training on the Code of Conduct would take place between 6.00 – 9.00 p.m. on 1st March 2010.

Members' attention was drawn to CP1: Town Centre ref 1.5 Train Station and the continued slippage in the timescale for this. Members were informed that an Overview & Scrutiny Proposal Form had been completed in respect of the parking issues and the increased traffic that this would bring to the area. This



proposal would be considered at the Overview Board meeting to be held on 2nd March 2010. Further discussion followed on the issue of civil parking enforcement.

**RESOLVED:**

- (a) that the revisions to the Improvement Plan Exception Report together with the corrective action being taken be noted;
- (b) that it be noted that for the 93 actions highlighted for November within the plan 75.3% of the Improvement Plan is on target (green), 5.4% is one month behind (amber) and 4.3% is over one month behind (red). 15% of actions have been reprogrammed or suspended with approval; and
- (c) that the Performance Management Board support the Overview & Scrutiny proposal in respect of the Railway Station.

80/09 **SHARED SERVICES HIGHLIGHT REPORT**

The Board considered the Shared Services Report and shared concerns in respect of members of staff leaving and staff taking up their new posts. The Director of Policy, Performance and Partnerships confirmed that the management team had been appointed and that there were two vacancies; Head of Customer Service and Head of Planning and Regeneration. He undertook to provide Members with details of the new structure. Although the structure would not be officially in place until 20th April 2010 the Director of Policy, Performance and Partnerships confirmed that the post holders would take up their new roles unofficially with immediate effect in order to ensure a smooth transition. Members were also assured that the Strategic Management Team and Corporate Management Team were meeting regularly to ensure this was the case.

**RESOLVED** that the Board extends its thanks to all staff for their professionalism during these difficult times.

81/09 **PROGRESS UPDATE ON DATA QUALITY STRATEGY AND PERFORMANCE MANAGEMENT STRATEGY ACTION PLANS**

The Board noted the progress update on Data Quality Strategy and Performance Management Strategy action plans. The Director of Policy, Performance and Partnerships advised that item 1(a) Ensure that responsibility for data quality is part of job descriptions had been suspended during the implementation of Single Status.

**RESOLVED** that the report be noted.

82/09 **QUARTERLY RECOMMENDATION TRACKER**

The Board received the Quarterly Recommendation Tracker and discussed the progress made to date on various items.

**RESOLVED** that the Quarterly Recommendation Tracker Report be noted.

83/09 **WORK PROGRAMME**

Having considered the report on the Board's Work Programme, the Director of Policy, Performance and Partnerships confirmed that the meeting on 15th March 2010 would include training on Value for Money, which may take up a large part of the meeting.

Following discussion the Board agreed that due to the success of the Selby benchmarking exercise, the visit to Tunbridge Wells was no longer necessary. The Director of Policy, Performance and Partnerships undertook to contact Tunbridge Wells to thank them for their offer of assistance.

Members discussed the future role of the Board and its Work Programme. The Director of Policy, Performance and Partnerships advised that he would discuss possible options with the Head of Legal, Equalities and Democratic Services and report back to the Board as soon as possible.

**RESOLVED** that the Work Programme be noted.

The meeting closed at 8.05 p.m.

Chairman

# Agenda Item 7

THE ENCLOSURES FOR THIS ITEM WILL FOLLOW ON A  
SUPPLEMENTARY AGENDA

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# Agenda Item 8

**THERE ARE NO ENCLOSURES FOR THIS AGENDA ITEM**

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## BROMSGROVE DISTRICT COUNCIL

### CABINET

3RD MARCH 2010

#### OLDER PEOPLE TASK GROUP REPORT

Responsible Portfolio Holders	Councillor Mrs. M. A. Sherrey JP
Responsible Head of Service For Overview and Scrutiny	Mrs. C. Felton – Head of Legal, Equalities and Democratic Services

#### 1. SUMMARY

- 1.1 The purpose of this report is to allow Cabinet to consider the findings and recommendations of the attached Overview Board Task Group report.

#### 2. RECOMMENDATION

- 2.1 The Cabinet is requested to:
- (a) consider the attached Overview Board report (Appendix 1) and recommendations contained within it;
  - (b) to either agree, amend or reject each of the Overview Board recommendations contained in the report;
  - (c) provide an Executive Response to the Overview Board report and recommendations,
  - (d) request the relevant Portfolio Holder in consultation with the Assistant Chief Executive to indicate the expected implementation dates within the Executive Response, as appropriate.

#### 3. BACKGROUND

- 3.1 At the Meeting of the Overview Board on 3rd February 2009, it was decided a Task Group would be established to scrutinise issues relating to older people and that Councillor Mrs. M. Bunker would be appointed as Chairman.

- 3.2 The role of the Older People Task Group was:

- To carry out a scrutiny exercise to identify existing services and how they can be accessed.
- To identify any gaps and consider how they can be addressed or signposted to other agencies.
- To identify positive initiatives and make general recommendations for strengthening services offered for Older People and share best practice with partner agencies and the voluntary sector.

- To seek the views of statutory, voluntary and community organisations supporting older people services.
- 3.3 The full terms of reference for the Task Group investigation are contained within the attached Task Group report.
- 3.4 The Assistant Chief Executive and Task Group Chairman presented the draft recommendations to the Older Peoples Forum meeting on 8th December 2009 and the Equality and Diversity Forum meeting on 10th December 2009 for comment.
- 3.3 The Task Group report and recommendations were agreed by the Overview Board at its meeting on 2nd February 2010 and referred to Cabinet for consideration.

#### **4. OVERVIEW AND SCRUTINY RECOMMENDATIONS**

- 4.1 Overview and Scrutiny committees do not have decision making powers but make recommendations to the Cabinet and other decision makers. Overview and Scrutiny recommendations are published and presented to the Cabinet in accordance with Part 14.1 of the Council Constitution.
- 4.2 Upon consideration of the recommendations the Cabinet is requested to provide an Executive Response and executive decision in respect of each recommendation.
- 4.3 The recommendations of the Task Group are summarised on page 3 of the Task Group report attached at Appendix 1.

#### **5. THE EXECUTIVE RESPONSE**

- 5.1 The Cabinet is asked to provide an Executive Response to the Overview Board report and recommendations and to either agree, reject or amend each of the recommendations set out in the report. The relevant portfolio holder(s) are also requested to present the Executive Response to the next meeting of the Overview Board on 30th March 2010.
- 5.2 The Executive Response should provide clarity about what executive decisions are being made by Cabinet in respect of each recommendation. The Executive Response should also provide a target implementation date or timetable to clarify when each agreed scrutiny recommendation will be implemented.
- 5.3 The Executive Response presented to the Overview Board may include an Action Plan to summarise:
- the Cabinet decision,
  - the service(s) responsible for implementation,
  - any key stages of the implementation process with key dates, and
  - the target implementation date.



This will enable the Overview Board to monitor the implementation of agreed recommendations effectively.

- 5.4 The Cabinet Decisions made in respect of Overview and Scrutiny recommendations will be monitored and reviewed by the Scrutiny Board to check on how they are being implemented, until each of the recommendations have been fully implemented.

## **6. FINANCIAL IMPLICATIONS**

- 6.1 The recommendations supporting an Ageing Well Scheme and an Older Person's Services Directory both have revenue funding implications. Since the Task Group agreed its report, the recommendations for the necessary funding in respect of these items were approved by the full Council on 20th January 2010 as part of the Medium Term Financial Plan for 2010/11 -2012/13.

## **7. LEGAL IMPLICATIONS**

- 7.1 There are no legal implications relating to this report.

## **8. COUNCIL OBJECTIVES**

- 8.1 This report links to the Council's Objectives of Sense of Community and Well Being and Regeneration and the Priorities in relation to Town Centre and Housing.

## **9. RISK MANAGEMENT INCLUDING HEALTH AND SAFETY CONSIDERATIONS**

- 9.1 The risk of not implementing the recommendations contained within the attached overview report is that this Council does not continue to improve the services for older people and in particular, customer service standards.

## **10. CUSTOMER IMPLICATIONS**

- 10.1 If the recommendations were approved and implemented, residents living in Bromsgrove District would benefit from improved customer service, which would have an emphasis on customer satisfaction.

## **11. EQUALITIES AND DIVERSITY IMPLICATIONS**

- 11.1 There are no implications directly relating to this report for the Council's Equalities and Diversity Policies.

## **12. VALUE FOR MONEY IMPLICATIONS**

- 12.1 There are no value for money implications directly relating to this report.

### **13. CLIMATE CHANGE AND CARBON IMPLICATIONS**

13.1 None

### **14. OTHER IMPLICATIONS**

Procurement Issues – None
Personnel – None
Governance/Performance Management – None
Community Safety including Section 17 of Crime and Disorder Act 1998 None
Policy – None
Biodiversity – None

### **15. OTHERS CONSULTED ON THE REPORT**

Portfolio Holder	<b>No</b>
Chief Executive	<b>No</b>
Executive Director (Partnerships and Projects)	<b>No</b>
Executive Director (Services)	<b>No</b>
Assistant Chief Executive	<b>No</b>
Head of Service	<b>No</b>
Head of Financial Services	<b>No</b>
Head of Legal, Equalities & Democratic Services	<b>No</b>
Head of Organisational Development & HR	<b>No</b>
Corporate Procurement Team	<b>No</b>
Head of Street Scene and Community Services	<b>No</b>

### **16. WARDS AFFECTED**

All Wards.

### **17. APPENDICES**

Appendix 1 Older People Task Group Report

### **18. BACKGROUND PAPERS**

None

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## BROMSGROVE DISTRICT COUNCIL

### CABINET

3<sup>RD</sup> MARCH 2010

#### BROMSGROVE ROVERS FC/VICTORIA GROUND - UPDATE

Responsible Portfolio Holder	Cllr Mike Webb
Responsible Head of Service	John Godwin (Deputy Head of SS&C)
Non-Key Decision	

#### 1. SUMMARY

- 1.1 The report sets out the current situation with regard to Bromsgrove Rovers Football Club Limited (in administration) (BRFC), the lease of the Victoria Ground and makes recommendations to ensure that a clear process is implemented to address the future lease implications for the site.

#### 2. RECOMMENDATION

- 2.1 Members are requested to:

- 2.1.1 Note the position relating to the current lease;
- 2.1.2 Note that officers are working on changing the conditions on which the Council holds the Victoria Ground;
- 2.1.3 Request officers to seek expression of interest for the lease of the Victoria Ground to ensure that the Council's community objectives and priorities are met and sustained.

#### 3. BACKGROUND

- 3.1 In 1948 the land which now comprises the Victoria Ground was gifted to the Council subject to the following conditions:
- To let it for a term of 14 years to the Bromsgrove Rovers Football Club ("BRFC") for use by the club as a football field at such rent and subject to such terms as were to be agreed by the Council with a condition to renew the lease for a further 14 years provided certain conditions were met;
  - At the end of a second term of 14 years to further extend the lease on such terms as were to be agreed by the Council and BRFC;
  - At the determination of any further extensions of the lease to BRFC the land is to vest in the Council as an open space for the enjoyment by the public of Bromsgrove.

- 3.2 There have been a number of leases between the Council and BRFC, the most recent of which was for a term of 6 years 364 days at a peppercorn rent which expires on 6 August 2010.
- 3.3 In April 2009 a report was submitted to Cabinet to consider a request from BRFC that the Council grant a new lease to BRFC for 14 years at a peppercorn rent. This request was not granted and as such the current lease expires as per point 3.2. No further proposals have been received from BRFC.
- 3.4 The Council has been formally notified that BRFC is in administration. The Council is one of BRFC's creditors and the current level of outstanding debt to the Council is **£8079.15** which relates to the non-payment of business rates (NNDR) for 2009/10.
- 3.5 The Administrator of BRFC sought approval from BRFC's creditors to enter into a Company Voluntary Arrangement to enable BRFC to continue trading pending sale of its assets to a third party. That proposal was rejected by creditors but accepted by BRFC's members. It has not yet been clearly communicated to the Council by the Administrator how this decision will be implemented. The original proposal for a Company Voluntary Arrangement proposed that the assets of the company be sold to a third party individual but those proposals did not make it clear whether the Administrator was proposing to purport to assign BRFC's lease to the third party or not; no approach has been made to the Council about this.
- 3.6 The current lease contains a number of provisions which might prove to be relevant. First, it prohibits assignment of the lease without the consent of the Council. Secondly it gives the Council the right to forfeit the lease if BRFC enters into either voluntary or compulsory liquidation or if BRFC is disbanded or suspended by the Football Association.
- 3.7 The Council has recently been approached by an interested party who wishes to be granted a lease of the Victoria Ground. The interested party has put forward an initial business case and indicated that it is its intention to make the facilities available to BRFC (whether that is Bromsgrove Rovers Football Club Ltd or a third party who has purchased from that company the right to use the name) and to develop youth and community sport in the local area. However in order to ensure that the Council achieves best value and that the Council's aspirations for the local community as laid out in the Sustainable Community Strategy are achieved in an open and transparent manner, officers' opinion is that expressions of interest should be formally sought.
- 3.8 In order to achieve this objective, officers are proposing to invite all interested parties to submit business cases for consideration that clearly demonstrate links to the issues identified in 3.8, in particular, the benefits for the local community that such an agreement will bring and links to the overall Corporate Objectives and Prioritise with in the Council Plan. Once

received such proposals with then be reviewed and a subsequent report put forward for member consideration based on a preferred option.

3.9 In order to ensure that the Victoria Ground is utilised to the maximum benefit of the community, officers are negotiating with the Charity Commission on the extent to which the terms on which the Council holds the land may need to be varied to make it clear that the land can be used for the benefit of the inhabitants of Bromsgrove, for example:

- to promote the provision of facilities for recreation or other leisure time for individuals who have need of such facilities by reason of their youth, age, infirmity or disablement, financial hardship or social and economic circumstances; or
- for the public at large in the interests of social welfare and with the object of improving the condition of the life of the said inhabitants; and the advancement of amateur sport (where 'sport' means sports or games which promote health by involving physical or mental skill or exertion).

#### **4. FINANCIAL IMPLICATIONS**

4.1 There are no financial implications contained with in the report as all out standing debts are being handled through the administration process. The lease costs associated with the ground have been addressed through the MTFP, however dependant upon the nature of the expression of interest received this situation may need to be reviewed.

#### **5. LEGAL IMPLICATIONS**

5.1 The legal implications are set out in the body of the report.

#### **6. COUNCIL OBJECTIVES**

6.1 This report does not specifically relate to the Council's objectives, however it will create a process to review the lease of the Victoria ground to ensure that future arrangements support the Objectives and Priorities of the Council and Sustainable Communities Plans.

#### **7. RISK MANAGEMENT INCLUDING HEALTH & SAFETY CONSIDERATIONS**

7.1 The main risks associated with in the report are:

- Reputational Damage if it is portrayed that the Council have been responsible for the potential lose of the BRFC.
- Reputational Damage if the new lease agreement does not enhance and improve community football provision/activities, play pathways and/or

deliver the community outcomes contained with in subsequent business plans.

- The new organisation are unable to make the payments on the lease/NNDR's and fall into arrears.

7.2 These risks are being managed as follows:

- Reputational Damage:
  - *Production of a communications plan to cover this matter and to establish the facts that lead to the decision and the benefits that BDC are endeavouring to bring to the local community.*
  - *Establishing a thorough review process for expression of interests and robust lease agreements to ensure that performance and agreed outcomes are achieved.*
  - *The Street Scene & Community department will work with the new organisation, the Schools Sport Partnership, Community Organisations and the County FA to support the production and delivery of development plans so that all teams associated with the club are supported and enhanced where ever possible.*
- Rent Arrears:
  - *This would be managed inline with the established Council procedures and be subject to further discussions should the situation arise.*

7.3 Currently the risk identified in the above *bullet* points in 7.1 is not addressed by any risk register and will be added to the Corporate Risk Register in due course.

## **8. CUSTOMER IMPLICATIONS**

8.1 There are no customer implications contained with in this report.

## **9. EQUALITIES AND DIVERSITY IMPLICATIONS**

9.1 There are no Equality and Diversity implications contained with in this report. However these implications will be considered where reviewing the expression of interest and report to members in future reports.

## **10. VALUE FOR MONEY IMPLICATIONS**

10.1 There are no specific VFM implications contained with in this report, such implications will be contained with in a future report to feedback on the receipt of expressions of interest.



## 11. CLIMATE CHANGE AND CARBON IMPLICATIONS

11.1 There are no Climate Change implications contained with in this report.

## 12. OTHER IMPLICATIONS

Procurement Issues - None
Personnel - None
Governance/Performance Management – None
Community Safety including Section 17 of Crime and Disorder Act 1998 - None
Policy - None
Biodiversity - None

## 13. OTHERS CONSULTED ON THE REPORT

Portfolio Holder	Yes
Joint Chief Executive	Yes
Executive Director	No
Executive Director	No
Assistant Chief Executive	No
Head of Service	Yes
Head of Financial Services	Yes
Head of Legal, Equalities & Democratic Services	Yes
Head of Organisational Development & HR	No
Corporate Procurement Team	No

## 14. WARDS AFFECTED

All Wards

**15. APPENDICES**

None

**16. BACKGROUND PAPERS**

None

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## BROMSGROVE DISTRICT COUNCIL

### CABINET

3rd MARCH 2010

#### TREASURY MANAGEMENT STRATEGY STATEMENT AND INVESTMENT STRATEGY 2010-11 TO 2012-13

Responsible Portfolio Holder	Cllr Geoff Denaro
Responsible Head of Service	Head of Financial Services – Jayne Pickering

#### **1. SUMMARY**

- 1.1 A strategy statement for the treasury management and investments in relation to Bromsgrove District Council to comply with the Local Government Act 2003 and to ensure the Council demonstrates accountability and effectiveness in the management of its funds.

#### **2. RECOMMENDATION**

- 2.1 Cabinet recommend to Full Council approval of the strategy and prudential indicators shown at Appendix A and B.
- 2.2 That Cabinet notes that the Audit Board will undertake additional scrutiny of the Strategy during 2010/11 to ensure the Council's investments are being managed in a risk free environment.
- 2.3 That Cabinet recommend to Full Council the approval of the Authorised Limit for borrowing at £6,500,000 if required.
- 2.4 That Cabinet recommend to Full Council the approval of the maximum level of investment to be held within each organisation (i.e. bank or building society) as detailed at £3m subject to market conditions.
- 2.5 That Cabinet recommend to Full Council the approval of unlimited level for investment in Debt Management Account Deposit Facility (DMADF).
- 2.6 That Cabinet notes that training for Treasury management has been identified and will be incorporated within the Modern Councillor Programme (Training and Development Events for Members) prioritised with all other needs.
- 2.7 That Cabinet recommend to Full Council the approval of the Treasury Management Policy statement shown at Appendix F.

#### **3. BACKGROUND**

- 3.1 As members will be aware the world has been experiencing an economic downturn of exceptional proportions in which the origins can be traced back

to the US and the sale of risky mortgages. However, by Summer 2007, the problem spread around the world, eventually leading to the collapse of the Icelandic banking system.

- 3.2 At the time, 127 English local authorities had funds in one or more of the Icelandic banks, with deposits totalling more than £954 million.
- 3.3 Many other local authorities – including this Council – did not have any funds invested in Icelandic banks at the time of their collapse. However, the repercussions of the collapse of Icelandic banks raised questions about the stewardship of funds held by local authorities.
- 3.4 In response to the Icelandic banking collapse, the Audit Commission carried out an urgent investigation, which examined local authorities' arrangements for placing and managing cash on deposit. This led to the publication of a national report in March 2009.
- 3.5 One of the key messages highlighted in the Audit Commission's report was that local treasury management arrangements vary and (nationally) the governance and scrutiny of treasury management arrangements specifically is generally poor.
- 3.6 A key recommendation within the Audit Commission's report was that CIPFA should revise and tighten its Treasury Management Code to take account of the findings in their report.
- 3.7 Consequently CIPFA has revised its Treasury Management Code and guidance notes. The key changes to that Code are as follows:
  - Enhancement of the role of scrutiny of treasury management strategies and procedures. It will be the Council's responsibility to identify an appropriate body or individual to have responsibility for the scrutiny function. It is proposed that this be the Audit Board.
  - Currently, full Council must approve the Treasury Management Strategy. The revised Code will allow approval from a relevant committee. Where approval is not by full Council, the decisions made must be reported to full Council. It is proposed that the responsibility remains with Full Council.
  - The revised Code will require Treasury Management training to be available for relevant Council members with responsibility for treasury management; and
  - The existing Code requires the Treasury Management Strategy to be approved prior to the start of the financial year and a report presented after the end of the financial year. The revised Code will also require an interim or mid-year operational report.
- 3.8 In addition the Local Government Act 2003 requires the Council to 'have regard to the Prudential Code and to set Prudential Indicators for the next

three years to ensure that the Council's capital investment plans are affordable, prudent and sustainable.

3.9 CIPFA has defined Treasury Management as:

*“the management of the organisation’s investments, cash flows, its banking, money market and capital market transactions; the effective control of the risks associated with those activities; and the pursuit of optimum performance consistent with those risks.”*

3.10 The Council regards the successful identification, monitoring and control of risk to be the prime criteria by which the effectiveness of its treasury management activities will be measured. Treasury management risks are identified in the Council's approved Treasury Management Practices and include:

- Liquidity Risk (Adequate cash resources)
- Market or Interest Rate Risk Fluctuations in the value of investments).
- Inflation Risks (Exposure to inflation)
- Credit and Counterparty Risk (Security of Investments)
- Refinancing Risks (Impact of debt maturing in future years).
- Legal & Regulatory Risk (Compliance with statutory and regulatory requirements).

#### **4. FINANCIAL IMPLICATIONS**

4.1 The financial implications are contained within the body of the strategy statement at Appendix A.

#### **5. LEGAL IMPLICATIONS**

5.1 This is a statutory report under the Local Government Act 2003.

#### **6. CORPORATE OBJECTIVES**

6.1 Approval of this strategy statement will ensure that the Council invests its resources within a robust and effective framework to deliver a maximum return on investments within a secure environment.

#### **7. RISK MANAGEMENT**

7.1 The main risks associated with the details included in this report are:

- *Poor Use of Resources scoring*
- *Poor investment return*
- *Loss of capital due to investing with inappropriate organisations*

7.2 These risks are being managed as follows:

- Poor Use of Resources scoring

Risk Register: *Corporate*

Key Objective Ref No: 1

Key Objective: *Effective Financial Management*

7.3 The risks associated with the delivery of maximum return within a secure environment have now been addressed in the risk register. The risks and controls in place to mitigate them have been assessed and detailed within the register.

7.4 Current controls to reduce the risk of loss of capital and poor return on investment include:

- Monthly reports from investment managers on performance of funds
- Quarterly reporting to Performance Management Board and Cabinet of financial position on investments
- Monthly updates from treasury advisors in respect of level of status for organisations we invest with
- Daily monitoring by internal officers of banking arrangements and cash flow implications

## **8. CUSTOMER IMPLICATIONS**

8.1 The effective management of treasury operations will ensure that the management of the public funds is monitored and reviewed in a complaint way to satisfy the public of the use of their financial resources.

## **9. EQUALITIES AND DIVERSITY IMPLICATIONS**

9.1 None as a direct result of this strategy

## **10. VALUE FOR MONEY IMPLICATIONS**

10.1 The robust framework that is in place to ensure investments maximise return within a secure environment support the demonstration that the Council is providing value for money is the use of its funds available.

## **11. OTHER IMPLICATIONS**

Procurement Issues -None
Personnel Implications None
Governance/Performance Management None
Community Safety including Section 17 of Crime and Disorder Act 1998 None
Policy

None
Environmental None

## 12. **OTHERS CONSULTED ON THE REPORT**

Portfolio Holder	<b>No</b>
Chief Executive	<b>No</b>
Executive Director (Partnerships and Projects)	<b>No</b>
Executive Director (Services)	<b>No</b>
Assistant Chief Executive	<b>No</b>
Head of Financial Services	<b>Yes</b>
Head of Legal, Equalities & Democratic Services	<b>No</b>
Head of Organisational Development & HR	<b>No</b>
Corporate Procurement Team	<b>No</b>

## 13. **WARDS AFFECTED**

All wards

## **CONTACT OFFICER**

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## BROMSGROVE DISTRICT COUNCIL

### CABINET

3RD MARCH 2010

#### BROMSGROVE LOW-COST HOUSING SCHEME

Responsible Portfolio Holder	Cllr Peter Whittaker
Responsible Head of Service	David Hammond
<b>Key Decision No</b>	

#### **1. SUMMARY**

- 1.1 Since 1989 Bromsgrove District Council has operated a Low-Cost Housing Scheme involving 222, one two and three bedroom houses sold to first time buyers at 70% of market value. The purchasers then had the opportunity to staircase out to full ownership and a number have exercised this right meaning that there are now only one hundred and twenty properties left in the scheme.
- 1.2 The current eligibility criteria is restricted to applicants who live in Bromsgrove District. Currently there is little demand for these properties, and there are only fifteen applicants on the Low Cost Housing waiting list. Low demand is partly due to the current difficulties of obtaining mortgages for these types of affordable properties and partly due to lack of awareness of the scheme. As properties only become available occasionally with very little notice the applicants on the list are rarely in a position to move and the properties then have to be passed to estate agents for open marketing to any potential purchasers who may be from outside the District.
- 1.3 This report therefore proposes an extension to the eligibility criteria and revised methods of marketing the scheme and properties that become available for sale.

#### **2. RECOMMENDATION**

- 2.1 That members approve extending the eligibility criteria to align with the local connection criteria for the housing register and include applicants who are employed in Bromsgrove District and those who have family already resident in the District. Whilst more restrictive than general access to the Housing Register the changes are intended to ensure that maximum benefit of the scheme is available to address local housing need. .
- 2.2 That members approve the marketing of Low-Cost resale properties using the advertising opportunity available via the Home Choice Plus, Choice Based Lettings Scheme

### **3. BACKGROUND**

- 3.1 Between 1989 and 1992 the Council enabled the provision of two hundred and twenty one, two and three bedroom first time buyer homes built on sites in Wythall, Alvechurch, Sidemoor and Stoke Heath alongside open market housing. These properties were sold at 70% of their market value with the Council retaining a 30% share by way of covenant.
- 3.2 The objective was to enable local people to access housing at an affordable level at the same time giving them the opportunity to staircase out to full home ownership at some point in the future should they so wish.
- 3.3 There is no rent or interest payable to the Council on the outstanding 30%. The only restriction is that the property has to be offered back to the Council for them to nominate a purchaser from a waiting list held by the Council.
- 3.4 The criteria for accessing the scheme are that clients have to be resident in Bromsgrove District, and have not owned a property in the preceding two years unless that property was in joint names.
- 3.5 The criteria for being nominated for a property is as follows:
- First priority on the waiting list is given to new applicants who are Council tenants (or Housing Association Tenants) and are able to give vacant possession of their Council home (or Housing Association home) to the Council (or Housing Association) on completing the purchase of their new low cost home.
  - Second priority on the waiting list is given to other new applicants who qualify, in the order in which they first contacted the Council to register their interest in a low cost home, (priority for the Alvechurch and Hollywood schemes is given to applicants living the northern and eastern parts of the Bromsgrove District).
- 3.4 Members will note that in this original criteria, priority for nomination is given to applicants in social housing which would thus free up a unit of social housing for rent to clients on the Council's waiting list. There is no proposal to change this.
- 3.5 Historically there has been steady demand for these properties. However recently this has reduced and two properties have had to be sold through an estate agent. The result being that properties built for the benefit of Bromsgrove residents could be purchased by someone from outside the District. There are several reasons for this mainly the difficulty in obtaining a mortgage in the current economic climate and the need to have a larger deposit than previously required.

- 3.6 In an attempt to raise awareness of the scheme, leaflets have been produced and distributed, the scheme has been advertised in Together Bromsgrove and the Council's website has been updated. However interest remains low.
- 3.7 It is proposed that in order to retain some control over the nominations to these properties and prevent them having to be sold on the open market we should extend the eligibility criteria to include applicants who are employed in the District and to applicants who already have family living here. Priority would still be given to current residents.
- 3.8 Members are therefore asked to approve the revised criteria for the allocation of Low Cost Housing Scheme Units that become available for resale as set out at Appendix 1 of this report.
- 3.9 In addition, in an attempt to reach a larger client group, it is proposed that Low Cost Housing Scheme applicants registered on the current waiting list are advised to register on the Home Choice Plus Choice Based Lettings Scheme and that properties that become available are advertised on the Home Choice Plus website. A nomination will then be selected from the shortlist as set out at Appendix 1.

#### **4. FINANCIAL IMPLICATIONS**

- 4.1 There are no financial implications to the Council as there will be no charge to the Council for advertising on Home Choice Plus.

#### **5. LEGAL IMPLICATIONS**

- 5.1 There are no legal implications

#### **6. COUNCIL OBJECTIVES**

##### **6.1 Community and Wellbeing:**

- Raises awareness with local people of affordable housing choices in Bromsgrove.
- Priority will continue to be given to applicants living in social rented properties thus freeing up property for someone else to rent.
- In accessing Home Choice Plus clients can see other housing options that may be available to them e.g. private rented.
- Increases the likelihood of a property being purchased by someone with a local connection to the district rather than encouraging migration from other districts.

##### **6.1 Improvement:**

Improves the service to Low Cost home owners selling properties who have no alternative under the terms of the covenant but to offer the property back to the Council for a nomination.

## **7. RISK MANAGEMENT INCLUDING HEALTH & SAFETY CONSIDERATIONS**

7.1 The main risks associated with the existing criteria and marketing methods are:

- The vendor has to pay for an independent valuation before the property can be marketed. The Council could be criticised for failing to explore all marketing methods to find a purchaser having charged for that valuation. The proposed changes improve marketing options.
- The Council has invested funds in providing a Low Cost Home Ownership solution for Bromsgrove people who cannot afford open market housing. The current restrictions of the scheme and difficulties in marketing properties that do become available for resale mean that finding potential applicants in housing need with the ability to raise a mortgage are limited. There is a risk that this assistance goes to clients who have less need and no connection with Bromsgrove. The proposals improve access and awareness to the scheme.
- The Home Choice Plus scheme is a web based initiative that requires applicants to access the internet in order to view available properties. This means that applicants who do not have internet access may be disadvantaged. However an action plan is in place to improve access and awareness.

7.2 These risks are being managed as follows:

- By advertising the property on Home Choice Plus this guarantees that the property can be seen by the 2700 clients registered with Home Choice plus as opposed to the fifteen applicants currently on the Low Cost waiting list and are consequently more likely to be sold to someone in housing need who has a connection to the District.
- Clients can browse the Home Choice Plus website prior to registering thus there is the potential that a large number of other people will become aware of the scheme.
- Applicants will be asked to contact the Housing Enabling and Monitoring Officer if they require assistance in accessing Home Choice Plus so that a record of their contact details can be maintained and they can continue to be contacted in writing should a property become available

7.3 There are no health and safety implications

## **8. CUSTOMER IMPLICATIONS**

- 8.1 There will be no impact on internal customers. External customers i.e. the current Low Cost waiting list, will be contacted and advised of the change in the scheme and asked to register with Home Choice Plus, the choice based lettings scheme. Applicants will be advised in writing that the Council will not be writing to them individually in future unless they request assistance to access Home Choice Plus. The website and leaflets will be revised to reflect the changes
- 8.2 Relevant staff such as customer service advisers at the HUB will be trained to give advice to customers in the changes to accessing the scheme.
- 8.3 Utilising Home Choice Plus will improve the customer journey into housing as they will be able to complete a single application form to access a range of housing options such as social rented, private rented, shared ownership as well as the low cost housing scheme.

## **9. EQUALITIES AND DIVERSITY IMPLICATIONS**

- 9.1 It is anticipated that by using Home Choice Plus more applicants from a range of equality and diversity groups will be made aware of the low cost housing scheme

## **10. VALUE FOR MONEY IMPLICATIONS**

- 10.1 The scheme is more likely to achieve its objectives of providing a housing option for those with a local connection to the District who cannot afford open market housing. therefore making best use of the Council's investment of funds into the scheme.
- 10.2 There will be saving on postage and stationary costs as mails shots will no longer be sent out.
- 10.3 Staff time in driving to a location to take a photograph for advertising will be offset against the staff time in organising a mail shot.

## **11. CLIMATE CHANGE AND CARBON IMPLICATIONS**

- 11.1 An officer will have to make a journey to go out to take a photograph of the property for it to be advertised.
- 11.2 By encouraging the use of a web based service there will be a reduction in use of paper

**12. OTHER IMPLICATIONS**

Procurement Issues None
Personnel None
Governance/Performance Management None
Community Safety including Section 17 of Crime and Disorder Act 1998 None
Policy None
Biodiversity None

**13. OTHERS CONSULTED ON THE REPORT**

Portfolio Holder	Yes
Joint Chief Executive	Yes
Executive Director - Partnerships and Projects	Yes
Executive Director - Services	No
Assistant Chief Executive	Yes
Head of Service	Yes
Head of Financial Services	Yes
Head of Legal, Equalities & Democratic Services )	Yes
Head of Organisational Development & HR	Yes
Corporate Procurement Team	No

**14. WARDS AFFECTED**

All wards

**15. APPENDICES**

Appendix 1: New Criteria for the Bromsgrove Low Cost Waiting List.

**16. BACKGROUND PAPERS**

There are no background papers

**CONTACT OFFICER**

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## **Revised Criteria for Bromsgrove Low-Cost Housing Scheme**

Applications for the scheme will be accepted from people who are

- Resident in the Bromsgrove District Council area
- Work in Bromsgrove District Council Area
- Have relatives already resident in Bromsgrove District Council Area

Nominations will only be given to people who meet the above criteria and are:

First time buyers **or**

Applicants who have not owned a property in the previous two years unless the previous home ownership was in joint names and this application is a sole application.



## BROMSGROVE DISTRICT COUNCIL

### CABINET

3RD MARCH 2010

#### SUPPORTING PEOPLE STRATEGY 2010 - 2013

Responsible Portfolio Holder	Cllr Peter Whittaker
Responsible Head of Service	Head of Planning & Environment
Key Decision	

#### **1. SUMMARY**

- 1.1 Nationally the Supporting People programme offers housing related support to over a million vulnerable people in the UK. The Worcestershire Supporting People programme provides strategically planned housing-related support services to vulnerable people with the goal of supporting them to achieve a range of outcomes that will improve their quality of life.
- 1.2 A new Supporting People Strategy for the period 2010 - 2013 has been developed by the Worcestershire Supporting People Team. A draft copy of the new strategy was circulated by the Strategic Housing Manager to all Members in January for consultation and the opportunity for comments to be submitted directly to the Supporting People Manager.
- 1.3 The Strategy now comes before the Executive Cabinet for approval. The document is also in the process of being considered for approval by the County Council and the other District and Borough Councils within Worcestershire.

#### **2. RECOMMENDATION**

- 2.1 **That the new Supporting people Strategy for the period 2010 – 2013 attached at Appendix 1 be approved.**

#### **3. GENERAL BACKGROUND TO SUPPORTING PEOPLE**

- 3.1 The Supporting People programme within Worcestershire is helping more than 20,000 vulnerable people each year to attain or maintain independence, through the provision of housing related support services. This includes older people, people with mental health issues, learning disabilities, physical disabilities, homeless, offenders, teenage parents, travellers, people with alcohol problems, people who have

suffered from domestic violence, young people at risk and young people leaving care.

- 3.2 The Supporting People programme was launched in April 2003 and comprises a funding, quality monitoring and needs assessment programme for housing related support services. Prior to Supporting People, housing related support was funded in a number of different ways and was not strategically planned and co-ordinated. Following the launch, one of the Supporting People responsibilities was to review all these services to ensure that they were strategically relevant, were eligible for SP funding, offered value for money and quality services.
- 3.3 The Supporting People programme is administered by the County Council on behalf of the Worcestershire Supporting People partnership, which consists of representatives of the 6 District Councils, the 3 Primary Care Trusts and West Mercia Probation Service as well as the County Council. The County Council in its role of administering authority, issues contracts to providers, makes payments and has responsibility for ensuring that the programme is effectively administered and delivered. The County Council has a key responsibility for the finances of Supporting People and the responsibility to work with its partners to deliver the best possible services within the resources available. Part of this responsibility is to ensure a robust Supporting People Strategy is in place setting out the direction in which services will change and develop to meet the needs of the local area.
- 3.4 The previous SP Strategy 2005 – 2010 that was approved by the Executive Cabinet back in February 2006 has now expired and following consultation with a broad range of partners and stakeholders is being replaced by the Strategy set out at Appendix 1 of this report.

#### **4. The Supporting People Strategy for 2010 - 2013**

- 4.1 The Supporting People Strategy 2010-2013 informs and embeds the commissioning intentions and priorities for helping the most vulnerable and excluded to contribute to wider society within Worcestershire. In addition it sets out how service users and providers can become a more integral element within the commissioning of the programme. The intention is for the most vulnerable people within the County to have services which are appropriate and responsive to individual needs and expectations thus preventing the need for intrusive intervention at the point of crisis.
- 4.2 The strategy sets out the direction the programme for the next 3 years in meeting vulnerable client needs, becoming more flexible and creative in meeting the rising demand for support services (taking into account changing demographics within the county).

- 4.3 As from April 2010, the Supporting People programme grant will become part of the Local Area Agreement's Area Based Grant (ABG). The 3 year strategy outlines the intention to align all current and future commissioned projects and their outcomes to those of the LAA priorities; thus ensuring local priorities within the County can be fulfilled in partnership. This is particularly important as under new arrangements effective from April 2010, the Supporting People Programme Grant and Administration budgets lose their ring fenced protection under these new funding arrangements. At this stage it is not clear to what extent the LAA will allocate budgets through the ABG and for 2010 / 11 it is expected that the Supporting People Grant will be passported back to the SP Partnership.
- 4.4 The strategy details the approach of the programme in aligning all 117 contracts to meet LAA priorities, a financial benefits model which identifies significant public cost savings as a result of these preventative services, and a range of projects the programme seeks to commission in 2010/11.

## **5. Summary Of The Commissioning Intentions For 2010 - 2013**

### **5.1 All service provision will achieve the following:**

- Deliver the vision of this strategy, and align to key County priorities (Local Area Agreement, as a for instance);
- Meet the needs of vulnerable people in the county, and seek to engage with the most chaotic;
- Be flexible in approach to engage with such a diverse range of needs;
- Be sustainable and have the ability to attract additional funding as a result of our investment;
- Be cost effective, providing value for money;
- Fit with the strategic priorities of the Worcestershire Supporting People Partnership;
- Be high quality;
- Demonstrate that the client groups being supported are prioritised for our support;
- Provision also is commissioned on needs evidence, and remains tenure neutral.

### **5.2 Older People**

- Early intervention services for older people (particularly with mental health needs).
- Low-level preventative housing related intervention as provided by home improvement agencies, community alarms and assistive technology.
- Provision of a countywide floating support that meets the needs of the most vulnerable (irrespective of their tenure)
- To provide low level support where appropriate within existing and new models of housing support provision.

- To identify the additional outcomes that may be achieved through social inclusion activity, for instance volunteering. (Either as a mechanism to identify housing related concerns for people who are not currently engaged, or to sustain networks for communities.)
- Please also refer to Learning Disability, Physical Disability and Sensory Impairment, in addition to Mental Health commissioning intentions for this client group.

### **5.3 Mental health**

- To undertake a strategic needs analysis of mental health provision within Worcestershire. The review will provide a strategic framework for commissioning intentions for Worcestershire's Supporting People programme seeking to add value to existing provision, create a real life account for gaps in provision, identify opportunities for joint commissioning and create alignment to Local Area Agreement priorities (current and potential).
- Within existing provision, increase the awareness of mental health issues and capacity build to assist programmes in identifying early someone's mental health deterioration.
- Within existing provision, support the drive for an equitable provision of mental health support programmes providing community based support, opportunities for training, education, employment, housing and support to develop networks (inclusion activities) and assist move on.
- Within existing provision, support the drive for equitable provision of support for people with a mental health illness to return to their home or supported living arrangement at the earliest opportunity that their condition allows. This provision should include a coordination of multi agency support in regard to health, housing and social care agreed with patients and their carers.
- Ensure appropriate choice is developed within Supporting People initiatives to aid recovery, increase social integration, enable maintenance of social networks and provide opportunities for increased independence, including return to appropriate employment.
- Within existing mental health provision, ensure move on is a priority, to ensure independent living opportunities and throughout.

### **5.4 Learning disabilities**

- Provision should seek to enhance greater choice and control, the use of community-based activities, with greater opportunities to integrate with increased accessibility, an emphasis on leisure, work and learning opportunities regardless of disability and, importantly, a desire to ensure that social contact with friends is maintained.
- Ensure that provision identifies the needs of carers, in addition to the service user.
- Ensure that programmes within our portfolio achieve multi faceted outcomes, and that provision works alongside each other with the adaptability to meet choice and control expectations.

### **5.5 Physical Disability and sensory impairments**

- To undertake a strategic needs analysis of physical disability and sensory impairment provision within Worcestershire. Working in partnership with key stakeholders (policy makers, physical disability and sensory impairment commissioners, providers and service users) the review will provide a strategic framework for commissioning intentions for Worcestershire's Supporting People programme seeking to add value to existing provision, create a real life account for gaps in provision, identify opportunities for joint commissioning and create alignment to Local Area Agreement priorities (current and potential).
- To ensure that existing provision and any newly commissioned provision is enabling people to access supported housing and low level housing related support, in addition to identifying social inclusion activity.

### **5.6 Gypsy and Travellers**

- To carry out a strategic review of the Gypsy and Traveller community within Worcestershire (and neighbouring authorities where appropriate) to ascertain the housing related support needs of this client group. The recommendations of this review will provide support for investment decisions to be made within the lifetime of this strategy.
- Within existing provision, ensure that Gypsies and Travellers are recognised within the diversity and training of providers;
- Work strategically with Children Services and stakeholders where appropriate to support families in existing provision seeking support, specifically around education or access, and also health (families who travel may not have a regular doctor). Providers will be expected to work closely with Health Visitor's/practitioners about specialist health support available to this community.
- Identify the needs of older communities specifically in terms of adaptations and health.

### **5.7 Young People at risk**

- Preventative work: early prevention and advice, mediation, home visiting, school based work and assessment and local authority advice in housing.
- Accommodation and support: supported lodgings, nightstops, emergency accommodation (hostels), forms of move on from hostels and floating support.
- Person-specific services: complex needs and high vulnerability, health, learning and work, BME young people, tackling anti social behaviour and offenders and offending, identifying opportunities for contribution to positive activities agenda (for instance, volunteering)
- Provision of a greater range of housing options and support (embraced within the freedom and flexibility of funding governance), which contributes to the prevention of homelessness and repeat

homelessness. This includes specific issues within mainstream housing and support including substance misuse issues, youth offending behaviour, learning disabilities and difficulties including Asperger's Syndrome, dyspraxia, minority ethnic groups particularly unaccompanied asylum seekers, teenage parents and young people who are pregnant and young victims and survivors of domestic abuse, and care leavers.

### **5.8 Teenage parents**

- Provision of short-term transitional services to make the move to independent living
- Floating support and coordinating services, enabling access to health and well being support through to training, education, employment and benefits support.
- Development of move on support functions, for instance life coaching / mentoring to aid and support transitions.

### **5.9 Homelessness**

- Ensure preventive agenda is extended throughout the County, including the introduction of a single service gateway and improved systems such as common monitoring and common assessment
- Crisis intervention: emergency access accommodation and street outreach, often dealing with high vulnerability and complex needs.
- Supported independent living: supported accommodation for single homeless people, offenders and substance mis-users.
- 'Preparation for independent living': floating support, which can be generic or specialist. Some focuses solely on crisis intervention work, some are specialist services and other floating support moves with the person through different types of accommodation.
- Ensure provision continues to complement housing strategies countywide, and remains equitable based on need.
- Development of move on support functions, for instance life coaching / mentoring to aid and support transitions.

### **5.10 Substance misuse**

- The provision of Low-level and floating support for individuals with drugs and alcohol problems;
- Complementing low-level community interventions and alignment to the strategic direction of the Drug and Alcohol Action Team partnership
- Provision to address the demand profile within the County, and remains equitable.
- Development of move on support functions, for instance life coaching / mentoring to aid and support transitions.

### **5.11 Offenders**

- Ensure that provision of effective offending behaviour support programmes (housing related needs) aimed at the low / medium and high risk offenders, within the community, are implemented

effectively to reduce and stop further offending based on research and intelligence in terms of need per district.

- Ensure housing related provision supports offenders in accessing training and employment opportunities, as this is identified as a very effective mechanism in helping previously unemployed offenders live crime-free lives
- Ensure that we have a mixed economy of low, medium and high risk offenders within the current portfolio of provision.
- Development of move on support functions, for instance life coaching / mentoring to aid and support transitions.

#### **5.12 Domestic violence**

- Ensure that Supporting People provision is available to meet a targeted response to the needs of specific vulnerable groups including Gypsy and Traveller Communities; Rural Communities; Vulnerable Adults – drugs, alcohol, mental health, older people; Young Adults.
- Work in Partnership with the Domestic Abuse unit, ensuring a portfolio of provision is applied throughout the county (specifically looking at both prevention (including perpetrator programmes) and recovery/resettlement programmes).
- Work in conjunction with the WFADA in regard to a Safer Housing strategy, including a needs assessment of need and options within the county.
- Continue to work strategically with WFADA on improving practice through training, service standards and outcome / data monitoring with current provision within the Supporting People programme in Worcestershire.
- To work strategically with the Domestic Abuse Forum to ascertain the needs of the County and allocate resource to meet identified housing related needs.
- Development of move on support functions, for instance life coaching / mentoring to aid and support transitions.

#### **5.13 Additional requirements:**

A comprehensive and integrated needs analysis for the following groups will also be commissioned to assist with actions within future annual plans.

- Training Needs Analysis for providers supporting HIV/AIDS
- Refugees and migrant communities
- Carers for all client groups

5.14 The strategy will be accompanied by an annual work plan, which will detail and organise activity to achieve the requirements of the strategy. An element of this work plan will be to ascertain the distribution of funding per District. Currently, there is not an equal split of funding by District. This is based on the way SP commission its provision – on need and priority target areas. Demographic and existing provision will determine the level of support needed by District, and it is also to be

noted that the countywide provision will offer support per District also on need. The initial stage of the work plan focus on the distribution of funding, identify changing demographics and ensure that allocation is representative. This will be supported by the housing lead officers.

## **6.0 FINANCIAL IMPLICATIONS**

- 6.1 The County Council as the Administering Authority bears the full financial risk of the Supporting People programme and has the right to veto any decisions made by the Supporting People Partnership if likely to compromise the financial position of the County Council.
- 6.2 There are no financial implications for the District Council with regard to the programme. The administration (carried out by County Council) for the SP programme is fully subsidised by grant funding from Department for Communities and Local Government (DCLG).
- 6.2 The Programme's recurrent budget for 2010/11 has been set by DCLG at £14.5million. This recurrent budget is expected to be fully commissioned on provision and assessed to be meeting value for money expectation, services meeting the Quality Assessment Framework, and addressing the priority needs of the county in regard to these client groups.
- 6.3 The six housing leads will continue to work with the Supporting People commissioners and Development Manager to ensure that the provision of services are reflective of District/Borough needs. Within the last 12 months significant developments have been made to ensure Supporting People services meet the priorities of the Local Area Agreement. The next stage will be to manage the provision per area/cross county to meet the most vulnerable needs. (Housing leads also have a strategic position by sitting on the Supporting People Commissioning Body, the governing body for the programme.)

## **7. LEGAL IMPLICATIONS**

- 7.1 None as the County Council as the Administering Authority bears the full risk of the Supporting People programme and has the right to veto any decisions made by the Supporting People Partnership if likely to compromise the position of the County Council.

## **8. COUNCIL OBJECTIVES**

- 8.1 **Objective 1 – Regeneration (Town Centre and Housing)**



Improved standard of support and preventative service for homeless and vulnerable people.

**8.2 Objective 2 – Improvement**

Improved service to customers by the ability to provide a higher standard of support services.

**8.3 Objective 3 – Sense of Community and Wellbeing**

The broad range of support services across the client group including homelessness prevention, reduction and support influences health and wellbeing.

**8.4 Priority 4 – Environment**

Reduction of homelessness and support for a broad range of vulnerable clients in assisting them to live independently helps better neighbourhood integration and therefore reduces any negative impact upon the environment.

**9. RISK MANAGEMENT INCLUDING HEALTH & SAFETY CONSIDERATIONS**

9.1 The County Council as the Administering Authority bears the full financial and legal risk of the Supporting People programme and has the right to veto any decisions made by the Supporting People Partnership if likely to compromise the financial or legal position of the County Council.

**10. CUSTOMER IMPLICATIONS**

10.1 Increased outcomes for customers aligned to the priorities set out in the Local Area Agreement.

**11. EQUALITIES AND DIVERSITY IMPLICATIONS**

11.1 All SP services have to comply under Quality Assessment Framework when commissioned or reviewed.

**12. VALUE FOR MONEY IMPLICATIONS**

12.1 All SP services considered for VFM under Quality Assessment Framework when commissioned or reviewed.

**13. OTHER IMPLICATIONS**

Procurement Issues None
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Personnel None
Governance/Performance Management None
Community Safety including Section 17 of Crime and Disorder Act 1998 None for BDC
Policy None
Biodiversity None

#### 14. **OTHERS CONSULTED ON THE REPORT**

Portfolio Holder	Yes
Joint Chief Executive	Yes
Executive Director - Partnerships and Projects	Yes
Executive Director - Services	
Assistant Chief Executive	Yes
Head of Service	Yes
Head of Financial Services	Yes
Head of Legal, Equalities & Democratic Services	Yes
Head of Organisational Development & HR	Yes
Corporate Procurement Team	No

#### 15. **WARDS AFFECTED**

#### 16. **APPENDICES**

Appendix 1 Supporting People Strategy Document 2010 – 2013.

#### 17. **BACKGROUND PAPERS**

None

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## BROMSGROVE DISTRICT COUNCIL

### CABINET

3RD MARCH 2010

#### OUTURN EXPENDITURE OF CLG HOMELESSNESS GRANT FUNDING FOR 2009/10, UPDATE ON PERFORMANCE AND PROPOSED USE OF GRANT FOR HOMELESSNESS PREVENTATIVE SCHEMES FOR 2010/11.

Responsible Portfolio Holder	Councillor P. Whittaker
Responsible Head of Service	Head of Planning and Environment
Key Decision	No

#### 1. SUMMARY

- 1.1 Since the Homelessness Act 2002, the Government has allocated grant funding to local authorities to prevent and tackle homelessness and to help achieve the Government target set for each LA of halving the number of homeless people living in temporary accommodation by 2010.
- 1.2 The annual grant to BDC, allocated through Communities and Local Government (CLG) has been used to fund a range of homelessness support services and schemes that focus upon the prevention of homelessness and repeat homelessness in the District and has assisted the Council in meeting the Government's target of halving the use of temporary accommodation ahead of schedule.
- 1.3 This report provides members with information relating to:
- The schemes in place in this District funded by CLG Grant during 2009/10 which provide support to the homeless or help to prevent homelessness.
  - The impact the preventative services have had on reducing homeless presentations and acceptances and the authorities performance against the Government target of reducing the use of temporary accommodation by 2010.

and seeks Members approval of the recommendations for the award of grant to specific schemes in 2010/11 that have been made by the Homelessness Strategy Steering Group.

- 1.4 In addition to Homelessness Grant mentioned above and in response to the Economic downturn, the Council has received a Non Tenure

Specific 'Economic Recovery Fund' of £28,500 to assist people who have suffered an income shock due to redundancy or short time working, whether they are home owners or tenants. The fund which is being held separately from Homelessness Grant has so far prevented one family from becoming homeless whereby £4,000 was used to clear a second charge to prevent their house from being repossessed therefore leaving remaining funds to assist further cases in avoiding repossession.

## **2. RECOMMENDATION**

- 2.1 That the update on the homelessness prevention and support schemes funded through CLG Homelessness Grant during 2009/10 be noted.
- 2.2 That the Council's continuing performance in more than halving the use of temporary accommodation in advance of the Government's 2010 target date be noted.
- 2.3 That the submissions for the funding of schemes recommended by the Bromsgrove Homelessness Strategy Steering Group as set out at Sect 7 of the report be approved to receive funding from the Council's CLG Homelessness Grant for 2010/11.
- 2.4 That the Head of Planning & Environment Services in consultation with the Portfolio Holder for Strategic Housing be granted delegated authority to allocate any under spend or make further adjustments necessary to ensure full utilisation of the grant allocation for 2010/11 in support of existing or new schemes and approve expenditure of the Non Tenure Specific Economic Recovery Fund.

## **3. BACKGROUND**

- 3.1 Since the Homelessness Act 2002, the Government has allocated grant funding to local authorities to prevent and tackle homelessness and repeat homelessness and to help achieve the Government target set for all local housing authorities to halve the number of homeless people living in temporary accommodation by 2010. Since its inception, the annual grant to BDC, allocated through Communities and Local Government (CLG) has been used to fund a range of homelessness support services provided in the District by a range of partner organisations.
- 3.2 The Government requires the following outcomes to be delivered by the grant:
  - Reduced and sustained reduction in the level of rough sleeping by at least two thirds below the level in 1998.
  - Avoidance of long-term use of bed and breakfast accommodation for homeless families with households with children or a pregnant woman.

- By 2010, end the use of bed and breakfast accommodation for young people between 16 and 17 years of age.
  - Reduction in the use of temporary accommodation by 50% by 2010.
- 3.3 As the Council experiences minimal or no rough sleeping, has very low usage of B&B (using hostel and self contained dispersed units to house homeless families) and has sound homelessness preventative services, all of the above requirements are currently being met.

**4. SCHEMES FUNDED BY CLG GRANT DURING 2009/10 WHICH PROVIDE SUPPORT TO THE HOMELESS AND/OR HELP TO PREVENT HOMELESSNESS.**

- 4.1 Members may recall that as the Strategic Housing Authority, BDC coordinates and leads the Bromsgrove Homelessness Strategy Steering Group. Through this group which includes partners from a range of organisations, the Homelessness Section of the Council's Housing Strategy and Action Plan has been developed to address the support needs of the homeless and provide schemes that are aimed at the prevention of homelessness. The successful outcomes were recognised by the Council (in partnership with Bromsgrove Youth Homelessness Forum and BDHT) being awarded Regional Centre of Excellence for Youth Homelessness for 2008/2009.
- 4.2 In 2008, for the first time, the Council was awarded Homelessness Grant totalling £80,000 pa for a three year period from 08/09 – 10/11. On the 1st April 2009 the Executive Cabinet gave approval to the grant funding for 2009/10 and 2010/11 being used in accordance with the recommendations made by the Bromsgrove Homelessness Strategy Steering Group. The Executive Cabinet also gave delegated authority to the Portfolio Holder to re-allocate any under spend or make further adjustments necessary to ensure full utilisation of the grant allocation for 2009/10 in support of existing or new schemes.

The table below sets out how the grant funding for 2009/10 has therefore been allocated and utilised:

Allocation of CLG Homeless Grant 2009/10			
	Budget	Bids Approved	Projected Actual Spend
	£	£	£
Amount Carried Forward from 08/09	46,609		
Homelessness Grant for 09/10	81,050		
Additional BYHF Grant for PTS	10,000		
Economic Downturn Grant	10,000		
Total	147,659		
CAB Mortgage Rescue allocated 08/08		12,000	12,000

Newstart Furniture Project		5,000	5,000
Baseline Rent Deposit Scheme		18,000	18,000
Floating Homelessness Prevention Officers		24,000	24,000
Housing Options Service		15,000	15,000
Consultation		500	100
Training flat		2,728	0
New Start Van Driver		5,000	5,000
Basement Team Leader/ Peer Mentoring		2,000	2,000
Basement Management		5,200	5,200
Underoccupation		21,000	14000
Education Initiative		2,000	0
County Homelessness Strategy coordination (previously allocated to Centerpoint		3,000	625
Regional Centre of Excellence		3,424	3,424
BYHF PTS from CLG		10,000	10,000
Prevention Training		250	250
Economic Downturn Grant		10,000	9,545
<b>Total</b>	<b>147,659</b>	<b>139,102</b>	<b>124,144</b>
<b>Underspend (budget less actual spend)</b>			<b>23,515</b>

4.3 The new initiatives funded during **2009/10** are progressing as follows:

#### **Under occupation**

There is evidence that there are significant numbers of people under occupying their homes and the Council has commissioned a research project to understand the full scale of under occupation and what opportunities might exist or be put in place to encourage people to downsize and thus free up accommodation to meet the needs of homeless people and to provide an incentive fund for encouraging people to downsize. Any under spend in the grant allocated will need to be carried forward to 2010/11.

#### **Owner Occupier Money Adviser**

The Owner Occupier Specialist Adviser based at the CAB spent an average of 10 hours with 73 clients (up to the end of Dec 2009) who were experiencing difficulties meeting their mortgage repayments. Of these, two cases were referred to full mortgage rescue. The remainder have been resolved by accessing additional benefits such as support for mortgage interest, debt prioritisation and negotiation with mortgage lenders.

#### **Economic Downturn Fund**

An additional £10k was awarded to Bromsgrove DC to assist in providing a response to the economic downturn. This was utilised to provide the Mortgage Wise advice packs, promote CAB services and extend the hours of the Owner Occupier Specialist Advisor post at CAB.



### **BYHF Private Tenancy Scheme**

Following the successful Regional Centre of Excellence Youth Homelessness Event held at Avoncroft Museum in May, CLG awarded an additional £10k to BYHF to promote the private tenancy scheme for under 25 year olds.

#### **5.0 THE IMPACT THAT PREVENTATIVE SERVICES HAVE HAD ON REDUCING HOMELESS PRESENTATIONS AND ACCEPTANCES AND BDC's PERFORMANCE AGAINST THE GOVERNMENT TARGET OF REDUCING THE USE OF TEMPORARY ACCOMMODATION BY 2010.**

- 5.1 The number of people presenting as homeless, those accepted and the outcome of homelessness prevention services are monitored by the BDC Strategic Housing Team on a quarterly basis. The table below indicates a trend of reducing homeless presentations and acceptances and a growing number of cases that are being prevented from becoming homeless.

Performance info 2009/10	Total 2006-7	Total 2007/8	Total 2008/9	2009/10 1 <sup>st</sup> Qtr	2009/10 2 <sup>nd</sup> Qtr
Presentations	249	147	119	20	32
Acceptances	123	91	69	11	12
No of people in temp accommodation	63	16	13	15	13
Preventions	76	157	172	41	47
New homes	72	46	145	22	24
Voids	291	314	343	91	89
Housing advice (BDHT)		646	695	160	233

- 5.2 Back in 2004, the Government set all housing authorities a target of reducing the number of homeless clients living in temporary accommodation by 2010. For Bromsgrove, this meant reducing the number of households in temporary accommodation from 68 to 34.
- 5.3 By the 31<sup>st</sup> December 2007, we had achieved the target figure of 34 when we recorded only 33 clients occupying temporary accommodation. Since that milestone, the trend for reducing the number of households in temporary accommodation has continued with 13 occupying temporary accommodation at the end of December 2009. This impressive performance has been recognised at a National Level with BDHT and BDC being invited to a Homelessness Conference in London to talk about how the target was achieved two years early. It is also important to recognise that it has only been through strong partnership working, and the funding of additional

prevention activities that has enabled the Council to achieve this. Investment in prevention activities will need to continue to be a priority in this challenging economic climate.

## **6.0 THE CLG HOMELESSNESS GRANT FUNDING THAT HAS BEEN ALLOCATED FOR 2010/11.**

- 6.1 In 2008 CLG allocated Homelessness Grant of £80,000pa for three financial years, 2008/09, 2009/10 and 2010/11. This has enabled more security and forward planning of services. The following are the schemes were approved last year for the period up to Mar 2011 and schemes where 09/10 funding needs to be carried forward to complete the work during 2010 / 11.

<b>Name of Project</b>	<b>Grant Approved £</b>	<b>Outcomes  Other Considerations</b>
BYHF – Private Tenancy Scheme for under 25's	£18,000pa	Continuation of scheme offering rent deposit, rent in advance and support to assist under 25's to access private rented accommodation
BDHT – Floating Support Service	£24,000pa	Continuation of the floating support service for homeless or potentially homeless. This scheme is jointly funded by Supporting People and BDHT.
Owner Occupier Money Adviser with CAB	£12,000pa	To provide specialist advice regarding mortgage repayment issues including debt prioritisation, benefit advice and negotiation with lenders in order to prevent repossession.
County Homelessness Strategy Co-ordinator	£4,375	To be responsible for the co-ordination, implementation, monitoring and review of the Worcestershire Homelessness Strategy. (All districts being asked to contribute)
Education Initiative	£2,000 carried forward from 09/10	To support the 'Is Homelessness Hitting Home' and Stamp education initiatives which are delivered in schools for young people to be made aware of the importance of a home, what it might be like to become homeless and the reasons for this.
Training Flat	£5,456 for two years	To provide young people an opportunity to experience independent living on a trial period of up to 4 weeks following which they return home. The Training Flat is intended to help young

		people understand their responsibilities and find out whether they are ready for independent living thus increasing their chances of future tenancy sustainment
Underoccupation	£7,000 carried forward from 09/10	To carry out research into underoccupation and provide incentives to encourage people to downsize
Home Visiting Service BDHT	£15,000	For BDHT to continue to provide Home Visiting and prevention activities as per the recommendations of the CLG Homelessness Adviser in 2006
Consultation	£400 carried forward from 09/10	To carry out consultation of housing options and homelessness services.
New Start Re-use and Resettlement Project	£5,000pa	To provide furniture and support to homeless people.
	<b>£93,231</b>	

**7.0 DETAILS OF THE NEW SCHEMES RECOMMENDED BY THE HOMELESSNESS STRATEGY STEERING GROUP TO RECEIVE GRANT FUNDING FOR 2010/11.**

**7.1** At the last meeting of the Homelessness Steering Group on 17<sup>th</sup> November 2009, bids for funding of new preventative schemes during 2010/11 were considered.

The Steering Group considered bids against the available amount of £8,627 (which is made up of Homelessness Grant for the year, plus under spend for last year less the amount for schemes previously approved up to 2011), approved by the Executive Cabinet last year as itemised at in 6.1 above.

The Homelessness Strategy Steering Group recommended the following schemes for approval by the Executive Cabinet.

<b>Name of Project</b>	<b>Initial Bid £</b>	<b>Grant Recommended £</b>	<b>Period of grant</b>	<b>Outcomes Other Considerations</b>
Move on Essential	3,000	1,400	1 year	To provide essential items that cannot be

Items Pack – Fry Housing				provided by the New Start Furniture Project to enable move on into independent living. To be recovered from the Community Care Grant so that the fund is replenished.
New Start – Part time van driver	£5,000	£3,500	1yr	To meet the growing expectations and demand for doorstep furniture collections and deliveries.
The Basement Private Tenancy Scheme	£5,000	£3,500	1yr	To cover a shortfall in the funding already approved to pay for a full time post to deliver the private tenancy scheme for under 25's.
		<b>8,400</b>		

7.2 The recommendations from the Homelessness Strategy Steering Group to support additional new schemes during 2009/10 total £8,400.

## **8.0 CONCLUDING COMMENTS**

8.1 Members are therefore asked to approve from the remaining 2010/11 CLG Homelessness Grant, the funding of schemes recommended by the Bromsgrove Homelessness Steering Group amounting to £8,400 as set out at 7.1 of this report.

8.2 Finally, as in previous years, Members are asked to grant the Head of Planning & Environment Services (or after 1.4.10, the Head of Community Services) in consultation with the Portfolio Holder For Strategic Housing delegated authority to approve re-allocation of any under spend or make further adjustments necessary to ensure full utilisation of the grant allocation for 2010/11 in support of existing or new schemes and approve expenditure of the Non Tenure Specific Economic Recovery Fund.

## **9.0 FINANCIAL IMPLICATIONS**

9.1 In summary the financial implications are as follows:

Carry forward from 09/10	£23,515
Grant 10/11	£80,000
	<b>£103,515</b>
Approved or carried forward from 09/10 (per 6.1)	-£93,231

Recommended projects (per 7.1)	-8,400
Balance remaining	£1,884

- 9.2 Grant funding under the Homelessness (In Need of Accommodation) (England) Order 2002 is allocated by the CLG to local authorities in accordance with their expenditure upon schemes up to the allocation limit. Accordingly the expenditure incurred in supporting the schemes does not fall upon this authority.

## **10.0 LEGAL IMPLICATIONS**

Prevention of homelessness through the schemes developed and funded through CLG Grant assist the Council in meeting its statutory duties to homeless applicants under the Homeless provisions of the Housing Act 1996 and the requirements of the Homelessness Act 2002 that prevents local authorities from placing homeless families or expectant mothers in B&B type accommodation.

## **11.0 COUNCIL OBJECTIVES**

- 11.1 **Objective 1 – Regeneration (Town Centre and Housing)**  
Improved standard of support and preventative service for homeless people.
- 11.2 **Objective 2 – Improvement**  
Improved service to customers by the ability to provide a higher standard of prevention and support service together with more choice in solutions available.
- 11.3 **Objective 3 – Sense of Community and Wellbeing**  
Homelessness prevention, reduction and support influences health and wellbeing.
- 11.4 **Priority 4 – Environment**  
Reduction of homelessness helps a more planned allocation of housing thus supporting better neighbourhood integration and therefore reduces any negative impact upon the environment.

## **12.0 RISK MANAGEMENT INCLUDING HEALTH AND SAFETY CONSIDERATIONS**

- 12.1 If the recommended schemes are not approved there is a risk that more households who are threatened with homelessness or who are in housing need will have limited alternative options. There is the risk that they may have to make a homeless approach and this could consequently lead to the following risks:

- Inability by the Council to meet the statutory duty to provide temporary accommodation in the District thus necessitating placement in B&B accommodation outside of the District.
- Increased B&B costs.
- Inability to maintain the reduction in the use of temporary accommodation to no more than 34 units.

**13. CUSTOMER IMPLICATIONS**

13.1 This scheme will benefit the Council’s customer, by offering household’s more options to prevent their homelessness. Where possible to enable them to remain in their own homes, the Council will be encouraging them to be more independent and take responsibility for their housing situation.

The scheme will also benefit the larger community as there will be fewer households making homeless approaches, and in turn less homeless households in the district.

**14. EQUALITIES AND DIVERSITY IMPLICATIONS**

14.1 Grant funded initiatives are utilised to help vulnerable groups to access housing. For example, young people, ex-offenders, care leavers etc. It is anticipated that the underoccupation research will encourage older residents to move to more manageable sized properties that will be easier to maintain, more affordable to keep warm and be more easily adapted to meet any needs they may have should they become frail or disabled due to the ageing process.

**15 VALUE FOR MONEY IMPLICATIONS**

15.1 Homelessness Grant is provided by CLG to facilitate the development of homelessness prevention activities. By working with partners we are able to deliver a wide range of services and initiatives cost effectively.

**16. CLIMATE CHANGE AND CARBON IMPLICATIONS**

16.1 None

**17. OTHER IMPLICATIONS**

Procurement Issues
None
Personnel Implications

None
Governance/Performance Management  Ability to improve and maintain performance against BVPI's as detailed in the report.
Community Safety including Section 17 of Crime and Disorder Act 1998 None
Policy None
Biodiversity None

**18. OTHERS CONSULTED ON THE REPORT**

Portfolio Holder	Yes
Joint Chief Executive	Yes
Executive Director (Services)	No
Executive Director (Partnerships and Projects)	Yes
Assistant Chief Executive	Yes
Head of Service	Yes
Head of Financial Services	Yes
Head of Legal & Democratic Services	Yes
Head of Organisational Development & HR	Yes
Corporate Procurement Team	No

**19. WARDS AFFECTED**

- 19.1 The homeless prevention services and issues covered in the report are District wide and are not specific to any particular ward.

**20.0 BACKGROUND PAPERS**

20.1 None

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## BROMSGROVE DISTRICT COUNCIL

### CABINET

3<sup>RD</sup> MARCH 2010

#### NON DOMESTIC RATES - HARDSHIP RELIEF POLICY

Responsible Portfolio Holder	Cllr Denaro
Responsible Head of Service	Jayne Pickering
Non-Key Decision	

#### 1. SUMMARY

- 1.1 To request Councillors consider approval to adopt a National Non Domestic Rates Hardship Policy.

#### 2. RECOMMENDATION

- 2.1 That the Council considers the policy and approves its adoption.
- 2.2 That the approval of applications be delegated to the S151 officer of the Council.

#### 3. BACKGROUND

- 3.1 Non Domestic Rates (NDR) is a national tax on Non Domestic Properties (Business) levied by the Council.
- 3.2 The council is responsible for the collecting the charges which are paid into a central pool and redistributed to Councils, County Council and Police Authorities
- 3.3 Due the current economic climate it has become apparent that a number of businesses are looking to apply for relief due to financial hardship.
- 3.4 Section 49 of the Local Government Finance Act 1988 gives billing authorities (the Council) the discretion to reduce or remit the payment of Non Domestic Rates for any ratepayer. The Council can do so where it is satisfied that the ratepayer would sustain real hardship if it did not do so, and it is responsible to do so, having regarded to the wider interests of its Council Tax Payers.
- 3.5 It is important to recognise that the award of Hardship Relief is purely discretionary, and as there is no legislation requirement for Councils to

make such awards, they should not adopt a blanket policy to award or not award relief, dealing with each case on its own merits.

- 3.6 The hardship policy includes criteria which have to be met by the businesses to enable the relief to be granted. These include;
- The impact the closure of the business would have on employment in the area, and if the amenities available to the public would be reduced if the business was no longer trading.
  - Other business in the area which provide the same or similar services or facilities
  - Whether the business is essential to the local community eg the impact on a community through the loss of its only village shop

#### **4. FINANCIAL IMPLICATIONS**

- 4.1 There is currently no budget allocated to grant hardship relief to business rate payers. Any allocation would have to be met from existing budgets.
- 4.2 25% of the award must be borne by the council and the local Council Tax payers, as only 75% of any award can be recovered from the non domestic pool
- 4.3 It is recommended that the relief be limited to a maximum of 10% of the annual rate charge, for a period of three months in any financial year

#### **5.0 LEGAL IMPLICATIONS**

- 5.1 Section 49 of the Local Government Finance Act 1988, gives billing authorities' (the council), the discretion to reduce or remit the payment of non domestic rates for any ratepayer
- 5.2 The council can do so where it is satisfied that the ratepayer would sustain real hardship if it did not do so, and it is reasonable to do so having regard to the wider interests of its Council Tax payers
- 5.3 The award of Hardship Relief is purely discretionary, and there is no legislative requirement for councils to make such awards
- 5.4 Applications must be made in writing , and the last 2 years audited trading accounts must be submitted, along with other information outlined in the policy at appendix 1.

#### **6. COUNCIL OBJECTIVES**

- 6.1 Maximising the collection of NDR in order to achieve high customer satisfaction as specified in KD04. In order a professional service, to all

business rate payers, advising and ensuring that reliefs are granted when eligible.

## **7. RISK MANAGEMENT INCLUDING HEALTH & SAFETY CONSIDERATIONS**

7.1 The main risks associated with the details included in this report are:

- Loss of income
- Performance of Local Indicators

Risk Register: *Financial Services*

Key Objective Ref No: 1

Key Objective: *Maximise collection of Council Tax and Business Rates*

## **8. CUSTOMER IMPLICATIONS AND EQUALITIES AND DIVERSITY**

8.1 The Councils Hardship Relief Policy makes provision for customers to be treated fairly and equally.

## **9. OTHER IMPLICATIONS**

Procurement Issues	None
Personnel	None
Governance/Performance Management	None
Community Safety including Section 17 of Crime and Disorder Act 1998	None
Policy	None
Biodiversity	None

## **10. OTHERS CONSULTED ON THE REPORT**

Portfolio Holder	Yes
Joint Chief Executive	Yes
Executive Director - Partnerships and Projects	
Executive Director – Services	
Assistant Chief Executive	Yes
Head of Service	Yes
Head of Financial Services	Yes
Head of Legal, Equalities & Democratic Services	Yes

Head of Organisational Development & HR	
Corporate Procurement Team	No

**11. WARDS AFFECTED**

All wards

**12. APPENDICES**

Appendix 1    Hardship Relief Policy

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## BROMSGROVE DISTRICT COUNCIL

03 March 2010

### Cabinet

#### **IMPROVEMENT PLAN EXCEPTION REPORT [January 2010]**

Responsible Portfolio Holder	Cllr. Roger Hollingworth, Leader of the Council
Responsible Officer	Hugh Bennett Assistant Chief Executive

#### **1. SUMMARY**

- 1.1 To ask Cabinet to consider the Improvement Plan Exception Report for January 2010 (Appendix 1).

#### **2. RECOMMENDATION**

- 2.1 That Cabinet considers and approves the revisions to the Improvement Plan Exception Report attached as Appendix 1, and the corrective action being taken.
- 2.2 That Cabinet notes that for the 83 actions highlighted for November within the plan 77.1% of the Improvement Plan is on target [green], 3.6% is one month behind [amber] and 7.2% is over one month behind [red]. 12.1% of actions have been reprogrammed or suspended with approval<sup>1</sup>; these include the suspension of the Code of Conduct for Members (due to Government delays in introduction) and the working practices review (due to shared services).
- 2.3 This month's performance is shown on the first page of Appendix 1.

#### **3 BACKGROUND**

- 3.1 July 2008 Cabinet approved the Improvement Plan 2008/09. The Improvement Plan is directly linked to the four corporate priorities and thirteen enablers identified in the Council Plan 2009/2012.
- 3.2 The Improvement Plan is designed to help monitor the detailed actions flowing from the Council Plan, which will help move the Council forward to excellent in the medium term.
- 3.3 There were 3 amber and 6 red activities this month for the following areas of the Improvement Plan:-

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<sup>1</sup> NB reprogrammed actions are those that have been moved to a later point in the year. Suspended actions are those which have been suspended completely for the period covered by the Plan.

Ref.	Council Plan Balanced Scorecard Reference	Number
CP1	Town Centre	2
PR1	Customer Processes	1
PR4	Improved Partnership Working	2
PR5	Planning	3
HR&OD2	Modernisation	1

3.4 The re-programmed and suspended actions Plan are:-

Ref.	Action	Reason
5.4.8	Budget Jury	Suspended
7.3.3	Climate Change Matrix	Suspended due to changed approach
10.1.4	New governance arrangements	Suspended- decision postponed until 2010
10.2.2	Code of Conduct for Members	Suspended due to Government delays
14.2.7	Investors in People	Suspended due to revised approach
16.1.1, 16.1.2, 16.1.3, 16.1.5	Working practices review	Suspended due to prioritisation of harmonisation
16.2.5	Employee satisfaction implementation	Suspended

#### 4. **FINANCIAL IMPLICATIONS**

4.1 No financial implications.

#### 5. **LEGAL IMPLICATIONS**

5.1 No legal implications.

#### 6. **COUNCIL OBJECTIVES**

6.1 The Improvement Plan relates to all of the Council's four objectives and four priorities as per the 2009/2012 Council Plan.

#### 7. **RISK MANAGEMENT**

Corporate Risk Title	Improvement Plan Reference
KO1: Effective Financial Management and Internal Control	FP1 – Managing Finances
KO2: Effective corporate leadership	FP1 – Managing Finances FP2 – Governing the Business FP3 – Managing Resources FP4 – Managing Performance PR2 –Political Governance
KO3: Effective Member / Officer relations	PR2 –Political Governance HROD1 – Learning & Development
KO4: Effective Member / Member relations	PR2 –Political Governance HROD1 – Learning & Development
KO5*: Full compliance with the Civil	PR1 – Customer Processes

Contingencies Act and effective Business Continuity	
KO6: Maximising the benefits of investment in ICT equipment and training	PR1 – Customer Processes
KO7: Effective partnership working	PR4 – Improved Partnership Working
KO8: Effective communications (internal and external)	PR1 – Customer Processes
KO9: Equalities and diversity agenda embedded across the Authority	CP3 – Sense of Community FP4 – Managing Performance
KO10: Appropriate investment in employee development and training	HROD1 – Learning & Development HROD2 – Modernisation HROD3- Positive Employee Climate
KO11: Effective employee recruitment and retention	HROD1 – Learning & Development HROD2 – Modernisation HROD3- Positive Employee Climate
KO12: Full compliance with all Health and Safety legislation	HROD3- Positive Employee Climate
KO13: Effective two tier working and Community Engagement	CP3 – Sense of Community PR4 – Improved Partnership Working
KO14: Successful implementation of Job Evaluation	HROD2 - Modernisation
KO15: All Council data is accurate and of high quality	FP1 – Managing Finances FP4 – Managing Performance
KO16: The Council no longer in recovery	FP1 – Managing Finances FP2 – Governing the Business FP3 – Managing Resources FP4 – Managing Performance PR2 –Political Governance
KO17: Effective Projects Management	FP1 – Managing Finances
KO19: Effective Business and Performance Management	FP4 – Managing Performance
KO20: Effective Customer Focused Authority	CP3 – Sense of Community PR1 – Customer Processes

\* KO5 and KO18 have been merged

## **8. CUSTOMER IMPLICATIONS**

8.1 The Improvement Plan includes a range of actions to deliver the Council's Customer First value. Please see section PR1 of the Improvement Plan.

## **9. EQUALITIES AND DIVERSITY IMPLICATIONS**

9.1 Please see sections CP3 and FP4 of the Improvement Plan

## **10. VALUE FOR MONEY IMPLICATIONS**

10.1 See sections FP1-FP3 of the Improvement Plan

## **11. OTHER IMPLICATIONS**

Procurement Issues: See Section FP2 of the Improvement Plan.
Personnel Implications: See Sections HROD1-HROD3 of the Improvement Plan.
Governance/Performance Management: See Sections FP4 and PR2 of the Improvement Plan.
Community Safety including Section 17 of Crime and Disorder Act 1998: See section CP3 of the Improvement Plan
Policy: All sections of the Improvement Plan relate to this.
Environmental: See sections CP4 and FP3 of the Improvement Plan.

## 12. **OTHERS CONSULTED ON THE REPORT**

Portfolio Holder	<b>No</b>
Chief Executive	<b>At CMT</b>
Executive Director (Partnerships and Projects)	<b>At CMT</b>
Executive Director (Services)	<b>At CMT</b>
Assistant Chief Executive	<b>Yes</b>
Head of Service	<b>At CMT</b>
Head of Financial Services	<b>At CMT</b>
Head of Legal & Democratic Services	<b>At CMT</b>
Head of Organisational Development & HR	<b>At CMT</b>
Corporate Procurement Team	<b>No</b>

## 13. **WARDS AFFECTED**

13.1 All wards.

## 14. **APPENDICES**

14.1 Appendix 1 Improvement Plan Exception Report January 2010.

## 15. **BACKGROUND PAPERS:**

15.1 The full Improvement Plan for January can be found at [www.bromsgrove.gov.uk](http://www.bromsgrove.gov.uk) under meetings Minutes and Agendas. A hard copy is also left in the Members' Room each month.

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# Exception Report for January 2010 Improvement Plan

# Appendix 1

## PROGRESS IN 2009/10

Overall performance as at the end of January 2010, in comparison with the previous year, is as follows: -

July 2008			August 2008			September 2008			October 2008			November 2008			December 2008		
RED	11	8.6%	RED	17	14.4%	RED	16	11.9%	RED	15	10.6%	RED	12	8.7%	RED	13	9.9%
AMBER	3	2.3%	AMBER	4	3.4%	AMBER	8	6.0%	AMBER	7	5.0%	AMBER	8	5.8%	AMBER	5	3.9%
GREEN	114	89.1%	GREEN	96	81.4%	GREEN	99	73.9%	GREEN	104	73.8%	GREEN	106	76.8%	GREEN	100	76.3%
REPRO	0	0%	REPRO	1	0.8%	REPRO*	11	8.2%	REPRO	15	10.6%	REPRO	12	8.7%	REPRO	13	9.9%

January 2009			February 2009			March 2009			April 2009			May 2009			June 2009		
RED	0	0%	RED	2	1.5%	RED	3	2.9%	RED	3	3.2%	RED	3	3.85%	RED	1	1.2%
AMBER	4	3.6%	AMBER	3	2.3%	AMBER	5	4.9%	AMBER	5	5.4%	AMBER	3	3.85%	AMBER	0	0%
GREEN	95	86.4%	GREEN	112	86.2%	GREEN	80	78.5%	GREEN	71	76.3%	GREEN	60	76.9%	GREEN	70	82.3%
REPRO	11	10.0%	REPRO	13	10.0%	REPRO	14	13.7%	REPRO	14	15.1%	REPRO	12	15.4%	REPRO	14	16.5%

July 2009			August 2009			September 2009			October 2009			November 2009			December 2009		
RED	0	0%	RED	0	0%	RED	4	3.8%	RED	2	2.1%	RED	2	2.1%	RED	4	4.3%
AMBER	11	13.3%	AMBER	6	8.5%	AMBER	9	8.7%	AMBER	9	9.6%	AMBER	5	5.3%	AMBER	5	5.4%
GREEN	67	80.7%	GREEN	60	84.5%	GREEN	79	76%	GREEN	70	74.5%	GREEN	71	74.7%	GREEN	70	75.3%
REPRO	0	0%	REPRO	0	0%	REPRO	0	0%	REPRO	0	0%	REPRO	3	3.2%	REPRO	1	1.1%
SUSP	5	6%	SUSP	5	7%	SUSP	12	11.5%	SUSP	13	13.8%	SUSP	14	14.7%	SUSP	13	13.9%

January 2010			February 2010			March 2010			April 2010			May 2010			June 2010		
RED	6	7.2%	RED			RED			RED			RED			RED		
AMBER	3	3.6%	AMBER			AMBER			AMBER			AMBER			AMBER		
GREEN	64	77.1%	GREEN			GREEN			GREEN			GREEN			GREEN		
REPRO	0	0%	REPRO			REPRO			REPRO			REPRO			REPRO		
SUSP	10	12.1%	SUSP			SUSP			SUSP			SUSP			SUSP		

# Exception Report for January 2010 Improvement Plan

## Appendix 1

Where: -

	On Target or completed		One month behind target or less		Over one month behind target		Original date of planned action		Re-programmed date.*		Suspended**
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\* NB. Reprogrammed actions are those that have been moved to a later point in the year. They are not actions that have been extended and they do not appear on the exception report once they have received approval.

\*\*NB. Suspended actions are those that have been suspended completely for the period covered by the Improvement Plan

An Exception Report detailing corrective actions follows:

CP1: Town Centre																	
Ref	January 2010 Action	Colour	Corrective Action												Who	Original Date	Revised Date
1.1.1	Engage specialist organisation to complete unified vision		Work will recommence on the AAP from January 2010.													Jan 10	Apr 10
Ref.	Action	Lead	July	Aug.	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	Corrective Action		
1.1	Agreement on preferred option of Area Action Plan																
1.1.1	Engage specialist organisation to complete unified vision															<p>The listing of Parkside has delayed the resumption of the work on the AAP and the preferred option. However, it would appear that the police and fire service have now secured an alternative site and are awaiting the outcome of a HMIC report and a final decision from the Police Committee before commencing work on the building although there is sufficient money to secure the site. It is anticipated that work will recommence on the AAP from January 2010. The unified vision will be completed by April with the AAP itself being completed by June 2010. However, it is not likely to receive official approval until April 2011.</p>	

# Exception Report for January 2010 Improvement Plan

# Appendix 1

<b>CP1: Town Centre</b>																	
Ref	January 2010 Action		Colour		Corrective Action										Who	Original Date	Revised Date
1.5.4	Work on site commences				Work cannot start until the design and funding issues can be resolved.										HB	Jan 10	TBC
Ref.	Action	Lead	July	Aug.	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	Corrective Action		
<b>1.5</b>	<b>Train Station</b>																
1.5.4	Work on site commences	HB													Work cannot start until the design and funding issues can be resolved.		

<b>PR1: Customer Processes</b>																	
Ref	January 2010 Action		Colour		Corrective Action										Who	Original Date	Revised Date
9.2.4	Launch of updated customer standards .				REPROGRAMMED: Some of the proposed changes have proved impracticable. Needs further discussion at November CF Board. Standards agreed. Will be launched in January. Delayed										HB	Jan 10	TBC
Ref.	Action	Lead	July	Aug.	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	Corrective Action		
<b>9.2</b>	<b>Customer satisfaction (delivery of customer access strategy)</b>																
9.2.4	Launch of updated customer standards	HB													REPROGRAMMED: Some of the proposed changes have proved impracticable. Needs further discussion at November CF Board. Standards agreed. Will be launched in January. Delayed		

<b>PR4: Improved Partnership Working</b>																	
Ref	January 2010 Action		Colour		Corrective Action										Who	Original Date	Revised Date
12.3.1	Benchmark grants policies of other councils.				EXTENDED: Not started yet, due to focus on LSP Board. Initial meeting arranged for January. Della involved in Trunk. No capacity. Suspend until 10/11?										HB	Jan 10	TBC
Ref.	Action	Lead	July	Aug.	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	Corrective Action		
<b>12.3</b>	<b>Grants policy</b>																
12.3.1	Benchmark grants policies of other councils.	HB															EXTENDED: Not started yet, due to focus on LSP Board. Initial meeting arranged for January. Della involved in Trunk. No capacity. Suspend until 10/11?

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<b>PR4: Improved Partnership Working</b>																	
Ref	January 2010 Action		Colour		Corrective Action										Who	Original Date	Revised Date
12.3.2	Develop draft and seek Cabinet approval.				EXTENDED: See 12.3.1 As above. Would want to suspend this project.										HB	Jan10	TBC
Ref.	Action	Lead	July	Aug.	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	Corrective Action		
<b>12.3</b>	<b>Grants policy</b>																
12.3.2	Develop draft and seek Cabinet approval.	HB															EXTENDED: See 12.3.1 As above. Would want to suspend this project.

PR5: Planning																		
Ref	January 2010 Action	Colour	Corrective Action													Who	Original Date	Revised Date
13.2.3	Receive and respond to RSS2 Proposed Changes		Proposed changes delayed due to legal implications.													MD	Jan 10	TBC
Ref.	Action	Lead	July	Aug.	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	Corrective Action			
<b>13.2</b>	<b>Regional Spatial Strategy</b>																	
13.2.3	Receive and respond to RSS2 Proposed Changes	MD														Proposed changes delayed due to legal implications.		

PR5: Planning																		
Ref	January 2010 Action	Colour	Corrective Action													Who	Original Date	Revised Date
13.4.6	Consider results at Customer First Board and CMT, including action plan.		Meeting to be set up in January between internal parties to decide on progress forward and preparation of action plan. Meeting scheduled for early February to check through document. Further meeting scheduled for later Feb with Peer review team to comment on Draft.													HB	Jan 10	Feb 10
Ref.	Action	Lead	July	Aug.	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	Corrective Action			
<b>13.4</b>	<b>Effective Development Control Service</b>																	
13.4.6	Consider results at Customer First Board and CMT, including action plan.	HB														Meeting to be set up in January between internal parties to decide on progress forward and preparation of action plan. Meeting scheduled for early February to check through document. Further meeting scheduled for later Feb with Peer review team to comment on Draft.		

<b>PR5: Planning</b>																		
Ref	January 2010 Action		Colour		Corrective Action											Who	Original Date	Revised Date
13.4.7	Report conclusions to Members				Timetable is running behind. This action and that below will need re scheduling. Meeting arranged this month with I&DeA and new Director to handover on this project and determine when to report to Members.											HB	Jan 10	TBC
Ref.	Action	Lead	July	Aug.	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	Corrective Action			
<b>13.4</b>	<b>Effective Development Control Service</b>																	
13.4.7	Report conclusions to Members	HB														Timetable is running behind. This action and that below will need re scheduling. Meeting arranged this month with I&DeA and new Director to handover on this project and determine when to report to Members.		

<b>HR&amp;OD2: Modernisation</b>																	
Ref	January 2010 Action		Colour		Corrective Action										Who	Original Date	Revised Date
Ref.	Action	Lead	July	Aug.	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	Corrective Action		
15.2.1	<i>Harmonisation of employee terms and conditions of employment; post SERCO report.</i>				Revised timelines need to be agreed with Chief Executive due to capacity issues at RBC and now BDC.											Jan 10	TBC
<b>15.2</b>	<b>Policy review and development</b>																
15.2.1	<i>Harmonisation of employee terms and conditions of employment; post SERCO report.</i>															Revised timelines need to be agreed with Chief Executive due to capacity issues at RBC and now BDC.	



**BROMSGROVE DISTRICT COUNCIL**

**CABINET**

**3 MARCH 2010**

**JANUARY (PERIOD 10) PERFORMANCE REPORTING**

Responsible Portfolio Holder	Cllr Roger Hollingworth
Responsible Head of Service	Hugh Bennett, Assistant Chief Executive
Non Key Decision	

**1. SUMMARY**

1.1 To report to Cabinet on the Council's performance at 31 January 2010 (period 10).

**2. RECOMMENDATIONS**

2.1 That Cabinet notes that 37% of PIs are stable or improving.

2.2 That Cabinet notes that 65% of PI's that have a target are meeting their target as at the month end and 85% are projected to meet their target at the year end.

2.3 That Cabinet notes the performance figures for January 2010 as set out in Appendix 2.

2.4 That Cabinet notes the particular areas of improvement as summarised in section 3.5.

2.5 That Cabinet notes the PI's of particular concern as set out in section 3.6.

**3. BACKGROUND**

3.1 The full list of performance indicators due to be reported monthly is set out in **Appendix 2** where:-

On Target	I	Performance is Improving
Less than 10% from target	S	Performance is Stable
More than 10% from target	W	Performance is Worsening
No target set	N/a	No target set

3.2 Comparisons of overall performance improvements this month to last month are shown on Appendix 1.

3.3 At the beginning of the year the set of corporately reported PI's was revised to ensure they reflect current priorities and also to take account of the revised

assessment methodology that the Council will be judged on under CAA. There are a total of 100 PI's in the corporate set, 37 reported monthly, 26 quarterly and 40 annually. Many of the annually reported PI's are outcome measures. Due to continued problems in obtaining figures for Domestic Violence incidents the two indicators covering these have been removed from the reporting set with effect from November, hence the number of PI's reported monthly is now 35.

3.4 Although the percentage of indicators declining in the month is considerably higher than usual a number of these are due to expected seasonal variations and the others are not a significant drop. As the percentage of PI's meeting both their year to date target and expected to meet target at year end remains high the proportion of indicators declining this month is not a cause for concern.

3.5 Performance worthy of particular mention is as follows:

- Sickness absence remains significantly below the monthly target figure. Outturn is now predicted as amber, i.e. to be within 10% of target. If sickness levels remain this low for the remaining 2 months of the year then outturn will be within annual target.
- Overall Crime levels remain low.
- Sports development usages are running significantly ahead of target.

3.6 Performance of potential concern is as follows:

- Burglaries and Violent Crime rose significantly in January, both of these are being addressed by the CDRP and interventions are being planned/implemented to address this.
- Average speed of answer at the CSC was below target, this was due to the high volumes of calls to the CSC, which were 50% up on December.
- The number of complaints rose significantly in January to 34, 17 of which were about delayed refuse collections during the bad weather. On the other hand, 3 compliments were received about the refuse collection service during the bad weather and 2 about the street cleansing service.

#### **4. FINANCIAL IMPLICATIONS**

4.1 There are no financial implications

#### **5. LEGAL IMPLICATIONS**

5.1 There are no legal implications.

**6. COUNCIL OBJECTIVES**

6.1 Performance reporting & management links to the Improvement objective

**7. RISK MANAGEMENT INCLUDING HEALTH & SAFETY CONSIDERATIONS**

7.1 The main risks associated with the details included in this report are:

- Data quality problems
- Poor performance

7.2 These risks are being managed as follows:

- Implementation of the Data Quality Strategy
- Robust follow up on performance issues, including performance clinics

7.3 There are no Health & Safety considerations

**8 CUSTOMER IMPLICATIONS**

8.1 Performance Improvement is a Council Objective

**9. EQUALITIES AND DIVERSITY IMPLICATIONS**

9.1 There are no implications for the Council's Equalities and Diversity Policies.

**10. VALUE FOR MONEY IMPLICATIONS**

10.1 There are no VFM implications

**11 CLIMATE CHANGE AND CARBON IMPLICATIONS**

11.1 There are no climate change implications

**12. OTHER IMPLICATIONS**

Procurement Issues None
Personnel Issues None
Governance/Performance Management – Production of the performance report supports the aim of improving performance & performance management
Community Safety including Section 17 of Crime & Disorder Act 1988 None
Policy None
Biodiversity None

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12. **OTHERS CONSULTED ON THE REPORT**

Portfolio Holder	No
Chief Executive	Yes (at CMT)
Executive Director (Partnerships & Projects)	Yes (at CMT)
Executive Director (Services)	Yes (at CMT)
Assistant Chief Executive	Yes
Head of Service	Yes
Head of Financial Services	Yes (at CMT)
Head of Legal, Equalities & Democratic Services	Yes (at CMT)
Head of Organisational Development & HR	Yes (at CMT)
Corporate Procurement Team	Yes (at CMT)

13. **WARDS AFFECTED**

All Wards.

14. **APPENDICES**

- Appendix 1 Performance Summary for the period
- Appendix 2 Detail Performance report for the period
- Appendix 3 Detailed figures to support the performance report

15. **BACKGROUND PAPERS**

None

**Contact officer**

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# Overview Board

## Older People Task Group

**DECEMBER 2009**  
**OVERVIEW BOARD**  
Supporting Officer: Pauline Ross



**Bromsgrove**  
District Council

[www.bromsgrove.gov.uk](http://www.bromsgrove.gov.uk)



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throughout Bromsgrove district)

**Appendix 6** - Current Bromsgrove District Council Provision



**BROMSGROVE DISTRICT COUNCIL**  
**REPORT OF THE OLDER PEOPLE TASK GROUP**

**DECEMBER 2009**

**INTRODUCTION BY THE CHAIRMAN**

The Task Group process has helped to identify the extensive range of existing services available and aims to promote access to mainstream services for older people, by informing and recognising that services need to help maintain or regain a good quality of life between work and retirement.

The Task Group identified the need to provide clear information on key services in a variety of formats and to establish a single point of contact for information on what services are available and how to access those services more easily. The recommendations within this report highlight the importance of providing clear, concise information and to raise awareness on the extensive range of existing services available.

The Bromsgrove Sustainable Community Strategy 2010-2013 and the Council Plan 2010-2013 both recognise and include older people as a priority, with key deliverables identified as access to services, housing, community transport and an age well scheme.

The Audit Commission 'Don't stop me now', preparing for an ageing population, suggests that all councils should work with older people to age-proof mainstream services. Councils need to engage with older people in commissioning, designing, and delivering both mainstream and targeted services. Older people's champions and representative boards can play an important role in assessing and evaluating the effect of local services in older people's lives. Marketing and promoting existing services to older people can increase take-up and support independent lives.

**MEMBERS**

Councillors Mrs. M. Bunker (Chairman), S. R. Colella, D. McGrath, D. L. Pardoe, C. J. Tidmarsh, L. J. Turner. The Chairman of the Older People Theme Group, Ms. A. Sowton (Bromsgrove & Redditch Network, BARN) was co-opted onto the Task Group.

This Task Group wishes to acknowledge the assistance received from the Assistant Chief Executive who has helped the Task Group from the start of the investigation and all the way through to the end of the investigation when this report was finalised.

Members would like to extend their personal thanks to Ms. A. Sowton and to all officers and partner agencies for attending meetings and providing presentation material and informing Task Group Members of the positive and comprehensive range of services provided. Thanks are also extended to the Portfolio Holder for Vulnerable and Older People (including Lifeline) for her attendance and contribution to Task Group meetings.

## **SUMMARY**

The role of the Older People Task Group was:

- To carry out a scrutiny exercise to identify existing services and how they can be accessed.
- To identify any gaps and consider how they can be addressed or signposted to other agencies.
- To identify positive initiatives and make general recommendations for strengthening services offered for Older People and share best practice with partner agencies and the voluntary sector.
- To seek the views of statutory, voluntary and community organisations supporting older people services.

## **SUMMARY OF RECOMMENDATIONS**

### **Healthy Living, inclusive of community facilities, activities, participation and inclusion - Recommendations 1 – 5**

One of the agreed outcomes of the Task Group was to promote and celebrate older people and to investigate existing facilities and activities which led to the following:

#### **1. UK Older People's Day**

- (a) That the Council be requested to build on the success and continue to promote and celebrate UK Older People's Day throughout the Council and via the Councils Communications Plan; and that a Member / officer working group be developed to drive future promotions / events and provide an ongoing focus on older people.
- (b) That the Portfolio Holder for Vulnerable and Older People (including Lifeline) be requested to investigate funding opportunities for future events to be held throughout the District.

#### **2. Dolphin Centre – free swimming**

- (a) That following the expiry of the Grant funded Free of Charge (FOC) swimming scheme for 60 plus residents, the Deputy Head of Street Scene and Community be requested to review the impact the service has had the health of those participating.
- (b) That in partnership with NHS Worcestershire and other key members of the Local Strategic Partnership (LSP), Health and Well Being Theme Group, the Deputy Head of Street Scene and Community be requested to produce a report for Members to identify the key successes and failures of the scheme, make recommendations for the future provision to include additional funding opportunities, changes to the structure of the provision, key performance indicators required moving forward and, if required, alternative methods of service delivery.

#### **3. Dolphin Centre – Gym Facilities**

That the Portfolio Holder for Youth, Sports, Recreation and Culture and the Deputy Head of Street Scene and Community be requested to scope the possibility of introducing a dedicated gym session programme for the 50+ age group to encourage greater use from this market segment and report back to the Older People Theme Group within 6 months.

#### **4. Community Transport Services - BURT**

- (a) That the Portfolio Holder for Planning and Transport and the Assistant Chief Executive be requested to assess the service after one year, using the Council's project management framework, to determine usage, costs and feedback from users of the scheme in order to ensure continuous improvement.

- (b) That the Portfolio Holder for Planning and Transport and the Assistant Chief Executive when assessing feedback from users establish if there is a need to expand the Community Transport Service to a wider area and that the Assistant Chief Executive be requested to continue to raise awareness and promotion of the service.

5. **THE TRUNK**

That Members continue to work with THE TRUNK and utilise future developments at the Centre – drop in sessions, surgeries and the core group of (resident) advocates as a means of communicating, informing and updating residents on the Council's service provision.

**Existing Services and Accessibility – Recommendations 6 - 7**

It was often highlighted during task group meetings that there was a need for an increased awareness of the existing extensive services and facilities available, how to access them and to identify any gaps. The Task Group therefore recommend:

6. **Older People's Strategy for Worcestershire**

That the Portfolio Holder for Vulnerable and Older People (including Lifeline) and the Assistant Chief Executive be requested to continue to work with Worcestershire County Council, Joint Commissioning Officer on the revised Older People's Strategy for Worcestershire, with Bromsgrove as a possible pilot district, to ensure there is a Bromsgrove District dimension and that the services provided by the Council and its partners are responsive to the emerging challenges of the changing demographics.

7. **Mapping Exercise**

- (a) The Older People Theme Group Chairman be requested to develop the mapping exercise currently being undertaken in liaison with the Health and Well Being Team, Worcestershire County Council to identify any gaps and complete the mapping exercise by 31st July 2010.
- (b) That the Assistant Chief Executive and the Older People Theme Group Chairman continue to liaise with the Health and Well Being Team, Worcestershire County Council to promote existing services offered and to take an active role in the development of future schemes and re-commissioning of low level services for Bromsgrove District and work with community groups to set up sustainable initiatives with partner agencies.

**Literature Review – Recommendation 8 - 10**

The Task Group found that there is a vast amount of available literature for older people, both within the Council and partner agencies on the existing extensive services and facilities available throughout the District, which led to:

**8. A – Z Directory**

- (a) That the Portfolio Holder for Vulnerable and Older People (including Lifeline) and the Assistant Chief Executive be requested to scope funding to publish an A – Z directory of services available for older people in the Bromsgrove District , to be sustainable so as to keep it up to date. That the Assistant Chief Executive be tasked to produce the directory within 12 months and report back to the Cabinet.
- (b) That the A – Z directory be made available on the Council's Internet and Intranet Sites, a copy to be held at the Customer Service Centre and that Customer Service Centre advisors be requested to use the directory to signpost older people.

**9. Information Management**

- (a) That the Council's website and Connect site be regularly reviewed and updated with service information, contact details and particularly when staff changes occur and that consideration be given to a dedicated page for older people with links to related internet sites.
- (b) That any future mystery shopper exercises include a test of services to older people.

**10. Older People's Champions**

That a Member / officer working group comprising the Assistant Chief Executive, interested Task Group Members and the Portfolio Holder for Vulnerable and Older People (including Lifeline) be established to further explore Age Concern's, Best Practice and scope working with partner agencies to promote the introduction of 'Older People's Champions' (see **Appendix 1**) in each Parish who can disseminate information on available services and accessibility to residents in the Town Centre and surrounding areas within the Bromsgrove District.

**Housing – Recommendations 11 - 13**

The Task Group discussed housing issues and concerns including market and social issues and supporting people – Telecare adaptations, whilst taking into account residents' aspirational expectations. The Task Group therefore recommend:

**11. Older People's Housing Strategy for Worcestershire**

That the Assistant Chief Executive and the Strategic Housing Manager be requested to ensure that any opportunities to assist in meeting the aims and objectives being developed for the newly revised Older People's Housing Strategy for Worcestershire be explored at a local level.

**12. Housing**

That the Portfolio Holder for Strategic Housing, Environment and Climate Change and the Strategic Housing Manager be requested to ensure there is an appropriate housing mix and that older people's needs are catered for within the housing market as identified in the Bromsgrove Sustainable Community Strategy 2010-2013, Stronger Communities and the Bromsgrove Housing Market Assessment 2008.

**13. Lifeline**

That the Head of Street Scene and Waste Management be requested to continue to promote the Lifeline Service, including the range of monitoring equipment available and that the quarterly Lifeline newsletter be used to promote and inform residents of other services and benefits available.

**Income and Employment – Recommendations 14 - 16**

The Task Group looked at pension and benefits advice, employment and adult learning opportunities and preparing for retirement, which led to:

**14. Benefit Service**

- (a) That the Portfolio Holder for Resources and the Benefit Service Manager be requested to continue to raise awareness of the Benefit Service and proactively engage or seek elderly residents who are not claiming benefits by attending residents meetings, providing information surgeries and use of other service area meetings to find out how to reach or inform residents of the benefit service.
- (b) That the Portfolio Holder for Resources and the Benefit Service Manager be requested to continue to work with the relevant service areas within the Council to issue information to residents in receipt of council tax benefit.

**15. Employment**

- (a) That the Portfolio Holder Youth, Sports, Recreation and Culture and the Assistant Chief Executive be requested to explore opportunities to inform and educate young people regarding pension information.
- (b) That the Assistant Chief Executive be requested to liaise with the Local Strategic Partnership – Partners to explore opportunities of raising employees' awareness on pension information.

**16. Adult Learning Opportunities**

That the Portfolio Holder for Vulnerable and Older People (including Lifeline) be requested to work closer with the Adult Learning Team, Worcestershire County Council in order to be familiar with and to promote the adult learning packages available.

**Funding Opportunities– Recommendation 17**

The Task Group discussed funding opportunities for intergenerational projects and events for UK Older People's Day. Task Group Members highlighted the need to ensure that funding opportunities were not missed, which led to:

**17. Funding Opportunities**

That the Assistant Chief Executive be requested to investigate ways in which officers can keep up to date with funding developments and utilise the skills of officers to bid for future funding when appropriate.

**Miscellaneous – Recommendation 18**

Task Group Members raised questions on the general condition of footpaths, specifically around the Town Centre and areas surrounding sheltered housing, which led to:

**18. Worcestershire County Council – Highways Department**

That the Head of Street Scene be requested to liaise with and obtain information from Worcestershire County Council, Highways Department on the current work programme and future work schedule for Bromsgrove District regarding renewal and repairs of pavements and the identification of areas requiring additional dropped kerbs within Bromsgrove District, more specifically the Town Centre and areas around sheltered accommodation.

**Future Vision – Recommendations 19 - 20**

To focus on continuous improvement of older people's services, ensure older people are consulted when formulating new planning policies and the Town Centre Area Action Plan, the Task Group recommend:

**19. Future Vision**

- (a) That the Portfolio Holder for Vulnerable and Older People (including Lifeline) be requested to ensure that the views of older people in Bromsgrove are valued, shared and promoted within all service areas of the Council and negative perceptions of older people are challenged.
- (b) That the Assistant Chief Executive be requested to ensure that the Council achieves more formal engagement with Bromsgrove Older People's Forum.
- (c) That officers take into account the Communities and Local Government, Lifetime Homes, Lifetime Neighbourhoods strategy and other relevant evidence and strategies when formulating new policies.
- (d) That as part of the Council's decision to pilot Mosaic, it is used to target relevant marketing materials to older people.
- (e) That older people be considered as a possible priority in the Corporate Communications Strategy.

**20. Older People's Strategy for Worcestershire - Phase 2**

That the Overview Board be tasked with initiating, when appropriate, an investigation on the revised Older People's Strategy for Worcestershire, Levels of Inclusion, Levels 3, 4 and 5, which deals with dependency created by older age.



## **TERMS OF REFERENCE**

At the meeting of the Overview Board held on 3rd February 2009, it was decided a Task Group would be established to scrutinise issues relating to older people.

The Task Group's terms of reference were approved by the Board at its meeting held on 3rd March 2009. The full terms of reference are attached at **Appendix 2**. The Membership of the Task Group was also agreed at the same meeting. During the Overview Board meeting on the 2nd June 2009 the Board agreed an additional Member to the Task Group.

The Task Group was given 4 months (from the date of its first meeting) to complete its work. During the Overview Board meeting held on 7th July 2009 the Task Group Chairman informed Members that due to the enforced cancellation of its scheduled meeting on 22nd June 2009 it was unlikely that the Task Group would be completed within the allocated 4 month period and that the Task Group would need to review its anticipated workload in order to determine how much additional time was needed. A further update was given to the Overview Board during its meeting on 1st September 2009 and the Board agreed that the Task Group report be presented to the Overview Board meeting on 2nd February 2010.

## **BACKGROUND AND METHODOLOGY**

### Public Involvement

A press release was issued informing the public that the Older People Task Group had been set up. Members of the public were encouraged to submit their views, comments and suggestions for the Task Group to consider. Information about the Task Group was also uploaded onto the website where again the public were encouraged to voice their opinions and suggestions for improvement.

One local retired resident replied requesting involvement in finding the best solutions to providing good support for our ageing population.

Task Group Members were informed that a local resident (via the Scrutiny email address) had questioned the Council's Core Strategy with the specific question "what is the Council doing in areas such as Alvechurch and Barnt Green, where elderly residents live in large detached houses, to facilitate these actively mobile elderly residents to down-size into 'suitable and appropriate properties, as they would be very unlikely to want to down-size into a small apartment/maisonette/flat built on top of each other with very little privacy and recreational facilities". Members received details of the Senior Solicitor's response.

## Witnesses

The Older People Task Group worked closely with the Assistant Chief Executive and the following officers provided the Task Group with information on their specific service area: the Strategic Housing Manager, Sports Development Officer for adults and disabilities, CCTV and Lifeline Manager and the Benefits Service Manager. The Task Group also believed it was important to gain input from the Portfolio Holder for Vulnerable and Older People (including Lifeline).

Information and presentations were provided by –

Tanya Crawford, Advice Service Manager, Bromsgrove & District Citizens Advice Bureau.

Debbie Roberts, Centre Manager, THE TRUNK.

Kay Parry, Health and Well Being Manager, Worcestershire County Council

Colin Barnett, Adult Learning Manager, Worcestershire County Council

Sue Rollason, Head of Supported Services, Bromsgrove District Housing Trust

Sue Keating, Signposting Co-ordinator, Hereford & Worcestershire Fire & Rescue Service

Gillian Christison, Health Improvement Co-ordinator, Worcestershire Primary Care Trust

Duncan Jones, Independent Financial Advisor

Keith Sherman, Chief Officer, Age Concern, Bromsgrove & District

Carol Tipping, Secretary, Older People's Forum

## Meetings attended

The Task Group Chairman and Assistant Chief Executive attended the Older People's Forum, 8th December 2009, with the Task Group Chairman attending the Equality and Diversity Forum on 10th December 2009 to present both Forums with information on the Older People Task Group and the 'draft' recommendations. Both Forums were asked –

1. Do you recognise the issues facing older people?
2. What services would make the biggest differences to your lives?
3. Is there anything else you wish to feed into the Task Group?

## Research

Task Group Members were provided with the following background reading information –

Bromsgrove Profile, Mott Macdonald report. This document was prepared by Mott MacDonald on behalf of Bromsgrove Partnership in order to collate and present

evidence relating to the 6 blocks in Worcestershire's Local Area Agreement (LAA) -

- A** Communities that are safe and feel safe
- B** A better environment – for today and tomorrow
- C** Economic success that is shared by all
- D** Improving health and well being
- E** Meeting the needs of children and young people
- F** Stronger Communities

Bromsgrove District Councils Older People's Focus Groups, July – August 2008 draft report by SNAP Surveys.

The Older People's Strategy for Worcestershire, Worcestershire County Council, (Members were asked to note that this document was currently being reviewed).

Neighbourhood Management, Overview and Scrutiny Commission, Task and Finish Group, 'Looking Forward', Older People's Services in Stoke-on-Trent, Final Report (September 1st 2006)

In-depth Scrutiny Project –To consider how well placed Southend is in relation to the independence and wellbeing of older people “our own future selves”- Report and Recommendations, Community Services Scrutiny Committee, June 2007.

Final report of the Older People's Services Commission presented to West Lancashire District Council.

Review of Older People's Engagement with Government, John Elbourne – Report to Government

#### Members Fact Finding Visit

Ms. A. Sowton and Councillor Turner attended a conference held by Lancashire District Council, Learning from Lancashire, a Beacon Authority. The conference included guest speakers and provided candidates with the opportunity to see the many excellent and innovative services they provide for its older citizens.

#### Areas Covered

There were a total of seven task group meetings. During the first meeting a schedule of work was devised, but due to the enforced cancellation of two consecutive meetings the scoping checklist was reviewed during the task group meeting held on 21st July 2009 and the following areas agreed:

- Healthy Living (inclusive of community facilities, activities, participation and inclusion)

- Housing (inclusive of market and social, supporting people – Telecare, adaptations, handyperson schemes)
- Income and Employment (inclusive of pension and benefits advice, employment and training opportunities and preparing for retirement)

Members were informed during their first meeting that the Older People's Strategy for Worcestershire was currently being reviewed. During the task group process Members were informed by the Joint Commissioning Officer that they were currently planning a review of the older people's strategy and the development of a new strategy. Service users and representatives of the Older People's Forums across the county, as well as voluntary sector organisations would be involved in the development of the new strategy. The Assistant Chief Executive subsequently met with the Joint Commissioning Officer and Task Group Members were informed that the Assistant Chief Executive has requested that the revised strategy includes a district dimension. The Joint Commissioning Officer agreed and suggested working with Bromsgrove as the pilot district. We would recommend that the revised Older Peoples' Strategy for Worcestershire includes aspects on healthy ageing such as leisure, transport, learning opportunities, employment and volunteering.

## **FINDINGS AND RECOMMENDATIONS**

### **Healthy Living, inclusive of community facilities, activities, participation and inclusion**

(Recommendations 1 – 5)

During the initial meeting of the Task Group the Task Group Chairman informed Members of UK Older People's Day on 1st October 2009, a day to celebrate the contribution older people make to society. Members agreed to recommend to the Overview Board that Cabinet approve the promotion of UK Older People's Day throughout the Council and via the Council's Communications Plan and that the Task Group drive the promotion in order to ensure a coordinated approach.

In order to raise awareness and to coordinate events a message was forwarded to all service areas within the council via the council's Connect site. No specific events were being held but positive responses were received from officers and Members, including the Member Champion for Promotions, Sponsorships and Public Events requesting to be actively involved in organising or supporting events to celebrate the day. We were encouraged with the responses received from officers and partner agencies who welcomed the celebration.

We looked at holding events throughout the district, but as the Task Group Chairman highlighted, there was no specific funding for events, so we had to rely on officers and partner agencies resources which meant that events would be limited to a smaller area. Following further discussions with officers and partner agencies the Task Group promoted and publicised events being held throughout the week to celebrate UK Older People's Day. A press release was issued and information slides were displayed by officers, partner agencies and on the television screen at the Customer Service Centre (see **Appendix 4**).

The Task Group Chairman, officers and partner agencies involved in the events held throughout the week received positive responses from residents and Task Group Members suggested that events should be held throughout the district next year.

The Task Group Chairman would like to thank officers and partner agencies for their positive help in organising events and for their support during the events, as events took place with no specific funding available.

The Task Group therefore recommend the following:

<b>Recommendation 1 (a)</b>	That the Council be requested to build on the success and continue to promote and celebrate UK Older People's Day throughout the Council and via the Councils Communications Plan and that a Member / officer working group be developed to drive future promotions / events and provide an ongoing focus on older people.
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<b>Financial Implications</b>	There are no financial implications.
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<b>Recommendation 1 (b)</b>	That the Portfolio Holder for Vulnerable and Older People (including Lifeline) be requested to investigate funding opportunities for future events to be held throughout the District.
<b>Financial Implications</b>	There are no financial implications.

One of the main areas the Task Group considered was 'Health and Well Being'. The current free swimming for the over 60's is funded until 31st March 2011 via the Department for Culture, Media and Sport (DCMS), under the scheme anyone over the age of 60 can swim for free. The scheme has proved extremely successful. Further funding has been secured via the Amateur Swimming Association (ASA) to run over 60 lessons in the future (for free) so those who cannot swim will be able to access the free lessons and swimming for all the obvious health benefits. Officers are due to meet in the future with colleagues from Worcestershire County Council to look at a funding bid for a hoist access for mobility impaired users and to discuss new hoist systems to support usage in this area.

We were interested to learn of the successful uptake of the free swimming for the over 60's and were keen to investigate the possibility of an increase in usage of the newly refurbished gym with a programme offered to the 50+ age group. The Deputy Sports Manager informed the Task Group that all new members receive an individual induction and programme but there were no specific sessions just for the 50+ age group.

The Task Group therefore recommend the following:

<b>Recommendation 2 (a)</b>	That following the expiry of the Grant funded Free of Charge (FOC) swimming scheme for 60 plus residents, the Deputy Head of Street Scene and Community be requested to review the impact the service has had on the health of those participating.
<b>Financial Implications</b>	There are no financial implications.

<b>Recommendation 2 (b)</b>	That In partnership with NHS Worcestershire and other key members of the Local Strategic Partnership (LSP), Health and Well Being Theme Group, the Deputy Head of Street Scene and Community be requested to produce a report for Members to identify the key successes and failures of the scheme, make recommendations for the future provision to include additional funding opportunities, changes to the structure of the provision, key performance indicators required moving forward and, if required, alternative methods of service delivery.
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<b>Financial Implications</b>	There are no financial implications
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<b>Recommendation 3</b>	That the Portfolio Holder for Youth, Sports, Recreation and Culture and the Deputy Head of Street Scene and Community be requested to scope the possibility of introducing a dedicated gym session programme for the 50+ age group to encourage greater use from this market segment and report back to the Older People Theme Group within 6 months.
<b>Financial Implications</b>	There are no financial implications.

We agreed in the Terms of Reference that “Other areas such as transport have already been looked at taking into account the needs of older people, so will not be covered again”.

The Bromsgrove Sustainable Community Strategy 2008 – 2011, Priority: Transport in the District, highlighted the need for Community Transport. This was also highlighted by the company the Council commissioned to conduct the Older People Focus Groups in Hagley and Bromsgrove. The company concluded “the restrictions to social inclusion caused by poor or lack of public transport provision”.

During the Task Group process and in response to the Older People’s Focus Groups the transport sub-group of Bromsgrove Local Strategic Partnership (LSP) launched a new community transport service for the District - Bromsgrove Urban and Rural Transport (BURT).

The BURT minibus is specially adapted for easy access with low steps and a wheelchair lift. It is a safe, secure transport service for any resident of Bromsgrove District who has difficulties with personal mobility and are unable to use public transport, or if suitable public transport is not available.

We recommend:

<b>Recommendation 4 (a)</b>	That the Portfolio Holder for Planning and Transport and the Assistant Chief Executive be requested to assess the service after one year, using the Council’s project management framework, to determine usage, costs and feedback from users of the scheme in order to ensure continuous improvement.
<b>Financial Implications</b>	There are no financial implications.

<b>Recommendation 4 (b)</b>	That the Portfolio Holder for Planning and Transport and the Assistant Chief Executive when assessing feedback from users establish if there is a need to expand the Community Transport Service to a wider area and that the Assistant Chief Executive be requested to continue to raise awareness and promotion of the service.
<b>Financial Implications</b>	There are no financial implications.

Task Group Members welcomed the Centre Manager, The TRUNK to the September 2009 Task Group meeting. The Centre Manager provided us with brief details of the services and developments for Older People at The TRUNK. The services and projects are still in the early stages and being developed. We were informed that funding had been secured from the Citizens Advice Bureau to provide a weekly drop in session with a generic outreach worker with a possible monthly or bi-monthly specific advisor or specialist attending The TRUNK. Further funding has also been secured for a pilot project for intergenerational work with Bromsgrove District Housing Trust. Regular coffee mornings will be held to enable residents to be actively involved in shaping future service provision. The computer courses offered at The TRUNK have proved to be successful and a further day was offered to accommodate numbers; residents have also requested beginner computer courses. The TRUNK are looking at introducing a core group of residents to become advocates in order to inform people of services and prevent social isolation. During their recent open day residents had requested information on walking, so the Centre Manager met with Bromsgrove District Council's Walks Co-ordinator to promote this service. Future opportunities will include working on The TRUNK allotment in Sidemoor, specialist awareness days on benefits, pension and job centre information and cooking sessions will be offered at Crabtree Court.

We therefore recommend:

<b>Recommendation 5</b>	That Members continue to work with The TRUNK and utilise future developments at the Centre – drop in sessions, surgeries and the core group of (resident) advocates as a means of communicating, informing and updating residents on the Council's service provision.
<b>Financial Implications</b>	There are no financial implications



## Existing Services and Accessibility (Recommendations 6 – 7)

We had a very good response from officers and partner agencies who worked closely with older people. This was evident when promoting UK Older People's Day. We were encouraged by the level of service provision both from the Council (see **Appendix 5**), partner agencies and the voluntary sector. But it was often highlighted throughout the Task Group process that there is a need for an increased awareness by District Councillors, Parish Councils, partner agencies and residents of the services available and how to access them.

This was also highlighted by the company the Council commissioned to conduct the Older People Focus Groups in Hagley and Bromsgrove. The company concluded "that while the Council may not wish to make older people a stated priority, much more could be done to communicate to older people what services are available and how to access them".

During the first meeting of the Task Group the role of District Councillors and Parish Councils in reporting issues and concerns and also recognising and sharing good practice within their area was discussed.

The Assistant Chief Executive and the Portfolio Holder for Vulnerable and Older People (including Lifeline) attended the Parish Council Forum on 22nd September 2009 to present information on the role of the Task Group and to ask Parish Councils the following:

1. What are the issues facing older people in your parish?
2. What services would make the biggest differences to their lives?
3. Is there anything else you wish to feed into the Task Group?

Alvechurch Parish Council responded with –

The issues were discussed during the meeting and the points raised were:

- Older people & disability issues. Alvechurch Parish Council frequently have residents calling into the office to complain about access around the village such as:
  - Disabled parking bays not clearly marked, not well policed. Some could be repositioned for safer and easier access.
  - Dropped kerbs. Although the village does have dropped kerbs these are often blocked by poor and inconsiderate parking. Requests are often received for additional dropped kerbs in The Gaunts which is predominately older residents.

- Winter arrangements – lack of grit buckets and lack of gritting often an issue.
- Benches are removed to discourage anti social behaviour but these are used by older residents whose mobility is poor.
- The other area that has been raised frequently is Affordable housing for older people in the Parish.

Alvechurch Parish Council had received positive comments regarding the free swimming for the over 60s and the mobility sessions that take place in Alvechurch.

### **Older People’s Strategy for Worcestershire 2006-2010**

Members were made aware that the Older People’s Strategy for Worcestershire was currently being updated. The current Older People’s Strategy for Worcestershire points out that most of the focus and resource for older people is on Levels 3, 4 and 5, which is dealing with the results of dependency created by older age, rather than focusing on prevention. Older people are such a huge subject area, that the Task Group agreed it would find it very difficult to cover all five levels in any detail with the time available. We therefore agreed to concentrate our time on Levels 1 and 2, as these are preventative, receive less funding and are areas where we may be able to have more influence.

<b>Level of Inclusion</b>	<b>Elements</b>
1. Citizenship, inclusion and active ageing.	Accessible housing. Information and advice services. Advocacy. Financial assessments and benefits take up. NHS Direct. Community safety. Affordable warmth/fuel poverty. Transport. Exercise. Learning, Ageing Well, Healthy Ageing Schemes. Volunteering and timebanks. Befriending and volunteer visiting schemes.
2. Prevention / Self Care.	Supporting people with long term conditions. Expert Patient Programme. Community equipment services/assistive technology. Community alarms. Telecare. Adaptations. Home improvement agencies. Handyperson/gardening schemes.

	Floating support. Community/neighbourhood wardens. Domestic support. Shopping. Community meals. Lunch clubs. Social clubs. Falls prevention. Short term breaks.
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In order to ensure that a district dimension was included within the revised Older People’s Strategy for Worcestershire the Assistant Chief Executive met with the Joint Commissioning Officer, Joint Commissioning Unit, Worcestershire County Council. The Joint Commission Officer agreed with the inclusion of a district dimension and suggested working with Bromsgrove as the pilot district.

We would also recommend that the revised Older Peoples’ Strategy for Worcestershire includes aspects on healthy ageing such as leisure, transport, learning opportunities, employment and volunteering.

Task Group Members therefore recommend:

<b>Recommendation 6</b>	That the Portfolio Holder for Vulnerable and Older People (including Lifeline) and the Assistant Chief Executive be requested to continue to work with Worcestershire County Council, Joint Commissioning Officer on the revised Older People’s Strategy for Worcestershire, with Bromsgrove as a possible pilot district, to ensure there is a Bromsgrove District dimension and that the services provided by the Council and its partners are responsive to the emerging challenges of the changing demographics.
<b>Financial Implications</b>	There are no financial implications.

During the Task Group process we were interested to learn of the role and developments of the Health and Well Being Team, Worcestershire County Council. The team concentrated on the lower end of the services – the preventative spectrum which focused on keeping people healthy and independent, decreasing dependency on the acute services and delivering services closer to home within local communities, tackling inequalities, cultural differences and supporting people to take an active part in the commissioning and evaluation of services. It was highlighted that currently older people accessed services when a crisis occurred and the Health and Well Being Team felt it needed to engage with people before reaching this stage.

The Health and Well Being Team has evaluated the services offered, looked at what has gone well and how to roll out best practice across the County. A mapping exercise of the whole County has been conducted with a variety of older people's forums and community groups visited to find out about the communities and as potential service users what was needed and important to them. There were currently 3 County wide schemes offered –

- Handypersons
- Befriending /Mentoring
- Well Check

We were also informed that next year the Health and Well Being Team was hoping to offer help with gardening, housework and shopping and to develop and re-commission community meals and day care services and ongoing further low level services, even though these services proved difficult to evidence the impact on reducing money spent on acute services, evaluation would continue. The Health and Well Being Team was keen to work with community groups to set up sustainable initiatives and to work with partner agencies to develop a shared vision and objectives; where older people come together for like minded interests and not just because of their age, we therefore recommend the following:

<b>Recommendation 7 (a)</b>	The Older People Theme Group Chairman be requested to develop the mapping exercise currently being undertaken in liaison with the Health and Well Being Team, Worcestershire County Council to identify any gaps and complete the mapping exercise by 31st July 2010.
<b>Financial Implications</b>	There are no financial implications.

<b>Recommendation 7 (b)</b>	That the Assistant Chief Executive and the Older People Theme Group Chairman continue to liaise with the Health and Well Being Team, Worcestershire County Council to promote existing services offered and to take an active role in the development of future schemes and re-commissioning of low level services for Bromsgrove District and work with community groups to set up sustainable initiatives with partner agencies
<b>Financial Implications</b>	There are no financial implications.

The Task Group during their investigation were provided with information from the Health Improvement Co-ordinator, Worcestershire PCT on Postural Stability Instruction (PSI) and Falls Prevention. Members were informed that the 2008 Stakeholder event had identified the need for a robust model for falls risk management and falls prevention to reduce the risk of falls and recurrent falls. PSI formed part of the vision of Worcestershire PCT and its partners to meet this target. Falls were the leading cause of accidental death in the United Kingdom, with bone fractures, most commonly hip and associated medical complications. 50% of hip fracture patients lost their ability to live independently, which destroys confidence, leads to social isolation and deterioration in mental health. The cost of falls and hip fracture outcomes to Worcestershire PCT was highlighted to Members.

Task Group Members were further informed that PSI was the only evidenced based exercise programme for the prevention of falls.

The four point plan was to:

Improve balance and co-ordination

Increase functional capacity

Increase bone and muscle mass

Increase confidence – reduce fear of falling

Task Group Members were pleased to note that Bromsgrove Sports Development are to deliver PSI courses from April 2010 as successful bids had been secured through The Community Leadership for Health Fund.

The Chief Officer, Age Concern was invited to attend and present information on Age Concern, Bromsgrove and District. Members were once again delighted with the extensive range of services provided to Bromsgrove residents. The Chief Officer highlighted to Task Group Members that Age Concern did not offer a list of services, they provided services holistically; services that had been identified as needed via liaison work. He continued to explain the three key strands which had been developed over 7 - 10 years with Worcestershire County Council funding –

- 'Need to Know' – working to ensure that local people had access to the information they needed in order to make decisions about their lives, at the time they needed it.
- 'Safe at Home' – helping local older people to remain safe, secure and comfortable in a home of their own choosing.
- 'Circle of Friends' – working to supplement local older peoples' natural support mechanisms as these decrease with time.

The Chief Officer continued to inform Task Group Members of the comprehensive range of services identified and provided by Age Concern, Bromsgrove & District, including the Occupational Therapy Technician (OTT), funded by Age Concern for 12.5 hours per week. The OTT provided a 'base' assessment within 3 to 4 weeks, by using this assessment and providing simple aids this enabled older people to stay safe and more able in their own home until a full OTT assessment was carried out.

The Chief Officer also asked Task Group Members to note that he had received positive testimonies from users of the Bromsgrove Urban and Rural Transport (BURT). BURT had proved to be an important part of the process for older people who used Amphlett Hall and the drivers had proved to be both helpful and cheerful.

## Literature Review (Recommendations 8 - 10)

The Assistant Chief Executive agreed to undertake a literature review on older people, as a pre-cursor to determining the methodology and focus of the Task Group's work. There is a mountain of available literature on older people, in fact one of the documents comments that there is a considerable amount of rhetoric versus action on the issues that older people face in England. The Assistant Chief Executive focused on the following 9 documents:

### **1. Bromsgrove Profile –**

The Bromsgrove Profile has recently been commissioned by the Local Strategic Partnership Board to provide a profile of the District across the six objectives to the Sustainable Community Strategy. The Profile includes population projections for the District up to 2026, which clearly shows the dramatic projected increase in the over 50 population and decline in the younger population.

### **2. Bromsgrove Partnership Sustainable Community Strategy –**

The Bromsgrove Sustainable Community Strategy 2008-2011 contains a high level action plan for the Older People Theme Group. The action plan includes:-

- Developing and operating an effective directory of services for older people;
- Mapping outreach services to older people provided by all agencies;
- Improving access to services for older people; and
- Giving older people a greater voice.

The Chairman of the Older People Theme Group, Ms A. Sowton, Bromsgrove and Redditch Network (BARN) was co-opted onto the Task Group. The Theme Group is also linked to the Older People's Forum. The main problem for the Theme Group is resourcing. No new funds have been made available to the Theme Group to complete the deliverables shown above so consequently progress has been difficult. A small amount of funding from the Local Strategic Partnership (LSP) Partners could make a significant difference to the Older People Theme Group. Capacity is required to undertake research work for the Theme Group and to support the deliverables, for example, despite being an excellent idea, there are currently no allocated funds for the proposed older person's directory.

**3. Bromsgrove District Council – Housing Strategy 2006-2011 -**

The Council's Housing Team has recently updated the District's Housing Strategy, including a housing market assessment to identify the true housing need in the District, versus the regional allocation. Older people were consulted as part of the update.

**4. Place Survey 2008/2009 -**

The Council has recently received the results of the national Place Survey, conducted on behalf of the Audit Commission and a key tool for measuring satisfaction and perception. There are still issues with the figures and an embargo; however, without providing the actual quantitative data for NI138 Satisfaction of people over 65 with both home and neighbourhood, it is possible to discuss some aspects of the results. For the older people of the District, roads/pavements, activities for teenagers and shopping are their biggest priorities. Crime and health, which have been priorities in the previous surveys, have seen a significant improvement, which presumably reflects the high levels of investment in these services over the last decade.

If the state of the District's road and pavements is the number one priority for older residents, it tends to suggest that the majority of older residents in the District have comfortable lives; however, the more vulnerable amongst our older community probably did not complete the survey, so the results need to be balanced with other sources of information. Interestingly another question in the Survey asks about the level of support for older people to live independently (NI139); the result suggests we have some way to go to improve the perception and reality of this provision.

**5. Older People Focus Groups -**

During 2008, the Council commissioned two focus groups, one in Hagley and one in Bromsgrove, with older people. Focus groups by their nature cannot be statistically valid and will attract older people who are sufficiently mobile to attend them; nevertheless, it is interesting to note the similarities with the Place Survey. Roads and pavements were a major concern. *“These responses may demonstrate that respondents were generally so comfortable in their lives, and so in control of them that there was little else to worry them. Alternatively, it may be more strongly linked to respondents attending the focus groups with the specific intention of complaining about the quality of roads and pavements.”*

The focus groups identified a number of pertinent issues, including “poor income” as a key determinant factor in the quality of older age and the restrictions to social inclusion caused by poor or lack of public transport provision, something currently being addressed through the Council's community transport scheme. Many of the Council's facilities were considered very good, for example, Sanders Park and the Artrix, however, access to them was considered a problem by many attendees.



The research company noted that crime was not an issue that was raised as much as expected. The company also concluded that while the Council may not wish to make older people a stated priority, much more could be done to communicate to older people what services are available and how to access them.

#### **6. Don't Stop Me Now – Preparing for an Ageing Population –**

The report points out that getting older is a diverse experience. For some it can mean more leisure time, grandchildren, renewed interest in learning, while for others it can mean bereavement, living alone, falling income and social exclusion. The report points out that it is important not to stereotype older people as dependent, when many are a beneficial resource to the local community through their contributions to voluntary work and civic life.

The report also explodes a number of myths about older people, for example, only 15% of over 65s receive social care and only 3% live in residential care, rising to only 28% in the over 90s; conversely, the unemployment rate for those aged 50 is higher than the average for the working population.

The report identifies that the Government's Opportunity Age, a ten year strategy for older people, published in 2005, has not been a success and contrasts this with the "Every Child Matters" agenda for young people. What the Opportunity Age paper does do is separate issues for older people into three manageable strands:

1. Work and income: ending the perception of older people as dependent.
2. Ageing: ensuring that longer life is healthy and fulfilling; and
3. Well being and independence: ensuring older people are full participants in society.

#### **7. Towards Common Ground –**

The Help the Aged's report focuses on the Government's concept of "place shaping" i.e. that Council's have a lead role in shaping the quality of life of their area, through integrated planning and service provision. There are ten recommendations within the report and Task Group Members were asked to note that the Council is responding to many of these, for example, the high dependency toilets, community transport scheme, proposals for improving the high street which suggests that the Council does have a sound understanding of its older community.

#### **8. Social Inclusion and Older People: A Call for Action –**

This report starts by making the point that the most vocal and active older people tend to be those that are most involved and whose opinions are heard, car parking would be a classic example of this, and that the more vulnerable are more likely to be overlooked. The report undertook some interesting engagement activity through care homes, a senior citizen's club, structured one to one interviews and a deprived estate.

## 9. Getting on Well Together – Councils Working with Older People –

The report states that more engagement is required, that the whole council should understand the requirements of older people, we need to focus on changing behaviours, deliver outcomes and evaluate what is delivered. These lessons could apply to anything the council does, so whilst a relevant backdrop the report did not really add much value to the specific role of the Task Group.

The Task Group considered the 9 documents and the information provided by the Assistant Chief Executive in his initial report to the Task Group which highlighted the need to ensure that partner agencies and older people are aware of services and facilities available. Older people often felt isolated and whilst Task Group Members agreed with service information being made available via publications, websites and the media; there is a need for information to be streamlined and presented in a user friendly format, A – Z Directory.

The Task Group therefore recommend the following:

<b>Recommendation 8 (a)</b>	That the Portfolio Holder for Vulnerable and Older People (including Lifeline) and the Assistant Chief Executive be requested to scope funding to publish an A – Z directory of services available for older people in the Bromsgrove District , to be sustainable so as to keep it up to date. That the Assistant Chief Executive be tasked to produce the directory within 12 months and report back to the Cabinet.
<b>Financial Implications</b>	Revenue funding implications, to be recommended to Full Council as part of the 2010-2013 budget.

<b>Recommendation 8 (b)</b>	That the A – Z directory be made available on the Council's Internet and Intranet Sites, a copy to be held at the Customer Service Centre and that the Customer Service Centre advisors be requested to use the directory to signpost older people.
<b>Financial Implications</b>	There are no financial implications.

During the Task Group process we also discussed the need for information provided by the Council to be current and up to date.

We therefore recommend the following:

<b>Recommendation 9 (a)</b>	That the Council's website and Connect site be regularly reviewed and updated with service information, contact details and particularly when staff changes occur and that consideration be given to a dedicated page for older people with links to related internet sites.
<b>Financial Implications</b>	There are no financial implications.

<b>Recommendation 9 (b)</b>	That any future mystery shopper exercises include a test of services to older people.
<b>Financial Implications</b>	There are no financial implications.

Throughout the Task Group process we were made aware that it has been strongly suggested that older people often feel isolated and whilst service information is made available via publications, websites and the media; there is a need for information to be presented in person, we therefore recommend:

<b>Recommendation 10</b>	That a Member / officer working group comprising the Assistant Chief Executive, interested Task Group Members and the Portfolio Holder for Vulnerable and Older People (including Lifeline) be established to further explore Age Concern's, Best Practice and scope working with partner agencies to promote the introduction of 'Older People's Champions' (see <b>Appendix A</b> ) in each Parish who can disseminate information on available services and accessibility to residents in the Town Centre and surrounding areas within the Bromsgrove District.
<b>Financial Implications</b>	There are no financial implications.

## Housing (Recommendations 11 - 13)

During the Task Group process we were presented with information detailing housing support for older people, identifying needs, options and services provided and “where are the gaps?”

There was a good supply of sheltered housing but these were not spread evenly across the district, with limited provision for those in the private sector. It was noted that the Council’s current draft Core Strategy did not contain a requirement for lifetime homes, although due to consultation responses, future versions would encourage the building of all new homes to be suitable for adaptation.

Both the Council and Bromsgrove District Housing Trust (BDHT) provided detailed information on the future and needs of older people in Worcestershire, showing by the year 2031 a 52% increase in those over 60 and a 155% increase in those over 85. With 7,000 people with dementia, increasing to 21,000 in the next 20 years and a growing number of older people with learning disabilities, rising to 6,000 over the next 20 years.

We were informed by the Head of Supported Services, Bromsgrove District Housing Trust (BDHT) of the Community Support Service available to anyone regardless of tenure with tailored packages to meet individual needs. This included offering an on site support team and an on site care team who were available twenty four hours, seven days a week. BDHT had recently built twenty seven new apartments, 12 rented, 9 shared ownership and 6 intermediate care. New windows, kitchens and bathrooms had been fitted to existing homes. BDHT were due to launch Gilbert Court, premier extra care housing scheme, offering an activities co-ordinator, beautician, therapist, hairdresser and intensive care apartments. The restaurant facilities would be accessible to all elderly residents. Currently housing options were limited; future development and service provision needed to meet people’s aspirations, providing and offering choice and specialist care.

Focus Group headlines showed that people wanted better information and advice on support, grants for adaptations and alternatives. Extra Care housing was viewed positively both for rent and to buy. Older people often experienced difficulty in getting practical jobs done. Telecare, aid and adaptations were seen as potentially helpful but not at the ‘expense’ of personal support from people. Residential Care was not popular, people were not aware of the full implications, for them personally and their finances, of different options.

Good Practice Pointers included early consultation by developers with Adult Social Care, it was also important to ensure a balance of nominated occupiers and self funders.

Consultation with older people highlighted the following –

- More options for older people in large family homes to downsize their property for younger households.
- The need to develop more aspirational, two-bedroomed products aimed at older people, including equity release schemes.
- The active promotion of shared ownership.
- The development of extra-care housing and ‘retirement’ villages, incorporating a range of options with tailored care and support.

We therefore recommend the following:

<b>Recommendation 11</b>	That the Assistant Chief Executive and the Strategic Housing Manager be requested to ensure that any opportunities to assist in meeting the aims and objectives being developed for the newly revised Older People’s Strategy for Worcestershire be explored at a local level.
<b>Financial Implications</b>	There are no financial implications.

<b>Recommendation 12</b>	That the Portfolio Holder for Strategic Housing, Environment and Climate Change and the Strategic Housing Manager be requested to ensure there is an appropriate housing mix and that older people’s needs are catered for within the housing market as identified in the Bromsgrove Sustainable Community Strategy 2010-2013, Stronger Communities and the Bromsgrove Housing Market Assessment 2008.
<b>Financial Implications</b>	There are no financial implications.

We were informed by the CCTV / Lifeline Manager that Lifeline enabled people to live independently in their own homes with the facility and peace of mind of being able to call for help in an emergency. Lifeline operated a 24 hour service 365 days per year and was operated by fully trained staff. Other monitoring equipment could be fitted in the property -bogus caller / panic button, carbon monoxide, smoke, flood, fall and extreme temperature detectors.

We therefore recommend the following:

<b>Recommendation 13</b>	That the Head of Street Scene and Waste Management be requested to continue to promote the Lifeline Service, including the range of monitoring equipment available and that the quarterly Lifeline newsletter be used to promote and inform residents of other services and benefits available.
<b>Financial Implications</b>	There are no financial implications.

**Income and Employment**  
(Recommendations 14 – 16)

The recent ‘credit crunch’ led us to question if older people proactively sought information on benefits. We were concerned to note that despite mail shots, promotions and information provided by the Council’s benefit service, only a small percentage of claimants aged over 60 had claimed housing council tax benefit direct, the majority of claimants were passported across or signposted by the Pension Service. Task Group Members questioned if potential claimants who had requested claim forms were followed up if the claim form was not returned. We were informed that although currently no follow up procedure was in place, there was no reason why a process could not be included when scoping future customer engagement.

We were pleased to note that staff at the Worcestershire Hub are trained and receive continuous updates on the benefit service to ensure residents are correctly advised. We were also surprised to learn that the benefit team operated a home visiting service and unlike other authorities the Council had no visiting restrictions. If a resident requested a visit the visiting officer would attend.

The benefit service case load had increased by 14.6% over the last twelve months with benefit claims being processed quicker than in the last eighteen months to two years, but the benefit service was still aware that despite moving forward there was a need for further engagement with customers. The team was aware of the need to proactively engage or seek elderly residents who weren’t claiming benefits rather than being reactive. One good example provided was the work the benefit service team had recently carried out with the Council’s Private Sector Housing Team Leader, where information on home improvement grants was issued to residents in receipt of council tax benefit.

We also felt that residents should be made aware that when calculating housing and council tax benefit, the benefits team, in accordance with central government legislation, can disregard some of the income in the calculation of benefit meaning their total income is treated as lower and they receive more help. We were informed that the government will only pay the Council a subsidy payment using the standard £10.00 disregard and since the Council fully disregard in respect of War Disablement and War Widows Pensions, the Council has to fund the extra benefit. However, the Council has provision within the yearly benefit budget to cover the extra cost.

<b>Recommendation 14 (a)</b>	That the Portfolio Holder for Resources and the Benefit Service Manager be requested to continue to raise awareness of the Benefit Service and proactively engage or seek elderly residents who are not claiming benefits by attending residents meetings, providing information surgeries and use of other service area meetings to find out how to reach or inform residents of the benefit service.
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<b>Financial Implications</b>	There are no financial implications.
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<b>Recommendation 14 (b)</b>	That the Portfolio Holder for Resources and the Benefit Service Manager be requested to continue to work with the relevant service areas within the Council to issue information to residents in receipt of council tax benefit.
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<b>Financial Implications</b>	There are no financial implications.
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Task Group Members questioned pension provision and pension awareness amongst young people. Task Group Members were informed by an Independent Financial Advisor that the recent 'credit crunch' had not specifically created issues currently experienced by older people. People were living longer in good health. The question was 'how do we finance living to an older age?'

It was highlighted that recent figures showed that out of 20 million people in work, currently 11 million were not included in any pension scheme. Europe had a robust pension system, whereas the western pension system had slowly declined, with well known, household names and large organisations facing deficit of their final-salary pension schemes. It was emphasised that out of the top 100 companies in the country only 3 had company pension funds. According to a survey many people were relying on cashing in on the rising value of their property to fund their retirement.

The Independent Financial Advisor highlighted there needed to be a general change in attitudes towards retirement. People needed to play an active part in preparing for retirement by becoming 'savers not consumers!'. He suggested one way to engage with young people and encourage them to join a pension scheme that was more attractive would be to look at a pension scheme for 'Life Events'. A scheme that allowed access to pension funds for specific life events and not just for retirement, to purchase a car, a deposit on a property etc. The Assistant Chief Executive suggested engaging with young people in order to establish their understanding and level of knowledge on pensions and to motivate them with a flexible pension scheme.

Task Group Members therefore recommend:

<b>Recommendation 15 (a)</b>	That the Portfolio Holder Youth, Sports, Recreation and Culture and the Assistant Chief Executive be requested to explore opportunities to inform and educate young people regarding pension information.
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<b>Financial Implications</b>	There are no financial implications.
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<b>Recommendation 15 (b)</b>	That the Assistant Chief Executive be requested to liaise with the Local Strategic Partnership – Partners to explore opportunities of raising employees' awareness on pension information.
<b>Financial Implications</b>	There are no financial implications.

During our investigation, we considered opportunities for adult learning and education. The Adult Learning Manager, Worcestershire County Council provided Task Group Members with details of the five learning opportunities available for adults aged 19+:

- The Life Skills programme provided free learning opportunities for adults aged over 26 years with learning disabilities and/or disabilities.
- The Skills for Life programme provided free adult learning opportunities for people who wanted to develop their Literacy, Language and Numeracy skills.
- The Comput@bus, a purpose built, fully equipped, mobile computer classroom with a range of computer courses provided. Some courses were offered free of charge with no upper age limit to be a student on one of the courses.
- Family Learning provided parents the opportunity to help their children to learn or learn new skills together, in the child's school, nursery or children's centre, local library or at home.
- Community Learning Outreach – the community outreach team travelled to venues all over the county where people would not have easy access to adult learning through established education centres, such as colleagues. The team worked in informal settings, from libraries, church halls, community centres and school halls.

We were encouraged to hear that community centres and schools could request learning activities, provided they identified a specific need. The Adult Learning Team had successfully rolled out a number of learning activities which local libraries had identified as a need for specific learning opportunities. With the programme for next year currently being developed, the Adult Learning Team welcomed the opportunity to work with partner agencies to develop further sustainable learning activities and opportunities.

We welcomed the fact that the Adult Learning Team during January 2010 would be contacting Parish Councils to scope additional suitable accommodation and possible learning opportunities. With the Adult Learning Team now having a full complement of tutors and sessional tutors we needed to ensure that partner agencies liaised with the Adult Learning Team with suggestions regarding possible venues and identifying further adult learning activities and opportunities.



The Task Group therefore recommend the following:

<b>Recommendation 16</b>	That the Portfolio Holder for Vulnerable and Older People (including Lifeline) be requested to work closer with the Adult Learning Team, Worcestershire County Council in order to be familiar with and to promote the adult learning packages available.
<b>Financial Implications</b>	There are no financial implications.

**Funding**  
(Recommendation 17)

We were encouraged during the Task Group process to note that officers and partner agencies actively sought funding for initiatives and specific projects, but even further encouraged when it was highlighted that their main aim when bidding for funding was to show and evidence how projects would be sustainable.

This was demonstrated by the invaluable presentation from the Council's Sports Development Officer, Adults and Disability. The presentation highlighted the successful and positive activities offered to residents throughout the district (see **Appendix 5**).

<b>Recommendation 17</b>	That the Assistant Chief Executive be requested to investigate ways in which officers can keep up to date with funding developments and utilise the skills of officers to bid for future funding when appropriate.
<b>Financial Implications</b>	There are no financial implications.

**Worcestershire County Council – Highways Department**  
(Recommendation 18)

During the final meeting of the Task Group members discussed the general condition of the footpaths and the lack of dropped kerbs within specific areas of the town centre and around sheltered housing accommodation. Members expressed concerns raised by residents who visited the town centre and also those who used motorised scooters around the district.

The Task Group therefore recommend:

<b>Recommendation 18</b>	That the Head of Street Scene be requested to liaise with and obtain information from Worcestershire County Council, Highways Department on the current work programme and future work schedule for Bromsgrove District regarding renewal and repairs of pavements and the identification of areas requiring additional dropped kerbs within Bromsgrove District, more specifically the Town Centre and areas around sheltered accommodation.
<b>Financial Implications</b>	There are no financial implications.

**Future Vision**  
(Recommendation 19 - 20)

The Task Group was keen to ensure the continuous involvement of older people in the planning and developing of future services and that older people are consulted when formulating new planning policies.

The Task Group therefore recommend:

<b>Recommendation 19 (a)</b>	That the Portfolio Holder for Vulnerable and Older People (including Lifeline) be requested to ensure that the views of older people in Bromsgrove are valued, shared and promoted within all service areas of the Council and negative perceptions of older people are challenged.
<b>Financial Implications</b>	There are no financial implications.

<b>Recommendation 19 (b)</b>	That the Assistant Chief Executive be requested to ensure that the Council achieves more formal engagement with Bromsgrove Older People's Forum.
<b>Financial Implications</b>	There are no financial implications.

<b>Recommendation 19 (c)</b>	That officers take into account the Communities and Local Government, Lifetime Homes, Lifetime Neighbourhoods strategy and other relevant evidence and strategies when formulating new policies.
<b>Financial Implications</b>	There are no financial implications.

<b>Recommendation 19 (d)</b>	That as part of the Council's decision to pilot Mosaic, it is used to target relevant marketing materials to older people.
<b>Financial Implications</b>	There are no financial implications.

<b>Recommendation 19 (e)</b>	That older people be considered as a possible priority in the Corporate Communications Strategy.
<b>Financial Implications</b>	There are no financial implications.

As detailed in the preamble to Recommendation 6 of our report, the Older People’s Strategy for Worcestershire is being updated. As stated, the Task Group has chosen to focus on Levels 1 and 2 (preventative) and we are of the view that it would be desirable for the Overview Board to conduct a follow up exercise which focuses on Levels 3,4 and 5 which deals with dependency created by older age.

The Task Group therefore recommend:

<b>Recommendation 20</b>	That the Overview Board be tasked with initiating, when appropriate, an investigation on the revised Older People’s Strategy for Worcestershire, Levels of Inclusion, Levels 3, 4 and 5, which deals with dependency created by older age.
<b>Financial Implications</b>	There are no financial implications.

The recommendations within this report link to the Council Objectives, Sense of Community and Well Being, Regeneration and the following Priorities – Town Centre, Housing and One Community.

**CONCLUSION**

Task Group Members agreed that officers and witnesses provided a wealth of information on the extensive services and good practice currently offered to older people in the Bromsgrove district.

The Council provides good service provision, with a range of activities to promote health and well being, from free swimming, free swim lessons and the diverse range of activities supported by the Sports Development Team, Adults and Disabilities. The Lifeline service, an accredited service recognised by the Telecare Services Association enables people to live independently in their own homes with the facility and peace of mind of being able to call for help in an emergency, 24 hours a day, 365 days per year. Shopmobility offers customers who want to visit the town of Bromsgrove the use of manual and electric wheelchairs and motorised scooters offered free of charge.

The Benefit Service Manager has recognised the need for future customer engagement in order to raise awareness and inform residents of the benefit service.

We were briefly informed by the Strategic Planning Manager that the Communities and Local Government (CLG) ‘Lifetime Homes, Lifetime Neighbourhoods’ a national strategy for Housing in an Ageing Society along with other evidence/strategies would be considered when formulating new planning policy, including the Town Centre Area Action Plan.

We were encouraged to find that officers and partner agencies continually reviewed their service area and looked at ways of moving forward in the future to positively engage with customers. This was evident with the invaluable information provided by Bromsgrove & District Citizens Advice Bureau (CAB) who in order to meet the demand and rise to the challenge had changed the way they see clients to give quicker and better access; by offering morning appointments, gateway interviews (to assess a client's problem) drop-in sessions and telephone advice. A redundancy information pack had also been compiled to provide comprehensive information and guidance for clients. The Council had also committed funding to the CAB to employ a part time Debt Advisor for 16 hours per week to assist struggling owner occupiers and assist with the mortgage rescue schemes.

We also recognised the contribution of Age Concern, Bromsgrove & District who provide services holistically; services that have been identified as needed via liaison work.

As previously mentioned in the report, we were continuously made aware of the way information is made available to older people on accessing services that are delivered by a number of sectors including the Council, Worcestershire County Council, Worcestershire Primary Care Trust, Citizens Advice Bureau, Age Concern and the voluntary sector. The Task Group therefore recommends the development of a combined information services directory for older people.

The Task Group concludes that their shared vision for the future would be that older people are considered in all aspects and service areas within the Council; that the views of older people are valued, shared and promoted and that older people are involved and consulted in making decisions about issues affecting their lives and communities and that any negative perceptions of older people are challenged.

The Task Group Chairman was invited to attend the Equality and Diversity Forum meeting in June 2009 to provide forum members with brief details of the role and remit of the Older People Task Group and to include any feedback from forum members to the Task Group. The Task Group Chairman presented the 'draft' recommendations to the Equality and Diversity Forum meeting held on 10th December 2009.

The Assistant Chief Executive and Task Group Chairman presented the 'draft' recommendations to the Older Peoples Forum meeting on 8th December 2009 where the Forum welcomed the recommendations and were delighted with the presentation.

## **REVIEW**

The Older People Task Group will reconvene in 12 months time to carry out a review of the outcome of this report including whether or not recommendations were approved and implemented and the impact of these actions.

**ROLE DEFINITION**

**OLDER PEOPLE'S CHAMPION**

To assist the Council and appropriate Portfolio Holders by advising on service issues which support and encourage active, independent and healthy lives for older people, to inform older people on the extensive range of services available and how to access them. To raise the profile of older people and their needs in policy development across all areas of the council.

- To act as a Spokesperson to promote the positive aspects of the Council's work with Older People.
- To encourage Older People to play a fuller role in shaping the policies of the Council and in designing its services.
- To work and promote positive images of Older People as citizens and to combat stereotyping and age discrimination.
- To scope and maintain links with local Older People's forums / groups.
- To report on progress to the Assistant Chief Executive and Portfolio Holder for Vulnerable and Older People (including Lifeline).

## OLDER PEOPLE TASK GROUP

### TERMS OF REFERENCE

The attached scrutiny exercise scoping checklist, (which will act as the Older People Task Group's terms of reference) was approved by the Overview Board on 3rd March 2009.

"Health and Wellbeing, Community Facilities and Activities, Housing and Cost of Living".

**"Other areas such as transport have already been looked at taking into account the needs of older people, so will not be covered again".**

During the Task Group meeting held on 21st July 2009 Task Group Members revisited the original scoping checklist and the following changes were made and agreed by the Task Group.

- Healthy Living (inclusive of community facilities, activities, participation and inclusion)
- Housing (inclusive of market and social, supporting people - Telecare, adaptations, handyperson schemes)
- Income and Employment (inclusive of pension and benefits advice, employment and training opportunities and preparing for retirement)

Task Group Members agreed the age group criteria of 60+ and to look at 'what is the need', existing services / provision, access to existing services / provision, identify any gaps and agree recommendations.





## OVERVIEW AND SCRUTINY EXERCISE SCOPING CHECKLIST

This form is to assist Members to scope the overview and scrutiny exercise in a focused way and to identify the key issues it wishes to investigate.

- Topic: **Mental and physical wellbeing of the older population of Bromsgrove District.**

- Specific subject areas to be investigated:

- **Health and Wellbeing**
- **Community Facilities and Activities**
- **Housing and Cost of Living**

**Other areas such as transport have already been looked at taking into account the needs of older people, so will not be covered again**

- Possible key outcomes:

(i.e. please state what Members hope to achieve through this investigation):

**To develop a strategic plan for older people in Bromsgrove District to ensure that the services provided by the Council and its partners are responsive to the emerging challenges of the changing demographics.**

**All councils need to understand their older communities and shape both universal and targeted services accordingly. Increased awareness, better engagement and innovation could help many older people without significant expenditure. (Don't stop me now, Audit Commission 2008)**

- Should the relevant Portfolio Holder(s) be invited to give evidence? **YES**

- Which officers should be invited to give evidence?

(Please state name of officer and/or job title)

**Assistant Chief Executive/Senior Policy Officer; Strategic Housing Manager; Health Improvement Practitioner (from PCT based at the Council House)**

- Should any external witnesses be invited to give evidence? **YES**  
If so, who and from which organisations?

**Age Concern; Worcestershire County Council; PCT; and Older Peoples Forum.**

- What key documents/data/reports will be required?

**An assessment of each council priority to determine the extent to which its delivery currently takes into account the needs of older people. To include evidence and recommendations stating what changes will be needed in the future.  
Scrutiny exercises undertaken by other authorities that may be relevant. Mott McDonald Bromsgrove Report 2007. Reports from other organisations e.g. Age Concern; Don't stop me now, Audit Commission 2008.**

- Is it anticipated that any site visits will be required? **NO**  
If so, where should Members visit?

**N/A**

- Should a period of public consultation form part of the exercise? **NO**  
If so, on what should the public be consulted?

**Have already consulted via focus groups and there will be the usual press release requesting comments/suggestions from the public.**

(Please Note: A separate press release requesting general comments/suggestions from the public will be issued in the normal way at the beginning of the investigation.)

- Have other authorities carried out similar overview and scrutiny exercises?  
**YES**  
If so, which authorities?

**Stoke-on-Trent  
West Lancashire**

- Will the investigation cross the District boundary? **NO**

If so, should any other authorities be invited to participate?

**NO**

If yes, please state which authorities:

**N/A**

- Would it be appropriate to co-opt anyone on to the Task Group/Board whilst the Overview and Scrutiny exercise is being carried out?

**YES/NO\***

If so, who and from which organisations?

**Anne Sowton, Chairman of the Older Peoples Theme Group**

- What do you anticipate the timetable will be for the Overview and Scrutiny exercise?

**To be discussed by the Overview Board.**

**A List of those the Task Group Consulted**

The Task Group considered evidence from the following sources before making its recommendations:

**External Witnesses:**

Public:

- Members of the Public via a press release and the Council's website. A total of 2 emails were received. The Manager at Brook Court, Retirement Apartments met with the Assistant Chief Executive and the Task Group Chairman.

Parish Councils:

- The Assistant Chief Executive and the Portfolio Holder for Vulnerable and Older People (including Lifeline) gave a presentation to the Parish Council Forum on 22nd September 2009 to obtain information and input from the Parish Councils on the three Task Group strands.

Partner Agencies

- Tanya Crawford Advice Service Manager, Bromsgrove & District Citizens Advice Bureau
- Debbie Roberts Centre Manager, THE TRUNK.
- Kay Parry Health and Well Being Manager, Worcestershire County Council
- Colin Barnett Adult Learning Manager, Worcestershire County Council
- Sue Rollason Head of Supported Services, Bromsgrove District Housing Trust
- Duncan Jones Independent Financial Advisor
- Sue Keating Signposting Co-ordinator, Hereford & Worcestershire Fire & Rescue Service
- Gillian Christison Health Improvement Co-ordinator, Worcestershire Primary Care Trust
- Keith Sherman Chief Officer, Age Concern, Bromsgrove & District
- Carol Tipping Secretary, Bromsgrove Older People's Forum

**Internal Witnesses:**

Andy Coel	Head of Strategic Housing
Rachel McAndrews	CCTV / Lifeline Manager
Arran Sharman	Benefits Service Manager
Laura Kerrigan	Sports Development Officer, Adults and Disabilities
Jan Woolley	Operations Officer, Spadesbourne Suite

## Free Mobility Exercise Class

To celebrate U.K. Older People's Day, Bromsgrove Sports Development invite you to their mobility exercise event, led by a fully qualified professional. With refreshments available afterwards, you can watch or take part in the activity and chat to the team to find your local session, or even start your own! To book your place, please ask one of the Customer Service Advisors, or contact Laura Kerrigan on 01527 881631; email l.kerrigan@bromsgrove.gov.uk

**Session Details**    Date: MONDAY 28<sup>th</sup> SEPTEMBER 2009  
 Time: 2.30 P.M. – 4.00 P.M.  
 Venue: SPADESBOURNE SUITE, BROMSGROVE DISTRICT COUNCIL, BURCOT LANE

**FREE** Mobility Exercise Class,  
 Bromsgrove Sports Development





## U.K. Older People's Day - Events

Date: TUESDAY 29<sup>th</sup> SEPTEMBER 2009  
 Time: STARTING FROM 10.00 A.M.  
 Venue: HIGH STREET, BROMSGROVE

Bromsgrove District Housing Trust (BDHT) information stall with details of BDHT services, the Bromsgrove District Council Lifeline Service and West Mercia Police





## U.K. Older People's Day - Events

Date: WEDNESDAY 30<sup>th</sup> SEPTEMBER 2009  
 Time: 2.00 P.M. – 4.00 P.M.  
 Venue: SPADESBOURNE SUITE, BROMSGROVE DISTRICT COUNCIL, BURCOT LANE

Tea Dance  
 Admission: £2.50,  
 to include tea/coffee and biscuits








## U.K. Older People's Day - Events

Date: WEDNESDAY 30<sup>th</sup> SEPTEMBER 2009  
 Time: 2.00 P.M. – 4.00 P.M.  
 Venue: SPADESBOURNE SUITE CONSERVATORY, BROMSGROVE DISTRICT COUNCIL

Neighbourhood Wardens and Lifeline officers will be present to provide information

## U.K. Older People's Day - Events

Date: FRIDAY 2<sup>nd</sup> OCTOBER 2009  
 Time: 10.00 A.M. – 12.00 NOON  
 Venue: THE TRUNK, HUMPHREY AVENUE, CHARFORD, BROMSGROVE

Coffee Morning  
 An opportunity to find out about future events and support for older people





**Bromsgrove District Council, Sports Development Officer – Adults and Disability**, activities currently offered to residents throughout Bromsgrove district:

### **Activity Referral**

The 'Healthy Horizons' activity referral scheme developed in partnership with Sports Development, the Dolphin Centre, the PCT and the County Sports Partnership, has seen a 90% sign up from local doctors and practice nurses who refer patients with stable conditions onto the exercise programme. Participants receive expert advice on nutrition, stress relief and smoking cessation. The scheme benefits from free gym membership, exercise classes and swimming. The group is encouraged to explore different forms of exercise and is introduced to the Walks for Health programme, local bowls clubs and are provided with free taster sessions with local clubs to encourage life long sports participation.

### **Mobility Exercise Sessions**

These sessions are currently being developed to offer mobility exercise sessions for older adults across the district. There are currently sessions based in central Bromsgrove, Alvechurch, Barnt Green and Hollywood, with sessions to be offered in the future in Charford and Sidemoor. Sports Development are looking to develop partnerships with Worcestershire Primary Care Trust and Age Concern to roll out the district's first postural rehabilitation course for people who have suffered from falls or who could be at risk of falling. Bromsgrove have a high number of people who have been injured through a fall. The Team work with the MS physiotherapist and provide an exercise session specifically for this group. Mobility exercise sessions will be offered in rural locations such as Hagley, Belbroughton and Clent if the bid to Sport England is successful.

### **Over 60's Swimming**

The Sports Development team supports the Dolphin Centre in providing free swim sessions for the over 60's. Quarter one showed a significant increase in the number of people participating in the free sessions.

### **Disability Provision**

The Keep on Moving project provides disability sports clubs for adults, is open to all abilities and incorporates a multi-sport club, a Boccia club (similar to bowls) and a dance club. Participants range in age from ages 16 – 70. The project benefits from guest coaches in fencing and wheelchair basketball and was created in partnership with Chadsgrove Sports College.

**Families Fit Together**

A successful bid has been secured for a sports project based on the theme of families to encourage all ages to engage in sport. This includes older men's table tennis club (with a mobility session added on), family cricket in the park, a mother and daughter netball club and a ladies only badminton club. Sports Development will continue to work with local accredited sports clubs to make this 16 week project sustainable.

**Walks for Health**

The Sports Development team supports the Walks for Health initiative. A volunteer led programme that provides led walks around the district. The scheme is currently being developed to cater for a variety of levels for all abilities, provide 'walk exchanges' with other districts and visits to new areas.



# Current Provision



Shopmobility.

Bromsgrove Urban and Rural Transport (BRT).

Over 60s swimming concession.

Disabled facilities grant.

Free swimming lessons.

Lifeline.

Mobility sessions for older people.

Activity referral scheme.

Walks for health.

Gilbert Court (BDHT).

Perryfields Development.



# Current Provision



## Benefits

- Pension Credits, Winter Fuel

## Adult learning

- Life Skills Programme
- The Comput@Bus
- Family Learning
- Community Learning Outreach

## Age Concern Services

The Trunk (intergenerational project, computer courses etc)

Handyperson Scheme, Befriending Scheme, Well Check (WCC)

Falls Prevention Course (NHS Worcestershire)





**This report can be provided  
in large print, braille, CD, audio tape  
and computer disc.**



**Bromsgrove**  
District Council

[www.bromsgrove.gov.uk](http://www.bromsgrove.gov.uk)



**Legal, Equalities and Democratic Services**

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e-mail: [scrutiny@bromsgrove.gov.uk](mailto:scrutiny@bromsgrove.gov.uk)

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## **Treasury Management Strategy Statement and Investment Strategy 2010/11 to 2012/13**

### **Template**

#### **Contents**

- 1. Background**
- 2. Balance Sheet and Treasury Position**
- 3. Outlook for Interest Rates**
- 4. Borrowing Requirement and Strategy**
- 5. Investment Policy and Strategy**
- 6. Balanced Budget Requirement**
- 7. 2010/11 MRP Statement**
- 8. Reporting**
- 9. Other Items**

#### **Appendices**

- A. Current and Projected Portfolio Position
- B. Prudential Indicators
- C. Interest Rate Outlook: The Council's, Arlingclose's
- D. Specified Investments for use by the Council
- E. Non- Specified Investments for use by the Council
- F. Treasury Management Policy Statement

## 1. Background

- 1.1 The Chartered Institute of Public Finance and Accountancy's Code of Practice for Treasury Management in Public Services (the "CIPFA TM Code") requires local authorities to determine the Treasury Management Strategy Statement (TMSS). This statement also incorporates the Investment Strategy as required under the Communities and Local Government (CLG) Investment Guidance. Together, these cover the financing and investment strategy for the forthcoming financial year.

In response to the financial crisis in 2008 and the collapse of the Icelandic banks, CIPFA revised the TM Code and Guidance Notes as well as the Prudential Indicators in late November 2009. CLG has produced draft revisions to Investment Guidance. In the event that the official Guidance differs from the draft, and changes required to be made to this Strategy and/or documentation will be placed before members for consideration at the next appropriate Cabinet meeting.

- 1.2 CIPFA has defined Treasury Management as:

*"the management of the organisation's investments and cash flows, its banking, money market and capital market transactions; the effective control of the risks associated with those activities; and the pursuit of optimum performance consistent with those risks."*

- 1.3 The Council is responsible for its treasury decisions and activity. No treasury management activity is without risk. The successful identification, monitoring and control of risk is an important and integral element of its treasury management activities. The main risks to the Council's treasury activities are:

- Liquidity Risk (Inadequate cash resources)
- Market or Interest Rate Risk (Fluctuations in interest rate levels)
- Inflation Risk (Exposure to inflation)
- Credit and Counterparty Risk (Security of Investments)
- Refinancing Risk (Impact of debt maturing in future years)
- Legal & Regulatory Risk

- 1.4 The strategy also takes into account the impact of the Council's Revenue Budget and Capital Programme on the Balance Sheet position, the current and projected Treasury position (Appendix A), the Prudential Indicators (Appendix B) and the outlook for interest rates (Appendix C).

- 1.5 The purpose of this Treasury Management Strategy Statement is to approve:
- Treasury Management Strategy for 2010-11 (Borrowing - Section 4, Debt Rescheduling - Section 5, Investments - Section 6)
  - Prudential Indicators – Appendix B (NB - PI No. 6 - The Authorised Limit is a statutory limit)
  - MRP Statement – Section 8
  - Use of Specified and Non-Specified Investments – Appendices D & E

## **2. Balance Sheet and Treasury Position**

- 2.1 The underlying need to borrow for capital purposes as measured by the Capital Financing Requirement (CFR) together with Balances and Reserves are the core drivers of Treasury Management Activity. The estimates, based on the current Revenue Budget and Capital Programmes, are set out below:

	<b>31 Mar 10 Estimate £m</b>	<b>31 Mar 11 Estimate £m</b>	<b>31 Mar 12 Estimate £m</b>	<b>31 Mar 13 Estimate £m</b>
CFR	0	0	0	0
Balances & Reserves	4.742	3.751	2.617	2.118
<b>Net Balance Sheet Position</b>	<b>4.742</b>	<b>3.751</b>	<b>2.617</b>	<b>2.118</b>

- 2.2 The Council's level of physical debt and investments is linked to these components of the Balance Sheet. The current portfolio position is set out at Appendix A. Market conditions, interest rate expectations and credit risk considerations will influence the Council's strategy in determining the borrowing and investment activity against the underlying Balance Sheet position.
- 2.3 The CFR represents the level of borrowing for capital purposes. The CFR for the Council is predicted to remain at zero, as the capital programme has been fully financed to date with no use of borrowing.
- 2.4 The move to International Financial Reporting Standards (IFRS) has implications for the Capital Financing Requirement components on the Balance Sheet. Analysis of the Council's Private Finance Initiative (PFI) schemes and Operating leases against IFRS requirements may result in the related long term assets and liabilities being brought onto the Council's Balance Sheet. The estimates for the CFR and Long Term Liabilities will therefore need to take into account such items. This will influence the determination of the Council's Affordable Borrowing Limit and Operational Boundary.
- 2.5 The estimate for interest receipts is £0.080m.

## **3. Outlook for Interest Rates**

The economic interest rate outlook provided by the Council's treasury advisor, Arlingclose Ltd, is attached at Appendix C. Financial markets remain reasonably volatile as the structural changes necessary within economies and the banking system evolve. This volatility provides opportunities for active treasury management. The Council will reappraise its strategy from time to time and, if needs be, realign it with evolving market conditions and expectations for future interest rates.

## **4. Borrowing Requirement and Strategy**

- 4.1 The Council's underlying need to borrow for capital purposes is measured by reference to its Capital Financing Requirement (CFR) – see Appendix B. The CFR represents the cumulative capital expenditure of the local authority that has not been financed. The current CFR is zero and is predicted to remain zero until the period ended 31/03/2013. This is in line with the proposed capital programme where all expenditure will be financed by Capital Receipts and Capital Grants. Based on this the Council does not propose to have any external borrowing other than that of a short term nature for cash flow requirements

## 5. **Investment Policy and Strategy**

### **Background**

- 5.1 Guidance from CLG on Local Government Investments in England requires that an Annual Investment Strategy (AIS) be set.

### **Investment Policy**

- 5.2 To comply with the CLG's guidance, the Council's general policy objective is to invest its surplus funds prudently. The Council's investment priorities are:

- security of the invested capital;
- liquidity of the invested capital;
- an optimum yield which is commensurate with security and liquidity.

The CLG's recent (draft) revised Guidance on investments reiterates security and liquidity as the primary objectives of a prudent investment policy. The speculative procedure of borrowing purely in order to invest is unlawful.

- 5.3 Investments are categorised as 'Specified' or 'Non Specified' investments based on the criteria in the CLG Guidance. Potential instruments for the Council's use within its investment strategy are contained in Appendix D.

- 5.4 The credit crisis has refocused attention on the treasury management priority of security of capital monies invested. The draft revisions to the CLG's Investment Guidance state that a specified investment is one made with a body or scheme of "high credit quality". The Council will continue to maintain a counterparty list based on these criteria and will monitor and update the credit standing of the institutions on a regular basis. This assessment will include credit ratings and other alternative assessments of credit strength as outlined in paragraph 5.12. The CLG's Draft revisions to its Guidance on local government investments recommend that the Investment Strategy should set out the procedures for determining the maximum periods for which funds may prudently be committed. Such decisions will be based on an assessment of the authority's Balance Sheet position with the limit being set in Prudential Indicator 12 - Upper Limit for total principal sums invested over 364 days.

- 5.5 The CLG's Draft revisions to its Guidance on local government investments recommend that the strategy should state the authority's policies on investing money borrowed in advance of spending needs. This statement should identify any measures to minimise such investments, including any limits on:

- amounts borrowed and
- periods between borrowing and expenditure.

The statement should also comment on the management of risks, including the risk of loss of the borrowed capital and the risk associated with interest rate changes.

- 5.6 The Council's current level of investments is presented at Appendix A.

### **Investment Strategy**

- 5.7 The global financial market storm in 2008 and 2009 has forced investors of public money to reappraise the question of risk versus yield. Income from investments is a key support in the Council's budget. The UK Bank Rate has been maintained at 0.5% since March 2009. **Short-term money market rates are likely to remain at very low levels which will have a significant impact on investment income.** The Council's strategy must however be geared



towards this development whilst adhering to the principal objective of security of invested monies.

- 5.8 The Executive Director of Finance and Resources, under delegated powers, will undertake the most appropriate form of investments in keeping with the investment objectives, income and risk management requirements and Prudential Indicators. Decisions taken on the core investment portfolio will be reported to the Cabinet meeting.

**Investments managed in-house:**

- 5.9 The Council's shorter term cash flow investments are made with reference to the outlook for the UK Bank Rate and money market rates.
- 5.10 In any period of significant stress in the markets, the default position is for investments to be made with the Debt Management Office.
- 5.11 Currently the Council has restricted its investment activity to:
- The Debt Management Agency Deposit Facility (The rates of interest from the DMADF are below equivalent money market rates. However, the returns are an acceptable trade-off for the guarantee that the Council's capital is secure)
  - AAA-rated Money Market Funds with a Constant Net Asset Value (CNAV)
  - Deposits with other local authorities
  - Business reserve accounts and term deposits. *These have been primarily restricted to UK institutions that are rated at least A+ long term (or equivalent), and have access to the UK Government's 2008 Credit Guarantee Scheme (CGS)\**
  - Bonds issued by Multilateral Development Banks  
*Please see Appendix D for a breakdown of current counterparties, instruments and limits used.*

*\*Eligible Institutions can issue new guaranteed debt under the CGS until 28/02/2010, after which only existing guaranteed debt can be rolled over.*

- 5.12 Conditions in the financial sector have begun to show signs of improvement, albeit with substantial intervention by government authorities. In order to diversify the counterparty list, the use of comparable non-UK Banks for investments is now considered appropriate.

The sovereign states whose banks are to be included are Australia, Canada, Finland, France, Germany, Netherlands, Spain, Switzerland and the US. These countries, and the Banks within them (see Appendix E/E), have been selected after analysis and careful monitoring of:

- Credit Ratings (minimum long-term A+)
- Credit Default Swaps
- GDP; Net Debt as a Percentage of GDP
- Sovereign Support Mechanisms / potential support from a well-resourced parent institution
- Share Price

The Council has also taken into account information on corporate developments and market sentiment towards the counterparties. The Council and its Treasury Advisors, Arlingclose, will continue to analyse and monitor these indicators and credit developments on a regular basis and respond as necessary to ensure security of the capital sums invested.

We do remain in a heightened state of sensitivity to risk. Vigilance is key. This modest expansion of the counterparty list is an incremental step. In order to meet requirements of the revised CIPFA Treasury Management Code, the Council is focusing on a range of indicators (as stated above), not just credit ratings.

Limits for Specified Investments are set out in Appendix E/F.

### **Investments managed externally**

#### Collective Investment Schemes (Pooled Funds):

- 5.13 The Council has evaluated the use of Pooled Funds and determined the appropriateness of their use within the investment portfolio. Pooled funds enable the Council to diversify the assets and the underlying risk in the investment portfolio and provide the potential for enhanced returns.
- 5.14 Investments in pooled funds will be undertaken with advice from Arlingclose. The Council's current investments in Pooled Funds are listed in Appendix A; their performance and continued suitability in meeting the Council's investment objectives are regularly monitored.

### **6. Balanced Budget Requirement**

- 6.1 The Council complies with the provisions of S32 of the Local Government Finance Act 1992 to set a balanced budget.

### **7. 2010/11 MRP Statement**

- 7.1 The Local Authorities (Capital Finance and Accounting)(England)(Amendment) Regulations 2008 (SI 2008/414) place a duty on local authorities to make a prudent provision for debt redemption. Guidance on Minimum Revenue Provision has been issued by the Secretary of State and local authorities are required to "have regard" to such Guidance under section 21(1A) of the Local Government Act 2003.
- 7.2 The four MRP options available are:
  - Option 1: Regulatory Method
  - Option 2: CFR Method
  - Option 3: Asset Life Method
  - Option 4: Depreciation Method

The 2009 SORP and IFRS may result in PFI schemes and leases being brought on balance sheet. Where this is the case the CFR will increase, which will lead to an increase in the MRP charge to revenue. MRP for these items will match the annual principal repayment for the associated deferred liability.

- 7.3 The Council's CFR at 31<sup>st</sup> March 2010 is estimated to be £Nil/Negative and as such under Option 2 (the CFR Method) there is no requirement to charge MRP in 2010/11.
- 7.4 An analysis is underway at this time to determine if under the 2009 SORP and IFRS accounting requirements, any leases will be brought onto the Balance Sheet, this review will subsequently assess the impact on the MRP in respect of leases brought onto the Balance Sheet and will match the annual principal repayment for the associated deferred liability.

**8. Reporting on the Treasury Outturn**

The Executive Director of Finance and Resources will report to the Performance Monitoring Board and Cabinet on treasury management activity / performance as follows:

- (a) Quarterly against the approved strategy for the year.
- (b) The Council will produce an outturn report on its treasury activity no later than 30<sup>th</sup> September after the financial year end.
- (c) The Audit Board will be responsible for the scrutiny of treasury management activity and practices.

**9. Other items**

**Training**

CIPFA's revised Code requires the *responsible officer* to ensure that all members tasked with treasury management responsibilities, including scrutiny of the treasury management function, receive appropriate training relevant to their needs and understand fully their roles and responsibilities.

The CLG's Draft revisions to its Guidance on local government investments recommend that the Investment Strategy should state what process is adopted for reviewing and addressing the needs of the authority's treasury management staff for training in investment management.

Responsibility for the scrutiny of the Treasury Management function will rest with the Audit Board. The Executive Director of Finance and Resources will ensure that adequate training is provided for all relevant Members during this Financial Year.

**Investment Consultants**

The CLG's Draft revisions to its Guidance on local government investments recommend that the Investment Strategy should state:

- Whether and, if so, how the authority uses external contractors offering information, advice or assistance relating to investment and
- How the quality of any such service is controlled.

The Council uses external contractors, Arlingclose for information and advice relating to investments. Updated information is received and monitoring undertaken by regular meetings and reports between the Executive Director of Finance and Resources and representatives from Arlingclose.

**Publication**

The CLG's Draft revisions to its Guidance on local government investments recommend that the initial strategy and any revised strategy should, when approved, be made available to the public free of charge, in print or online.

Publication requirements will be complied with, the Revised Strategy will be made available to the public on the internet. Its availability will be published to ensure the public are aware of its existence.

## EXISTING PORTFOLIO PROJECTED FORWARD

This is our current investment portfolio as at 31<sup>st</sup> January 2010.

	<b>Current Portfolio £m</b>
<b>Investments:</b> <i>Managed in-house</i> - Deposits and monies on call and Money Market Funds - Fixed Term Deposits	   6.0 11.5
<b>Total Investments</b>	17.5

## PRUDENTIAL INDICATORS 2010/11 TO 2012/13

**1 Background:**

There is a requirement under the Local Government Act 2003 for local authorities to have regard to CIPFA's Prudential Code for Capital Finance in Local Authorities (the "CIPFA Prudential Code") when setting and reviewing their Prudential Indicators. It should be noted that CIPFA undertook a review of the Code in early 2008, and issued a revised Code in November 2009.

**2. Net Borrowing and the Capital Financing Requirement:**

This is a key indicator of prudence. In order to ensure that over the medium term net borrowing will only be for a capital purpose, the local authority should ensure that the net external borrowing does not, except in the short term, exceed the total of capital financing requirement in the preceding year plus the estimates of any additional capital financing requirement for the current and next two financial years.

The Executive Director of Finance and Resources reports that the authority had no difficulty meeting this requirement in 2009/10, nor are there any difficulties envisaged for future years. This view takes into account current commitments, existing plans and the proposals in the approved budget.

**3. Estimates of Capital Expenditure:**

3.1 This indicator is set to ensure that the level of proposed capital expenditure remains within sustainable limits and, in particular, to consider the impact on Council Tax and in the case of the HRA, housing rent levels.

No. 1	Capital Expenditure	2009/10 Approved £m	2009/10 Revised £m	2010/11 Estimate £m	2011/12 Estimate £m	2012/13 Estimate £m
	General Fund	3.389	4.755	2.465	1.600	0.599
	<b>Total</b>	<b>3.389</b>	<b>4.755</b>	<b>2.465</b>	<b>1.600</b>	<b>0.599</b>

3.2 Capital expenditure will be financed as follows:

Capital Financing	2009/10 Approved £m	2009/10 Revised £m	2010/11 Estimate £m	2011/12 Estimate £m	2012/13 Estimate £m
Capital receipts	2.514	3.891	1.877	1.227	0.226
Government Grants	0.875	0.864	0.588	0.373	0.373
<b>Total</b>	<b>3.389</b>	<b>4.755</b>	<b>2.465</b>	<b>1.600</b>	<b>0.599</b>

**4. Ratio of Financing Costs to Net Revenue Stream:**

4.1 This is an indicator of affordability and highlights the revenue implications of existing and proposed capital expenditure by identifying the proportion of the revenue budget required to meet borrowing costs. The definition of financing costs is set out at paragraph 87 of the Prudential Code.

4.2 The ratio is based on costs net of investment income.

No. 2	Ratio of Financing Costs to Net Revenue Stream	2009/10 Approved %	2009/10 Revised %	2010/11 Estimate %	2011/12 Estimate %	2012/13 Estimate %
	General Fund	-1.27	-1.41	-0.56	-0.77	-0.70
	<b>Total</b>	<b>-1.27</b>	<b>-1.41</b>	<b>-0.56</b>	<b>-0.77</b>	<b>-0.70</b>

**5. Capital Financing Requirement:**

5.1 The Capital Financing Requirement (CFR) measures the Council's underlying need to borrow for a capital purpose. The calculation of the CFR is taken from the amounts held in the Balance Sheet relating to capital expenditure and its financing. It is an aggregation of the amounts shown for Fixed and Intangible assets, the Revaluation Reserve, the Capital Adjustment Account, Government Grants Deferred and any other balances treated as capital expenditure.

No. 3	Capital Financing Requirement	2009/10 Approved £m	2009/10 Revised £m	2010/11 Estimate £m	2011/12 Estimate £m	2012/13 Estimate £m
	General Fund	0	0	0	0	0
	<b>Total CFR</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

**6. Actual External Debt:**

6.1 This indicator is obtained directly from the Council's balance sheet. It is the closing balance for actual gross borrowing plus other long-term liabilities. This Indicator is measured in a manner consistent for comparison with the Operational Boundary and Authorised Limit.

No. 4	Actual External Debt as at 31/03/2009	£m
	Borrowing	0.116
	<b>Total</b>	<b>0.116</b>

The short term borrowing as at 31<sup>st</sup> March 2009 was for the management of the Council's cash flow requirements.

**7. Incremental Impact of Capital Investment Decisions:**

7.1 This is an indicator of affordability that shows the impact of capital investment decisions on Council Tax. The incremental impact is calculated by comparing the total revenue budget requirement of the current approved capital programme with an equivalent calculation of the revenue budget requirement arising from the proposed capital programme.

No. 5	Incremental Impact of Capital Investment Decisions	2009/10 Approved £	2010/11 Estimate £	2011/12 Estimate £	2012/13 Estimate £
	Increase in Band D Council Tax	0.31	0.01	0.01	0.15

7.2 The impact on Band D council tax reflects the reduction in investment income due to depletion of capital receipts to finance the capital programme.

**8. Authorised Limit and Operational Boundary for External Debt:**

8.1 The Council has an integrated treasury management strategy and manages its treasury position in accordance with its approved strategy and practice. Overall borrowing will therefore arise as a consequence of all the financial transactions of the Council and not just those arising from capital spending reflected in the CFR.

8.2 The **Authorised Limit** sets the maximum level of external borrowing on a gross basis (i.e. not net of investments) for the Council. It is measured on a daily basis against all external borrowing items on the Balance Sheet (i.e. long and short term borrowing, overdrawn bank balances and long term liabilities). This Prudential Indicator separately identifies borrowing from other long term liabilities such as finance leases. It is consistent with the Council's existing commitments, its proposals for capital expenditure and financing and its approved treasury management policy statement and practices.

8.3 The Authorised Limit has been set on the estimate of the most likely, prudent but not worst case scenario with sufficient headroom over and above this to allow for unusual cash movements.

8.4 The Authorised Limit is the statutory limit determined under Section 3(1) of the Local Government Act 2003 (referred to in the legislation as the Affordable Limit).

No. 6	Authorised Limit for External Debt	2009/10 Approved £m	2009/10 Revised £m	2010/11 Estimate £m	2011/12 Estimate £m	2012/13 Estimate £m
	Borrowing	6.0	6.0	6.5	7.5	8.5
	<b>Total</b>	<b>6.0</b>	<b>6.0</b>	<b>6.5</b>	<b>7.5</b>	<b>8.5</b>

8.5 The **Operational Boundary** links directly to the Council's estimates of the CFR and estimates of other cashflow requirements. This indicator is based on the same estimates as the Authorised Limit reflecting the most likely, prudent but not worst case scenario but without the additional headroom included within the Authorised Limit.

8.6 The Executive Director of Finance and Resources has delegated authority, within the total limit for any individual year, to effect movement between the separately agreed limits for borrowing and other long-term liabilities. Decisions will be based on the outcome of financial option appraisals and best value considerations. Any movement between these separate limits will be reported to the next meeting of the Cabinet.

No. 7	Operational Boundary for External Debt	2009/10 Approved £m	2009/10 Revised £m	2010/11 Estimate £m	2011/12 Estimate £m	2012/13 Estimate £m
	Borrowing	5.0	5.0	5.5	6.5	7.5
	<b>Total</b>	<b>5.0</b>	<b>5.0</b>	<b>5.5</b>	<b>6.5</b>	<b>7.5</b>

**9. Adoption of the CIPFA Treasury Management Code:**

9.1 This indicator demonstrates that the Council has adopted the principles of best practice.

<b>No. 8</b>	<b>Adoption of the CIPFA Code of Practice in Treasury Management</b>
	The Council is asked to adopt of the revised CIPFA Treasury Management Code at its meeting on 17 <sup>th</sup> March 2010.

*The Council has incorporated the changes from the revised CIPFA Code of Practice into its treasury policies, procedures and practices.*

**10. Upper Limits for Fixed Interest Rate Exposure and Variable Interest Rate Exposure:**

10.1 These indicators allow the Council to manage the extent to which it is exposed to changes in interest rates. This Council calculates these limits on net principal outstanding sums, (i.e. fixed rate debt net of fixed rate investments).

10.2 The upper limit for variable rate exposure has been set to ensure that the Council is not exposed to interest rate rises which could adversely impact on the revenue budget. The limit allows for the use of variable rate debt to offset exposure to changes in short-term rates on investments

		<b>2009/10 Approved £m or %</b>	<b>2009/10 Revised £m or %</b>	<b>2010/11 Estimate £m or %</b>	<b>2011/12 Estimate £m or %</b>	<b>2012/13 Estimate £m or %</b>
<b>No. 9</b>	<b>Upper Limit for Fixed Interest Rate Exposure</b>	100%	100%	100%	100%	100%
<b>No. 10</b>	<b>Upper Limit for Variable Interest Rate Exposure</b>	100%	100%	100%	100%	100%

*Note: These limits may be expressed as financial amounts or as percentages.*

10.3 The limits above provide the necessary flexibility within which decisions will be made for drawing down new loans on a fixed or variable rate basis; the decisions will ultimately be determined by expectations of anticipated interest rate movements as set out in the Council's treasury management strategy.

**11. Maturity Structure of Fixed Rate borrowing:**

11.1 This indicator highlights the existence of any large concentrations of fixed rate debt needing to be replaced at times of uncertainty over interest rates and is designed to protect against excessive exposures to interest rate changes in any one period, in particular in the course of the next ten years.

11.2 It is calculated as the amount of projected borrowing that is fixed rate maturing in each period as a percentage of total projected borrowing that is fixed rate. The maturity of borrowing is determined by reference to the earliest date on which the lender can require payment.



<b>No. 11</b>	<b>Maturity structure of fixed rate borrowing</b>	<b>Lower Limit %</b>	<b>Upper Limit %</b>
	under 12 months	0.00%	100.00%
	12 months and within 24 months	0.00%	100.00%
	24 months and within 5 years	0.00%	100.00%
	5 years and above	0.00%	100.00%

11.3 As the Council currently has no outstanding long-term borrowing, the limits above provide the necessary flexibility within which decisions will be made for drawing down new fixed rate loans.

**12. Upper Limit for total principal sums invested over 364 days:**

12.1 The purpose of this limit is to contain exposure to the possibility of loss that may arise as a result of the Council having to seek early repayment of the sums invested.

<b>No. 12</b>	<b>Upper Limit for total principal sums invested over 364 days</b>	<b>2009/10 Approved £m</b>	<b>2009/10 Revised £m</b>	<b>2010/11 Estimate £m</b>	<b>2011/12 Estimate £m</b>	<b>2012/13 Estimate £m</b>
		3.0	3.0	2.0	2.0	2.0

## Arlingclose's Economic and Interest Rate Forecast

	Mar-10	Jun-10	Sep-10	Dec-10	Mar-11	Jun-11	Sep-11	Dec-11	Mar-12	Jun-12	Sep-12	Dec-12	Mar-13
<b>Official Bank Rate</b>													
<b>Upside risk</b>			+0.25	+0.25	+0.50	+0.50	+0.50	+0.50	+0.50	+0.50	+0.50	+0.50	+0.50
<b>Central case</b>	0.50	0.50	0.50	1.00	1.50	2.00	2.50	3.00	3.00	3.00	3.00	3.00	3.00
<b>Downside risk</b>				-0.50	-0.50	-0.50	-0.50	-0.50	-0.50	-0.50	-0.50	-0.50	-0.50
<b>1-yr LIBID</b>													
<b>Upside risk</b>			+0.25	+0.50	+0.50	+0.50	+0.50	+0.50	+0.50	+0.50	+0.50	+0.50	+0.50
<b>Central case</b>	1.25	1.25	1.50	1.75	2.25	3.00	3.50	4.00	4.00	4.00	4.00	4.00	4.00
<b>Downside risk</b>				-0.25	-0.25	-0.50	-0.50	-0.50	-0.50	-0.50	-0.50	-0.50	-0.50
<b>5-yr gilt</b>													
<b>Upside risk</b>	+0.25	+0.25	+0.25	+0.50	+0.50	+0.50	+0.50	+0.50	+0.50	+0.50	+0.50	+0.50	+0.50
<b>Central case</b>	2.70	2.80	2.90	3.00	3.25	3.50	3.75	4.00	4.25	4.25	4.25	4.25	4.25
<b>Downside risk</b>	-0.25	-0.25	-0.25	-0.25	-0.25	-0.25	-0.25	-0.25	-0.25	-0.25	-0.25	-0.25	-0.25
<b>10-yr gilt</b>													
<b>Upside risk</b>		+0.25	+0.25	+0.25	+0.25	+0.25	+0.25	+0.25	+0.25	+0.50	+0.50	+0.50	+0.50
<b>Central case</b>	3.75	3.75	4.00	4.00	4.25	4.25	4.50	4.50	4.75	5.00	5.00	5.00	5.00
<b>Downside risk</b>		-0.25	-0.25	-0.25	-0.25	-0.25	-0.25	-0.25	-0.25	-0.25	-0.25	-0.25	-0.25
<b>20-yr gilt</b>													
<b>Upside risk</b>	+0.25	+0.50	+0.50	+0.50	+0.25	+0.25	+0.25	+0.25	+0.25	+0.25	+0.50	+0.50	+0.50
<b>Central case</b>	4.25	4.50	4.75	4.75	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
<b>Downside risk</b>	-0.25	-0.25	-0.25	-0.25	-0.25	-0.25	-0.25	-0.25	-0.25	-0.25	-0.25	-0.25	-0.25
<b>50-yr gilt</b>													
<b>Upside risk</b>	+0.25	+0.25	+0.50	+0.50	+0.50	+0.50	+0.50	+0.50	+0.50	+0.50	+0.50	+0.50	+0.50
<b>Central case</b>	4.25	4.50	4.50	4.50	4.75	4.75	4.75	4.75	4.75	5.00	5.00	4.75	4.75
<b>Downside risk</b>		-0.25	-0.25	-0.25	-0.25	-0.25	-0.25	-0.25	-0.25	-0.25	-0.25	-0.25	-0.25

- The recovery in growth is likely to be slow and uneven, more “W” than “V” shaped. The Bank of England will stick to its lower-for-longer stance on policy rates.
- Gilt yields will remain volatile; yields have been compressed by Quantitative Easing and will rise once QE tapers off and if government debt remains at record high levels.
- The path of the base rate has been downgraded to reflect the fragile state of the recovering economy and the severe fiscal correction that will be coming post General Election that will dampen aggregate demand and cut household cashflow. Expectations of central bank exit strategies and their timing will increase volatility in sovereign bond yields and equities.
- There are significant threats to the forecast from potential downgrades to sovereign ratings and/or political instability.

Underlying assumptions:

- The Bank of England's Quantitative Easing (QE) program which injected £200bn to insure against the downside risks to growth and stimulate the economy officially ends 26<sup>th</sup> January. We estimate that QE has depressed gilt yields by around 70bs (0.7%).
- The Bank forecasts GDP to grow by 4% in 2011 but concedes growth could be impeded by corporate and consumer balance sheet adjustments, restrictions in bank credit and consumers' cautious spending behaviour. This is an optimistic forecast in our view; evidence of recovery is scant with weak real economic data and rising unemployment. Q4 2009 grew by just 0.1%.
- Looming bank regulation and liquidity and capital requirements will curb bank lending activity. The Bank retains the option to reduce the rate on commercial banks' deposits

to encourage them to lend. But FSA regulations will force banks to buy more Gilts which could help slow the rise in yields in 2010/11.

- The employment outlook remains uncertain. Pay freezes, short hours, job cuts and a migration toward part time employment will continue into 2010 keeping the headline unemployment number down.
- Inflation is not an immediate worry for the Bank which forecasts CPI to rise due to higher commodity prices and VAT reverting to 17.5%. Commodity prices and VAT will push inflation over 3% prompting a letter from the Bank's Governor to the Chancellor in Q1 2010.
- The UK fiscal deficit remains acute. Cuts in public spending and tax increases are now inevitable and more likely to be pushed through in 2010 by a new government with a clear majority, however a hung parliament cannot be ruled out and would be potentially disruptive to financial markets.
- The net supply of gilts will rise to unprecedented levels in 2010. Failure to articulate and deliver on an urgent and credible plan to lower government borrowing to sustainable levels over the medium term will be negative for gilts.
- The Federal Reserve Chairman Bernanke's diagnosis of a weak U.S. economy and labour market signal that the Fed's "extended period" of low rates may get even longer. The outlook for the Eurozone is more optimistic but the European Central Bank will only increase rates after a durable upturn in growth.

### Specified and Non Specified Investments

***Please note the CLG has produced draft revised Investment Guidance for Local Authorities in England and this section would therefore be subject to review and amendment if the final version differs from the draft.***

#### **Specified Investments identified for use by the Council**

Specified Investments will be those that meet the criteria in the CLG Guidance, i.e. the investment

- is sterling denominated
- has a maximum maturity of 1 year
- meets the “high credit quality” as determined by the Council or is made with the UK government or is made with a local authority in England, Wales, Scotland or Northern Ireland or a parish or community council.
- the making of which is not defined as capital expenditure under section 25(1)(d) in SI 2003 No 3146 (i.e. the investment is not loan capital or share capital in a body corporate).

“Specified” Investments identified for the Council’s use are:

- Deposits in the DMO’s Debt Management Account Deposit Facility
- Deposits with UK local authorities
- Deposits with banks and building societies
- \*Certificates of deposit with banks and building societies
- \*Gilts : (bonds issued by the UK government)
- \*Bonds issued by multilateral development banks
- AAA-rated Money Market Funds with a Constant Net Asset Value (Constant NAV)
- Other Money Market Funds and Collective Investment Schemes– i.e. credit rated funds which meet the definition of a collective investment scheme as defined in SI 2004 No 534 and SI 2007 No 573.

1. *\* Investments in these instruments will be on advice from the Council’s treasury advisor.*
2. *The use of the above instruments by the Council’s fund manager(s) will be by reference to the fund guidelines contained in the agreement between the Council and the individual manager.*

For credit rated counterparties, the minimum criteria will be the short-term/long-term ratings assigned by various agencies which may include Moody’s Investors Services, Standard & Poor’s, Fitch Ratings:

*Long-term minimum: A1 (Moody’s) or A+ (S&P) or A+(Fitch)*

*Short-term minimum: P-1 (Moody’s) or A-1 (S&P) or F1 (Fitch).*

The Council will also take into account information on corporate developments of and market sentiment towards investment counterparties.

New specified investments will be made within the following limits:

<b>Instrument</b>	<b>Country</b>	<b>Counterparty</b>	<b>Maximum Limit of Investments %/£m</b>
Term Deposits	UK	DMADF, DMO	No limit
Term Deposits/Call Accounts	UK	Other UK Local Authorities	No limit
Term Deposits/Call Accounts	UK	Abbey	
Term Deposits/Call Accounts	UK	Bank of Scotland/Lloyds	
Term Deposits/Call Accounts	UK	Barclays	
Term Deposits/Call Accounts	UK	Clydesdale	
Term Deposits/Call Accounts	UK	HSBC	
Term Deposits/Call Accounts	UK	Nationwide	
Term Deposits/Call Accounts	UK	Royal Bank of Scotland	
Term Deposits/Call Accounts	Australia	Australia and NZ Banking Group	
Term Deposits/Call Accounts	Australia	Commonwealth Bank of Australia	
Term Deposits/Call Accounts	Australia	National Australia Bank Ltd	
Term Deposits/Call Accounts	Australia	Westpac Banking Corp	
Term Deposits/Call Accounts	Canada	Bank of Montreal	
Term Deposits/Call Accounts	Canada	Bank of Nova Scotia	
Term Deposits/Call Accounts	Canada	Canadian Imperial Bank of Commerce	
Term Deposits/Call Accounts	Canada	Royal Bank of Canada	
Term Deposits/Call Accounts	Canada	Toronto-Dominion Bank	
Term Deposits/Call Accounts	Finland	Nordea Bank Finland	
Term Deposits/Call Accounts	France	BNP Paribas	
Term Deposits/Call Accounts	France	Calyon (Credit Agricole Group)	
Term Deposits/Call Accounts	France	Credit Agricole SA	
Term Deposits/Call Accounts	Germany	Deutsche Bank AG	

Accounts			
Term Deposits/Call Accounts	Netherlands	Rabobank	
Term Deposits/Call Accounts	Spain	Banco Bilbao Vizcaya Argentaria	
Term Deposits/Call Accounts	Spain	Banco Santander SA	
Term Deposits/Call Accounts	Switzerland	Credit Suisse	
Term Deposits/Call Accounts	US	JP Morgan	
Gilts	UK	DMO	No limit
Bonds	EU	European Investment Bank/Council of Europe	
AAA rated Money Market Funds	UK/Ireland/ Luxembourg	CNAV MMFs	
Other MMFs and CIS	UK	Collective Investment Schemes	

*NB Any existing deposits outside of the current criteria will be reinvested with the above criteria on maturity.*

*Please fill in your own limits above.*

**NB**

***Non-UK Banks*** - these should be restricted to a maximum exposure of 25-30% per country. This means that effectively all your authority's investments can be made with non-UK institutions should you wish, but it limits the risk of over-exposure to any one country.

***MMFs*** - We emphasise diversification for all investments including MMFs. We advise that, as far as is practicable, clients spread their investments in Money Market Funds between two funds or more.

***Group Limits*** - For institutions within a banking group, we advise a 20% limit.

### Non-Specified Investments determined for use by the Council

Having considered the rationale and risk associated with Non-Specified Investments, the following have been determined for the Council's use:

	In-house use	Use by fund managers	Maximum maturity	Max % of portfolio	Capital expenditure?
<ul style="list-style-type: none"> <li>▪ Deposits with banks and building societies</li> <li>▪ Certificates of deposit with banks and building societies</li> </ul>	<p style="text-align: center;">✓</p> <p style="text-align: center;">✓</p>	✓	<u>5 yrs</u>	<u>60%</u> in aggregate	No
Gilts and bonds <ul style="list-style-type: none"> <li>▪ Gilts</li> <li>▪ Bonds issued by multilateral development banks</li> <li>▪ Bonds issued by financial institutions guaranteed by the UK government, e.g. GEFCO</li> <li>▪ Sterling denominated bonds by non-UK sovereign governments</li> </ul>	✓ (on advice from treasury advisor)	✓	<u>10 years</u>	<u>75%</u> in aggregate	No
Money Market Funds and Collective Investment Schemes (pooled funds which meet the definition of a collective investment scheme as defined in SI 2004 No 534 and SI 2007 No 573) but which are not credit rated	✓ (on advice from treasury advisor)	✓	These funds do not have a defined maturity date	<u>50%</u>	No
Government guaranteed bonds and debt instruments (e.g. floating rate notes) issued by corporate bodies (e.g. govt bonds issued by HBOS / RBS / Nationwide, etc)	✓	✓	<u>10 years</u>	<u>75%</u> in aggregate	Yes

1. In determining the period to maturity of an investment, the investment should be regarded as commencing on the date of the commitment of the investment rather than the date on which funds are paid over to the counterparty.
2. The use of the above instruments by the Council's fund manager(s) will be by reference to the fund guidelines contained in the agreement between the Council and the individual manager.

**NB** Where clients wish to keep open the option of investing in Banks for periods in excess of 1 year, we advise the following minimum ratings:

	<b>Long-term</b>	<b>Short-term</b>
<b>Fitch</b>	AA- (AA minus)	F1+
<b>Moody's</b>	Aa3	P-1
<b>S&amp;P</b>	AA- (AA minus)	A-1+



## TREASURY MANAGEMENT POLICY STATEMENT

### 1. INTRODUCTION AND BACKGROUND

- 1.1 The Council adopts the key recommendations of CIPFA's Treasury Management in the Public Services: Code of Practice (the Code), as described in Section 5 of the Code.
- 1.2 Accordingly, the Council will create and maintain, as the cornerstones for effective treasury management:-
- A treasury management policy statement, stating the policies, objectives and approach to risk management of its treasury management activities
  - Suitable treasury management practices (TMPs), setting out the manner in which the Council will seek to achieve those policies and objectives, and prescribing how it will manage and control those activities.
- 1.3 The Council (i.e. full Council) will receive reports on its treasury management policies, practices and activities including, as a minimum, an annual strategy and plan in advance of the year, a mid-year review and an annual report after its close, in the form prescribed in its TMPs.
- 1.4 The Council delegates responsibility for the implementation and monitoring of its treasury management policies and practices to Cabinet and for the execution and administration of treasury management decisions to the Executive Director of Finance and Resources, who will act in accordance with the organisation's policy statement and TMPs and CIPFA's Standard of Professional Practice on Treasury Management.
- 1.5 The Council nominates the Audit Board to be responsible for ensuring effective scrutiny of the treasury management strategy and policies.

### 2. POLICIES AND OBJECTIVES OF TREASURY MANAGEMENT ACTIVITIES

- 2.1 The Council defines its treasury management activities as:
- "The management of the Council's investments and cash flows, its banking, money market and capital market transactions; the effective control of the risks associated with those activities; and the pursuit of optimum performance consistent with those risks."
- 2.2 This Council regards the successful identification, monitoring and control of risk to be the prime criteria by which the effectiveness of its treasury management activities will be measured. Accordingly, the analysis and reporting of treasury management activities will focus on their risk implications for the Council.
- 2.3 This Council acknowledges that effective treasury management will provide support towards the achievement of its business and service objectives. It is therefore committed

to the principles of achieving best value in treasury management, and to employing suitable performance measurement techniques, within the context of effective risk management.”

## **Worcestershire Supporting People Strategy 2010-2013**

**Dear Stakeholder,**

**Please find to follow the Supporting People draft strategy for 2010/13. This strategy is now out for public consultation.**

**The Supporting People draft Strategy questionnaire needs to be submitted to the Supporting People team by the 12<sup>th</sup> February 2010.**

**Please reply to [supportingpeople@worcestershire.gov.uk](mailto:supportingpeople@worcestershire.gov.uk)**

**timetable:**

21/01/10 – 12/02/10	Distribute for wider consultation
15/02/10 – 19/02/10	Update strategy, and prepare feedback for SPCB
22/02/10	Present to SPCB, confirm sign off
11/03/10	Strategy to go to DMT (WCC), and Design and Print for design
19/03/10	Present to WCC cabinet (*Strategy also needs to be signed off by District authorities too – around this period)

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If you have any queries please do not hesitate to contact me.

Best Regards,

Glyn Edwards.

## Forward:

The Supporting People programme within Worcestershire is helping more than **20,000** vulnerable people each year to attain or maintain independence, through the provision of housing related support services.

By reducing reoffending rates, homelessness and rough sleeping, anti social behaviour and the fear of crime through to the provision of housing adaptations to support the frail elderly to stay within their home, the Supporting People programme has been reported to produce substantial public funding cost savings of **£55,000,000** within the county per annum (Worcestershire County Council Research and Intelligence Unit, DCLG).

The Supporting People strategy 2010-2013 informs and embeds the commissioning intentions and priorities for helping the most vulnerable and excluded to contribute to wider society within Worcestershire; in addition to setting out how service users and providers can become a more integral element of the Supporting People programme for Worcestershire.

We all want the most vulnerable people within the County to have services which are appropriate and responsive to individual needs and expectations. Supporting People achieves this in a client centred manner, which often prevents the need for intrusive intervention often at the point of crisis. The success of the Supporting People programme within Worcestershire is in part due to the strong delivery of person centred provision and interventions which are tailored to a service user needs.

The landscape however is changing rapidly, presenting both funding and strategic challenges. This strategy is therefore a key document for the next 3 years, setting our agenda for meeting these challenges and strengthening the position of Supporting People within Worcestershire. The funding environment is arguably the biggest challenge in ensuring that these key services which are often a lifeline for some of the most vulnerable people are sustained. Supporting People funding has been decreasing year on year since its inception. This is likely to continue with public funding in the future being cut from Central Government.

We are proud of our services and the contribution we make to the Local Area Agreement priorities, in addition to the positive outcomes our providers achieve. As a result we have been successful in improving the quality of life for over 20,000 people a year.. This strategy sets out our agenda to meet the challenges we face, and we face this in partnership at both an operational and strategic level.

## Introduction

Since 2003, the Worcestershire Supporting People programme has been providing innovative housing related support to our most vulnerable and chaotic communities throughout our 6 Districts. Since 2003, on average 20,000 vulnerable people have been supported per year by person centred support packages enabling them to achieve and maintain independent living.

Our client groups range from:

- Homeless families
- Single homelessness
- Domestic Abuse
- Substance misuse
- Teenage parents
- Offenders
- Mental Health
- Learning Disabilities
- Physical Disabilities
- Young People at risk
- Frail Elderly

The Worcestershire Supporting People programme provides essential preventative services for people who need support to gain the skills needed to live an independent life with limited or no additional intervention. Our services are strategically commissioned to ensure that we add value to many local priorities within the county of Worcestershire. The very nature of our client groups provides us a passport to become a cross cutting strategic commissioning function which meets many local priorities, specifically within the context of Worcestershire's Local Area Agreement.

All of our 116<sup>1</sup> contracts have been strategically commissioned and steered by our multi agency Supporting People Commissioning Body. This governing body represents Worcestershire County Council Adult and Community Services, all of the District Councils within the County, West Mercia Probation, Worcestershire NHS, in addition to representation from our provider and service user forums.

**Services directed at local priorities:**

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<sup>1</sup> 116 contracts – November 2009

This strategy sets out the direction for the next 3 years. The rationale for this alignment is to ensure Supporting People remains not just a relevant programme within the County in meeting vulnerable client needs, but is enabled to become flexible and creative in meeting the rising demand for our services. We know and appreciate the effect an aging population will have on existing budgets and resources, we also know that the current economic pressures within the County will lead to an increased demand for some of our key services – offending, homelessness, mental health for instance.

Supporting People has a responsibility to meet the needs of our environment, and we need to be able to support these needs within parameters set for the programme. This strategy therefore seeks to further progress the innovative and creative approach to commissioning to achieve the supply and demand set. As a result, this 3 year plan will outline the intention to align all current and future commissioned projects and their outcomes to those of the LAA priorities; thus ensuring local priorities within the County can be fulfilled in partnership.

### **Partnership working and Social Capital:**

Supporting People has a diverse client group, and therefore we seek to enable outcomes through diverse partnerships (a balanced economy or private, public and third sector organisations). Our strategy will set out our intention to seek best value, added value and innovation to meet the most vulnerable needs within Worcestershire.

Our strategic governing body is embedded within a very strong partnership setting. We also have a strong history of joint commissioning initiatives that meet a plethora of key indicators and outcomes within a diverse partnership context.

Being commissioners of preventative and point of crisis programmes we have been able to accrue substantial cost savings for public funded authorities within the County (also referred to as the financial benefits model in this strategy). This work, initiated by DCLG, and undertaken in partnership with the Research and Intelligence team within County Council has illustrated a reflective costing saving as a result of Supporting People funding. The anticipated cost saving for 2009/2010 is estimated at £55,000,000 for the county. (This would be the cost to public authorities if Supporting People provision wasn't providing the support it does within the County.)

### **Sustaining SP networks and expanding them:**

Partnership work will continue to be the very bedrock of our function. We know we can achieve great outcomes, life changing outcomes for some of the most vulnerable and chaotic people – we also know that some of these outcomes can often be life saving. We also know that we need to achieve this within joint partnership arrangements that enable us to maximise the potential of our commissioning investments over the next 3 years. We seek to add value and avoid duplication, ensure that Supporting People funding can bridge some of the gaps within provision, and ease the transition between services and responsibilities (for



instance the transition between Children Services provision and Adult Community Service responsibility). We have achieved a lot since Supporting People became established, and we believe our relationship with appropriate partners is a healthy and vibrant one. However, in an age where funding is increasingly vulnerable, the need for such services is a growing trend and with the developments within social care (re Choice and Control agendas / personalisation) the stronger and committed partnership arrangement is vital to sustainability of service provision and strategic planning.

Relevant stakeholders, providers and service users will form part of the mechanics of our involvement in the next few years. We seek to joint commission with key providers to avoid duplication and add value, we also seek to meet the needs of people who are not receiving a service due to their circumstance. This strategy will enable us to work more creatively and innovatively utilising our new freedom and flexibility of funding arrangements<sup>2</sup>; maximising outcomes for our client groups. We are ready to embrace this development, keen to create more innovative partnership arrangements within the remit of the Local Area Agreement to meet the needs of Worcestershire.

The importance of multi-agency working has been highlighted within our consultation events leading up to this strategy. Opportunity is sought from this strategy to highlight the potential to engage with different sections of the community to enable an effective response to complex and multi-faceted nature of our client groups. The role of the third sector will have a key role to play in terms of assisting us to achieve the breadth of services needed within Worcestershire for our client groups. As a result of this we will ensure that we consider the COMPACT<sup>3</sup> in terms of our internal administration.

At a structural level, the following pre-requisites have been adopted to ensure we embrace a partnership approach to this strategy, our commissioning intentions and annual investment plan:

- Establish a strategic task and finish group that would drive forward this strategy (including District Housing leads, Probation, Adult and Community Services Management, The Chair of the Provider Forum and Waves, Officers from the Worcestershire Partnership (LSP), and County's Voluntary and Community Sector Coordinator).
- Involving wider key stakeholders to create, inform and structure this strategy through a range of consultation methods. We aim to ensure that partners may feel involved and integral to its success from the outset;

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<sup>2</sup> As from April 2010, Supporting People funding will be part of the Area Based Grant. Subsequently, the funding grant conditions that embodied Supporting People expenditure previous to this date are now replaced with the governance arrangements of the Local Area Agreement. This provides the programme the freedom and flexibility to tailor the programme to meet local need more effectively.

<sup>3</sup> The Worcestershire COMPACT is an agreement that determines how public bodies work with the Voluntary and Community Sector. The agreement was launched in 1998. (<http://www.worcestershire.gov.uk/cms/council-and-democracy/chief-executive-unit/directorates/planning--economy--performance/community-leadership/vcs-unit/worcestershire-compact.aspx>)

- Ensure that the strategy is effectively publicised so that organisations are aware of its principles and vision and appreciate what role they could play;
- The planning of a marketing and communication plan to ensure that the outcomes being achieved can support and influence achievements within the LAA's theme groups where appropriate, and in terms of the Total Place and Comprehensive Area Assessment agenda;
- Development of a communications plan between partners, providers, and service users.
- Development of relations with the SPCB and Choice and Control programme within County.

### **Building and expanding service user participation:**

Service user involvement is an essential element of our work, and we have made significant steps to create this integral element in our function. The service user element of our work we believe should not be underestimated, and we seek to strengthen this over the lifetime of this strategy to enable us to commission and review services that are centred to the needs of the service user. Person centred commissioning has enabled us to deliver key services in a cost effective manner over the past 6 years, and our commitment to this agenda will further accrue benefits both in terms of improved commissioned activity and validation through to cost savings for public partners.

We also seek to maximise the potential for Waves (Supporting People's Service User network) to become a more integral element of our function. We will evolve the function of Waves to become a gatekeeper for already established service user groups within our client groups. We seek to involve relevant groups/ service users in the consultation and decision making elements of commissioning services. This approach will enable us to accrue reflective representation to support our commissioning decisions.

### **Service Reviews (Quality Assessment Framework):**

The outcomes that will be expected from any service review we will carry out are principally:

- To ensure that the service is strategically relevant, that the service contributes to both the Supporting People agreed outcomes and also key identified Local Area Agreement priorities.
- That the service is enabling independent living for some of the most vulnerable / chaotic within Worcestershire.
- That the service meets all expected standards – specifically in regard to safeguarding
- That the service is value for money, and can illustrate where appropriate social capital gains
- And that holistically the provision will not pose a risk to the Supporting People programme, or detract from its principle in adding value.

Our expectation is that providers will deliver excellent services to those who need it most. The programme will be looking to implement a reformed review process over the lifetime of this strategy, a mix of light touch and involved reviews dependant upon need and risk assessment. The risk assessment of this process will be influenced by outcomes being achieved, safeguarding



concerns, financial and resource concerns, in addition to strategic fit requirements. The review team will carry out provider consultation and training during the lifetime of this strategy, in addition to supplementing Supporting People's online newsletter ([www.worcestershire.gov.uk/spm](http://www.worcestershire.gov.uk/spm)) with key information on the process.

The basis of our review process will embed the Quality Assessment Framework, and where appropriate this will be enhanced to reflect changing environmental factors. Providers will be expected to manage their function with the intent of being graded no lower than a level B. It will be a minimum requirement for new providers to be operating at a level B.

The reduced resource available to us as a commissioning and review function has meant that we are seeking to adapt a different, and leaner approach to reviewing our services. This more effective and efficient way of reviewing will ensure that all providers will have a review scheduled every 18 months.

### **Outcome based commissioning and contracting**

The strength of the Supporting People programme within Worcestershire has been the capability to illustrate its value from a service users perspective. Every provider currently submits outcomes evidence each quarter illustrating how their bespoke support service is changing and making a difference to someone's life. The Worcestershire model of outcomes has received acclaim on a national basis for its ability to provide accurate reflections in terms of investment gains.

This model has now been adapted further to draw immediate alignment to Local Area Agreement outcomes. As a consequence, we have the ability to illustrate the worth of every contract in terms of service user outcomes (who we have supported to sustain / maintain independent living) in the context of priority areas for concern within the County.

As we move forward into a new environment, outcomes data will become more fundamental in not only providing us with the evidence of valuable achieved outcomes but will also add value to the financial benefits model we have adapted (in conjunction with County Council's Research and Intelligence Unit, and Department for Communities and Local Government).

Outcomes will also remain a priority focus in the way we commission and procure services. Person centred commissioning requires optimum service user engagement, and these links are being developed in equal partnership with the provider forum, Supporting People Commissioning Body and the team and with Waves. Although ahead of the game in this respect, we will be developing stronger structures that will enable a more reflective engagement of service users with the commissioning of services. (A strategy for this will be developed within year one of the action plan.)

### **Cross tenure services**

Supporting People is an established support programme which is relied upon by over 20,000 vulnerable people. It is important for us as a commissioning, contracting and review function to appreciate the efficiencies achievable by seeking to commission services that not only meet individual needs of a service user, but develop future services that embrace both the freedom and flexibility entitlements encouraged by being part of the Area based grant. We seek therefore to work closely with providers over the coming 3 years to see how we can enhance service provision, seeking to procure cross tenure services and where possible identify opportunities for existing providers to work within the freedom and flexibility of new funding arrangements.

### **Enhanced safeguarding for adults, young people and children**

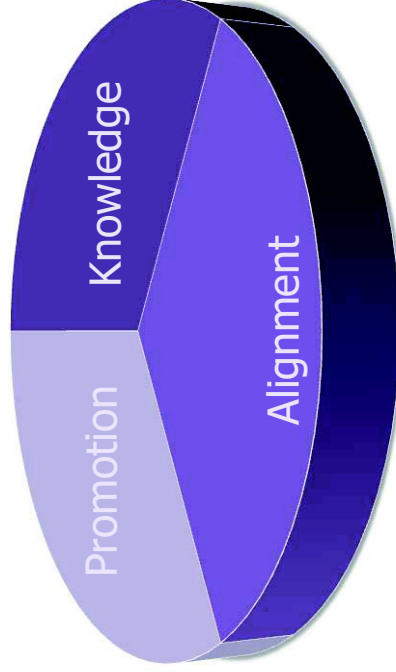
Safeguarding is a priority for every part of our business function. We have high expectations, and this strategy will identify the principles behind this and the structure in place to ensure Supporting People providers embrace the Safeguarding protocol. Communication with regard to safeguarding and an action plan to complement this strategy will illustrate our intentions. A series of training, sharing of best practice and regular communication and toolkits will support providers; and our review function will enable us monitor and support.

## Supporting People and Worcestershire's Local Area Agreement

The Supporting People programme grant will sit alongside our administration budget in the LAA's Area Based Grant (ABG) from April 2010/11. The removal of ring-fenced protection, additional freedom and flexibility in expenditure and meeting new LAA indicators is a new environment for Supporting People to deliver within, a new framework.

This new framework has many opportunities as well as threats. The opportunity to become more creative in achieving outcomes and aligning activity to meet known Worcestershire priorities with an outcome approach that enables us to illustrate how our investment is changing lives is one which we are ready to embrace as a partnership. The risks are also being mitigated against to our best ability. At the time of developing this strategy the Worcestershire Partnership have been drawing up governance arrangements regarding the allocation of the ABG. Over the last 12 months we have been preparing for LAA inception with some proactive steps (this has included many consultation events with key strategic stakeholders, funding bodies, policy makers through to providers and service users). These steps form part of our new strategic approach to LAA induction, known as Knowledge, Alignment and Promotion (KAP). KAP is embedding the principles which will strengthen our approach, induction and alignment to the Local Area Agreement. It looks to keep abreast of national developments (and where possible, lead developments as an excellent authority), and continue to tailor our approach to meet Worcestershire requirements. (The feedback from these consultations can be seen in Appendix 1.)

### KAP



The elements of KAP are embedded around service user involvement, quality of provision, identifying the value (cost saving) of preventative care and support through to a partnership driven agenda of incorporating a value for money framework, driving forward our outcome framework and ensuring Supporting People contracts are aligned to LAA priorities:

## Knowledge:

- Ensure that Supporting People meets the identified needs (through extensive and appropriate partnership working and alignment).
- Continue to carry out an understanding of current funding arrangements to achieve outcomes, and identify opportunities for joint commissioning arrangements, strategic alignment.
- Appreciate and understand the value of a balanced economy of provision, specifically looking at the value of the third sector in delivering some of our outcomes to vulnerable and chaotic communities.
- Ensure that the Quality Assessment Framework continue to drive forward excellent provision within SP funded services.
- In coordination with fellow funding bodies and strategic partnerships develop a value for money framework which seeks to drive forward the preventative agenda, identifying cost savings and an outcomes focused agenda.
- Identify the opportunities of the freedom and flexibilities enabled by the removal of ring-fencing for housing related support under the umbrella of community safety (identifying opportunities and providing support to provider with Choice and Control agenda).
- Carry out an outcomes analysis from every contract held by the Supporting People programme within the County
- Understand the strategic position of every contract held – opportunities to extend and strengthen strategic fit, or the need to reconfigure.
- Trend analysis of market place, and current supply (market development)
- Financial Benefits model – cost savings being accrued per contract and client group for the Worcestershire Partnership
- Social Accounts that provide an annual review of SP provision, detailing outcomes and achievements per district
- Work closely with neighbouring authorities to share and inform best practice on approaches to ABG
- Continue to evolve provider consultation and feed into the structure of the Supporting People strategy developments – creating an appreciation for what is needed and achievable.

## Alignment:

- Mapping of outcomes of Supporting People to the current Local Area Agreement, and the potential to align against the story of place for Worcestershire, community strategies and existing evidence of the areas of highest need analysis (with existing contracts, strategic direction of new initiatives).
- Structure of outcomes data received and requested to meet output and outcome information required for the LAA.
- Seek to develop the Supporting People Commissioning Body to become more reflective of the Partnerships alignment and funding directives.
- Ensure that the action plan and commissioning intentions is refreshed annually to reflect the county's strategic priorities and address gaps for our client groups (identifying opportunities to map new and creative partnership approached to achievement of outcomes, and joint commissioning intentions).



- Continue to integrate service user involvement within Supporting People administration decisions and influences over provision (including recruitment of staff, through to a seat on the Commissioning Body and steering user involvement in tender developments).
- Continue to work closer with the provider forum to provide support and feedback, and to structure the key elements of achievements which can be fed into to this process.
- Further embedding best practice surrounding safeguarding for us as commissioners, and providers in their role in providing support to the most vulnerable within society.

## Promotion:

- Ensure information channels are utilised where possible to inform all stakeholders of the distance travelled and next steps in this alignment process.
- Utilise Supporting People's online newsletter ([www.worcestershire.gov.uk/spm](http://www.worcestershire.gov.uk/spm)) , website ([www.worcestershire.gov.uk/supportingpeople](http://www.worcestershire.gov.uk/supportingpeople))
- Ensure links are being made into appropriate theme groups of the LAA
- Ensure appropriate partnerships are being formed within the LAA context, and assisting to structure Supporting People commissioning intentions (including the theme groups)
- Provision of guides and strategic reviews in conjunction with stakeholders promoting the strategic intent of the programme.
- Feed into strategic developments throughout Worcestershire (for instance, The Joint Strategic Needs Assessment, region and nationally where possible).

To date we have made excellent inroads into the Local Area Agreement priorities. We can clearly show the value of our programme through service user outcomes, market development and knowledge, and importantly ability to align our outcomes to make both direct and indirect contributions to the Local priorities. Working in partnership with County's Research and Intelligence Unit we can demonstrate as a partnership, in 2008/09 alone, in excess of 30,000 positive outcomes achieved by SP have influenced LAA achievements (a significant upward trend from previous years).

This strategy will enable us to take forward this work, utilise the value of our outcomes and align them within the context of the LAA. As a partnership we have seen the value of Supporting People as a strategic imperative, in addition to appreciating the real difference our programme is making to the most vulnerable and chaotic within our communities.

The financial benefits model undertaken to-date illustrates an estimated annual cost saving of £55,000,000 for Worcestershire Authorities and public sector bodies per year. This analysis has been shaped by Central Government, and reinforced by Worcestershire's Research and Intelligence team to ensure the calculations reflect the County's true picture. This strategy will ensure that we continue to develop the potential to provide services that create such cost savings. Consultation events have proven the vulnerability of funding streams over the coming years from all sectors. It is imperative therefore that this strategy

enables not only joined up provision, planning and commissioning; but the opportunity to create opportunities for the reduction of more intensive support at the point of crisis if this low level support is more appropriate.

Consultation events have also shown the importance of housing related support for our client groups. The impact of the recession, increasing levels of unemployment and uncertainty over existing support services outside of the SP arena could potentially result in a growing need for our services in the future. In addition to this the growing trends of demographic change that we will need to adapt to – for instance, the increasing numbers of people above 65, physical disability through to mental health concerns to teenage parents. Supporting People is well placed to provide support to some of the most 'harder to reach' communities. Through our innovative partnership of providers (from both private, public and third sector backgrounds) we have been able to accrue over 30,000 positive outcomes – we believe this is priceless. page.

This strategy will embed the principles of preventative housing related support, providing greater opportunity for joint commissioning arrangements under the umbrella of community safety. All contracts over the span of this strategy will become fully aligned to the LAA priorities. As a commissioning function we will enjoy the freedom and flexibility of the un-ring fenced grant conditions, remain flexible to meet environmental challenges – whether these are funding based, changing priorities through to changing demographic concerns.

We will also take the foresight to develop future strategic developments within the wider partnership setting; ensuring the voice of providers and service users can influence policy and future commissioning intentions of the Worcestershire.

# Supporting People Achievements 2008/09

**117**  
Services  
Supporting  
**20,119**  
Vulnerable  
People

**Over 12 client groups:**

- Domestic Abuse
- Generic
- Homeless Families
- Learning Disabilities
- Mental Health
- Offenders
- Older People with Support needs
- Call Alarm
- Single Homeless
- Substance Misuse
- Teenage Parents
- Young People at Risk

**30,786**  
Positive  
Outcomes

Contribution  
to Local  
Area  
Agreement  
Targets

- Vulnerable people supported to maintain independent living.
- Adults with learning disabilities in employment.
- Adults with mental health problems in employment.
- Adult reoffending rates.
- Alcohol-harm related hospital admissions.
- 16 to 18 year olds in education, employment or training.
- Working age people on out of work benefits.
- Proportion of children in poverty.
- Young people's participation in positive activities.
- 16+ smoking rate prevalence.
- Adult participation in sport.
- People who feel they belong to their neighbourhood.



worcestershire  
**supportingpeople**  
partnership

67% or 2539 people left the service in a positive way this year. This is an increase of 9% and 1103 people on the previous year. This means that an extra 1103 people have received success support to improve their lives because of the Supporting People programme

The excellent achievement of 30,786 positive outcomes builds and improves on last years 26,898 positive outcomes

## Safeguarding vulnerable adults, young people and children

Safeguarding is an essential part of our business. Our commitment to this agenda is simple and implicit. Every provider being supported financially by Supporting People will be able to demonstrate effective policies and procedures which meet our aspiration; adhering to Worcestershire County Council's latest Safeguarding guidance.

Our drive and commitment to Safeguarding is paramount to the successful and safe delivery of the Supporting People programme within Worcestershire. As a commissioning function enabling vulnerable and often chaotic communities to live with greater independence we are very aware of the responsibility and commitment needed by providers in maintaining and implementing appropriate safeguarding policies and practice in support to both clients and employees/volunteers.

Safeguarding will have a progressive precedence within the Supporting People programme, and will incorporate the complete function of our work from commissioning through to reviewing practice.

### National and Local Drivers for Safeguarding

- 'No Secrets' consultation – Ivan Lewis, former Care Services Minister announced a review of the Department of Health guidance on working with vulnerable adults.
- The Dignity in Care Campaign – A Government led campaign in partnership with many organisations that provide and commission care and protect the interests of those using care services and their carers.
- Deprivations of Liberty Safeguards – the process by which someone who does not have the mental capacity to agree to arrangements for their accommodation, treatment and care can be deprived of their liberty for their own health and safety.<sup>4</sup>
- Independent Safeguarding Authority – The new vetting and barring systems, involving the new Independent Safeguarding Authority (ISA)<sup>5</sup> which was established during 2008/09, will have a major impact on the recruitment and monitoring practices of people working or volunteering with children and vulnerable adults.
- The Council for Social Care Inspection (Care Quality Commission) – The Care Quality Commission (CQC)<sup>6</sup> was established by the Health and Social Care Act 2008 to regulate the quality of health and social care and also look after the interests of people detained under the Mental Health Act.

<sup>4</sup> Worcestershire County Council has set up a new Deprivation of Liberty Safeguards Team (DOLS) Team in partnership with the Worcestershire Primary Care Trust, Acute Trust and Mental Health Partnership Trust.

<sup>5</sup> [www.isa-gov.org.uk](http://www.isa-gov.org.uk)

<sup>6</sup> [www.cqc.org.uk](http://www.cqc.org.uk)



- Safeguarding and Personalisation – Action on Elder Abuse<sup>7</sup>, which campaigns actively on safeguarding all vulnerable adults and is the leading organisation in this field, has identified the critical need for health and social care agencies to develop their new personalised services within a framework that considers safeguarding issues.

### **Safeguarding expectation, objectives and process for Supporting People**

All providers who are financially supported by Worcestershire Supporting People working with vulnerable adults, young people and children will undertake all reasonable measures to ensure that the risks of harm to someone's welfare is minimised. Where there are concerns about vulnerable adults, young people and children's welfare, all agencies will undertake appropriate actions to address those concerns, working to agreed local policies and procedures in full partnership with other local agencies.

The Service Provider shall also have in place and operate a policy and set of procedures for safeguarding vulnerable adults, children and young people which shall be consistent with Worcestershire's Adult Protection Policy, or which the Service Provider shall be adapting during the duration of the contract to become consistent with Worcestershire's Adult Protection Policy.

### **Supporting People's strategic intent for Safeguarding within Worcestershire**

- Access and Public Engagement Strategy

An important element of our work over the next 3 years to drive the Safeguarding agenda forward within the Supporting People programme, and to reduce the risk of issue or concern will be to raise public and professional awareness of Adult Abuse. The Safeguarding and Adult Protection Access and Public Engagement Strategy was designed to meet the needs in this area. The aim of the strategy is clearly to raise awareness using a variety of methods including publication, Internet and newsletters. Supporting People will support providers over the next 3 years by hosting an e-forum which will support debate, provide access to best practice examples, and enable the opportunity to keep up to speed with developments within this arena.

- Training Strategy

A safeguarding training strategy will be developed in partnership with the Provider Forum as a means of reducing the risk of incidents of abuse but also to address and stop abuse when it does occur. This will look at training for both senior management and front line staff and vulnerable adults where appropriate. Again this strategy looks ahead for the next three years and the Supporting People management has a monitoring role within this strategy to ensure that training materials and events are relevant and appropriate.

- Audit Strategy

An annual audit will be carried out on the work of all providers in dealing with abuse and vulnerable adults (by Supporting People working with relevant stakeholders). This audit strategy will provide the evidence of appropriate policies and process and identify how these are being used on a day to day basis. This will either be through face to face review or desk top self assessment as part of the QAF, as deemed appropriate by the Supporting People risk management process.

It is anticipated that these three action points will enable the work of safeguarding in Worcestershire to develop over the next three years.

**"Safeguarding is everybody's business involved in Adult Social Care and Health Services."**

Eddie Clarke,  
Director of Adult and Community Services  
Chair of Worcestershire Safeguarding Adults Board

# Commissioning Intentions 2010-13

Scrutiny of current needs analysis and evaluation of the current supply profile has led us to select, within the context of the changing needs and available resources, the following commissioning priorities for each client group.

All provision will achieve the following:

- Deliver the vision of this strategy, and align to key County priorities (Local Area Agreement, as a for instance);
  - Meet the needs of vulnerable people in the county, and seek to engage with the most chaotic;
  - Are flexible in approach to engage with such a diverse range of needs;
  - Are sustainable and have the ability to attract additional funding as a result of our investment;
  - Are cost effective, providing value for money;
  - Fit with the strategic priorities of the Worcestershire Supporting People Partnership;
  - Are high quality;
  - Can demonstrate that the client groups being supported are prioritised for our support;
- Provision also is commissioned on needs evidence, and remains tenure neutral.

## Older persons

- Early intervention services for older people (particularly with mental health needs).
- Low-level preventative housing related intervention as provided by home improvement agencies, community alarms and assistive technology.
- Provision of a countywide floating support that meets the needs of the most vulnerable (irrespective of their tenure)
- To provide low level support where appropriate within existing and new models of housing support provision.
- To identify the additional outcomes that may be achieved through social inclusion activity, for instance volunteering. (Either as a mechanism to identify housing related concerns for people who are not currently engaged, or to sustain networks for communities.)
- Please also refer to Learning Disability, Physical Disability and Sensory Impairment, in addition to Mental Health commissioning intentions for this client group.

## Mental health

- To undertake a strategic needs analysis of mental health provision within Worcestershire. The review will provide a strategic framework for commissioning intentions for Worcestershire's Supporting People programme seeking to add value to existing provision, create a real life account for gaps in provision, identify opportunities for joint commissioning and create alignment to Local Area Agreement priorities (current and potential).

- Within existing provision, increase the awareness of mental health issues and capacity build to assist programmes in identifying early someone's mental health deterioration.
- Within existing provision, support the drive for an equitable provision of mental health support programmes providing community based support, opportunities for training, education, employment, housing and support to develop networks (inclusion activities) and assist move on.
- Within existing provision, support the drive for equitable provision of support for people with a mental health illness to return to their home or supported living arrangement at the earliest opportunity that their condition allows. This provision should include a coordination of multi agency support in regard to health, housing and social care agreed with patients and their carers.
- Ensure appropriate choice is developed within Supporting People initiatives to aid recovery, increase social integration , enable maintenance of social networks and provide opportunities for increased independence, including return to appropriate employment.
- Within existing mental health provision, ensure move on is a priority, to ensure independent living opportunities and throughout.

### **Learning disabilities**

- Provision should seek to enhance greater choice and control, the use of community-based activities, with greater opportunities to integrate with increased accessibility, an emphasis on leisure, work and learning opportunities regardless of disability and, importantly, a desire to ensure that social contact with friends is maintained.
- Ensure that provision identifies the needs of carers, in addition to the service user.
- Ensure that programmes within our portfolio achieve multi faceted outcomes, and that provision works alongside each other with the adaptability to meet choice and control expectations.

### **Physical Disability and sensory impairments**

- To undertake a strategic needs analysis of physical disability and sensory impairment provision within Worcestershire. Working in partnership with key stakeholders (policy makers, physical disability and sensory impairment commissioners, providers and service users) the review will provide a strategic framework for commissioning intentions for Worcestershire's Supporting People programme seeking to add value to existing provision, create a real life account for gaps in provision, identify opportunities for joint commissioning and create alignment to Local Area Agreement priorities (current and potential).
- To ensure that existing provision and any newly commissioned provision is enabling people to access supported housing and low level housing related support, in addition to identifying social inclusion activity.

### **Gypsy and Travellers**

- To carry out a strategic review of the Gypsy and Traveller community within Worcestershire (and neighbouring authorities where appropriate) to ascertain the housing related support needs of this client group. The recommendations of this review will provide support for investment decisions to be made within the lifetime of this strategy.
- Within existing provision, ensure that Gypsies and Travellers are recognised within the diversity and training of providers;
- Work strategically with Children Services and stakeholders where appropriate to support families in existing provision seeking support, specifically around education or access, and also health (families who travel may not have a regular doctor). Providers will be expected to work closely with Health Visitor's/practitioners about specialist health support available to this community.
- Identify the needs of older communities specifically in terms of adaptations and health.

### **Young People at risk**

Our strategic intent, supported from the joint strategic review, will contribute to these specific measures and to the three work streams set by central government, which are:

- Preventative work: early prevention and advice, mediation, home visiting, school based work and assessment and local authority advice in housing.
- Accommodation and support: supported lodgings, nightstops, emergency accommodation (hostels), forms of move on from hostels and floating support.
- Person-specific services: complex needs and high vulnerability, health, learning and work, BME young people, tackling anti social behaviour and offenders and offending, identifying opportunities for contribution to positive activities agenda (for instance, volunteering)
- Provision of a greater range of housing options and support (embraced within the freedom and flexibility of funding governance), which contributes to the prevention of homelessness and repeat homelessness. This includes specific issues within mainstream housing and support including substance misuse issues, youth offending behaviour, learning disabilities and difficulties including Asperger's Syndrome, dyspraxia, minority ethnic groups particularly unaccompanied asylum seekers, teenage parents and young people who are pregnant and young victims and survivors of domestic abuse, and care leavers.

### **Teenage parents**

- Provision of short-term transitional services to make the move to independent living
- Floating support and coordinating services, enabling access to health and well being support through to training, education, employment and benefits support.
- Development of move on support functions, for instance life coaching / mentoring to aid and support transitions.



## **Homelessness**

- Ensure preventive agenda is extended throughout the County, including the introduction of a single service gateway and improved systems such as common monitoring and common assessment
- Crisis intervention: emergency access accommodation and street outreach, often dealing with high vulnerability and complex needs.
- Supported independent living: supported accommodation for single homeless people, offenders and substance mis-users.
- 'Preparation for independent living': floating support, which can be generic or specialist. Some focuses solely on crisis intervention work, some are specialist services and other floating support moves with the person through different types of accommodation.
- Ensure provision continues to complement housing strategies countywide, and remains equitable based on need.
- Development of move on support functions, for instance life coaching / mentoring to aid and support transitions.

## **Substance misuse**

- The provision of Low-level and floating support for individuals with drugs and alcohol problems;
- Complementing low-level community interventions and alignment to the strategic direction of the Drug and Alcohol Action Team partnership
- Provision to address the demand profile within the County, and remains equitable.
- Development of move on support functions, for instance life coaching / mentoring to aid and support transitions.

## **Offenders**

- Ensure that provision of effective offending behaviour support programmes (housing related needs) aimed at the low / medium and high risk offenders, within the community, are implemented effectively to reduce and stop further offending based on research and intelligence in terms of need per district.
- Ensure housing related provision supports offenders in accessing training and employment opportunities, as this is identified as a very effective mechanism in helping previously unemployed offenders live crime-free lives
- Ensure that we have a mixed economy of low, medium and high risk offenders within the current portfolio of provision.
- Development of move on support functions, for instance life coaching / mentoring to aid and support transitions.

## **Domestic violence**

- Ensure that Supporting People provision is available to meet a targeted response to the needs of specific vulnerable groups including Gypsy and Traveller Communities; Rural Communities; Vulnerable Adults – drugs, alcohol, mental health, older people; Young Adults.
- Work in Partnership with the Domestic Abuse unit, ensuring a portfolio of provision is applied throughout the county (specifically looking at both prevention (including perpetrator programmes) and recovery/resettlement programmes).

- Work in conjunction with the WFADA in regard to a Safer Housing strategy, including a needs assessment of need and options within the county.
- Continue to work strategically with WFADA on improving practice through training, service standards and outcome / data monitoring with current provision within the Supporting People programme in Worcestershire.
- To work strategically with the Domestic Abuse Forum to ascertain the needs of the County and allocate resource to meet identified housing related needs.
- Development of move on support functions, for instance life coaching / mentoring to aid and support transitions.

**Additional requirements:**

A comprehensive and integrated needs analysis for the following groups will also be commissioned to assist with actions within future annual plans.

- Training Needs Analysis for providers supporting HIV/AIDS
- Refugees and migrant communities
- Carers for all client groups

**Eligibility criteria:**

Eligibility for Supporting People provision will remain consistent as with the previous strategy. Predominately as the work undertaken to date can highlight the very issue that without Supporting People funding these client groups would most likely not get the support required for their independence; and as a consequence their situations would worsen to a point of crisis - and incur additional cost on public authorities.

We also appreciate that the current vulnerability of the financial environment (increasing redundancies and unavailability of employment opportunities, increasing numbers of NEET for young people, and increasing likelihood for mental concerns, through to offending and family breakdown) will add to the volume of our client groups needing low level support. Provision will therefore be:

- Fair and equitable access based on need (housing benefit for Older People) through the introduction of common standards to assess housing related support needs.
- The services are focused on providing low level housing related support services that compliment preventative health, social care, substance misuse or criminal justice interventions;
- Supporting People services are complementary to the work of the wider Worcestershire Supporting People partnership, Local Area Agreement and not separate from, wider social care and health services; and
- Funding is used to support services in line with the grant conditions that apply to Worcestershire's Area Based Grant.

**Annual plan**

This three year strategy is an evolving and fluid document with commissioning intentions that may to be reviewed and refreshed where needed on an annual basis. This will be based on the strategic priorities and needs of the Supporting People Commissioning Body, in addition to Local Area Agreement, Total Place and opportunities to support the Comprehensive Area Assessment agenda. To preserve the relevance of the strategy and ensure progress is timetabled and monitored, the three year strategy will be used to inform a new annual plan each year.



# Adult Mental Health

"People with mental health problems are one of the most socially excluded groups in society"<sup>8</sup>.

## Worcestershire Context:

It is anticipated that approximately 42,000 adults will be experiencing a common disorder (such as general anxiety and depression), with 2000 people suffering from a psychotic disorder<sup>9</sup> within Worcestershire at anyone time. In 2008/09 alone, over 1,500 vulnerable and chaotic people within Worcestershire depended upon the Supporting People programme, accessing key mental health support. Their personal situation often meant they would not be supported by other statutory services (for instance, being homeless).

Research carried out by the Worcestershire Research and Intelligence Unit in 2009 highlighted that in excess of 15% of Supporting People service users had some form of recognised / diagnosed mental illness. We appreciate however, that due in part to the typology of client groups we support on a day to day basis, and the cross cutting issue of mental health throughout our client groups that the number of unrecognised or undiagnosed cases of mental health illness will be much higher. The very vulnerable and very chaotic will often have mental health needs, however their very basic needs (safety, housing) often take over tertiary needs the client may have at the point of support and referral; so mental health will not necessary be reported on within our outcome data.

It is widely acknowledged that, there is a strong link between mental health problems (specifically anxiety and depression) and that of deprivation<sup>10</sup> and the most vulnerable/social isolation within society. Research carried out by the Social Exclusion Unit of the Cabinet Office identified that problems were more common among people who were unemployed, had fewer educational qualifications, had been looked after or accommodated, were on low income or who had a low standard of living.<sup>11</sup>

<sup>8</sup> <sup>8</sup> Joint Commissioning Strategy for Adult Mental Health in Worcestershire, 2008-2012.

<sup>9</sup> Worcestershire Mental Health needs assessment, PCT, August 2006.

<sup>10</sup> Social Exclusion Unit Report, Cabinet Office 2009

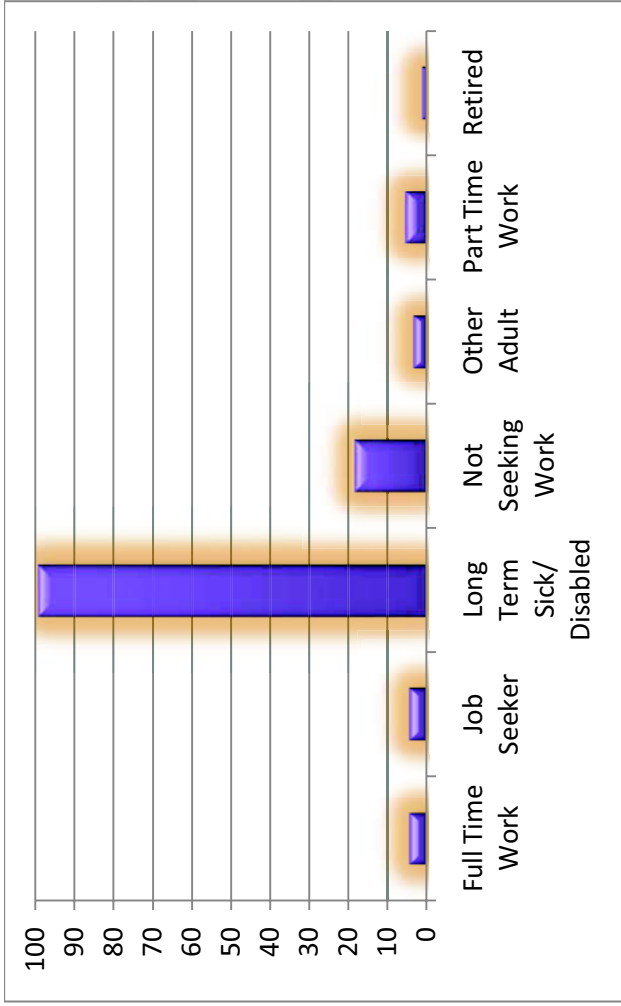
<sup>11</sup> Mental Health and social exclusion : Social Exclusion Unit Report, 2004.

Predominately, the majority of client groups within our programme would be able to relate to all of these situations. The bespoke housing related support provided in this essence is not only essential in achieving levels of stability with regard to mental health; but is also imperative in ensuring that people who may not be receiving access to support services due to their situation can receive the support needed to live an independent life within a safe environment, maximising their potential to live with increased independence, dignity and respect.

The economic status of service users at the point of entry into a mental health related service clearly demonstrates a need to support people who are unable to contribute to or enjoy economic well being within the County; the 1,000 positive outcomes that have been achieved per year within this client group by Supporting People is therefore significant in a multitude of ways.

- personal / inspirational
- achieving community safety expectations,
- meeting key strategic drivers around primary and community mental health care, through to
- enabling vulnerable, chaotic (and often isolated) people the skills and support necessary to become further engaged with their community. This engagement can be in the form of volunteering, employment, education and training through to more low level outcomes around self esteem, confidence through to accessing cultural and leisure activities.

**Chart** *Economic status of new service users – mental health*



Within 2008/09:

- 7% of new service users were in either full or part-time employment.
- A further 3% were currently seeking work.
- The other service users are not looking for any kind of work.
- For 74% of the service users this is because they are registered long-term sick/ disabled and are unable to work.

Source: Supporting People Client Record Data 2008/09

Significantly, the Supporting People programme within Worcestershire is proving to be an essential mechanism for addressing needs with what has been described as 'harder to reach' communities (ranging from teenage parents, homelessness through to Domestic Abuse victims, Offenders through to the frail elderly). We continue to seek innovative and creative ways of addressing needs of this client group and to provide a strategic alignment of positive outcomes which meet the highest areas of needs within the County; in addition to the procurement of specialist services that provides opportunity for a client group that is recognised for being one of the most excluded groups in society.

**Local Area Agreement alignment:**

Outcomes achieved for this client group both directly and indirectly support key Local Area Agreements priorities and indicator sets. Within Worcestershire's Local Area Agreement for 2008-11, priorities for this client group stem around adults with mental health problems; the gatekeepers for this priority are the Health and Well Being theme group.

This specific indicator looks at people aged between 18 and 69 who are in contact with secondary mental health services and on the Care Management Approach who are in employment. Current provision provides a direct link between the work of the Supporting People programme to support users with mental health problems in accessing employment. Success is measured by

the number of positive outcomes of those users who manage to achieve this. In order to report into this priority, Supporting People may need to consider collecting information on Care Management to ascertain the evidence regarding this target.

The following priorities were identified by providers as indicators which they were either working towards, or had the potential to work towards for this specific client group:

NI 2	Percentage of people who feel they belong to their neighbourhood
NI 8	Adult participation in sport
NI 17	Perceptions of anti social behaviour
NI 18	Adult reoffending rates for those under probation supervision
NI 20	Assault with injury crime rate
NI 39	Alcohol – harm related hospital admissions
NI 116	Proportion of children in poverty
NI 117	16-18 year olds who are not in education, employment or training (NEET)
NI 142	Number of vulnerable people who are supported to maintain independent living
NI 146	Adults with learning disabilities in employment
NI 150	Adults in contact with secondary mental health services in employment
NI 152	Working age people on out of work benefits
NI 163	Working age population qualified to at least level 2 or higher
NI 175	Access to services and facilities by public transport, walking and cycling

We will work with providers to ensure that additional alignment is achieved to the LAA, and that contracts can identify their link and value to Local priorities.

### **Strategic Intentions:**

- To undertake a strategic needs analysis of mental health provision within Worcestershire. The review will provide a strategic framework for commissioning intentions for Worcestershire's Supporting People programme seeking to add value to existing provision, create a real life account for gaps in provision, identify opportunities for joint commissioning and create alignment to Local Area Agreement priorities (current and potential).
- Within existing provision, increase the awareness of mental health issues and capacity build to assist programmes in identifying early someone's mental health deterioration.
- Within existing provision, support the drive for an equitable provision of mental health support programmes providing community based support, opportunities for training, education, employment, housing and support to develop networks and assist move on.

- Within existing provision, support the drive for equitable provision of support for people with a mental health illness to return to their home or supported living arrangement at the earliest opportunity that their condition allows. This provision should include a coordination of multi agency support in regard to health, housing and social care agreed with patients and their carers.
- Ensure appropriate choice is developed within Supporting People initiatives to aid recovery, increase social integration, enable maintenance of social networks and provide opportunities for increased independence, including return to appropriate employment.
- Within existing mental health provision, ensure move on is a priority, to ensure independent living opportunities and throughout.

# Gypsy and Traveller Communities

"Traveller women experience greater disadvantage in relation to health ... 70% of travellers die before the age of 59, infants are 10 times more likely to die before the age of 2, and a third of travellers die before the age of 25." <sup>12</sup>

## Worcestershire Context:

The gypsy and traveller community can often face barriers to accessing services, support or advice that can enable them to live independently, maintaining health and well being and their security. We are keen to ensure that information around education through to domestic abuse are addressed through the Supporting People programme where possible. This may involve existing projects accommodating and targeting the gypsy and traveller community proactively, through to new projects being commissioned to support these identified needs of the client group.

**Education:** Gypsy and traveller children and young people (and also the parents where there a high levels of illiteracy) experience disadvantages in education, not least because of being moved on. There are higher levels of bullying and racism within the community (including schools). "After puberty, there is pressure for some girls to stay at home to avoid mainstream culture." <sup>13</sup> The result is relatively low literacy in adults, making it difficult to access services.

**Domestic Violence:** Because gypsies and travellers live on the whole in a closed community, there is a tendency to try and resolve disputes within the extended family. For many issues it is an effective way of dealing with problems – but not so for domestic abuse. Cultural expectations can also make it difficult for domestic abuse to be challenged:

- Belief that many men are violent and a women has to accept such behaviour
- Taboos exist against interfering between spouses where violence occurs
- Expectations that marriage is for life – women who leave marriage can often be ostracised

The difficulties of gypsy and travellers living with domestic abuse can be made worse by attitudes and reactions of people outside their communities. Gypsy and traveller women may feel unable to contact the police or other support agencies for support. Most gypsy and travellers will have a social life that is mainly based around their extended family and community. Leaving because of

<sup>12</sup> Travellers Last Rights, 2007.

<sup>13</sup> Friends, Families and Travellers, May 2009.



domestic abuse means a women/man not only losing their home and partner, but also their community, culture and way of life. It also leaves them open to prejudice of the settled population, without the security and protection that living with their own community brings.

### **Local Area Agreement alignment:**

The commissioning of Gypsy and Traveller community provision is one which is being developed and established within the Supporting People arena within Worcestershire. We appreciate that the potential for us to meet many strategic priorities is achievable – whether these are within the context of community safety, health and well being through to education and bullying. Within such an embryonic stage of development we will be able to develop commissioning intentions based upon fresh strategic research into the needs of the community and embed this within this three year strategy for Worcestershire.

The following priorities were identified by providers as indicators which they were either working towards, or had the potential to work towards for this specific client group:

NI 2	Percentage of people who feel they belong to their neighbourhood
NI 8	Adult participation in sport
NI 17	Perceptions of anti social behaviour
NI 18	Adult reoffending rates for those under probation supervision
NI 20	Assault with injury crime rate
NI 39	Alcohol – harm related hospital admissions
NI 112	Under 18 conception rate
NI 116	Proportion of children in poverty
NI 117	16-18 year olds who are not in education, employment or training (NEET)
NI 123	16+ Smoking prevalence
NI 142	Number of vulnerable people who are supported to maintain independent living
NI 146	Adults with learning disabilities in employment
NI 150	Adults in contact with secondary mental health services in employment
NI 152	Working age people on out of work benefits
NI 163	Working age population qualified to at least level 2 or higher
NI 175	Access to services and facilities by public transport, walking and cycling
LI 2	Children who have experienced bullying
LI 3	Successful new claims generated for pension credit, attendance allowance and disability living allowance (as a percentage of the population of pensionable age).

We will work with providers to ensure that additional alignment is achieved to the LAA, and that contracts can identify their link and value to Local priorities.

**Strategic intent:**

- To carry out a strategic review of the Gypsy and Traveller community within Worcestershire (and neighbouring authorities where appropriate) to ascertain the housing related support needs of this client group. The recommendations of this review will provide support for investment decisions to be made within the lifetime of this strategy.
- Within existing provision, ensure that Gypsies and Travellers are recognised within the diversity and training of providers;
- Work strategically with Children Services and stakeholders where appropriate to support families in existing provision seeking support, specifically around education or access.
- Provision should also attend to any health issues the family may have. Families who travel may not have a regular doctor. Providers will be expected to work closely with Health Visitor's/practitioners about specialist health support available to this community.



# Learning Disability

"People with learning disabilities want to lead ordinary lives and do the things that most people take for granted. They want to study at college, get a job, have relationships and enjoy leisure activities. Yet for many people this does not happen and they still spend too much time in traditional day services"<sup>14</sup>

## Worcestershire Context:

"The term 'day services' is out of date."<sup>15</sup> There is a shift (as identified within the Learning Disability Strategy (2007)) from traditional day care provision to an approach which seeks to support active participation within the community and how they can exercise choice and control in what they do, with increased use of Individual Budgets; and subsequent support towards choice and control opportunities in the future.

Historically, people's lives have been organised in a way that suits organisations. We therefore have used terms such as "residential services" "respite services" and "day services". Supporting People will be seeking to support this drive towards more flexible and innovative services meeting the needs of service users, we will continue to become more person centred and believe that support should be organised around the person, not the other way round.<sup>16</sup>

As with other client groups we have a person centred approach to commissioning, and therefore we fully engage with and support this agenda. We also know that this form of commissioning can be rewarded by excellent positive outcomes for this client group. Some of the positive outcomes within 2008/09 have been to engage service users with government training/ new deal programmes, which has subsequently aided their aspiration to improve their employment opportunities.

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<sup>14</sup> Valuing People Now.

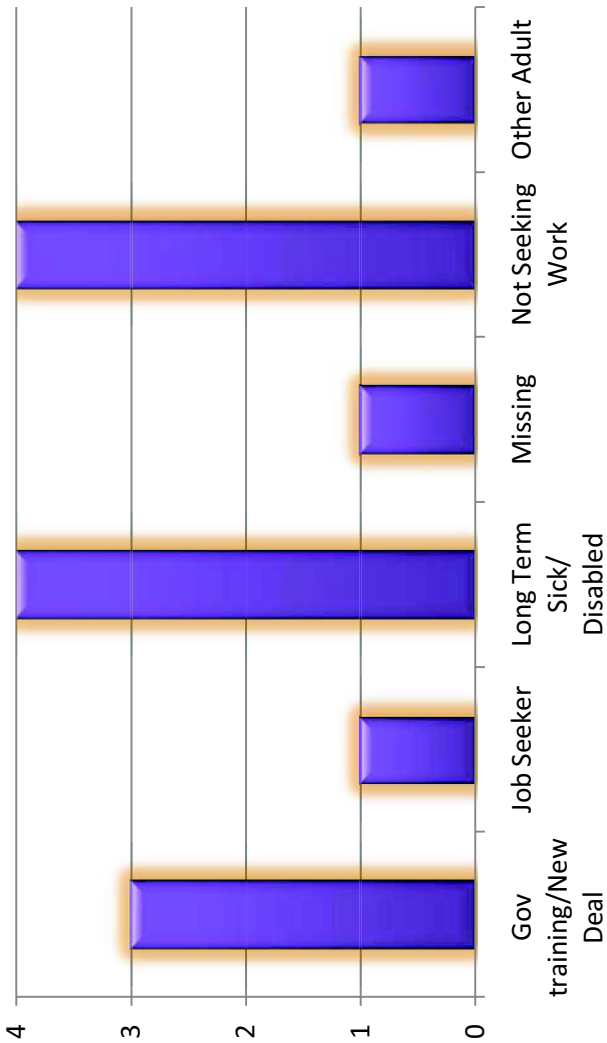
<sup>15</sup> Strategy for Daytime Support, Final version April 2008

<sup>16</sup> Strategy for Daytime Support, Final version April 2008

*Economic status of new service users – learning disability*

Source: Client Record Data 2008/09

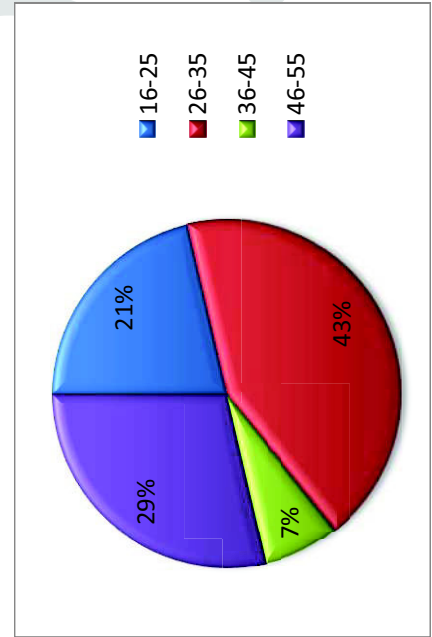
Within 2008/09 the economic status of new entrants into the Supporting People programme was analysed. No-one entering the learning disability services was in employment. 29% were registered as long-term sick/ disabled, 29% said they were not seeking work, with 28% looking for support to access work or training. This suggests that it may not be possible for some people to undertake paid employment, and for other they may be having difficulty in accessing suitable employment opportunities.



*Age of new service users – learning disability*

Source: Client record data 2008/09

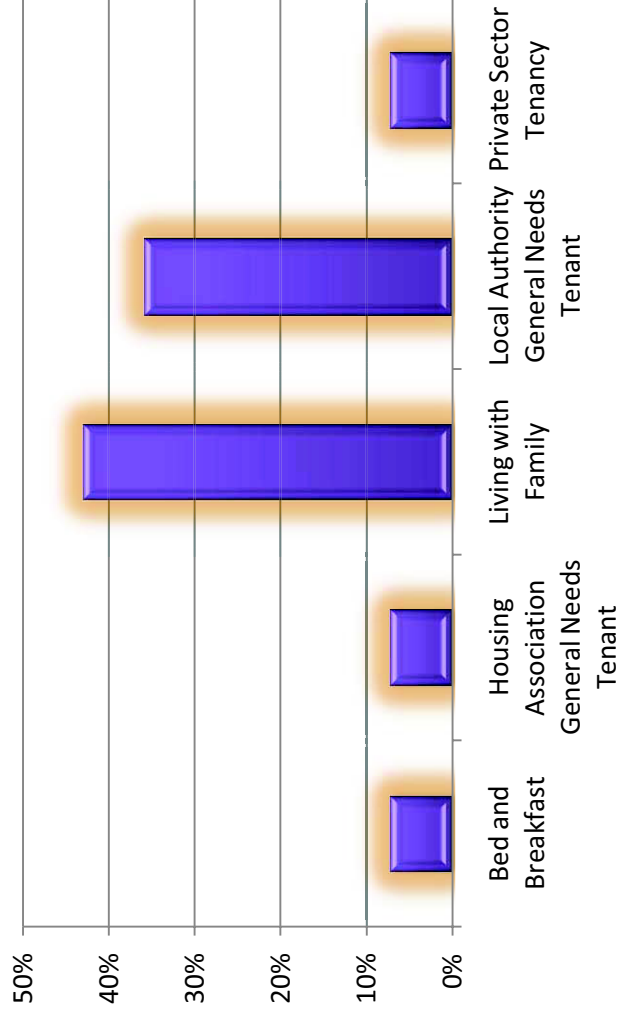
The trend in age of new service users from Supporting People provision generally shows that most users are young, with almost two thirds (64%) of users under the age of 35.



*Accommodation prior to entry into service – learning disability*

Source: Client record data 2008/09

If we look at this in conjunction with the accommodation they were occupying prior to entry into the service we see that over 40% of new users were previously living with their family. Therefore, it appears that a significant group of the users in these services are young people who are moving out of the family home.



Service users are generally referred to our providers by social services (79%). The services provided are essential in supporting these young people in developing the skills to successfully live independently, and capturing their aspirations in our commissioning, review and contracting function is essential.

The most common support need identified for this client group is the need to 'identify and manage personal and/or environmental risk.'. This also links with the need to 'understand/address health & hygiene within their personal environment'; all key interventions in achieving greater independent living. Social interaction is also a key outcome which is aspired to; including accessing social, cultural and leisure activities; through to developing relationships with neighbours and establishing social networks. These aspirations will be embedded within the commissioning intentions for this strategy, in addition to support around the carer too.

**Local Area Agreement alignment:**

One current indicator contributing to the LAA theme 'improve health and well-being' specifically concerns adults with learning disabilities. This looks at the number of people between the ages of 18 and 69 who have learning disabilities and who are in employment. This is a direct link from the work of the Supporting People programme to the outcomes of the LAA. Supporting People outcomes data details the number of people who following support have been successful in accessing employment.

We will seek to maximise the contribution that Supporting People can make by wherever appropriate assisting service users to access employment.

The following priorities were identified by providers as indicators which they were either working towards, or had the potential to work towards for this specific client group:

- NI 2 Percentage of people who feel they belong to their neighbourhood
- NI 8 Adult participation in sport
- NI 17 Perceptions of anti social behaviour
- NI 18 Adult reoffending rates for those under probation supervision
- NI 20 Assault with injury crime rate
- NI 39 Alcohol – harm related hospital admissions
- NI 112 Under 18 conception rate
- NI 116 Proportion of children in poverty
- NI 117 16-18 year olds who are not in education, employment or training (NEET)
- NI 123 16+ Smoking prevalence
- NI 142 Number of vulnerable people who are supported to maintain independent living
- NI 146 Adults with learning disabilities in employment
- NI 150 Adults in contact with secondary mental health services in employment
- NI 152 Working age people on out of work benefits
- NI 163 Working age population qualified to at least level 2 or higher
- NI 175 Access to services and facilities by public transport, walking and cycling
- LI 2 Children who have experienced bullying
- LI 3 Successful new claims generated for pension credit, attendance allowance and disability living allowance (as a percentage of the population of pensionable age).

We will work with providers to ensure that additional alignment is achieved to the LAA, and that contracts can identify their link and value to Local priorities.

### **Strategic intent:**

- Provision should seek to enhance greater choice and control, the use of community-based activities, with greater opportunities to integrate with increased accessibility, an emphasis on leisure, work and learning opportunities regardless of disability and, importantly, a desire to ensure that social contact with friends is maintained.
- Ensure that provision identifies the needs of careers, in addition to the service user.
- Ensure that programmes within our portfolio achieve multi faceted outcomes, and that provision works alongside each other with the adaptability to meet choice and control expectations.

# Physical Disability and sensory impairment

"Independence is not a measure of what you can do for yourself but how much choice and control you have over your life"<sup>17</sup>

## Worcestershire Context:

Strategic partnership representation is key for commissioning services that support physical disability and sensory impairment for the county – not only due to its scope but due to its current partnership setting. The current joint strategy for physical disability and sensory impairment suggests how Worcestershire County Council, Adult & Community Services and Worcestershire Primary Care Trust will plan to use their money to commission services. The concept of this strategy is one which is embraced by Supporting People's directive to commission services that are personalised, that maximise independence and citizenship.

The agenda within Worcestershire in regard to provision for this client group:

- To continue to reduce care home placements through building capacity in community based services and housing options to offer user choice. Building additional choice and flexibility in terms of outcomes and control is driven through the Supporting People process, and will continue to be the focus of our activity.
- The need to strengthen the integration between health and social care organisations including the development of joint commissioning has also been highlighted as a need for this client group.
- Continue to modernise day opportunities and community based services in a way that meets the needs of all service users
- Strengthen service to support carers
- Increase the number of people with a disability in employment
- Improve access to and appropriateness of services for black and ethnic minority groups and other hard to reach groups
- Ensure appropriate involvement at all key decision making levels including the development of LINKs
- Continue to improve public access to care services through better care pathways, improved systems, and more targeted information
- Contribute to sustainability and Gershon agendas

<sup>17</sup> Francis Hasler, chair of the Independent Living Fund



Existing provision for this client group achieves excellent positive outcomes within Supporting People's portfolio. One of the most important areas as sought by the service user is the ability to include social skills and activities in their life. 176 people were identified as needing support to access social, cultural and leisure activities in 2008/09 for instance.

The need to maintain social and community networks was identified for a vast majority of service users, as to the need to increase confidence which would help with the creation of social relationships.

Another commonly identified area of need which seems to be important for most of the client groups is financial; support to maximise income and access the correct benefits; and budgeting and reducing debt.

A third important support need area for this client group is health; including the access to health care services, understanding and addressing health and hygiene in the personal environment, in addition to support for developing and maintaining physical health. These outcomes have been prescribed to us from service users, and the feature significantly across the demographic of this client group.

### **Local Area Agreement alignment:**

This area of work contributes to many core priorities within the Local Area Agreement, specifically under the Improving Health and Well Being theme group.

- To support adults to lead healthier lifestyles
- To reduce health inequalities
- To improve the quality of life and independence of older people and those with a long term illness and their carers
- To improve mental health and well being

The commissioning and contracting function ensures that key elements of the contract identify with the priorities of the LAA, ensuring a strategic fit into outcomes required specifically within the Theme Group supporting these indicators (a golden thread).

The following priorities were identified by providers as indicators which they were either working towards, or had the potential to work towards for this specific client group:

NI 2	Percentage of people who feel they belong to their neighbourhood
NI 8	Adult participation in sport
NI 17	Perceptions of anti social behaviour

NI 18	Adult reoffending rates for those under probation supervision
NI 20	Assault with injury crime rate
NI 39	Alcohol – harm related hospital admissions
NI 112	Under 18 conception rate
NI 116	Proportion of children in poverty
NI 117	16-18 year olds who are not in education, employment or training (NEET)
NI 123	16+ Smoking prevalence
NI 142	Number of vulnerable people who are supported to maintain independent living
NI 146	Adults with learning disabilities in employment
NI 150	Adults in contact with secondary mental health services in employment
NI 152	Working age people on out of work benefits
NI 163	Working age population qualified to at least level 2 or higher
NI 175	Access to services and facilities by public transport, walking and cycling
LI 2	Children who have experienced bullying
LI 3	Successful new claims generated for pension credit, attendance allowance and disability living allowance (as a percentage of the population of pensionable age).

We will work with providers to ensure that additional alignment is achieved to the LAA, and that contracts can identify their link and value to Local priorities.

### **Strategic intent:**

- To undertake a strategic needs analysis of physical disability and sensory impairment provision within Worcestershire. Working in partnership with key stakeholders (policy makers, physical disability and sensory impairment commissioners, providers and service users) the review will provide a strategic framework for commissioning intentions for Worcestershire's Supporting People programme seeking to add value to existing provision, create a real life account for gaps in provision, identify opportunities for joint commissioning and create alignment to Local Area Agreement priorities (current and potential).
- To ensure that existing provision and any newly commissioned provision is enabling people to access supported housing and low level housing related support.
- To assist wider commissioners in developing specific service plans



# Offending

## Worcestershire Context:

In support of accommodation solutions for offenders and their transition into society the following principles are key strategic drivers for Supporting People within Worcestershire, in cooperation with the West Mercia Probation Trust (a member of our Commissioning Body):

- provision adds value to the coherence of the service at the point of delivery
- that provision supports the priorities of the area
- support meets the needs of local communities
- support fit strategically into the wider structure of the area service, integrating it, not splitting it by function
- provision meets local structures and priorities, e.g. Local Area Agreements ( LAAs)
- support is able to deliver to NOMS Offender Management and diversity standards
- support enhances West Mercia's ability to develop innovative solutions
- provision enhances, rather than undermine, West Mercia's aspirations for Trust status.

Supporting People, working in close partnership and on behalf of the West Mercia Probation Trust and Worcestershire's Community Safety Partnership, embraces the opportunity to put together a portfolio of services that meets local needs. Within the term of this strategy we will be working closely with key stakeholders to support existing provision and stimulate market development. We will ensure our knowledge of local communities and our links with other local authorities and criminal justice agencies, for instance through the Local Criminal Justice Board and the Crime and Disorder Reduction Partnerships help shape provision.

Current provision meets the strategy direction. Positive outcomes clearly provide strength to West Mercia Probations aims and objectives, in addition to providing strategic worth in regard to the LAA in Worcestershire.

Analysis of current provision and these outcomes can clearly identify the link with alcohol and substance misuse as a secondary need, and as many were identified as having a mental health concern. These secondary needs illustrate that providers and the market economy providing support for offenders need to be flexible and adaptable to cope with some other complex problems which service users are facing. It is the intent of the Supporting People programme to ensure that provision is maintained in ensuring sufficient and appropriate support required to meet such complex needs.

We are also aware through this analysis that (within 2008/09) throughout the whole supporting people programme 118 people or 6% of the total service users identified 'offender/ at risk of offending' as one of their support needs. Only 75 of these were accessing specific offender targeted services.

Other needs which we seek to support through provision are employment, training and maintaining a tenancy. Users may feel that anyone of these needs is more pressing at that time and access the corresponding service. 55% of new service users in 2008/09, were considered to be homeless in one form or another. This is also apparent when looking at the previous accommodation of new service users. Almost two thirds were in unstable or unsustainable housing. This was made up of 14% who were in prison, 30% who were living with family or friends and 18% who were in other temporary accommodation such as a hostel or rough sleeping.

We seek to ensure that provision continues to meet identified required support around manage finances and access employment. Supported to budget/ reduce debt and achieve appropriate expenditure is also a key priority for this client group, and is something which is supported through existing provision.

#### **Local Area Agreement alignment:**

The Worcestershire Local Area Agreement (LAA) priority to 'continue to improve community safety and build confidence in communities' includes the indicator of 'adult reoffending rates for those under probation supervision.' This relates to the work Supporting People services provide currently to this client group. While there are no direct figures on how many people were stopped from reoffending due to the support they received there is information on how many people have entered training and employment and have managed to maintain their tenancy. These factors have been shown to reduce the likelihood of reoffending. Addressing these issues can then give a stable background for the user along with the probation service to begin to deal with issues of offending. The Supporting People support can be a vital underlying factor in success.

We will be seeking to look at how we might be able to access data to evidence the contribution which the Supporting People services are making to reduce the adult reoffending rate.

The following priorities were identified by providers as indicators which they were either working towards, or had the potential to work towards for this specific client group:

- NI 2 Percentage of people who feel they belong to their neighbourhood
- NI 8 Adult participation in sport
- NI 17 Perceptions of anti social behaviour
- NI 18 Adult reoffending rates for those under probation supervision

NI 20	Assault with injury crime rate
NI 39	Alcohol – harm related hospital admissions
NI 112	Under 18 conception rate
NI 116	Proportion of children in poverty
NI 117	16-18 year olds who are not in education, employment or training (NEET)
NI 123	16+ Smoking prevalence
NI 142	Number of vulnerable people who are supported to maintain independent living
NI 146	Adults with learning disabilities in employment
NI 150	Adults in contact with secondary mental health services in employment
NI 152	Working age people on out of work benefits
NI 163	Working age population qualified to at least level 2 or higher
NI 175	Access to services and facilities by public transport, walking and cycling
LI 2	Children who have experienced bullying
LI 3	Successful new claims generated for pension credit, attendance allowance and disability living allowance (as a percentage of the population of pensionable age).

We will work with providers to ensure that additional alignment is achieved to the LAA, and that contracts can identify their link and value to Local priorities.

**Strategic intent:**

- Ensure that provision of effective offending behaviour support programmes (housing related needs) aimed at the low / medium and high risk offenders, within the community, are implemented effectively to reduce and stop further offending based on research and intelligence in terms of need per district.
- Ensure housing related provision supports offenders in accessing training and employment opportunities, as this is identified as a very effective mechanism in helping previously unemployed offenders live crime-free lives
- Ensure that we have a mixed economy of low, medium and high risk offenders within the current portfolio of provision.

# Domestic Abuse

"Domestic Violence remains a critical social, human rights and criminal issue. It accounts for a quarter of all violent crime and has significant impact on individuals, families and communities, alongside the increasing demand on services and organisations." <sup>18</sup>

## Worcestershire Context:

Supporting People appreciates the need to work in conjunction with the Worcestershire's Forum Against Domestic Violence to ensure a coordinated and joined up approach to Domestic Abuse provision within the County. Since the Strategic Review of Domestic Abuse provision within Worcestershire (2007) Supporting People have developed contracts and alignment of programmes to increase the choices and options for all people experiencing domestic violence meeting their needs in the most appropriate way. We are committed to ensure that good quality services are provided which are cost effective and enable people to regain their confidence and life skills to live independently.

Gaps in provision which were identified in this review have been addressed where feasible (including outreach services for BME communities). Service expansion has been enabled to ensure people can become more confident to access services.

An area where we appreciate the need to support further is rural awareness of services, there may be a lack of public or private transport leading to isolation and an inability to access services, lack of anonymity and some isolated areas with less opportunity to see family and friends and potentially reduced social network. This strategy will address this in partnership with key stakeholders. This strategy will also endorse the recommendations of the review by providing a greater balance of investment in services in the three primary areas, which include 'prevention and early intervention', 'protection and justice' and 'support for victims'.

From the outcomes data collected during 2008/09 the highest identified needs of this client group were to 'increase confidence' and to 'manage stress/ cope with a history of abuse', in addition to attending the Freedom Programme. The other needs which are identified as important to many service users are those which help them to rebuild an independent life. These include managing income and debts, understanding and maintaining tenancy, re-establishing contact with family and friends and engaging in leisure activities.

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<sup>18</sup> Valuing People Now.

The IDVA service reported against a separate specialist range of outcomes. For this service as similar to the other DA services the most identified need is 'better managing stress and coping with a history of abuse. 'Identifying and managing personal and environmental risks' is also a common need. The IDVA also reports most specific outcomes such as being supported through the crown or magistrates courts.

**Local Area Agreement alignment:**

The support provided to this client group enables us to meet a range of indicators indirectly. Greater stability in life from secure accommodation could help with accessing employment. Many of the people entering domestic violence services have children who could benefit from support to access children's positive activities, or be brought out of poverty by their parents finding paid employment.

Alcohol can be a coping mechanism which could be addressed if supported to manage stress and cope with a history of abuse having the knock on effect of reducing alcohol related harm and hospital admissions. We will continue to develop these key links with the appropriate theme groups.

The following priorities were identified by providers as indicators which they were either working towards, or had the potential to work towards for this specific client group:

- NI 2 Percentage of people who feel they belong to their neighbourhood
- NI 8 Adult participation in sport
- NI 17 Perceptions of anti social behaviour
- NI 18 Adult reoffending rates for those under probation supervision
- NI 20 Assault with injury crime rate
- NI 39 Alcohol – harm related hospital admissions
- NI 112 Under 18 conception rate
- NI 116 Proportion of children in poverty
- NI 117 16-18 year olds who are not in education, employment or training (NEET)
- NI 123 16+ Smoking prevalence
- NI 142 Number of vulnerable people who are supported to maintain independent living
- NI 146 Adults with learning disabilities in employment
- NI 150 Adults in contact with secondary mental health services in employment
- NI 152 Working age people on out of work benefits



- NI 163 Working age population qualified to at least level 2 or higher
- NI 175 Access to services and facilities by public transport, walking and cycling
- LI 2 Children who have experienced bullying
- LI 3 Successful new claims generated for pension credit, attendance allowance and disability living allowance (as a percentage of the population of pensionable age).

We will work with providers to ensure that additional alignment is achieved to the LAA, and that contracts can identify their link and value to Local priorities.

### **Strategic intent:**

- Ensure that Supporting People provision is available to meet a targeted response to the needs of specific vulnerable groups including Gypsy and Traveller Communities; Rural Communities; Vulnerable Adults – drugs, alcohol, mental health, older people; Young Adults.
- Work in Partnership with the Domestic Abuse unit, ensuring a portfolio of provision is applied throughout the county (specifically looking at both prevention (including perpetrator programmes) and recovery/resettlement programmes).
- Work in conjunction with the WFADA in regard to a Safer Housing strategy, including a needs assessment of need and options within the county.
- Continue to work strategically with WFADA on improving practice through training, service standards and outcome / data monitoring with current provision within the Supporting People programme in Worcestershire.
- To work strategically with the Domestic Abuse Forum to ascertain the needs of the County and allocate resource to meet identified housing related needs.

# Substance misuse

## Worcestershire Context:

Supporting People seeks to work in conjunction with Worcestershire's Drug, Alcohol Action Teams, linking strategically to the Tackling Substance Misuse in Worcestershire: A Partnership Approach (2008-11) strategy and the Drug and Alcohol Action Team (DAAT Action Plan). This strategic alignment will ensure 5 locally agreed outcomes for Worcestershire DAAT are prioritised. These are:

- Reducing drug related deaths and ill health
- Reducing drug and alcohol related crime and disorder
- Reducing social and educational exclusion
- Improving access to drug and alcohol treatment and support
- Increasing positive outcomes from drug and alcohol treatment

The strategic priorities within Worcestershire are in line with indicator 1 of PSA 25, 'Reducing the Harm Caused by Drugs and Alcohol'. Other indicators within the PSA also impact upon Worcestershire's treatment plan and wider drug and alcohol strategy, including measures of public perception and rates of drug-related offending.

From a wider perspective, this treatment plan links to the following Public Service Agreements:

- PSA 2: Improving the skills of the population
- PSA 8: Maximising employment opportunities for all
- PSA 16: Increase the proportion of socially excluded adults in settled accommodation and employment, education or training
- PSA 18: Promoting better health and wellbeing for all
- PSA 19: Ensuring better care for all
- PSA 23: Making communities safer

Worcestershire DAAT remit is to work towards a balanced treatment system, enabling access to treatment for all. Supporting People has a strategic requirement to support clients to leave the system in a planned way, with access to the necessary wraparound services, relapse prevention and aftercare. The need for a broad range of treatment modalities is recognised, including access to abstinence based interventions and support to help clients maintain drug free lives.

The 2008-2011 DAAT strategy has identified the following housing needs which have assisted in aligning Supporting People's strategy intentions for 2010-13.

A snapshot survey of 752 clients in treatment conducted in April 2006 indicated that:

- 23% of clients (172) had a housing need (for instance: B&B, with friends or relatives, hostel, on street, refuge or temporary)

- If extrapolated to the whole client cohort, this indicates that 268 clients in treatment in April 2006 had a housing need
- 10% of clients reported that they had been evicted, and 4% more than once main causes for eviction were rent arrears, relationship breakdown, client's drug use and anti-social behaviour

These identified needs can be related to the feedback we have received from service users and the outcomes achieved from this client group. In addition to this, we have been able to pin down the specific outcome needs of service users. 84% of the new service users record drug problems as their primary need within 2008/09. 9% record alcohol problems as their primary need. Current service users are telling us that the majority of them accessing substance misuse services are doing so for drugs rather than alcohol. This does not mean alcohol should be considered a secondary problem however. This combination of problems begins to demonstrate the complexity of needs for this client group. Complex needs and mental health are a common thread between many secondary needs.

11% of all new service users within the SP programme had a registered substance misuse concern; providers for all client groups need therefore to be aware of their support needs (these tend to be associated with particular client groups, specifically single homeless and offenders as with mental health).

In terms of secondary, the most commonly identified need was to access and continue to engage with drug and alcohol services. It is perhaps inevitable in this client group that some people would fail in their outcomes; however it is positive that 96% did have success in 2008/09.

A significant number of service users were identified to need support in accessing health services. This need can be because users may have neglected access to health services, or because of the greater risks faced by substance misusers in relation to issues such as Viral Hepatitis.

An additional important category of commonly identified needs was economic well being. Almost two thirds of service users were identified to need help to maximise their income, and to manage debt and budget appropriately. Accessing appropriate housing was a need expressed in a number of service users. Many were supported to register with social housing organisations and/or registration for choice based lettings. Accessing suitable housing can be important to provide a stable environment so service users can better engage with the drug and alcohol services they are being supported by.

### **Local Area Agreement alignment:**

The Worcestershire Local Area Agreement (LAA) contains the priority to 'reduce the harm cause by illegal drugs and alcohol'. This is an area that the substance misuse part of the Supporting People programme would aim to have a positive influence on. The specific indicator measured for this priority is the number of 'alcohol-harm related hospital admissions'.



The Supporting People programme cannot measure a direct effect on these numbers, however indirectly it encourages service users to stay engaged with specialist alcohol services that can help users get the problem under control and as a result reduce the need to be admitted to hospital on an alcohol related issue. Removing other stress factors such as homelessness and domestic violence from service users lives can also help people become less reliant on alcohol.

The is an indicator which Supporting People would not be able to provide evidence of their direct impact on the indicator however they can provide indirect evidence or more qualitative accounts of the work the services do.

The following priorities were identified by providers as indicators which they were either working towards, or had the potential to work towards for this specific client group:

NI 2	Percentage of people who feel they belong to their neighbourhood
NI 8	Adult participation in sport
NI 17	Perceptions of anti social behaviour
NI 18	Adult reoffending rates for those under probation supervision
NI 20	Assault with injury crime rate
NI 39	Alcohol – harm related hospital admissions
NI 112	Under 18 conception rate
NI 116	Proportion of children in poverty
NI 117	16-18 year olds who are not in education, employment or training (NEET)
NI 123	16+ Smoking prevalence
NI 142	Number of vulnerable people who are supported to maintain independent living
NI 146	Adults with learning disabilities in employment
NI 150	Adults in contact with secondary mental health services in employment
NI 152	Working age people on out of work benefits
NI 163	Working age population qualified to at least level 2 or higher
NI 175	Access to services and facilities by public transport, walking and cycling
LI 2	Children who have experienced bullying
LI 3	Successful new claims generated for pension credit, attendance allowance and disability living allowance (as a percentage of the population of pensionable age).

We will work with providers to ensure that additional alignment is achieved to the LAA, and that contracts can identify their link and value to Local priorities.

**Strategic intent:**

- The provision of Low-level and floating support for individuals with drugs and alcohol problems;
- Complementing low-level community interventions and alignment to the strategic direction of the Drug and Alcohol Action Team partnership
- Provision to address the demand profile within the County.

# Single Homelessness

## **Worcestershire Context:**

"The needs of single homeless people can be complex, as there are a multitude of housing and support needs. These can include offending behaviour, rough sleeping, mental health issues, old age, women and men having different support needs, domestic abuse, physical and sensory impairment and substance misuse issues. Adult Services tend to provide support and/or care if there is a diagnosed and an assessed critical to substantial level need. Some single homeless people will have low-level support needs, others a multitude of needs, which is where Supporting People funded services are particularly helpful."<sup>19</sup>

Supporting People plays a key strategic role with the District Councils in addressing homelessness. There are a large group of single homeless people (including substance misusers and offenders) who are more often than not, deemed to be non-priority, according to the Homelessness Act 2002, therefore there is no legal duty to house these groups. This element, key role and responsibility is being undertaken by Supporting People through investing in organisations primarily in the voluntary or third sector.

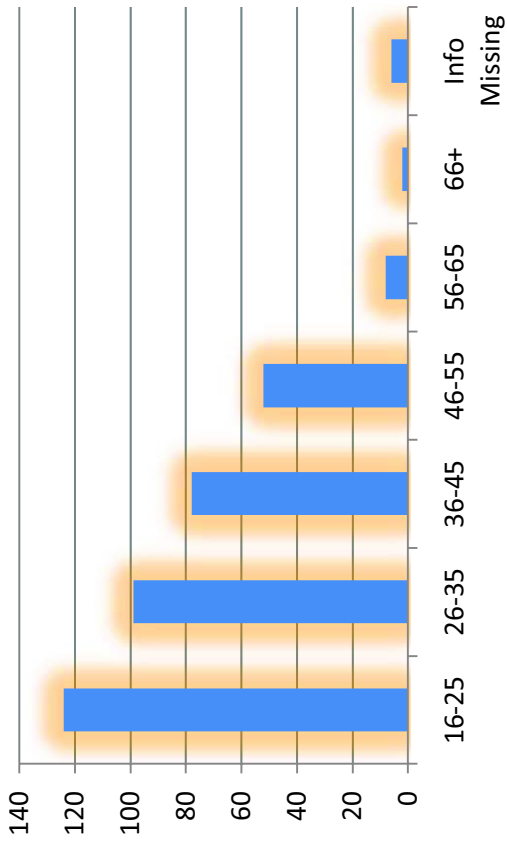
In a Worcestershire context, this is a client group which tends to be of a young age (as a person gets older they become less likely to be accessing single homeless services). From analysis over the last couple of years of Homeless services (supported by a Supporting People strategic review 08) services are more likely to have to deal with secondary needs associated with younger people such as teenage pregnancy, rather than those associated with older people such as health and mobility issues.

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<sup>19</sup> Worcestershire's options appraisal of housing and support services for single homeless people'

### Age of new service user – single homeless

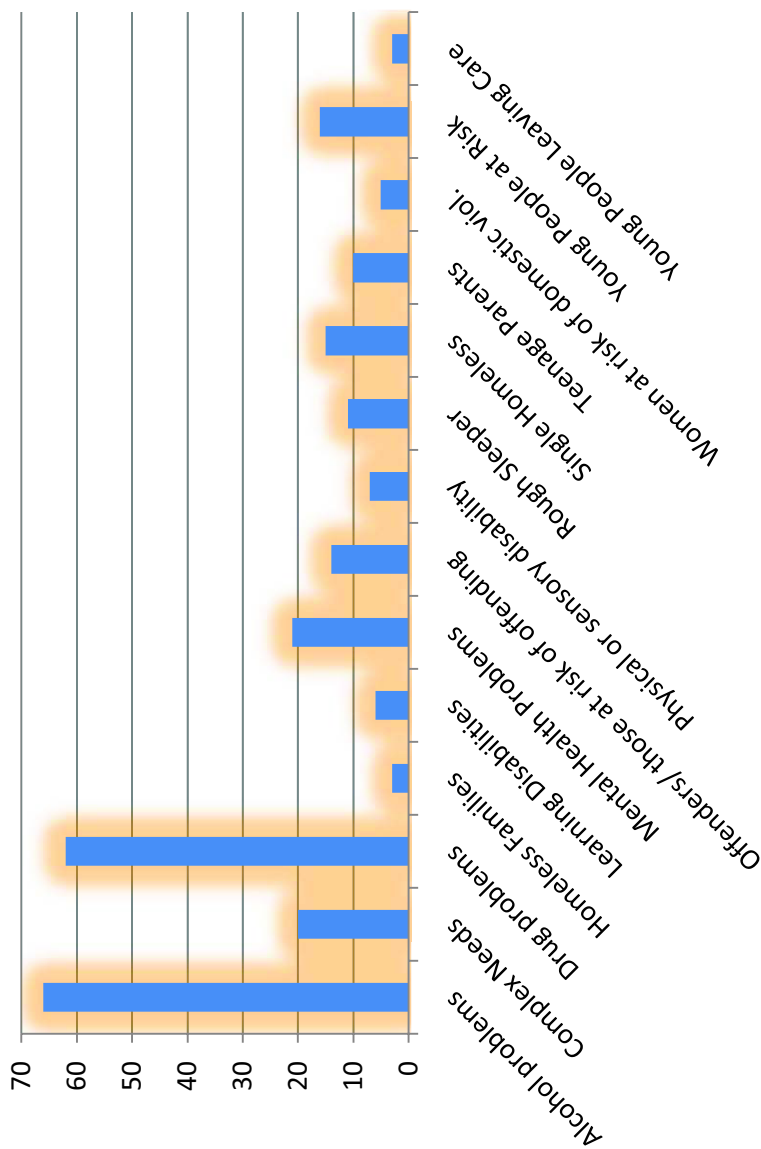
Source: Client record data, 2008/09



Alcohol problems and drug problems are the two most common secondary needs for people accessing single homeless services (with 18% and 17% of service users having these needs respectively in 2008/09).

**Recorded secondary needs of new users entering single homeless services**

Source: Client record data, 2008/09



Unsurprisingly, economic need is the most commonly identified required outcome for people accessing single homeless services. 450 and 480 people were found to need support to maximise their income, and to budget, reduce debt and achieve appropriate expenditure in 2008/09 alone. Budgeting and reducing debt seems to be more difficult, than simply accessing the right benefits. Increased engagement and support with this client group in terms of improve their income and budgeting are important towards maintaining a tenancy in the future.

373 people were identified as needing support to access a GP, dentist or primary healthcare service. This can be difficult to do if living in unstable accommodation or rough sleeping as many of the service users were prior to entry into the programme. 190 have managed to do this successfully with 138 still working towards it.

As recognised by the recording of needs, a fair number of service users in this client group have substance misuse problems. This is reflected in the 278 service users who were identified as needing support to access and continue to be engaged with drug and

alcohol services in 2008/09. To continue to engage with this support can be difficult with some service users who seem to be more transient than in other client groups and just come in and out of services for a short time.

In addition, a significant number of people are asking for support regarding access to training and education (76 people managed to find employment with support from providers in 2008/09).

### **Local Area Agreement alignment:**

Over a third of single homeless service users had a substance misuse problem with alcohol problems being the most common secondary need. This means that efforts to deal with these problems within single homeless services will be contributing towards the LAA target to reduce alcohol harm related hospital admissions.

Also, as with homeless families, stable accommodation and tenancy may provide the platform for service users to access employment and reduce the number of working age people on out-of-work benefits. We will continue to develop these links with the appropriate theme groups.

The following priorities were identified by providers as indicators which they were either working towards, or had the potential to work towards for this specific client group:

NI 2	Percentage of people who feel they belong to their neighbourhood
NI 8	Adult participation in sport
NI 17	Perceptions of anti social behaviour
NI 18	Adult reoffending rates for those under probation supervision
NI 20	Assault with injury crime rate
NI 39	Alcohol – harm related hospital admissions
NI 112	Under 18 conception rate
NI 116	Proportion of children in poverty
NI 117	16-18 year olds who are not in education, employment or training (NEET)
NI 123	16+ Smoking prevalence
NI 142	Number of vulnerable people who are supported to maintain independent living
NI 146	Adults with learning disabilities in employment
NI 150	Adults in contact with secondary mental health services in employment
NI 152	Working age people on out of work benefits
NI 163	Working age population qualified to at least level 2 or higher
NI 175	Access to services and facilities by public transport, walking and cycling

- LI 2 Children who have experienced bullying
- LI 3 Successful new claims generated for pension credit, attendance allowance and disability living allowance (as a percentage of the population of pensionable age).

We will work with providers to ensure that additional alignment is achieved to the LAA, and that contracts can identify their link and value to Local priorities.

# Family Homelessness

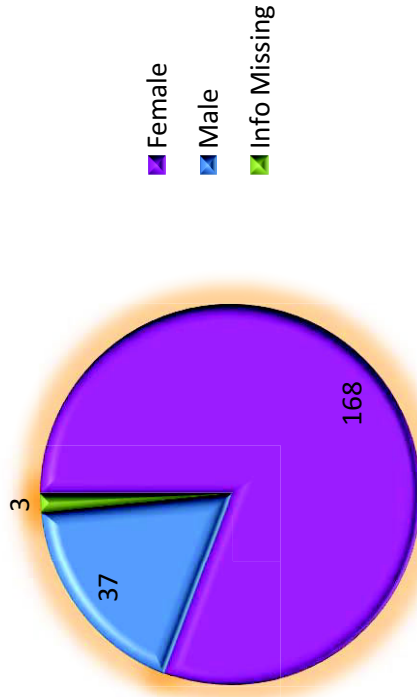
## Worcestershire Context:

There is a distinction between the needs of single homelessness and family homelessness, hence the separation in this strategy of the two client groups.

Analysis of recent trends of service users accessing Supporting People family homeless provision, there was an uneven split between male and female new service users (81% of the new service users were female in 2008/09).

Sex of new service users – homeless families

Source: Client record data, 2008/09



Of these new service users 66 of the households had children, 35 of these were single parent households (all of the single parent households had a female head of household). A total of 120 children were in Homeless Families support services. This is over a



quarter of the children in the supporting people programme. 137 people who accessed homeless families support services were alone and no other people were recorded, 100 of these people were female.

As expected, mental health concerns is the most common need identified in this respect. Mental health issues account for 26% of the needs identified. This is an increasing trend too, an 11% increase of identified needs from 2007/08. Physical or Sensory Disabilities also is a significant need identified by 15% of service users which could also impact how providers deliver a service to some members of this client group based on current trends.

The most common outcome identified is the need to increase confidence. This fits in with other needs identified such as the need to develop and maintain family and social networks, and access social, leisure and cultural activities. Economic outcomes are identified in a lot of service users in this client group. These include maximising income including accessing the correct benefits, as well as budgeting, reducing debt and achieving appropriate expenditure. The high assessment of need in this area is important as it means it may be a major reason why users had to enter the programme in the first place. Being able to deliver specialist support in these areas may help the families to move on successfully in the future.

Accessing health services and maintaining physical health and hygiene including understanding the dangers of smoking were important identified outcomes for about half of the users in this client group. The Family Intervention Project have reported against the core and specialist SP outcomes already discussed by they also have a number of other outcomes which are specific to the work they do. These include identified outcomes such as supporting families to keep to the conditions of ABSOs, ABC's or other statutory conditions, or to help excluded children to get back into full time education.

### **Local Area Agreement alignment:**

Support work with homeless families can help to meet a range of targets in the LAA for both the parents themselves, but also for their children or young people. Having a stable home and tenancy can be the first step towards other aspirations in life for homeless families. This often includes the aspiration to not live reliant on benefits and be able to access employment in order to support their family. This support helps to work towards the LAA target of reducing the working age population on out of work benefits. This indicator also links with another target of reducing the proportion of children in poverty which looks at children in families on out-of-work benefits. By being able to demonstrate the number of people who have managed to access employment following support you can demonstrate contribution towards these targets.

Support for homeless families can include helping parents to access groups specifically for their children such as homework clubs or play schemes. We also know that young people benefit from different experiences as well as working towards the LAA target to improve young people's participation in positive activities.

The following priorities were identified by providers as indicators which they were either working towards, or had the potential to work towards for this specific client group:

NI 2	Percentage of people who feel they belong to their neighbourhood
NI 8	Adult participation in sport
NI 17	Perceptions of anti social behaviour
NI 18	Adult reoffending rates for those under probation supervision
NI 20	Assault with injury crime rate
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NI 150	Adults in contact with secondary mental health services in employment
NI 152	Working age people on out of work benefits
NI 163	Working age population qualified to at least level 2 or higher
NI 175	Access to services and facilities by public transport, walking and cycling
LI 2	Children who have experienced bullying
LI 3	Successful new claims generated for pension credit, attendance allowance and disability living allowance (as a percentage of the population of pensionable age).

We will work with providers to ensure that additional alignment is achieved to the LAA, and that contracts can identify their link and value to Local priorities.

### **Strategic intent:**

- Ensure preventive agenda is extended throughout the County, including the introduction of a single service gateway and improved systems such as common monitoring and common assessment
- Crisis intervention: emergency access accommodation and street outreach, often dealing with high vulnerability and complex needs.
- Supported independent living: supported accommodation for single homeless people, offenders and substance mis-users.

- 'Preparation for independent living': floating support, which can be generic or specialist. Some focuses solely on crisis intervention work, some are specialist services and other floating support moves with the person through different types of accommodation.
- Ensure provision continues to complement housing strategies countywide.

# Older People

## Worcestershire Context:

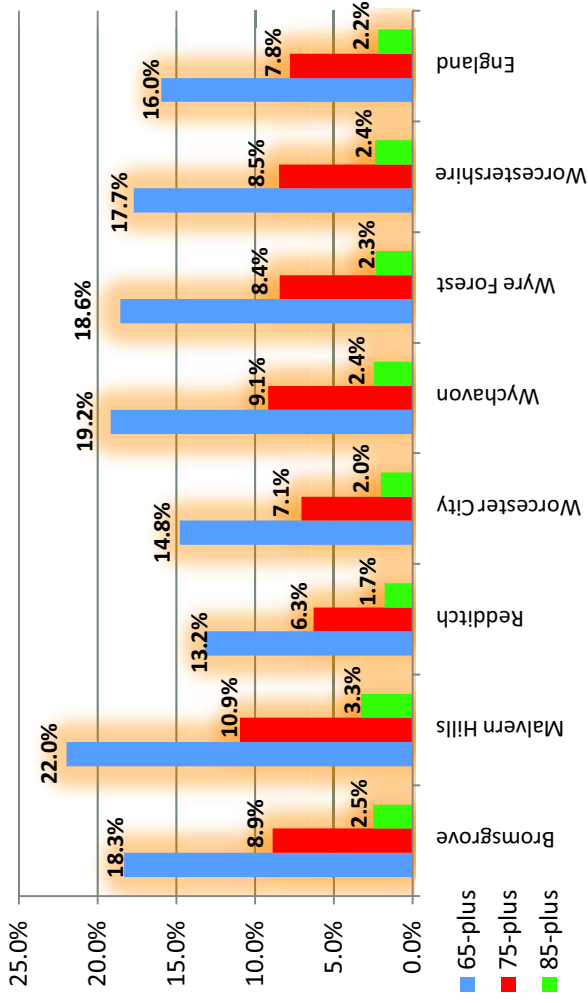
"There are substantial demographic changes taking place in the county." <sup>20</sup> The Older People housing and support needs research carried out in 2009 identified the changes required linked to the following trend:

- By 2031, those over 60 will increase by 52%
- Even more dramatic in terms of demands for care, those over 85 increase by 155%
- Growth is predicted to be the greatest in Wychavon and Malvern Hills
- People are living longer but along with increased life expectancy has gone longer periods of ill health in later years; 4.3 years for men and 5.9 years for women. This will often mean a need for some care.
- Those diagnosed with dementia will treble by 2025 leading to a requirement for more specialised provision available at home or in some alternative housing or care home setting.
- At over 80% of households in 55-74 age group levels of owner occupation are exceptionally high in Worcestershire. At the end of 2008, the average value of equity held was just over £180,000 but values are trending down.
- There are 745 households on local authority waiting lists, aged over 50 with a significant identified housing need; 1 in 5 of these are currently owner occupiers.
- The number of older people with learning disability, for whom there is currently little explicit provision, is projected to rise from 4732 to around 6050 by 2025; a 25% increase.

Supporting this we have gained an insight from Worcestershire's Research and Intelligence Unit into future population demands per District. By mid-2007 estimates reveal Worcestershire has a population of around 555,400. 17.7% of Worcestershire's population, 98,300 people, are aged 65-plus. This compares to 16.0% aged 65-plus for England.. The difference is even more pronounced in the 75-plus age group, which is 8.5% in Worcestershire compared to a national average of 7.8%. Worcestershire has a slightly older age structure than is seen nationally.

Figure 1: Proportion of population in 65+ age groups, Worcestershire and districts, 2007

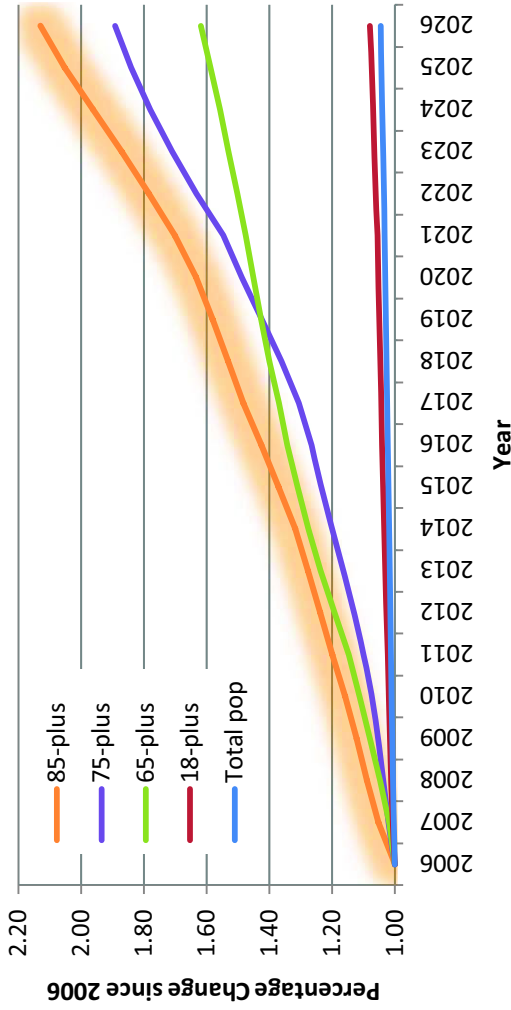
<sup>20</sup> Research into the Housing and Support needs of older people within Worcestershire, 2009.



Source: Office for National Statistics, Mid-Year Estimates, 2007

Forecasts of the population change in the County up to the year 2026 suggest that the population of Worcestershire is set to increase by around 25,200, representing an increase of 4.6%. The largest increase is projected to be in the older age groups. Persons aged 65 and over have a projected increase of almost 60,000, or over 60%, in this 20-year period.

Figure 2: Percentage Projected Population Increase in Worcestershire, 2006-26



Source – WCC projections based on RSS Preferred Option and past trends

Within the 65-plus age group, the percentage increase that is forecast is higher among the older age groups. The 85-plus age group, for example, is projected to more than double over the 20 year period, from 12,600 in 2006 to around 26,600 in 2026.

The 85-plus age group is projected to at least double in all of the districts with the exception of Worcester City. This could have an impact on access to health services, especially in the more rural districts of Wychavon and Malvern Hills, which are particularly popular areas of residence among the older generation.

	Age Group	2009	2013	Total Increase
<b>Bromsgrove</b>	65-74	9,300	9,600	495
	75-84	6,100	6,200	
	85+	2,400	2,500	
<b>Malvern Hills</b>	65-74	8,900	9,300	543
	75-84	5,800	5,900	
	85+	2,600	2,700	
<b>Redditch</b>	65-74	6,100	6,500	462
	75-84	3,700	3,700	



	85+	1,400	1,500	
<b>Worcester City</b>	65-74	7,500	7,600	176
	75-84	4,800	4,800	
	85+	2,000	2,000	
<b>Wychavon</b>	65-74	12,800	13,200	739
	75-84	8,000	8,100	
	85+	3,100	3,300	
<b>Wyre Forest</b>	65-74	11,200	11,800	834
	75-84	6,100	6,200	
	85+	2,500	2,500	
<b>Worcestershire</b>	65-74	55,700	58,000	3250
	75-84	34,500	34,900	
	85+	14,000	14,500	
<b>Total</b>	<b>65+</b>	<b>104,200</b>	<b>107,400</b>	

Source: *Worcestershire projections based on RSS Preferred Option*

The table above shows that there are predicted to be a further 3,200 people aged 65 and over by 2013. Wyre Forest and Wychavon have the highest increase in number of people aged 65-plus at 834 and 739 respectively.

This means that older peoples service will have to deal with an increased number of people with physical, sensory and learning disabilities, and mental health problems, possibly requiring support services which can deal with more complex needs.

#### **Local Area Agreement alignment:**

The existing Local Area Agreement (2008-2011) supports the target to improve the number of vulnerable people who are supported to maintain an independent living. This indicator information is taken directly from Supporting People lead role in the management and delivery of NI 142. We can demonstrate that due to the high numbers of older people in receipt of Supporting People's services they are likely to be able to have a significant impact on this target. By offering older people even small amounts of support in the form of a call alarm or help to access adaptations or remove trip hazards from their home our investment is assisting older people to enjoy independent living rather than possibly having to move to residential care if that support was not there. (Which also adds further public sector costs, and often is not the preferred option for the service user.)

While this indicator includes all client groups in the Supporting People programme, costs suggest that the older people client group require minimum spend to get a significant reward in terms of maintaining independent living and meeting the target.

In addition to this, another indicator specifically applicable and one which we will look to enhance our development towards is access to successful new claims generated for pension credit, attendance allowance and disability living allowance as a percentage of population of pensionable age. The aim of this indicator is to reduce levels of inequality within the community by providing extra benefits to those who need them.

We will seek to align our programme to meet the tackling fuel poverty indicator. We currently provide support to service users in receiving advice on what fuel poverty related benefits and payments are available to them, we need to enhance our reporting mechanism to identify the level of this support in meeting this indicator set.

The following priorities were identified by providers as indicators which they were either working towards, or had the potential to work towards for this specific client group:

- NI 2 Percentage of people who feel they belong to their neighbourhood
- NI 8 Adult participation in sport
- NI 17 Perceptions of anti social behaviour
- NI 20 Assault with injury crime rate
- NI 39 Alcohol – harm related hospital admissions
- NI 123 16+ Smoking prevalence
- NI 142 Number of vulnerable people who are supported to maintain independent living
- NI 175 Access to services and facilities by public transport, walking and cycling
- LI 3 Successful new claims generated for pension credit, attendance allowance and disability living allowance (as a percentage of the population of pensionable age).

We will work with providers to ensure that additional alignment is achieved to the LAA, and that contracts can identify their link and value to Local priorities.

**Strategic intent:**

- Early intervention services for older people with mental health needs
- Low-level preventative housing related intervention as provided by home improvement agencies, community alarms and assistive technology.
- Provision of a countywide floating support that meets the needs of the most vulnerable (irrespective of their tenure)
- To provide low level support where appropriate within existing and new extra care provision



- To ensure that housing related support provision also identifies opportunities to embrace social inclusion activities for this client group, either as a mechanism to identify housing related concerns for people who not currently engaged, or to sustain networks for communities.
- Please also refer to Learning Disability, Physical Disability and Sensory Impairment, in addition to Mental Health commissioning intentions for this client group.

Strategic intent within this client group will also link into 3 other client groups (these being) – Learning Disabilities, Mental health and Physical and Sensory Disabilities.

# Young People at risk

## **Worcestershire Context:**

Working in partnership with Children Services, Supporting People carried out an extensive strategic review of young peoples housing and support need within the County. The aim was to evaluate the current housing and support options available for young people in Worcestershire. This appraisal complimented the work undertaken for the 'Children and Young People's Plan' and the 'Worcestershire Homelessness Strategy'. Services within the County have evolved over time, mainly on a district by district basis. This review however, has embedded an opportunity to enhance joint working, and the commissioning of services in line with current and future needs. This strategy seeks to drive this forward, easing the transition from Children Services to that of Adult and Community Services, especially as a result of the Southwark Judgement.

The review and our analysis of existing provision and outcomes achieved identifies that the age group 16 to 25 year olds can be complex, as it is a transitional time from childhood to adulthood. The variation in needs of a 16 year old as opposed to a 25-year olds can vary greatly, and this is something that provision will need to accommodate. Some young people will have low-level support needs, which is where Supporting People funded services are particularly helpful. There is also some focus on more complex needs. In essence people in need of low level support, for example people who need support to sustain independence and enabled to be able to do things for themselves.

Within this client group the identified primary need was recorded as 'single homeless', with a secondary need covering a varied list from alcohol and drug problems, learning disabilities, mental health, offenders and young people leaving care.

All of the top five most common support needs identified for young people fit into the category of economic and financial issues. From accessing trends with this client group, it would seem that young people at risk require a lot of support in this area, possibly because they have not yet had the life experience to have gained these skills yet.

The most common support need for this client group is to maximise income including accessing the correct benefits. Following directly on from the need to maximise income is the need to budget appropriately with the money that is coming in and try to reduce any debt they may have built up. Key outcomes of housing related support.

As a more long term aspirational outcomes from simply sorting out their current finances is the aim to eventually not be reliant on benefits. To do this support to access education, training and employment is critical, and where Supporting People enabled 138 people (in 2008/09) to access training or education. As a result of this all are considering greater prospects in terms of gaining a

employment. Taking this further, 338 people were identified as needing support to access career and employment opportunities and 139 have already been successful in this goal and managed to enter employment. These outcomes are key, and very relevant to macro factors which may make getting employment difficult under 'normal' circumstances for young people at risk – let alone in the period of recession.

Soft skills (such as esteem and self confidence) have also been critical in enabling some of the more long term outcomes to be achieved (such as employment and training), in addition to establishing social and community networks, and developing a relationship with neighbours. Current provision is proving that if a person is confident they will feel more able to tackle other problems or difficulties in their lives.

### **Local Area Agreement alignment:**

The Worcestershire Local Area Agreement (LAA) specifically uses an indicator which Supporting People will be able to contribute towards. The indicator is the number of '16 to 18 year olds who are not in education, employment or training.' The SP programme will seek to contribute to this target by supporting young people in their services to access employment or education and training as displayed through the outcomes data. This element of information will be asked for from appropriate providers.

The following priorities were identified by providers as indicators which they were either working towards, or had the potential to work towards for this specific client group:

- NI 2 Percentage of people who feel they belong to their neighbourhood
- NI 8 Adult participation in sport
- NI 17 Perceptions of anti social behaviour
- NI 18 Adult reoffending rates for those under probation supervision
- NI 20 Assault with injury crime rate
- NI 39 Alcohol – harm related hospital admissions
- NI 112 Under 18 conception rate
- NI 116 Proportion of children in poverty
- NI 117 16-18 year olds who are not in education, employment or training (NEET)
- NI 123 16+ Smoking prevalence
- NI 142 Number of vulnerable people who are supported to maintain independent living
- NI 146 Adults with learning disabilities in employment
- NI 150 Adults in contact with secondary mental health services in employment
- NI 152 Working age people on out of work benefits
- NI 163 Working age population qualified to at least level 2 or higher

NI 175 Access to services and facilities by public transport, walking and cycling  
LI 2 Children who have experienced bullying

We will work with providers to ensure that additional alignment is achieved to the LAA, and that contracts can identify their link and value to Local priorities.

### **Strategic intent:**

Our strategic intent, supported from the joint strategic review, will contribute to these specific measures and to the three work streams set by central government, which are:

- Preventative work: early prevention and advice, mediation, home visiting, school based work and assessment and local authority advice in housing.
- Accommodation and support: supported lodgings, nightstops, emergency accommodation (hostels), forms of move on from hostels and floating support.
- Person-specific services: complex needs and high vulnerability, health, learning and work, BME young people, tackling anti social behaviour and offenders and offending.
- To carry out a strategic needs analysis of provision within the South of the County. Recommendations will provide the structure for provision and commissioning intent hereafter.

We seek to ensure that there is a greater range of housing options and support (embraced within the freedom and flexibility of funding governance), which contributes to the prevention of homelessness and repeat homelessness. This includes specific issues within mainstream housing and support including substance misuse issues, youth offending behaviour, learning disabilities and difficulties including Asperger's Syndrome, minority ethnic groups particularly unaccompanied asylum seekers, teenage parents and young people who are pregnant and young victims and survivors of domestic abuse.

# Eligibility

The Worcestershire Supporting People Partnership is committed to a programme that promotes independence through services that are high quality, strategically planned, cost effective and complement existing support and care packages. Services will:

- Have fair and equitable access;
- Are targeted at those in need;
- Are capable of delivering independent living through the provision of housing-related support;
- Provide value for money; and
- Complement other health and social care services.

One means of ensuring this is through the use of eligibility criteria. Eligibility is an issue that has caused significant problems for the Supporting People programme nationally since the inception of the programme. Worcestershire is proposing to adopt outcome focused eligibility criteria that are clear, transparent and consistent and underpin our vision for Supporting People in Worcestershire while allowing us to direct resources strategically.

Our starting point is that assumption that Supporting People is not the unique pathway to independent living and nor should it be seen as a discrete programme whose clients needs are likely to be met entirely from within this programme. Worcestershire County Council assumes that:

- For some individuals, Supporting People is the only intervention that is required to maximise independent living;
- For other individuals, independent living can be maximised through the provision of social care services; and
- For others, Supporting People is merely one part of an overall care and support package that maximises independent living.

Complementing this, an overarching single assessment process should end uncertainty and ensure vulnerable people have complete support packages. The eligibility model outlined below focuses on outcomes of, rather than approaches to, support. As well as removing distractions that could impede the scheme, this approach allows Supporting People to harness the experience and knowledge of individual providers who, in turn, benefit from increased flexibility and it emphasises the overall aim of maximised independent living.

## **Defining who is eligible to receive support**

Worcestershire continues to propose to introduce needs-based eligibility criteria to manage access to services. We are proposing:



- That all individuals should be assessed using a common framework to determine the nature of their presenting need;
- That following assessment, an individual's presenting need will be defined in line with clear eligibility definitions;

That an individual will be deemed eligible for Supporting People services when:

- They have been assessed as being at risk of losing their ability to reach or maintain independent living, or they have been assessed as not currently being able to reach or maintain independent living; and
- The provision of low level support focused around sustaining accommodation would prevent or delay loss of independence, or enable individuals to gain independence.

Worcestershire wants to target people in the low, moderate and substantial categories since it is these people who can be helped to live independently. Supporting people facing these difficulties can prevent or delay their conditions worsening. With support, a client who has been assessed as at moderate risk can over time move to the low risk category, or a client whose position has been deteriorating can be stabilised.

As was stressed at the beginning of this section, Supporting People is neither a unique nor a solo route to independent living and, as such, will share the responsibility for funding support with other services. Given the focus of the programme, Supporting People would expect to fund less of people's support as they move to increasingly serious risk categories and overall increased need.

As a person's condition becomes increasingly critical and the scope for independent living lessens, the potential for Supporting People funding falls. To make this system work fairly and ensure each client has a holistic support package in place it is vital that all users undergo a single assessment and that all assessments follow an identical process.

### **Defining what services are eligible under Supporting People**

Choices also have to be made in a transparent and strategic manner about which services are eligible for funding in line with the programme's vision for Worcestershire. Supporting People aims to maximise the level of independent living therefore services will be judged on how well they achieve this outcome. This approach avoids the trap of concentrating too much on how independence is realised, instead considering what is really accomplished.

Furthermore, to monitor an outcome based model it is clearly vital that these are gathered and monitored and assessed internally to measure the extent to which outcomes are being achieved and how far a client 'travelled'. With this in mind, Supporting People will only fund support that outcomes, both short term and longer term, have been agreed in partnership with the client and are regularly reviewed. We will therefore continue with:

- Contract specifications based on outcome (and relevant outcomes as deemed strategically important);
- Providers to develop method statements, setting outputs that will be delivered to achieve outcomes specified in the contracts;
- To monitor this, we will carry out contract spot checks where necessary to ensure these fundamental conditions are being upheld.

### **Value for money criteria**

Linked to measured outcomes, how services represent value for money will be judged on outcomes and price. Prices will be used in place of costs because this again focuses the attention on *what* is achieved instead of *how* it is achieved, allowing providers to use their unique experience and knowledge to decide the method to realise outcomes with each client. Only services capable of providing services within set price boundaries will be eligible for funding.

## Commissioning statement and Investment Plan (2010/11)

The strategic aim of Supporting People in Worcestershire is to commission housing related support services that, in coordination with partners including housing, health and social care services, promote or assist vulnerable individuals to sustain their accommodation. This is achieved through the delivery of low level support that, increase the individual's choices for independent living and complement existing services. Through funding Supporting People services, Worcestershire Supporting People Partnership aims to achieve a series of outcomes for service users. These outcomes meet the objectives of the programme as outlined above, and also contribute to the objectives of a number of local, regional and national strategies (including the Local Area Agreement). In Worcestershire, the key objectives that Supporting People contributes to are:

- Making our neighbourhoods safer (addressing crime, community safety and anti-social behaviour);
- Addressing homelessness (preventing homelessness, in particular repeat homelessness and supporting women at risk of domestic violence);
- Tackling substance misuse (alcohol and drugs); and
- Providing support that enables people who are vulnerable through age, disability or life experience to maintain independence.

These objectives have been identified through a strategy mapping exercise, which examined a range of strategies and policies published by Worcestershire County Council and its partners. This mapping exercise has also been supplemented by support from the County's Research and Intelligence Department in respect to mapping across outcomes from existing contracts to the expected and prioritised outcomes focused within the Local Area Agreement framework. As a consequence one of the principle aims of the annual plan is to ensure that all Supporting People contracts add significant value to local priorities.

This document is the three-year strategy for the Supporting People programme. It offers a direction of travel for next three years based on current strategic priorities. This element of the strategy embeds an action plan which will be a fluid document identifying priorities for spend. This is an evolving time for Supporting People: the formal integration in the Local Area Agreement, the development of Choice and Control, and the general vulnerability of national and local funding allocations as a result of the economic situation within the Country. As a result of this we make the commitment to systematically review these intentions and



commissioning statements on an annual basis to ensure that it meets local strategic aims and objectives, and reflects current national, regional and local policy making.

## **Worcestershire's vision**

We have been successful as a commissioning partnership (spanning two tier authorities, Probation and the Primary Care Trust) to identify significant cost savings for a range of public bodies as a result of prudent and strategic commissioning activity. In the current climate of vulnerable and expected depreciating funding streams this strategy seeks to enhance the opportunity to secure further cost savings linked to local needs. Our programme has gathered a considerable body of evidence demonstrating that when Supporting People funded activities are targeted and focused in an appropriate manner, significant benefits to the individual, their families and the community can be yielded. It is the intention in Worcestershire to ensure that the Supporting People programme funds and provides the most appropriate housing related support services for the county, in order to maximise the benefits produced.

Worcestershire County Council, the administering authority for the Worcestershire Supporting People programme, remains as an "Excellent" authority. A key aim for the county will be to maintain this status and ensure continual improvement of services, ensuring that Supporting People can play an instrumental part in the supporting agendas (such as the Local Area Agreement, and the Comprehensive Area Assessment (C.A.A.)). Effective use of the Supporting People programme will serve to contribute to this.

The Worcestershire Supporting People Partnership is committed to developing and delivering services that offer the highest standards of equality and diversity, including:

- Equal treatment regardless of race, gender, age, disability, sexual orientation, religion or belief
- Working to eliminate unlawful discrimination
- Promoting equal opportunities
- Promoting community cohesion, including good relations between people from different racial groups
- Facilitating reasonable access to interpretation or support on request
- Responding to the needs of all eligible groups and working to engage all eligible sections of the community

## **Pace of Change**

The findings set out within this document suggest that a moderate level of change is required to the current programme. This is due to:

- Changes in the level of Supporting People programme and administrative grant funding available;
- The alignment of outcomes to meet the Local Area Agreement Priorities;

- Expected depreciating levels of national funding in the near future;
- Current gaps in provision;
- Knowledge from recent strategic reviews and the learning from best practice;

The commissioning process will drive change in the Supporting People programme. The recently established commissioning sub group and the Commissioning Body will lead this ensuring strategic fit, value for money and safeguarding expectation.

This strategy will continue to commission services regardless of tenure. The programme will only provide tenure specific support when either intensive support is required in the short term or when tenure-based support meets the wider aspirations of service users. In the move towards non-tenure specific housing related support, a mix of service types will be provided dependent on service users needs and aspirations.

### **Current and future anticipated spend**

The Supporting People programme is funded by a grant from the Department for Communities and Local Government, this is a national allocation which is administered by equivalent democratic institutions. It is anticipated that the national allocation is distributed to administering authorities via the Local Strategic Partnership – forming part of the Area Based Grant from 2010/11. Removal of ring fence budgets obviously pose many risks for the programme, in addition to many opportunities. It is widely acknowledged that funding levels within the public sector will be at challenging levels for years to come, and also acknowledged that the vulnerability of our client groups will see increasing levels. It is clear that Worcestershire face some extremely difficult financial challenges within the Supporting People programme over the lifetime of the three-year Supporting People strategy.

### **Commissioning priorities**

Within the context of change and striving to ensure that the Supporting People programme is strategically relevant, supporting statutory and non-statutory services in meeting the needs of local people, a series of commissioning priorities have been developed to shape and drive change in the Supporting People programme for future years. This investment will initially be pump primed by non recurrent funding. Recurrent investment will remain static until the SPCB is more informed of the budget allocations post 2010/11, and once the reviewing process has identified potential reinvestment.

### **Overarching commissioning priorities**

A series of overarching key commissioning priorities have been identified that should be applied to all services commissioned by Worcestershire Supporting People:

- **Changing the face of service provision:** move from existing models of service provision (for example, group living) to services that supply a range of different support models that meet the needs and aspirations of users;

- **Improving access to good quality housing and support;**
- **Improving access for owner occupiers:** that enable people to remain independent within their homes;
- **Increasing access to services:** that are more flexible and able to respond to a wider range of needs. Where appropriate, access to services to also be considered geographically, on a cross authority basis;
- **Meeting the housing related support needs of black and minority ethnic groups:** across Worcestershire the number of individuals from BME communities is relatively low, therefore the need for BME specific Supporting People services is anticipated to be low. Currently the Supporting People programme has achieved limited success in accessing individuals from BME groups. A priority is to initially generate evidence to increase knowledge of the housing related support needs of the BME community across the county. Findings can be incorporated into future commissioning strategies to ensure that services commissioned are capable of incorporating the needs of BME users;
- **Encouraging the formulation of accommodation and support strategies across all client groups:** to enable services to focus on their needs and link with the strategic priorities of partners;
- **Linking the Supporting People programme to housing capital programmes to facilitate new development;**
- **Reducing and eliminating risks to the programme:** risk exists across the programme.

The service review programme will be tailored to identify risks, ensure that funds are released and change is agreed within the right pace. In combination with commissioning and the procurement programme, risks will be effectively managed in the future.

## Investment Plan 2010/2011: Client Group: Older People

Investment	Spend Allocation	Timeframe
<p><b>Community Floating Support programme</b> Investment to ensure that all 6 Districts are able to demonstrate and provide a countywide floating support provision.</p>	<p><b>£25,000 per district per annum (thus, £450,000 over 3 years)</b></p>	<p><b>2010/2013</b></p>
<p><b>Social Inclusion for the non engaged programme</b> Investment seeking to identify unmet needs of vulnerable service users who require access to services but have not engaged (due to lack of social contact, rural locations etc). The programme will pilot social isolation projects through the Districts and signpost and support people to services that would otherwise be unknown.</p>	<p><b>£75,000 per District</b></p>	<p><b>2010/2013</b></p>
<p><b>Rural and flood risk home improvement support programme</b> Grant funded from DCLG'S handy person programme, which Worcestershire was successful in being allocated for.</p>	<p><b>£310,000</b></p>	<p><b>2010/2011</b></p>
<p><b>Home Improvement Agency</b> Investment within the new Countywide HIA to provide assistance to people who have so far not had their needs, specifically seeking to involve the Housing Liaison Project.</p>	<p><b>£300,000</b></p>	<p><b>2010/2013</b></p>

**Outcome:**

- Early intervention services for older people (particularly with mental health needs).
- Low-level preventative housing related intervention as provided by home improvement agencies, community alarms and assistive technology.
- Provision of a countywide floating support that meets the needs of the most vulnerable (irrespective of their tenure)
- To provide low level support where appropriate within existing and new models of housing support provision.
- To identify the additional outcomes that may be achieved through social inclusion activity, for instance volunteering. (Either as a mechanism to identify housing related concerns for people who not currently engaged, or to sustain networks for communities.)
- Please also refer to Learning Disability, Physical Disability and Sensory Impairment, in addition to Mental Health commissioning intentions for this client group.

**Variation on spend**

Investment will be supported by non recurrent budget, for 2010/11.

Contracts will be reviewed within the next 12 months, and reviews scheduled strategically over the period of this strategy. The review will look into strategic fit and benchmark / value for money within contracts. We anticipate a depreciating budget (in line with other public funding) post 2010/11, and seek to enable a balance between service provision and opportunity. We will also develop a strategy to ensure future provision can be realigned to fed into the recommendations of the Older Person Housing Strategy 2009 (this will involve consultation), once aware of financial settlement.

**Investment Plan 2010/2011:  
Client Group: Younger People at risk, and teenage parents**

<b>Investment</b>	<b>Spend Allocation</b>	<b>Timeframe</b>
<p><b>South Worcestershire Review</b> Investment to identify the needs of South Worcestershire Housing provision for young people at risk— identifying best practice, current practice and need, service user expectation and outcomes, along with recommendations.</p>	<p><b>£40,000 for the review</b></p>	<p><b>April - August</b></p>
<p><b>Mentoring and life coaching Support Programme</b> Investment in a pilot programme of mentoring and life coaching support for vulnerable young people at risk. To improve and sustain move on rates, and to empower previous service users to volunteer. (This could cut across a range of client groups – Offending, Domestic Abuse, Substance Misuse, Teenage Parents.)</p>	<p><b>£225,000</b></p>	<p><b>2010/2013</b></p>
<p><b>Rent Guarantee Deposit Schemes</b> Investment in Rent Deposit Scheme in the North of the County to meet need, and proposed to meet need in the South post review. Recycled investment to provide a sustainable approach to schemes.</p>	<p><b>£140,000</b></p>	<p><b>2010/11</b></p>
<p><b>Complex Need support project</b> Investment in a pilot programme of support for vulnerable young people</p>	<p><b>£225,000</b></p>	<p><b>2010/13</b></p>



<p>who have complex needs (including asperges, dyspraxia etc).</p> <p><b>South Worcestershire Review Implementation programme</b></p> <p>Umbrella of projects implementing recommendations of the review.</p>	<p><b>£200,000</b></p>	<p><b>2010/13</b></p>
<p><b>Outcome:</b></p> <ul style="list-style-type: none"> <li>• Preventative work: early prevention and advice, mediation, home visiting, school based work and assessment and local authority advice in housing.</li> <li>• Accommodation and support: supported lodgings, nightstops, emergency accommodation (hostels), forms of move on from hostels and floating support.</li> <li>• Person-specific services: complex needs and high vulnerability, health, learning and work, BME young people, tackling anti social behaviour and offenders and offending, identifying opportunities for contribution to positive activities agenda (for instance, volunteering)</li> <li>• Provision of a greater range of housing options and support (embraced within the freedom and flexibility of funding governance), which contributes to the prevention of homelessness and repeat homelessness. This includes specific issues within mainstream housing and support including substance misuse issues, youth offending behaviour, learning disabilities and difficulties including asperges syndrome, dyspraxia, minority ethnic groups particularly unaccompanied asylum seekers, teenage parents and young people who are pregnant and young victims and survivors of domestic abuse, and care leavers.</li> </ul> <p><b>Teenage parents</b></p> <ul style="list-style-type: none"> <li>• Provision of short-term transitional services to make the move to independent living</li> <li>• Floating support and coordinating services, enabling access to health and well being support through to training, education, employment and benefits support.</li> <li>• Development of move on support functions, for instance life coaching / mentoring to aid and support transitions.</li> </ul>		
<p><b>Variation on spend</b></p> <p>Investment will be supported by non recurrent budget, for 2010/11.</p> <p>Contracts will be reviewed within the next 12 months, and reviews scheduled strategically over the period of this strategy. The review will look into strategic fit and benchmark / value for money within contracts. We anticipate a depreciating budget (in line with other public funding) post 2010/11, and seek to enable a balance between service provision and opportunity. We will also seek to update the commissioning priorities as a result of the South Worcestershire Housing</p>		

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## Investment Plan 2010/2011: Client Group: Substance Misuse

Investment	Spend Allocation	Timeframe
<p><b>Care and Cluster programme</b> Investment in a pilot project to provide accommodation and support packages (aided by a mentor support pathway to secure move on and sustain positive community links)</p>	<p><b>£240,000</b></p>	<p><b>2010/13</b></p>
<p><b>Care Farm Housing Support Programme</b> Investment in a pilot project to provide care farm intervention for chaotic lifestyles, and aid and enhance independent housing related living skills; whilst providing specialist support to reduce the risk of misuse.</p>	<p><b>£100,000</b></p>	<p><b>2010/13</b></p>
<p><b>Wychavon Dept Health project (Alcohol support programme)</b> Floating and accommodation based support for alcohol misuse in Wychavon, targeting unmet need and supporting investment from Dpt. Health.</p>	<p><b>£225,000</b></p>	<p><b>2010/2013</b></p>
<p><b>Outcome:</b></p> <ul style="list-style-type: none"> <li>• The provision of Low-level and floating support for individuals with drugs and alcohol problems;</li> <li>• Complementing low-level community interventions and alignment to the strategic direction of the Drug and Alcohol Action Team partnership</li> <li>• Provision to address the demand profile within the County, and remains equitable.</li> <li>• Development of move on support functions, for instance life coaching / mentoring to aid and support transitions.</li> </ul>		
<p><b>Variation on spend</b> Investment will be supported by non recurrent budget, for 2010/11.</p>		

Contracts will be reviewed within the next 12 months, and reviews scheduled strategically over the period of this strategy. The review will look into strategic fit and benchmark / value for money within contracts. We anticipate a depreciating budget (in line with other public funding) post 2010/11, and seek to enable a balance between service provision and opportunity. We will also seek to update the commissioning priorities as a result of the forthcoming work plan for the Drug and Alcohol Action Team.

## Investment Plan 2010/2011: Client Group: Ex-Offenders

Investment	Spend Allocation	Timeframe
<p><b>Mentoring and life coaching Support Programme</b> Investment in a pilot programme of mentoring and life coaching support for ex offenders. To improve and sustain move on rates, and to empower previous service users to volunteer, improve access to employment and training opportunities. (This could cut across a range of client groups –young people at risk, Domestic Abuse, Substance Misuse, Teenage Parents.)</p>	<p><b>£150,000</b></p>	<p><b>2010/2013</b></p>
<p><b>Outcome:</b></p> <ul style="list-style-type: none"> <li>• Ensure that provision of effective offending behaviour support programmes (housing related needs) aimed at the low / medium and high risk offenders, within the community, are implemented effectively to reduce and stop further offending based on research and intelligence in terms of need per district.</li> <li>• Ensure housing related provision supports offenders in accessing training and employment opportunities, as this is identified as a very effective mechanism in helping previously unemployed offenders live crime-free lives</li> <li>• Ensure that we have a mixed economy of both low, medium and high risk offenders within the current portfolio of provision.</li> <li>• Development of move on support functions, for instance life coaching / mentoring to aid and support transitions.</li> </ul>		
<p><b>Variation on spend</b> Investment will be supported by non recurrent budget, for 2010/11.</p> <p>Contracts will be reviewed within the next 12 months, and reviews scheduled strategically over the period of this strategy. The review will look into strategic fit and benchmark / value for money within contracts. We anticipate a depreciating budget (in line with other public funding) post 2010/11, and seek to enable a balance between service provision and opportunity. We will also develop a strategy to ensure future provision can be realigned to fed into the recommendations</p>		

of the Older Person Housing Strategy 2009 (this will involve consultation), once aware of financial settlement.

## Investment Plan 2010/2011: Client Group: Domestic Abuse

Investment	Spend Allocation	Timeframe
<p><b>Needs analysis programme</b> Investment in a needs analysis programme – bringing together key statistics throughout partner agencies and developing a needs led approach to planning of key services. This will identify gaps, opportunities for joint working, identify funding sources and plan and develop a joint work plan between SP and Domestic Abuse</p>	<p><b>£60,000</b></p>	<p><b>2010/2012</b></p>
<p><b>South Worcestershire Review Implementation programme</b> Umbrella of projects implementing recommendations of the review.</p>	<p><b>£100,000</b></p>	<p><b>2010/13</b></p>
<p><b>Perpetrator Programme</b> Countywide perpetrator preventative programme to be established throughout the county, working in partnership with the Forum Against Domestic Abuse.</p>	<p><b>£250,000</b></p>	<p><b>2010/2013</b></p>
<p><b>Outcome:</b></p> <ul style="list-style-type: none"> <li>• Ensure that Supporting People provision is available to meet a targeted response to the needs of specific vulnerable groups including Gypsy and Traveller Communities; Rural Communities; Vulnerable Adults – drugs, alcohol, mental health, older people; Young Adults.</li> <li>• Work in Partnership with the Domestic Abuse unit, ensuring a portfolio of provision is applied throughout the county (specifically looking at both prevention (including perpetrator programmes) and recovery/resettlement programmes).</li> <li>• Work in conjunction with the WFADA in regard to a Safer Housing strategy, including a needs assessment of need and options within the county.</li> </ul>		

- Continue to work strategically with WFADA on improving practice through training, service standards and outcome / data monitoring with current provision within the Supporting People programme in Worcestershire.
- To work strategically with the Domestic Abuse Forum to ascertain the needs of the County and allocate resource to meet identified housing related needs.
- Development of move on support functions, for instance life coaching / mentoring to aid and support transitions.

**Variation on spend**

Investment will be supported by non recurrent budget, for 2010/11.

Contracts will be reviewed within the next 12 months, and reviews scheduled strategically over the period of this strategy. The review will look into strategic fit and benchmark / value for money within contracts. We anticipate a depreciating budget (in line with other public funding) post 2010/11, and seek to enable a balance between service provision and opportunity. We will also develop a strategy to ensure future provision can be realigned to fed into the recommendations of the Older Person Housing Strategy 2009 (this will involve consultation), once aware of financial settlement.

## Investment Plan 2010/2011: Client Group: Homeless – single and family

Investment	Spend Allocation	Timeframe
<p><b>Referral Gateway project</b> Development and integration of a gateway referral mechanism for the allocation and identification of resource within the county.</p>	<p><b>£60,000 (recurrent)</b></p>	<p><b>2010/2013</b></p>
<p><b>Countywide Floating Homeless Support Provision</b> Investment in a pilot project to identify and supply a service to homelessness / rough sleeping throughout the county – signposting and facilitating, and reducing the flow of service users to Worcester City.</p>	<p><b>£225,000</b></p>	<p><b>2010/13</b></p>
<p><b>Extended provision of a Night Assessment Centre</b> In addition to recurrent funding already established and allocated, to pilot the outcomes achieved by increasing opening hours of the NAC for periods of unexpected / harsh cold/wet conditions, and to support the end to rough sleeping agenda.</p>	<p><b>£75,000</b></p>	<p><b>2010/2013</b></p>
<p><b>Move On Project (MOP)</b> Move on protocol project for Worcestershire</p>	<p><b>30,000</b></p>	<p><b>2010/2013</b></p>
<p><b>Outcome:</b></p> <ul style="list-style-type: none"> <li>• Ensure preventive agenda is extended throughout the County, including the introduction of a single service gateway and improved systems such as common monitoring and common assessment</li> <li>• Crisis intervention: emergency access accommodation and street outreach, often dealing with high vulnerability</li> </ul>		

- and complex needs.
- Supported independent living: supported accommodation for single homeless people, offenders and substance misusers.
- 'Preparation for independent living': floating support, which can be generic or specialist. Some focuses solely on crisis intervention work, some are specialist services and other floating support moves with the person through different types of accommodation.
- Ensure provision continues to complement housing strategies countywide, and remains equitable based on need.
- Development of move on support functions, for instance life coaching / mentoring to aid and support transitions.

**Variation on spend**

Investment will be supported by non recurrent budget, for 2010/11.

Contracts will be reviewed within the next 12 months, and reviews scheduled strategically over the period of this strategy. The review will look into strategic fit and benchmark / value for money within contracts. We anticipate a depreciating budget (in line with other public funding) post 2010/11, and seek to enable a balance between service provision and opportunity. We will also develop a strategy to ensure future provision can be realigned to fed into the recommendations of the Older Person Housing Strategy 2009 (this will involve consultation), once aware of financial settlement.



## Investment Plan 2010/2011: Client Group: Physical Disability and Visual Impairment

Investment	Spend Allocation	Timeframe
<p><b>Strategic Review of Need</b> Investment in a strategic Review to identify commissioning priorities and joint commissioning opportunities.</p>	<p><b>£25,000</b></p>	<p><b>April - August</b></p>
<p><b>Implementation programme</b> Programme of projects enabling the recommendations of the review to be implemented.</p>	<p><b>£100,000</b></p>	<p><b>2010/2013</b></p>
<p><b>Outcome:</b></p> <ul style="list-style-type: none"> <li>• To undertake a strategic needs analysis of physical disability and sensory impairment provision within Worcestershire. Working in partnership with key stakeholders (policy makers, physical disability and sensory impairment commissioners, providers and service users) the review will provide a strategic framework for commissioning intentions for Worcestershire's Supporting People programme seeking to add value to existing provision, create a real life account for gaps in provision, identify opportunities for joint commissioning and create alignment to Local Area Agreement priorities (current and potential).</li> <li>• To ensure that existing provision and any newly commissioned provision is enabling people to access supported housing and low level housing related support, in addition to identifying social inclusion activity.</li> </ul>		
<p><b>Variation on spend</b> Investment will be supported by non recurrent budget, for 2010/11.</p> <p>Contracts will be reviewed within the next 12 months, and reviews scheduled strategically over the period of this strategy. The review will look into strategic fit and benchmark / value for money within contracts. We anticipate a depreciating budget (in line with other public funding) post 2010/11, and seek to enable a balance between service provision and opportunity. We will also develop a strategy to ensure future provision can be realigned to fed into the recommendations of the Older Person Housing Strategy 2009 (this will involve consultation), once aware of financial settlement.</p>		

## Investment Plan 2010/2011: Client Group: Mental Health

<b>Investment</b>	<b>Spend Allocation</b>	<b>Timeframe</b>
<p><b>Strategic Review of Need</b> Investment in a strategic Review to identify commissioning priorities and joint commissioning opportunities.</p>	<p><b>£40,000</b></p>	<p><b>April - August</b></p>
<p><b>Implementation programme</b> Programme of projects enabling the recommendations of the review to be implemented.</p>	<p><b>£100,000</b></p>	<p><b>2010/2013</b></p>
<p><b>Outcome:</b></p> <ul style="list-style-type: none"> <li>• To undertake a strategic needs analysis of mental health provision within Worcestershire. The review will provide a strategic framework for commissioning intentions for Worcestershire's Supporting People programme seeking to add value to existing provision, create a real life account for gaps in provision, identify opportunities for joint commissioning and create alignment to Local Area Agreement priorities (current and potential).</li> <li>• Within existing provision, increase the awareness of mental health issues and capacity build to assist programmes in identifying early someone's mental health deterioration.</li> <li>• Within existing provision, support the drive for an equitable provision of mental health support programmes providing community based support, opportunities for training, education, employment, housing and support to develop networks (inclusion activities) and assist move on.</li> <li>• Within existing provision, support the drive for equitable provision of support for people with a mental health illness to return to their home or supported living arrangement at the earliest opportunity that their condition allows. This provision should include a coordination of multi agency support in regard to health, housing and social care agreed with patients and their carers.</li> <li>• Ensure appropriate choice is developed within Supporting People initiatives to aid recovery, increase social integration , enable maintenance of social networks and provide opportunities for increased independence, including return to appropriate employment.</li> <li>• Within existing mental health provision, ensure move on is a priority, to ensure independent living opportunities and throughout.</li> </ul>		
<p><b>Variation on spend</b> Investment will be supported by non recurrent budget, for 2010/11.</p>		

Contracts will be reviewed within the next 12 months, and reviews scheduled strategically over the period of this strategy. The review will look into strategic fit and benchmark / value for money within contracts. We anticipate a depreciating budget (in line with other public funding) post 2010/11, and seek to enable a balance between service provision and opportunity. We will also develop a strategy to ensure future provision can be realigned to fit into the recommendations of the Older Person Housing Strategy 2009 (this will involve consultation), once aware of financial settlement.

## Investment Plan 2010/2011: Client Group: Learning Disability

Investment	Spend Allocation	Timeframe
<p><b>Strategic Review of Need</b> Investment in a strategic Review to identify commissioning priorities and joint commissioning opportunities.</p>	<p><b>£20,000</b></p>	<p><b>April - August</b></p>
<p><b>Implementation programme</b> Programme of projects enabling the recommendations of the review to be implemented.</p>	<p><b>£100,000</b></p>	<p><b>2010/2013</b></p>
<p><b>Outcome:</b></p> <ul style="list-style-type: none"> <li>• Provision should seek to enhance greater choice and control, the use of community-based activities, with greater opportunities to integrate with increased accessibility, an emphasis on leisure, work and learning opportunities regardless of disability and, importantly, a desire to ensure that social contact with friends is maintained.</li> <li>• Ensure that provision identifies the needs of carers, in addition to the service user.</li> <li>• Ensure that programmes within our portfolio achieve multi faceted outcomes, and that provision works alongside each other with the adaptability to meet choice and control expectations.</li> </ul>		
<p><b>Variation on spend</b> Investment will be supported by non recurrent budget, for 2010/11.</p> <p>Contracts will be reviewed within the next 12 months, and reviews scheduled strategically over the period of this strategy. The review will look into strategic fit and benchmark / value for money within contracts. We anticipate a depreciating budget (in line with other public funding) post 2010/11, and seek to enable a balance between service provision and opportunity. We will also develop a strategy to ensure future provision can be realigned to fed into the recommendations of the Older Person Housing Strategy 2009 (this will involve consultation), once aware of financial settlement.</p>		

## Investment Plan 2010/2011: Client Group: Gypsy and Travellers

Investment	Spend Allocation	Timeframe
<p><b>Strategic Review of Need</b> Investment in a strategic Review to identify commissioning priorities and joint commissioning opportunities.</p> <p><b>Outcome:</b></p> <ul style="list-style-type: none"> <li>• To carry out a strategic review of the Gypsy and Traveller community within Worcestershire (and neighbouring authorities where appropriate) to ascertain the housing related support needs of this client group. The recommendations of this review will provide support for investment decisions to be made within the lifetime of this strategy.</li> <li>• Within existing provision, ensure that Gypsies and Travellers are recognised within the diversity and training of providers;</li> <li>• Work strategically with Children Services and stakeholders where appropriate to support families in existing provision seeking support, specifically around education or access, and also health (families who travel may not have a regular doctor). Providers will be expected to work closely with Health Visitor's/practitioners about specialist health support available to this community.</li> <li>• Identify the needs of older communities specifically in terms of adaptations and health.</li> </ul> <p><b>Variation on spend</b> Investment will be supported by non recurrent budget, for 2010/11.</p> <p>Contracts will be reviewed within the next 12 months, and reviews scheduled strategically over the period of this strategy. The review will look into strategic fit and benchmark / value for money within contracts. We anticipate a depreciating budget (in line with other public funding) post 2010/11, and seek to enable a balance between service provision and opportunity. We will also develop a strategy to ensure future provision can be realigned to fed into the recommendations of the Older Person Housing Strategy 2009 (this will involve consultation), once aware of financial settlement.</p>	<p><b>£30,000</b></p>	<p><b>June - October</b></p>

# Appendix 2

## Current supply profile

The total number of Supporting People funded household units (hereafter, HHUs) in Worcestershire is  
Average: 12,043  
Maximum: 15,572

- 126 services with 60 providers;
- 27 accommodation based services
- 73 floating support services
- 24 Call Alarm services
- 2 HIA<sup>21</sup>

In terms of our progress from the previous Supporting People Strategy (2005-2010) there has been a move from accommodation based services to more floating support, outreach and resettlement. This has enabled the Supporting People team to commission a more flexible supply of support to people that are in need, and moving away from being able to access the support on the caveat of where you live / your tenure.

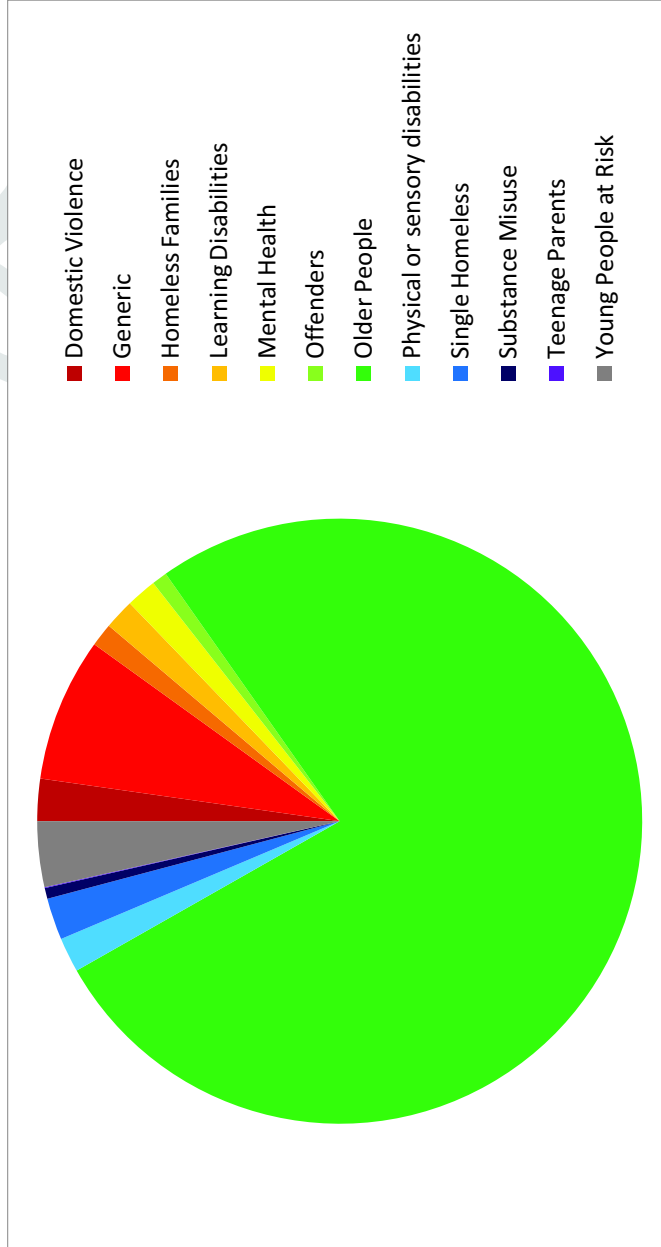
Client Group	Number of Services	Max Number Supported
<b>Domestic Violence</b>	4	351
<b>Generic</b>	12	1197
<b>Homeless Families</b>	5	193
<b>Learning Disabilities</b>	12	252
<b>Mental Health</b>	11	254
<b>Offenders</b>	3	127
<b>Older People</b>	47	11918
<b>Physical or sensory disabilities</b>	5	289

<sup>21</sup> As at December, 2009

Single Homeless	12	348
Substance Misuse	2	90
Teenage Parents	1	7
Young People at Risk	12	546

The following split of household units between client groups (as identified below) is:

- 77% of the available household units are for older people.



## Appendix 3

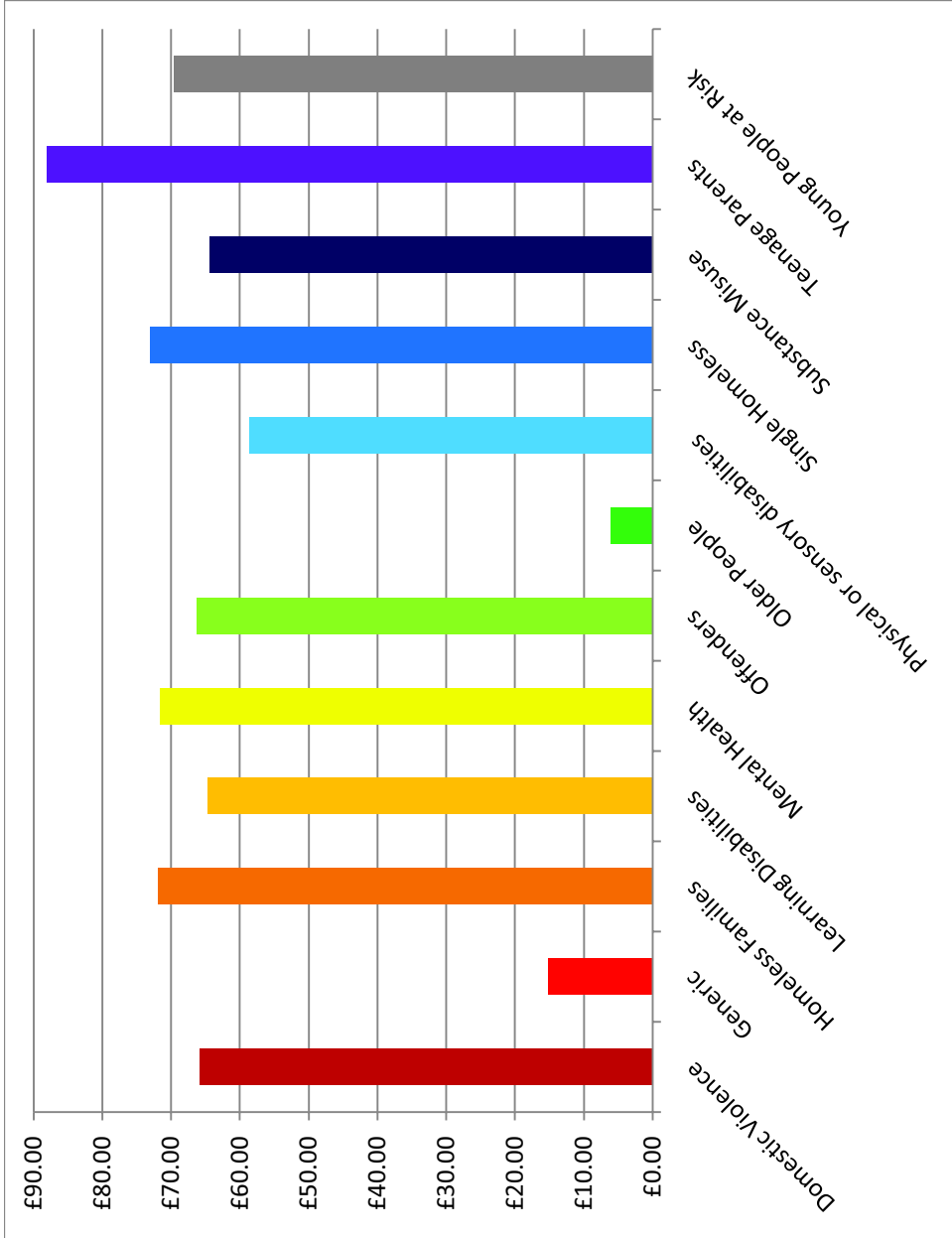
### Current resource profile

Range of unit costs per week is from £6.06 for older people's services to £87.95 for teenage parents.

Most client groups unit costs per week are between £58 and £73. All services are commissioned with the principle that the meet national/regional benchmarking expectations. The difference in cost is reflective of the type of support being offered.

Client Group	Cost per unit per week
Domestic Violence	£65.83
Generic	£15.23
Homeless Families	£71.94
Learning Disabilities	£64.60
Mental Health	£71.57
Offenders	£66.28
Older People	£6.06
Physical or sensory disabilities	£58.64
Single Homeless	£72.98
Substance Misuse	£64.37
Teenage Parents	£87.95
Young People at Risk	£69.55





Average/weekly unit cost per client group 2009/10

The chart below shows that while older people account for 77% of HHU's, because the unit cost is low the spending on older peoples services is just 28% of the total. This is representative of the support packages required by the specific client groups and the options available to meet the identified need.

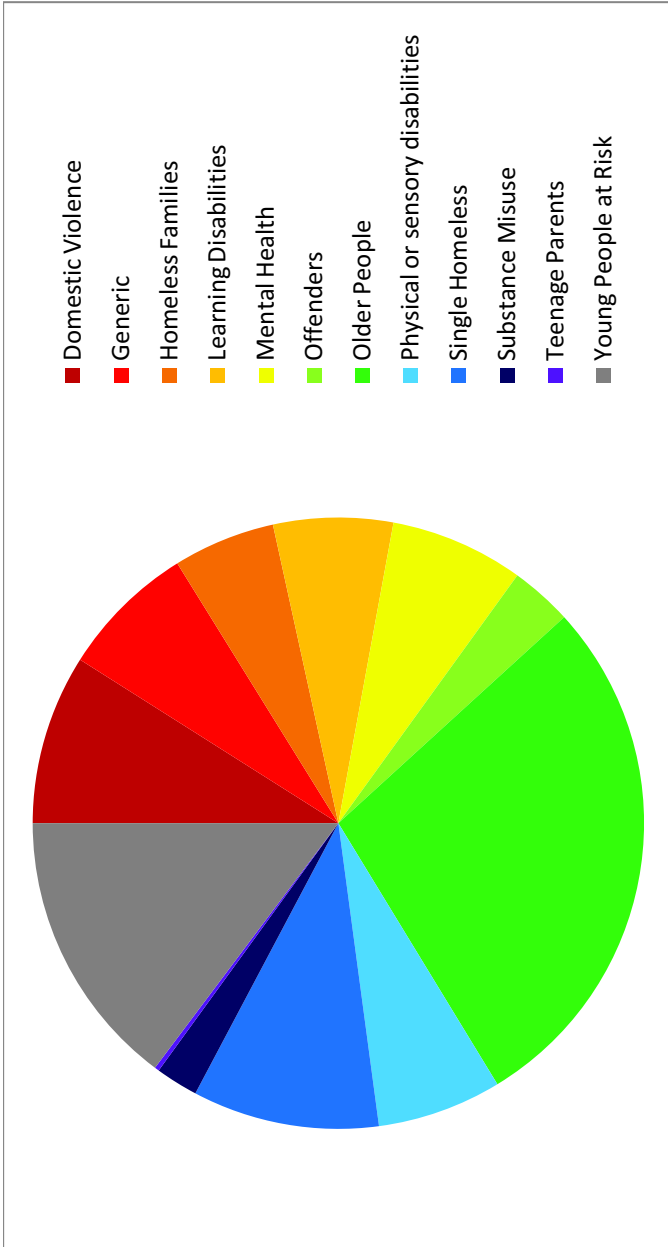


Figure Proportion of spending per client group 2003-04

## Appendix 4

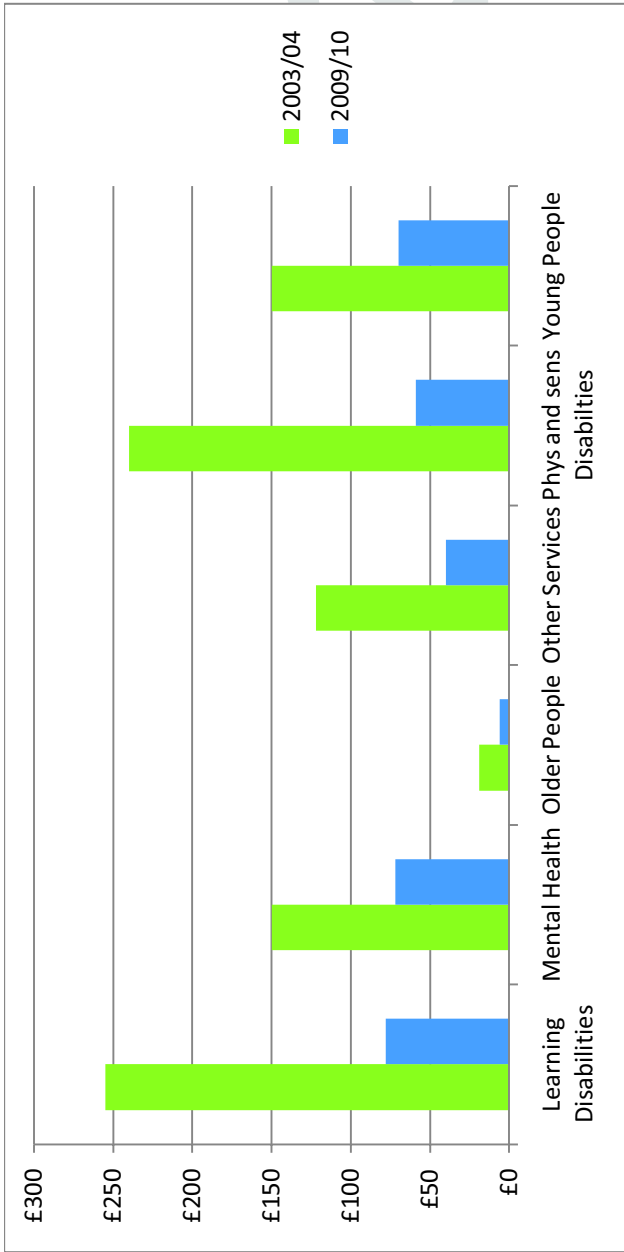
### What's been achieved since the last strategy?

Between 2003/04 at start of previous strategy and 2009/10 at start of new strategy

#### Average Weekly Unit Cost:

	Average weekly unit cost	
	2003/04	2009/10
<b>Learning Disabilities</b>	£255	£78
<b>Mental Health</b>	£150	£72
<b>Older People</b>	£19	£6(*)
<b>Other Services</b>	£122	£40
<b>Phys. and Sens. Disabilities</b>	£240	£59
<b>Young People</b>	£150	£70

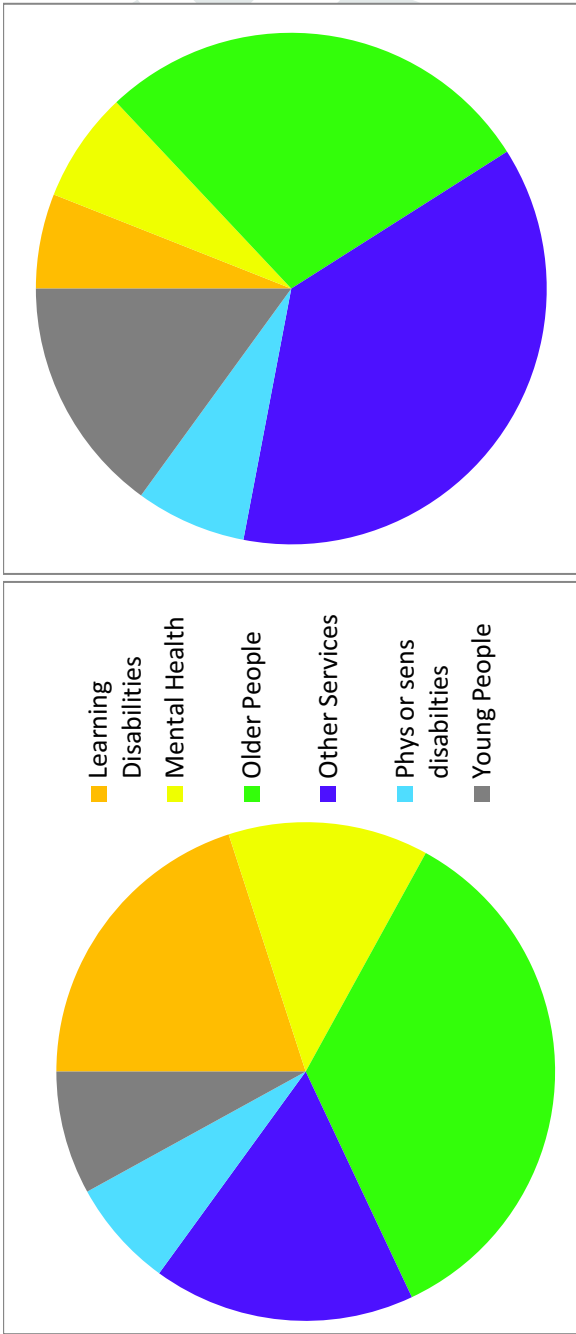
(\* Older People provision also includes call alarms at a lower unit rate than face to face support, hence the disproportionate weekly cost.)



Average Weekly Unit cost – 2003/04 and 2009/10.

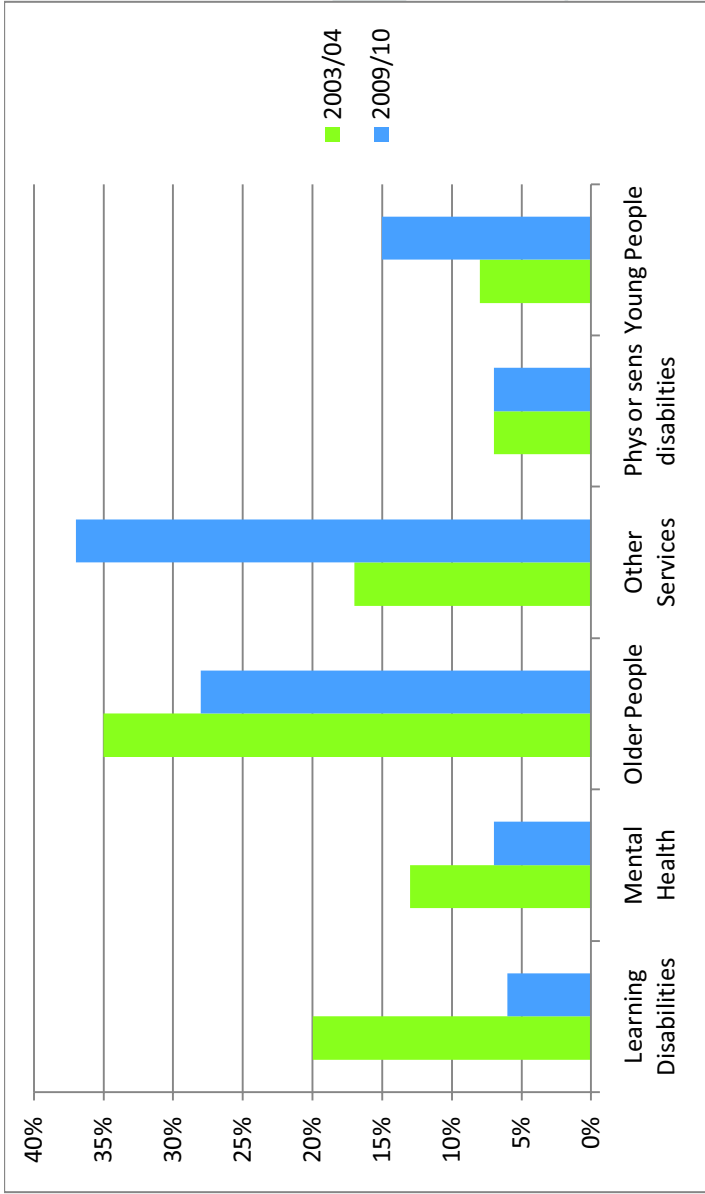
### Comparing Proportion of funding

	2003/04	2009/10
<b>Learning Disabilities</b>	20%	6%
<b>Mental Health</b>	13%	7%
<b>Older People</b>	35%	28%
<b>Other Services</b>	17%	37%
<b>Phys. or Sens. Disabilities</b>	7%	7%
<b>Young People</b>	8%	15%



Proportion of spend – 2003/04 on the left and 2009/10 on the right.

Proportions spent on LD, MH and OP have gone down, with that spent on 'other' increasing. It is envisaged that this portfolio will remain largely the same; and revisited once we are aware of funding allocations in the future.



Proportion of overall SP spending.

Proportion spent on 'other' client groups has more than doubled to be the biggest spend.

**Other details for comparison listed in the previous strategy**

	2003/04	2009/10
<b>Average HHUS</b>	8473	12046
<b>Number of Contracts</b>	120	127
<b>Number of Providers</b>	97	60
<b>Accommodation Services</b>	225	27
<b>Floating Support (and other)</b>	51	100

There are 3573 more places available with a similar number of services, however there is an obvious shift from accommodation based to floating support type services.

**Key Points of comparison:**

- The average weekly unit cost for all client groups has fallen by at least 50% between 2003/04 and 2009/10, as a result of value for money activity and contract development
- The proportion of spending on Learning Disabilities, Mental Health and Older People has gone down while there has been a corresponding increase in 'other' services which includes more short term, chaotic client groups such as single homeless, substance misuse, offenders, homeless families, generic, teenage parents and domestic violence. – shift in focus away from just providing longer-term services.
- The average number of service users which can be supported has gone up 42% from 2003/04 to 12046 HHU's in 2009/10.
- There is obvious evidence of a change from predominantly accommodation based services to more floating support services.

# Appendix 5

## Spread across Worcestershire, and by District

District of Delivery	Number of HHU's available	Expected number available based on district population
Countywide	2700	-
Bromsgrove	1624	2142
Malvern Hills	387	1726
Redditch	2834	1846
Worcester City	2536	2173
Wychavon	1789	2709
Wyre Forest	3706	2280
<b>Total Number of District Specific services - 12876</b>		

These figures are representative of the identified need at a District level, illustrating that Redditch, Worcester City and Wyre Forest have a differing demographic to that of Wychavon, Malvern and Bromsgrove. Though, acknowledging that need is presentable within all 6 Districts to a significant degree. Continual needs analysis of need, linking into specifically commissioned pieces of strategic needs work and the data held within the Local Area Agreement framework will support our commissioning intentions.



# District Report – Bromsgrove

(captured in the financial year 2008/09)

## Service provision

16 services were district specific to Bromsgrove (this includes services which may be district specific to 2 or 3 districts). These services can support an average of 1.180 people at any one time. District specific services represent 7 of the client groups.

Client Group	Number of district specific services	Number of countywide support services
Domestic Abuse		3
Generic		1
Homeless Families	1	2
Learning Disabilities		3
Mental Health	2	4
Offenders	1	2
Older People	8	3
Physical or Sensory Disabilities	1	2
Single Homeless	1	1
Substance Misuse		1
Teenage Parents		
Young People at Risk	2	2
<b>Total</b>	<b>16</b>	<b>24</b>

Table 1. Supporting People services in Bromsgrove, 2008/09 by client group.

## Service user demand

Service user demand can be assessed using the client record data which records which local authority district a user was living in prior to entry into a service. As previously mentioned in the discussion of the client record data this gives an under estimate of new service users in the older peoples client group as in 2008/09 sheltered housing accommodation were not required to submit the client record data for new clients. These people may be a significant proportion of new service users in some districts.

A total of 1855 new service users submitted client record data across the county in 2008/09. 157 (8%) of these recorded their previous location as being within the district of Bromsgrove.

Based on the population of Bromsgrove it is calculated that 17% of service users in the Worcestershire Supporting People Programme should be coming from Bromsgrove. This estimate does not take into account that a number of users were entering from outside the district so the real expected percentage of service users would be slightly lower.

Client Group	Number of new users	As a percentage of total new users for the client group	Difference from expected 17%
Domestic Abuse	34	7%	- 10%
Generic	3	6%	- 11%
Homeless Families	8	4%	- 13%
Learning Disabilities	1	7%	- 10%
Mental Health	16	12%	- 5%
Offenders	19	25%	+ 8%
Older People	0	0%	- 17%
Physical or Sensory Disabilities	2	6%	- 11%
Single Homeless	20	5%	- 12%
Substance Misuse	5	4%	- 13%
Teenage Parents	0	0%	- 17%
Young People at Risk	49	15%	-2%
<b>Total</b>	<b>157</b>	<b>8%</b>	<b>- 9%</b>

**Table 2. Actual and expected new service users from Bromsgrove, 2008/09 per client group.**

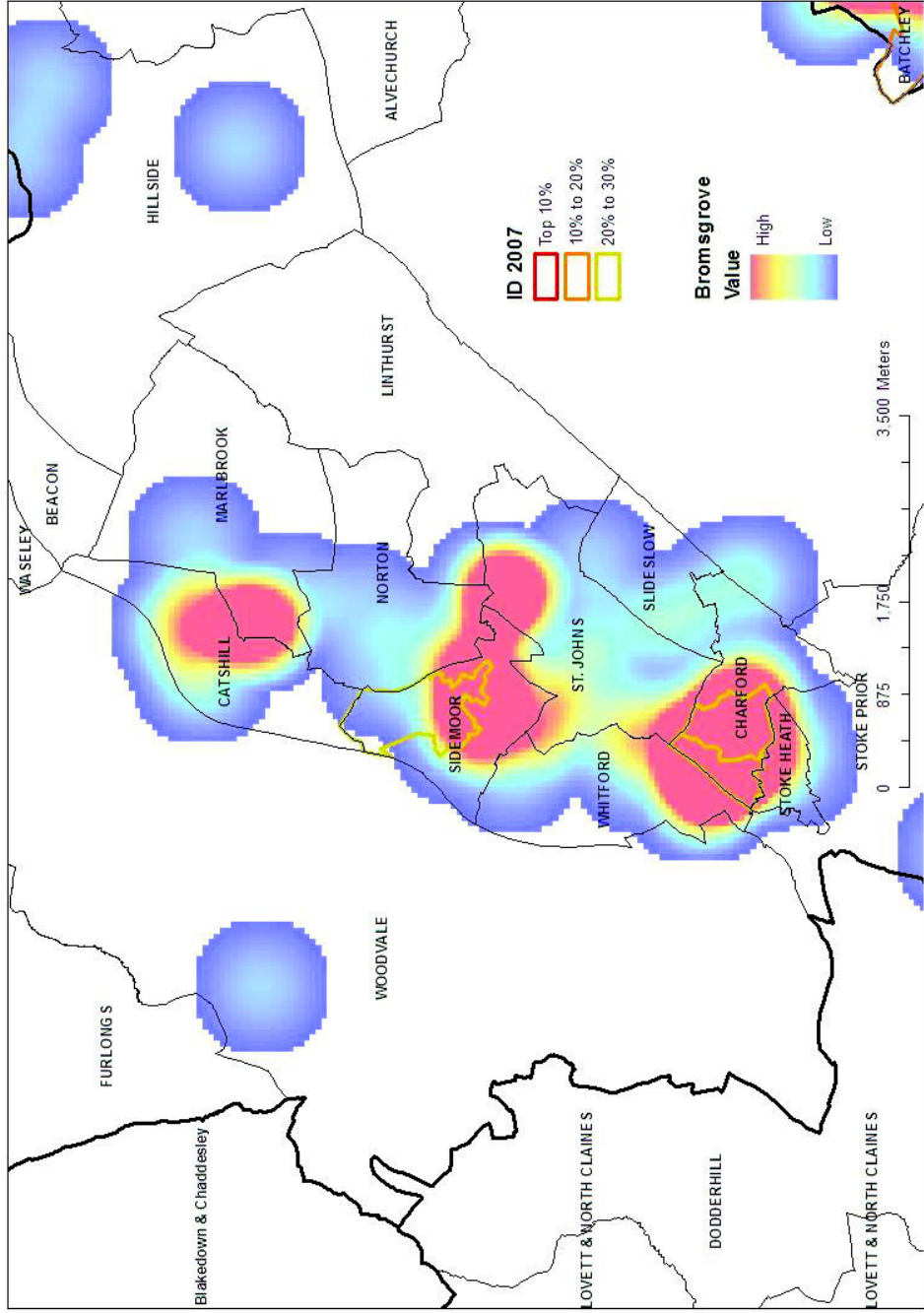
The data in table 2 shows that overall 9% fewer service users are entering the programme than would be expected if based solely on population of the district. Some client groups show a much larger difference.

Valuable future analysis could include looking at the characteristics of the district to see how these affect the demand for services to help investigate better any gaps in service provision which need to be filled.

63% of new service users coming from Bromsgrove actually received the support at the same address. This would be floating support that may be either district specific or countywide. About half of the new users who received the service at another address were entering accommodation based services for offenders, young people or domestic violence. Some others accessing floating support services may have moved on from accommodation based services from supported housing or women's refuge.

### Distribution of service users within district

The map below uses client record data submitted when a new service user enters the programme. It shows a hotspot analysis of the postcode the new user was living in prior to entry into the service. Red areas show large numbers of new service users coming from this area. Also plotted are the areas with a rank in the top 30% most deprived areas in 2007.



Map 3. Hotspot analysis of postcode of new service users, 2008/09 and top 30% rank of Indices of Deprivation, 2007.

Source: Client Record Data, 2008/09 and IMD 2007

There are three main hotspots which appear on the map. The first in Charford contains the most new service users and corresponds with 2 areas in the top 30% most deprived the hotspot over Sidemoor also coincides to a certain extent with a deprived area. The third hotspot over Catshill does not have a corresponding deprived area. This shows that it is not just deprivation which has an impact on whether residents are likely to need a Supporting People service. A number of the wards in Bromsgrove, particularly the rural ones have very little demand for services.

The demand information could be used possibly to inform where new services should be located but also where information about services needs to be displayed and available. In higher demand areas extra effort could be made to make sure GPs are aware of services and information about them can be found in local community centres or shops.

# District Report – Malvern Hills

(captured in the financial year 2008/09)

## Service provision

18 services were district specific to Malvern Hills (this includes services which may be district specific to 2 or 3 districts). These services can support an average of 352 people at any one time. District specific services represent 5 of the client groups.

Client Group	Number of district specific services	Number of countywide support services
Domestic Abuse		3
Generic		1
Homeless Families		2
Learning Disabilities	1	3
Mental Health	2	4
Offenders		2
Older People	7	3
Physical or Sensory Disabilities		2
Single Homeless	1	1
Substance Misuse		1
Teenage Parents		
Young People at Risk	2	2
<b>Total</b>	<b>13</b>	<b>24</b>

Table 1. Supporting People services in Malvern Hills, 2008/09 by client group.

## Service user demand

Service user demand can be assessed using the client record data which records which local authority district a user was living in prior to entry into a service. As previously mentioned in the discussion of the client record data this gives an under estimate of new service users in the older peoples client group as in 2008/09 sheltered housing accommodation were not required to submit the client record data for new clients. These people may be a significant proportion of new service users in some districts.

A total of 1855 new service users submitted client record data across the county in 2008/09. 143 (8%) of these recorded their previous location as being within the district of Malvern Hills.

Based on the population of Malvern Hills it is calculated that 13% of service users in the Worcestershire Supporting People Programme should be coming from Malvern Hills. This estimate does not take into account that a number of users were entering from outside the district so the real expected percentage of service users would be slightly lower.

Client Group	Number of new users	As a percentage of total new users for the client group	Difference from expected 13%
Domestic Abuse	39	8%	- 5%
Generic	3	8%	- 5%
Homeless Families	1	0%	- 13%
Learning Disabilities	0	0%	- 13%
Mental Health	14	10%	- 3%
Offenders	3	4%	- 9%
Older People	5	8%	- 5%
Physical or Sensory Disabilities	4	12%	- 1%
Single Homeless	50	14%	+ 1%
Substance Misuse	5	4%	- 9%
Teenage Parents	0	0%	- 13%
Young People at Risk	19	6%	- 7%
<b>Total</b>	<b>143</b>	<b>8%</b>	<b>- 5%</b>

**Table 2. Actual and expected new service users from Malvern Hills, 2008/09 per client group.**

The data in table 2 shows that overall 5% fewer service users are entering the programme than would be expected if based solely on population of the district. Some client groups show a much larger difference.

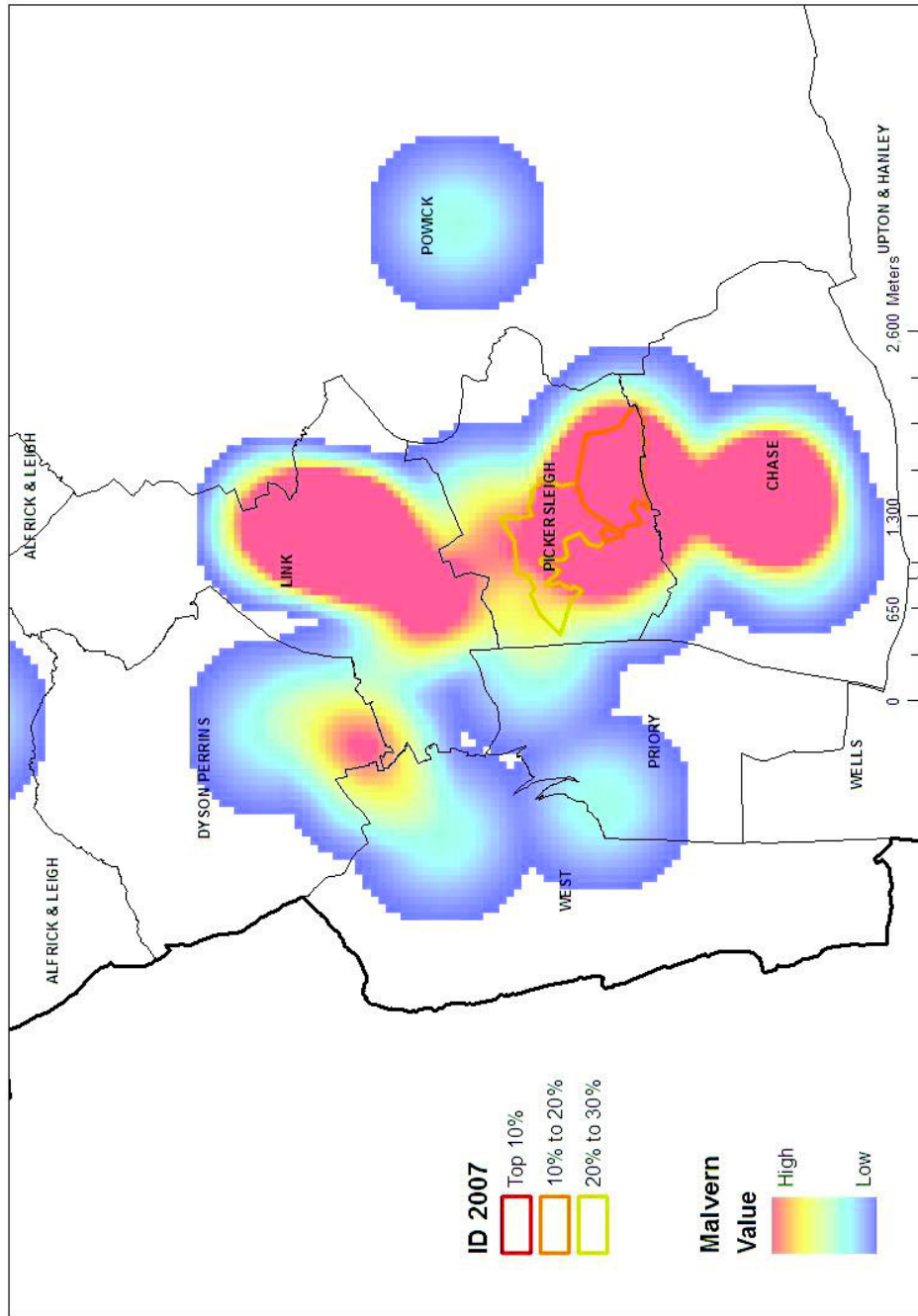
Valuable future analysis could include looking at the characteristics of the district to see how these affect the demand for services to help investigate better any gaps in service provision which need to be filled.

**Distribution of service users within district**

The postcode of where a new service user was living prior to entry into a service is recorded. These can be mapped and an analysis done to show where the concentrations of new service users or hotspots are. Map 3 shows these hotspots.



A number of the wards in Malvern Hills District, particularly the rural ones have very little demand for services and so the hotspot analysis is focused on Malvern town itself. Also mapped are those areas which have been ranked in the top 30% in the country for the indices of deprivation.



Map 3. Hotspot analysis of postcode of new service users, 2008/09 and top 30% rank of Indices of Deprivation, 2007.

Source: Client Record Data, 2008/09 and IMD 2007

The two areas of deprivation within Pickersleigh ward in Malvern correspond with a hotspot and the highest number of new service users. There are further hotspots in the Link and Chase wards which do not have a corresponding deprivation area. This shows that while deprivation may be a factor in where new service users come from, it is not the only thing important.

The demand information could be used possibly to inform where new services should be located but also where information about services needs to be displayed and available. In higher demand areas extra effort could be made to make sure GPs are aware of services and information about them can be found in local community centres or shops.



# District Report – Redditch

(captured in the financial year 2008/09)

## Service provision

17 services were district specific to Redditch (this includes services which may be district specific to 2 or 3 districts). These services can support an average of 4308 people at any one time. District specific services represent 6 of the client groups.

Client Group	Number of district specific services	Number of countywide support services
Domestic Abuse		3
Generic		1
Homeless Families	1	2
Learning Disabilities	1	3
Mental Health		4
Offenders	1	2
Older People	9	3
Physical or Sensory Disabilities	1	2
Single Homeless		1
Substance Misuse		1
Teenage Parents		
Young People at Risk	4	2
Total	17	24

Table 1. Supporting People services in Redditch, 2008/09 by client group.

## Service user demand

Service user demand can be assessed using the client record data which records which local authority district a user was living in prior to entry into a service. As previously mentioned in the discussion of the client record data this gives an under estimate of new service users in the older peoples client group as in 2008/09 sheltered housing accommodation were not required to submit the client record data for new clients. These people may be a significant proportion of new service users in some districts.

A total of 1855 new service users submitted client record data across the county in 2008/09. 257 (14%) of these recorded their previous location as being within the district of Redditch.

Based on the population of Redditch it is calculated that 14% of service users in the Worcestershire Supporting People Programme should be coming from Redditch. This estimate does not take into account that a number of users were entering from outside the district so the real expected percentage of service users would be slightly lower.

Client Group	Number of new users	As a percentage of total new users for the client group	Difference from expected 14%
<b>Domestic Abuse</b>	66	14%	0%
<b>Generic</b>	5	10%	- 4%
<b>Homeless Families</b>	22	11%	- 3%
<b>Learning Disabilities</b>	0	0%	-14%
<b>Mental Health</b>	17	13%	- 1%
<b>Offenders</b>	12	16%	+ 2%
<b>Older People</b>	0	0%	- 14%
<b>Physical or Sensory Disabilities</b>	6	18%	+ 4%
<b>Single Homeless</b>	0	0%	- 14%
<b>Substance Misuse</b>	18	16%	+ 2%
<b>Teenage Parents</b>	0	0%	-14%
<b>Young People at Risk</b>	111	34%	+ 20%
<b>Total</b>	<b>257</b>	<b>14%</b>	<b>0%</b>

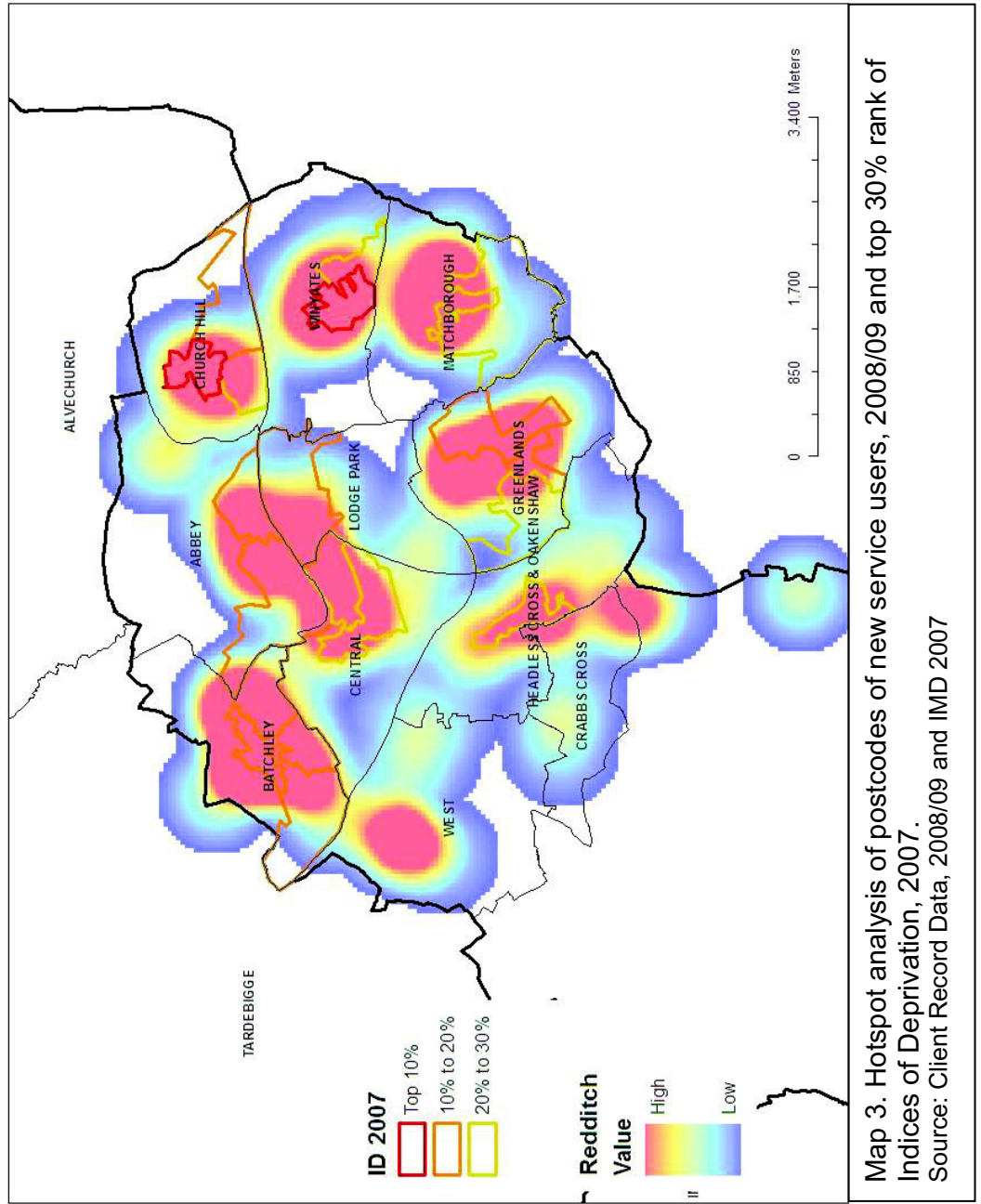
**Table 2. Actual and expected new service users from Redditch, 2008/09 per client group.**

The data in table 2 shows that overall exactly the same percentage of service users are entering the programme as would be expected if based solely on population of the district. However if you look down at the breakdown of this figure between the different client groups you see a very large variation. The majority of client groups have fewer service users entering from Redditch than would be expected based on population numbers. 4 client groups have no new service users from Redditch. However in the young people at risk client group Redditch is actually over represented with 20% more new service users than expected. Most of these people are entering one of the four the district specific services in Redditch.

Valuable future analysis could include looking at the characteristics of the district to see how these affect the demand for services to help investigate better any gaps in service provision which need to be filled.

## Distribution of service users within district

The postcode of where a new service user was living prior to entry into a service is recorded. These can be mapped and an analysis done to show where the concentrations of new service users or hotspots are. Map 3 shows these hotspots. Also mapped are those areas which have been ranked in the top 30% in the country for the indices of deprivation. The map below seems to show a fairly strong correlation between the hotspots and these areas of deprivation. This seems to show that a person is more likely to enter a Supporting People service if they come from a more deprived area.



The demand information could be used possibly to inform where new services should be located but also where information about services needs to be displayed and available. In higher demand areas extra effort could be made to make sure GPs are aware of services and information about them can be found in local community centres or shops.

# District Report – Worcester City

(captured in the financial year 2008/09)

## Service provision

36 services were district specific to Worcester City (this includes services which may be district specific to 2 or 3 districts). These services can support an average of 2976 people at any one time. District specific services represent 9 of the client groups.

Client Group	Number of district specific services	Number of countywide support services
Domestic Abuse		3
Generic		1
Homeless Families	2	2
Learning Disabilities	1	3
Mental Health	1	4
Offenders		2
Older People	10	3
Physical or Sensory Disabilities	1	2
Single Homeless	6	1
Substance Misuse	1	1
Teenage Parents	1	
Young People at Risk	2	2
Total	25	24

Table 1. Supporting People services in Worcester City, 2008/09 by client group.

## Service user demand

Service user demand can be assessed using the client record data which records which local authority district a user was living in prior to entry into a service. As previously mentioned in the discussion of the client record data this gives an under estimate of new service users in the older peoples client group as in 2008/09 sheltered housing accommodation were not required to submit the client record data for new clients. These people may be a significant proportion of new service users in some districts.

A total of 1855 new service users submitted client record data across the county in 2008/09. 621 (33%) of these recorded their previous location as being within the district of Worcester City.

Based on the population of Worcester City it is calculated that 17% of service users in the Worcestershire Supporting People Programme should be coming from Worcester City.

Client Group	Number of new users	As a percentage of total new users for the client group	Difference from expected
<b>Domestic Abuse</b>	161	35%	+ 18%
<b>Generic</b>	15	31%	+ 14%
<b>Homeless Families</b>	90	43%	+ 26%
<b>Learning Disabilities</b>	11	79%	+ 62%
<b>Mental Health</b>	72	54%	+ 37%
<b>Offenders</b>	24	31%	+ 14%
<b>Older People</b>	46	75%	+ 58%
<b>Physical or Sensory Disabilities</b>	1	3%	- 14%
<b>Single Homeless</b>	95	26%	+ 9%
<b>Substance Misuse</b>	42	36%	+ 19%
<b>Teenage Parents</b>	7	100%	+ 83%
<b>Young People at Risk</b>	57	17%	0%
<b>Total</b>	<b>621</b>	<b>33%</b>	<b>+ 16%</b>

**Table 2. Actual and expected new service users from Worcester City, 2008/09 per client group.**

The data in table 2 shows that overall 16% more service users are entering the programme than would be expected if based solely on population of the district. All client groups apart from physical and sensory disabilities are over-represented by new users coming from Worcester City.

Clearly the distribution of new service users is not evenly split between districts by population. Valuable future analysis could include looking at the characteristics of the district to see how these affect the demand for services to help investigate better any gaps in service provision which need to be filled.

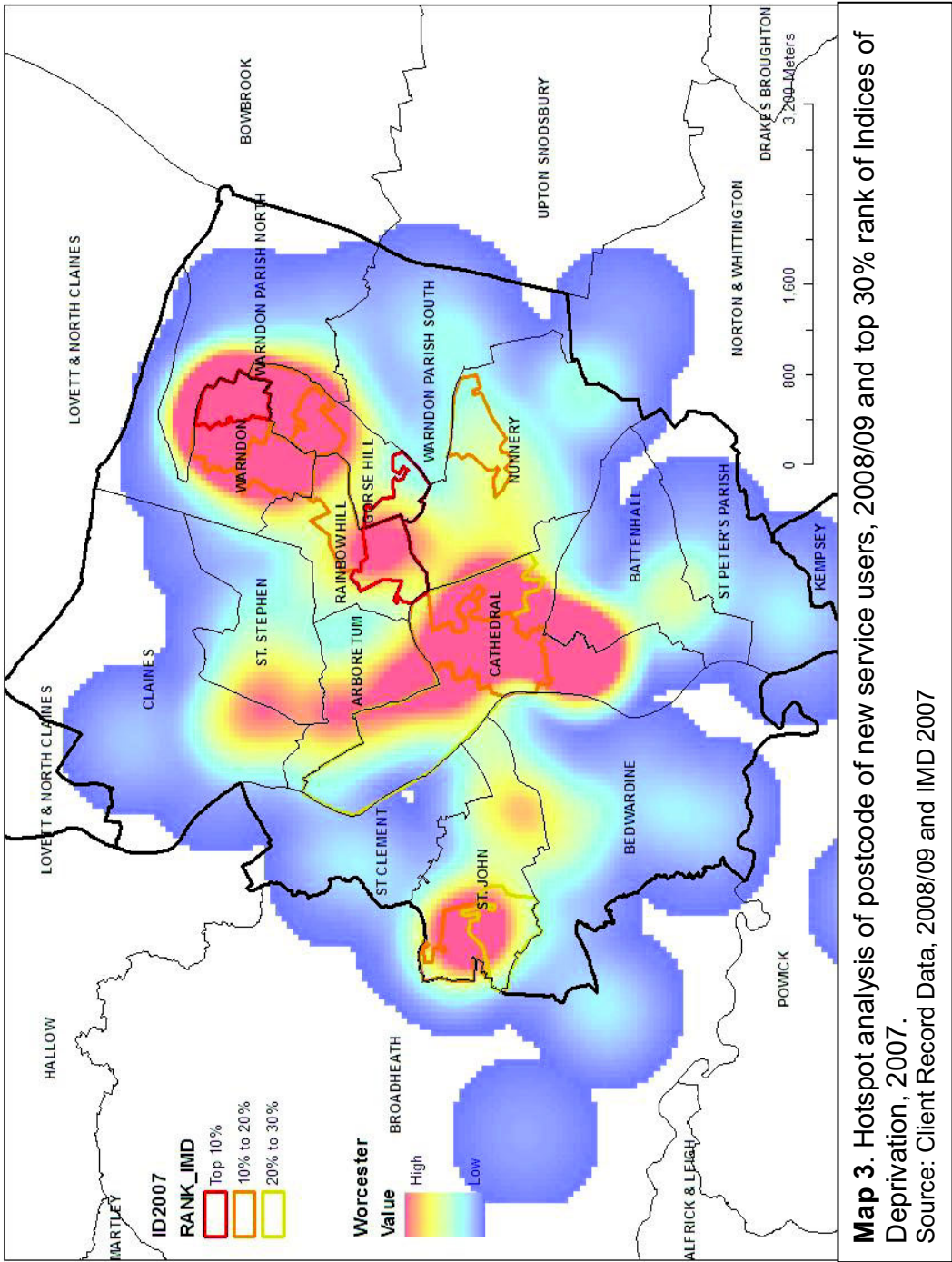
Just 58% of new service users coming from Worcester City entering services remained in the same accommodation. Many of those who did stay at the same address were already in fairly stable accommodation such as owner occupied, or private, housing

association or local authority rental. Those who moved were more likely to have been in unstable accommodation, rough sleeping, bed and breakfast or living with friends. About half of these people then moved into accommodation based services.

#### **Distribution of service users within district**

The postcode of new service users when they enter the Supporting People programme is recorded with the client record data. This information has been mapped and a hotspot analysis undertaken which shows the areas from which a high concentration of new service users have come. Also mapped are those areas which have been ranked in the top 30% in the country for the indices of deprivation.





The map seems to show a fairly strong correlation between the hotspots and these areas of deprivation. This is particularly pronounced around Warndon and Rainbow Hill and Gorse Hill which have areas in the top 10% of ranks of deprived areas



corresponding to hotspots of new service users. The area in St Johns Ward with a concentration of new service users also correlates well to the two areas of top 30% and top 20% of deprivation within this ward.

The demand information could be used possibly to inform where new services should be located but also where information about services needs to be displayed and available. In higher demand areas extra effort could be made to make sure GPs are aware of services and information about them can be found in local community centres or shops.

# District Report – Wychavon

(captured in the financial year 2008/09)

## Service provision

18 services were district specific to Wychavon (this includes services which may be district specific to 2 or 3 districts). These services can support an average of 1514 people at any one time. District specific services represent 7 of the client groups.

Client Group	Number of district specific services	Number of countywide support services
Domestic Abuse		3
Generic	1	1
Homeless Families	1	2
Learning Disabilities	5	3
Mental Health	1	4
Offenders		2
Older People	7	3
Physical or Sensory Disabilities		2
Single Homeless	1	1
Substance Misuse		1
Teenage Parents		
Young People at Risk	2	2
Total	18	24

Table 1. Supporting People services in Wychavon, 2008/09 by client group.

## Service user demand

Service user demand can be assessed using the client record data which records which local authority district a user was living in prior to entry into a service. As previously mentioned in the discussion of the client record data this gives an under estimate of new service users in the older peoples client group as in 2008/09 sheltered housing accommodation were not required to submit the client record data for new clients. These people may be a significant proportion of new service users in some districts.

A total of 1855 new service users submitted client record data across the county in 2008/09. 127 (7%) of these recorded their previous location as being within the district of Wychavon.

Based on the population of Wychavon it is calculated that 21% of service users in the Worcestershire Supporting People Programme should be coming from Wychavon. This estimate does not take into account that a number of users were entering from outside the district so the real expected percentage of service users would be slightly lower.

Client Group	Number of new users	As a percentage of total new users for the client group	Difference from expected 21%
Domestic Abuse	32	7%	- 14%
Generic	5	10%	- 11%
Homeless Families	42	20%	- 1%
Learning Disabilities	1	7%	- 14%
Mental Health	1	1%	- 20%
Offenders	2	3%	- 18%
Older People	7	11%	- 10%
Physical or Sensory Disabilities	0	0%	- 21%
Single Homeless	1	0%	- 21%
Substance Misuse	18	16%	- 5%
Teenage Parents	0	0%	- 21%
Young People at Risk	18	5%	- 16%
<b>Total</b>	<b>127</b>	<b>7%</b>	<b>- 14%</b>

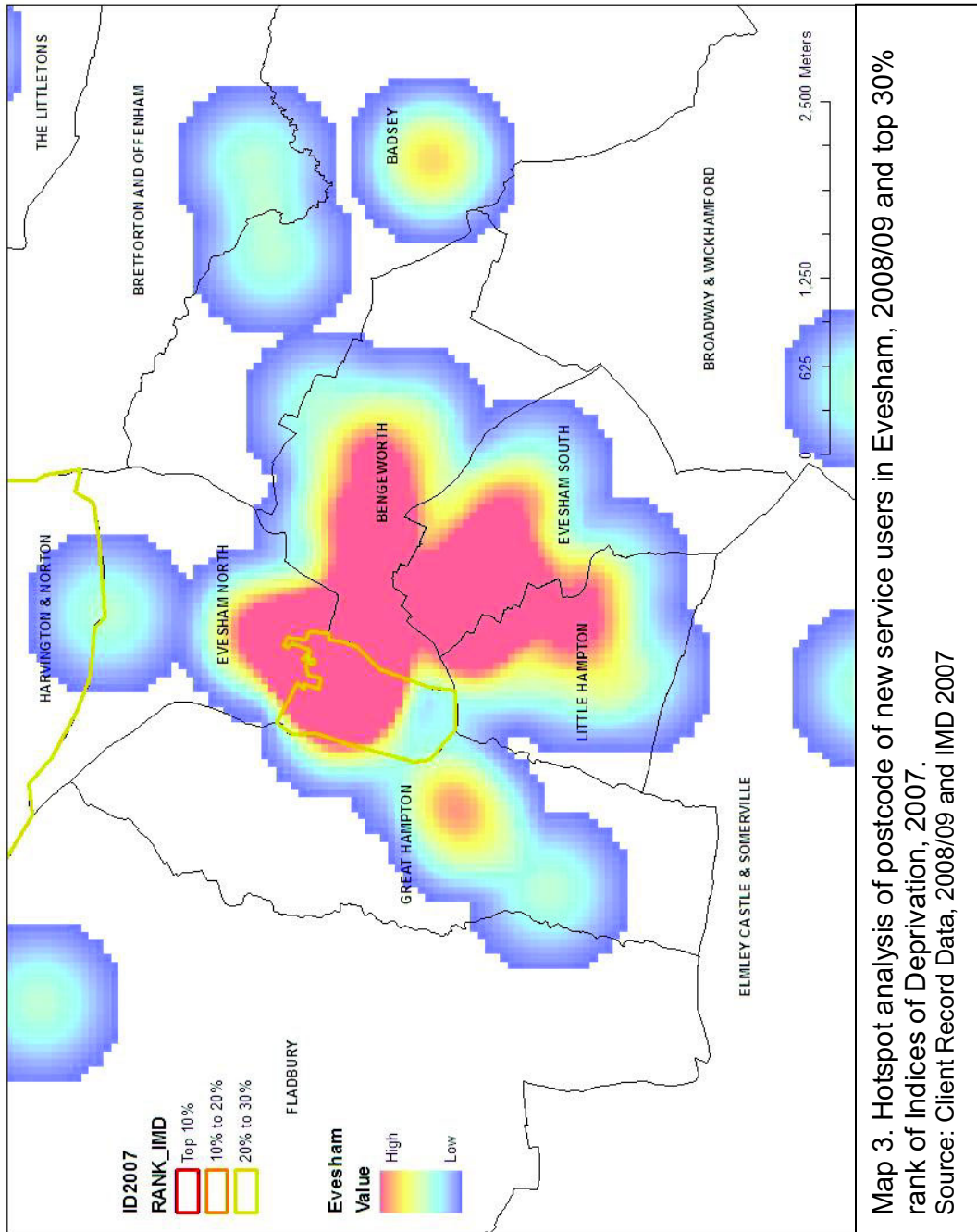
**Table 2. Actual and expected new service users from Wychavon, 2008/09 per client group.**

The data in table 2 shows that overall 14% fewer service users are entering the programme than would be expected if based solely on population of the district. All client groups are under-represented based on their population. The only client group to come anywhere near the expected proportion of new service users is homeless families. Even other client groups which have district specific services are under-represented.

Valuable future analysis could include looking at the characteristics of the district to see how these affect the demand for services to help investigate better any gaps in service provision which need to be filled.

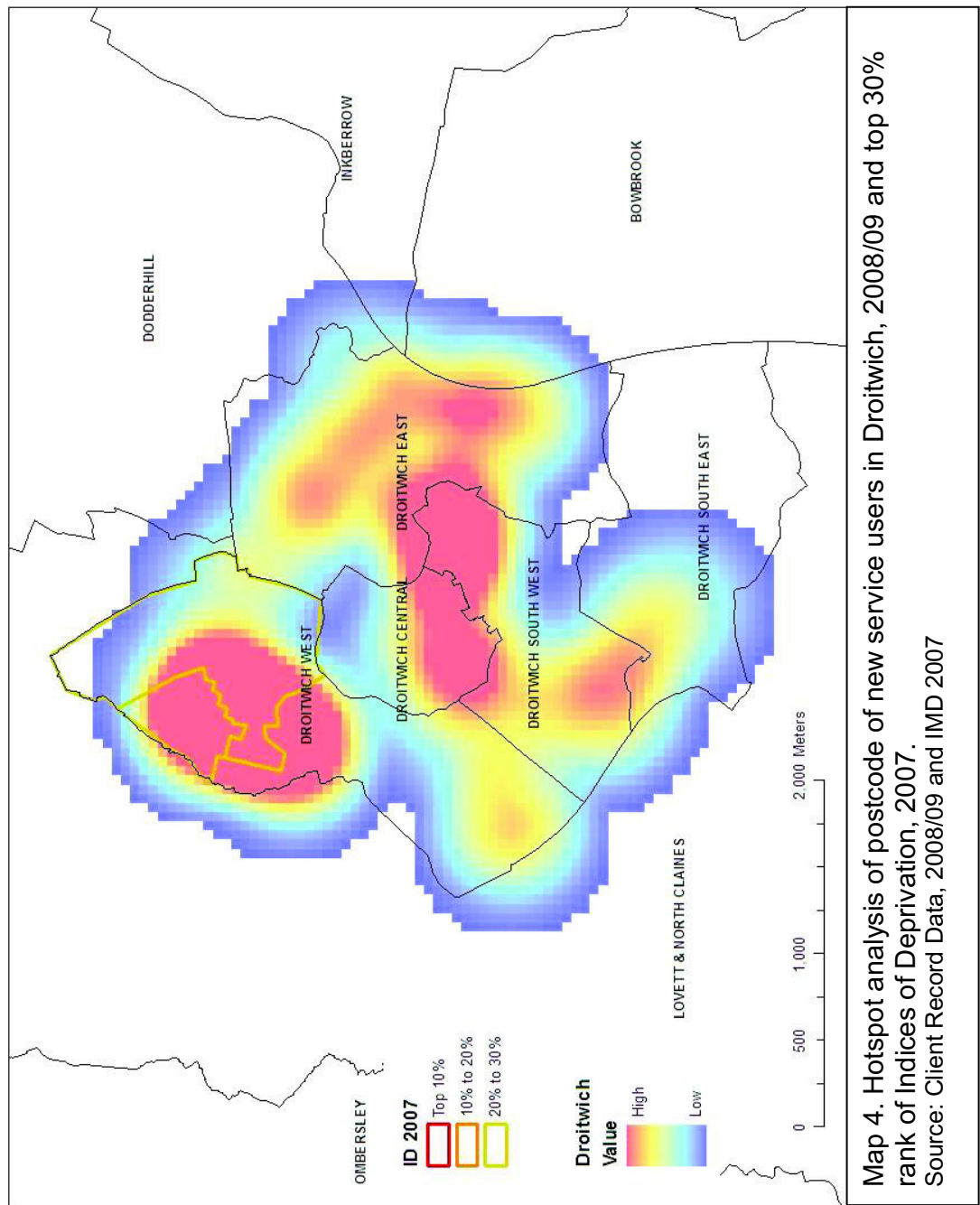
### Distribution of service users within district

Analysis of the distribution of new service users within the district shows that they are clustered in the towns as might be expected. An analysis has been done to show where the service users are coming from in both Evesham and Droitwich. Map 3 looks at Evesham and map 4 looks at Droitwich



Map 3. Hotspot analysis of postcode of new service users in Evesham, 2008/09 and top 30% rank of Indices of Deprivation, 2007.  
Source: Client Record Data, 2008/09 and IMD 2007

There is only one top 30% area of deprivation recorded for Evesham this correlates with some of the hotspots of new users over Evesham North Ward. However, there are further hotspots which extend over Bengeworth and Evesham South which do not have the corresponding deprivation ranks.



Map 4. Hotspot analysis of postcode of new service users in Droitwich, 2008/09 and top 30% rank of Indices of Deprivation, 2007.  
Source: Client Record Data, 2008/09 and IMD 2007

Droitwich West has two areas in the top 30% most deprived areas these correspond with the large hotspot of new service users in this area. There is also a hotspot in the centre of Droitwich covering parts of the central, south west and east wards but no corresponding deprivation in these areas. A number of the wards in Wychavon, particularly the rural ones have very little demand for services.

The results for Evesham and Droitwich show that it is not just deprivation which will mean a person will need to access the Supporting People services. This effect is more pronounced in these towns possibly because of their smaller populations and smaller numbers of service users.

The demand information could be used possibly to inform where new services should be located but also where information about services needs to be displayed and available. In higher demand areas extra effort could be made to make sure GPs are aware of services and information about them can be found in local community centres or shops.



# District Report – Wyre Forest

(captured in the financial year 2008/09)

## Service provision

17 services were district specific to Wyre Forest (this includes services which may be district specific to 2 or 3 districts). These services can support an average of 5215 people at any one time. District specific services represent 5 of the client groups.

Client Group	Number of district specific services	Number of countywide support services
<b>Domestic Abuse</b>		3
<b>Generic</b>		1
<b>Homeless Families</b>		2
<b>Learning Disabilities</b>	2	3
<b>Mental Health</b>	2	4
<b>Offenders</b>		2
<b>Older People</b>	11	3
<b>Physical or Sensory Disabilities</b>	1	2
<b>Single Homeless</b>	1	1
<b>Substance Misuse</b>		1
<b>Teenage Parents</b>		
<b>Young People at Risk</b>		2
<b>Total</b>	<b>17</b>	<b>24</b>

**Table 1. Supporting People services in Wyre Forest, 2008/09 by client group.**

## Service user demand

Service user demand can be assessed using the client record data which records which local authority district a user was living in prior to entry into a service. As previously mentioned in the discussion of the client record data this gives an under estimate of new service users in the older peoples client group as in 2008/09 sheltered housing accommodation were not required to submit the client record data for new clients. These people may be a significant proportion of new service users in some districts.

A total of 1855 new service users submitted client record data across the county in 2008/09. 264 (14%) of these recorded their previous location as being within the district of Wyre Forest.

Based on the population of Wyre Forest it is calculated that 18% of service users in the Worcestershire Supporting People Programme should be coming from Wyre Forest. This estimate does not take into account that a number of users were entering from outside the district so the real expected percentage of service users would be slightly lower.

Client Group	Number of new users	As a percentage of total new users for the client group	Difference from expected 18%
<b>Domestic Abuse</b>	59	13%	- 5%
<b>Generic</b>	12	24%	+ 6%
<b>Homeless Families</b>	45	22%	+ 4%
<b>Learning Disabilities</b>	0	0%	- 18%
<b>Mental Health</b>	13	10%	- 8%
<b>Offenders</b>	8	10%	- 8%
<b>Older People</b>	3	5%	- 13%
<b>Physical or Sensory Disabilities</b>	19	58%	+ 40%
<b>Single Homeless</b>	16	4%	- 14%
<b>Substance Misuse</b>	28	24%	+ 6%
<b>Teenage Parents</b>	0	0%	- 18%
<b>Young People at Risk</b>	61	18%	0%
<b>Total</b>	<b>264</b>	<b>14%</b>	<b>- 4%</b>

**Table 2. Actual and expected new service users from Wyre Forest, 2008/09 per client group.**

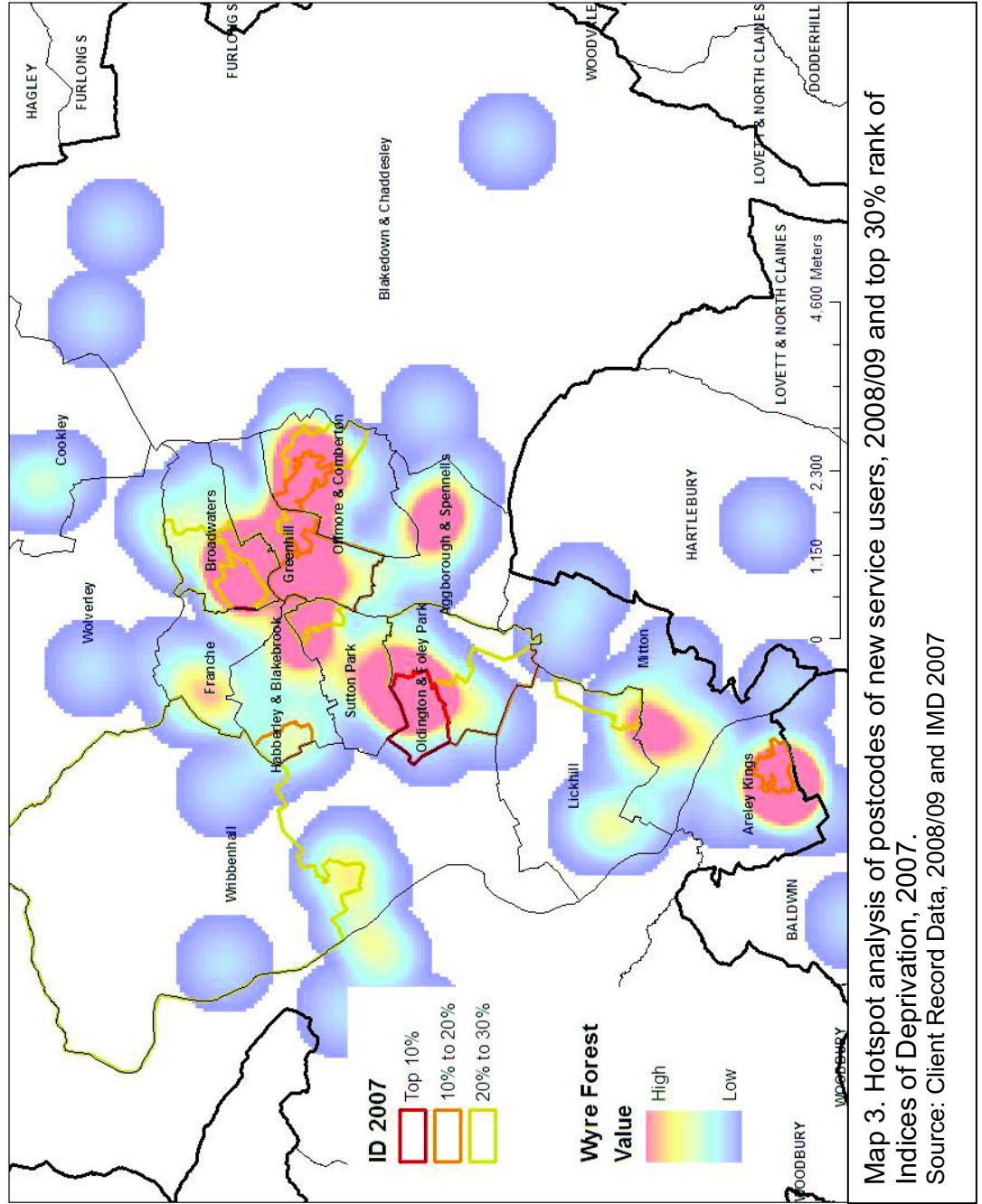
The data in table 2 shows that overall 4% fewer service users are entering the programme than would be expected if based solely on population of the district. Within this there is a large variation between client groups, for example, 40% of physical and sensory disabilities new service users come from the Wyre Forest, but no new users from the learning disabilities client group do.

Valuable future analysis could include looking at the characteristics of the district to see how these affect the demand for services to help investigate better any gaps in service provision which need to be filled.



**Distribution of service users within district**

The postcode of where a new service user was living prior to entry into a service is recorded. These can be mapped and an analysis done to show where the concentrations of new service users or hotspots are. Map 3 shows these hotspots. Also mapped are those areas which have been ranked in the top 30% in the country for the indices of deprivation.



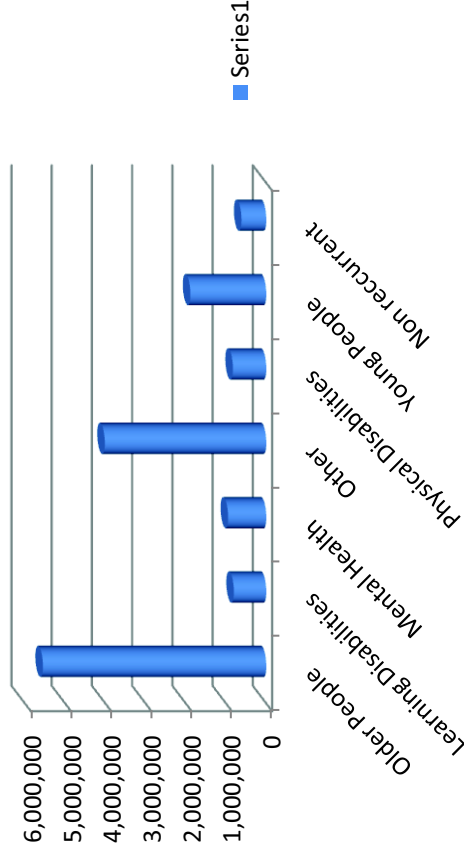
The map seems to show a fairly strong correlation between the hotspots and these areas of deprivation. Hotspots correspond well with the top 20% most deprived areas in Areley Kings, Oldington & Foley Park, Offmore & Comberton and Greenhill. This seems to show that a person is more likely to enter a Supporting People service if they come from a more deprived area. However, deprivation is apparently not the only important factor as the top 30% deprived areas in Wribbenhall and Habberley & Blakebrook do not have associated hotspots. Also, there is a hotspot in Aggborough & Spennells which does not have a deprived area.

The demand information could be used possibly to inform where new services should be located but also where information about services needs to be displayed and available. In higher demand areas extra effort could be made to make sure GPs are aware of services and information about them can be found in local community centres or shops.

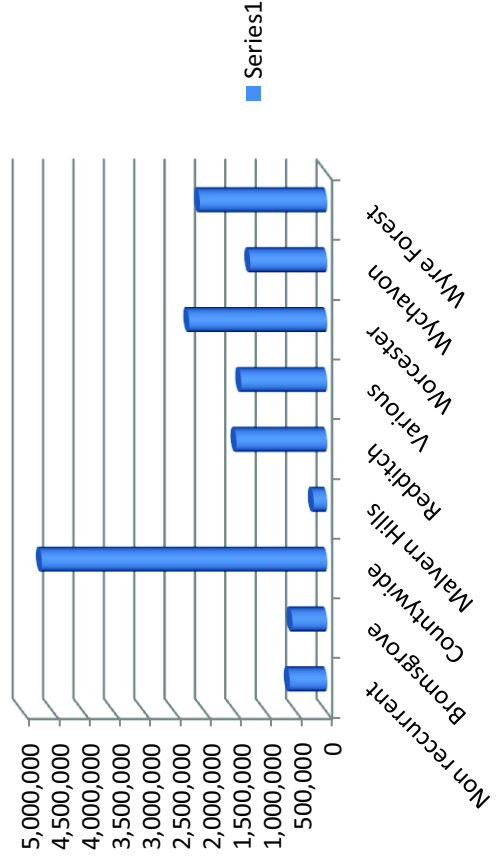
# Appendix 5

## Proposed budget allocation (recurrent) for 2010/11

By service	2010/11 £
Older People	5,553,557
Learning Disabilities	805,349
Mental Health	947,515
Other	4,014,765
Physical Disabilities	828,980
Young People	1,886,633
Non recurrent	616,201
<b>Total</b>	<b><u><u>14,653,000</u></u></b>



By district	Allocation (£)
Non recurrent	616,201
Bromsgrove	573,234
Countywide	4,696,613
Malvern Hills	221,796
Redditch	1,493,803
Various	1,416,628
Worcester	2,271,287
Wychavon	1,266,994
Wyre Forest	2,096,444
<b>Total</b>	<b><u><u>14,653,000</u></u></b>



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**Appendix 1**

**BROMSGROVE DISTRICT COUNCIL**

**NON DOMESTIC RATES**

**HARDSHIP RELIEF POLICY**

**Local Government Finance Act 1988, Section 49**

**March 2010**

## **Non Domestic Rates – Hardship Relief**

### **Introduction**

This policy identifies the legislation and procedures to be followed in considering applications for hardship relief, in relation to the payment of Non Domestic Rates (NDR).

### **Background**

NDR is a national tax on non domestic properties (business), levied by the council. The amount payable is based on the multiplier for the year (currently 48.9p in 2009/10), multiplied by the rateable value of the property, which is determined by the Valuation Office Agency. The council is responsible for collecting the charges, which are paid into a central pool and redistributed to Councils, County Councils and Police Authorities.

Section 49 of the Local Government Finance Act 1988 gives billing authorities (the Council) the discretion to reduce or remit the payment of Non Domestic Rates for any ratepayer. The Council can do so where it is satisfied that the ratepayer would sustain real hardship if it did not do so, and it is responsible to do so, having regard to the wider interests of its Council Tax Payers.

It is important to recognise that the award of Hardship Relief is purely discretionary, and as there is no legislation requirement for Councils to make such awards, they should not adopt a blanket policy to award or not award relief, dealing with each case on its own merits.

### **Amount and Period of Award**

It should be noted that 25% of any award must be borne by the council and local Council Tax Payers, as only 75% of each award can be recovered from the Non Domestic Rate Pool. Therefore, taking into account the financial implications of such awards and the financial constraints on the Councils General Fund the level of relief awarded will be limited to a maximum of 10% of the annual charge, for a period of three months in any financial year.

### **Applications For Hardship Relief**

Guidance on Hardship Relief and the application form is available from the Customer Service Centre, School Drive, Bromsgrove or on the Councils website at [www. Bromsgrove.gov.uk](http://www.Bromsgrove.gov.uk).

When applying for relief, businesses must:

- Complete the Hardship Relief application Form.
- Submit fully audited accounts for the last two financial years or the most recent audited accounts if trading for less than two years along

with projected income for the current financial year. The accounts will be reviewed by the accountancy section to assist in the decision process.

- Clearly demonstrates that hardship will occur if the application is refused.
- Declare if there are any creditors taking legal action against the business and provide details if required.
- Provide details of any financial support the business has received in the last two financial years preceding the application , such as reductions in rateable value; Small business rate relief :grants from any public bodies
- Be occupying the premises on which the relief is applied.

### **Determining The Application**

Guidance, published by the Office of the Deputy Prime Minister (ODPM) in 2002, advises it is for the councils to decide whether to use its powers under the section 49, based on the facts of each case. Decisions on applications will be made by nominated Officers of the Council, including the Head of Financial Services.

- Each case to be considered on its own merits, with the process kept as simple as possible to allow decisions to be made quickly.
- Reducing or remitting rates should be the exception rather than the rule and reductions should only be awarded for a period where hardship can clearly be shown.
- All relevant factors affecting the ability of the business to meet their rate liability, and if they have contacted the council to discuss alternative payment arrangements
- If business have appealed against their rateable value or explored the option of relief as a result of partial occupation of the premises (Section 44A)
- The impact the closure of the business would have on employment in the area, and if the amenities available to the public would be reduced if the business was no longer trading.
- Other business in the area which provide the same or similar services or facilities
- If the business has been proactive in attempts to improve its financial position eg increase in over draft , or loan from Bankers or Shareholders to resolve any short term cash flow problems
- If the hardship is due to normal market forces or general economic conditions.
- If there has been a marked decline in trading accounts compared to corresponding periods in previous years
- If the award of relief will have an anti –competitive effect on other businesses
- Whether the business is essential to the local community eg the impact on a community through the loss of its only village shop

**Conclusion**

As the grant of Hardship Relief is purely discretionary, the Council must carefully scrutinise each case on its own merits, and adopt a consistent approach when making a decision. The interest of the Council Tax Payer plays an important part of any decision, as 25% of any award will ultimately be paid via their council Tax charge, hence the reason why the size and duration of award is limited.



## APPENDIX 1

SUMMARY - Period 7 (October) 2009/10						
	Monthly (October) performance			Estimated Outcome		
	No.	%age <sup>3</sup>	%age <sup>3</sup>	No.	%age <sup>3</sup>	No.
Improving or stable.	21	68%	73%	22	73%	25
Declining	10	32%	23%	7	23%	2
No data	6		3%	1	3%	1
			No data <sup>2</sup>	7		4%
Total Number of Indicators reported this period <sup>1</sup>	37			37		37

SUMMARY - Period 8 (November) 2009/10						
	Monthly (November) performance			Estimated Outcome		
	No.	%age <sup>3</sup>	%age <sup>3</sup>	No.	%age <sup>3</sup>	No.
Improving or stable.	15	47%	76%	22	76%	27
Declining	17	53%	21%	6	21%	2
No data	3		3%	1	3%	1
			No data <sup>2</sup>	6		5
Total Number of Indicators reported this period <sup>1</sup>	35			35		35

SUMMARY - Period 9/Quarter 3 (December) 2009/10						
	Monthly (December) performance			Estimated Outcome		
	No.	%age <sup>3</sup>	%age <sup>3</sup>	No.	%age <sup>3</sup>	No.
Improving or stable.	24	47%	61%	28	61%	36
Declining	27	53%	22%	10	22%	4
No data	7		17%	8	17%	6
			No data <sup>2</sup>	12		12
Total Number of Indicators reported this period <sup>1</sup>	58			58		58

SUMMARY - Period 10 (January) 2010						
	Monthly (January) performance			Estimated Outcome		
	No.	%age <sup>3</sup>	%age <sup>3</sup>	No.	%age <sup>3</sup>	No.
Improving or stable.	11	37%	65%	17	65%	23
Declining	19	63%	27%	7	27%	3
No data	5		8%	2	8%	1
			No data <sup>2</sup>	9		4%
Total Number of Indicators reported this period <sup>1</sup>	35			35		35

## Notes

- 1 - This figure shows the total number of indicators reported in Appendix 2 for this period. This will vary as some indicators are reported monthly, some quarterly, some annually (but in different periods - depending on when they become available).
- 2 - Some of the indicators do not have all the performance elements, for instance some do not have targets because they are new indicators this year, others are activity measures (e.g. monthly call volume). These indicators will be included in the 'no data' count where comparisons cannot be made.
- 3 - The percentage figure shown is the percentage of the number of indicators for which relevant data is available this period, not the total number of indicators reported this period.

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Performance Indicators Period 10 (January 2010)

Ref	Description	Report - ed?	Cum or Snap?	2008/09		2009/10		Comments								
				Actuals	Target & trend	Nov Target	Nov Actual		Dec Target	Dec Actual	Jan Target	Jan Actual	Target & trend	Est. Outturn	Est. Outturn Target	
<b>Street Scene &amp; Community</b>																
NI 191	Residual Household waste per household (KG)	M	C	586.26		393.21	390.71	447.82	443.22	497.14	489.75		588.00	590.00	I	Trade waste data now complete up until Dec. Outturn looks to improve slightly on original target. Past 10 months have shown a reduction in overall tonnage collected over total waste streams and tonnage is now comparable with levels collected in 2004/5.
NI 192	Percentage of household waste re-used, recycled and composted	M	C	43.25		34.93	40.94	24.32	39.43	30.27	38.39		37.00	30.00	S	Trade waste data now complete up until Dec. garden waste collections have now ceased for winter therefore percentage will drop in line with expected targets
LPI Depot	Number of missed household waste collections	M	C	1,136		760	701	855	751	950	825		899	1,140	W	74 missed collections - increased due to snow causing problems
LPI Depot	Number of missed recycle waste collections	M	C	281		160	98	180	184	200	202		138	240	W	18 missed collections - increased due to snow causing problems
NWBCU5	Total Crime	M	C	New		3,736	3,451	4,210	3,848	4,685	4,277		5,180	5,588	I	Crime levels within Bromsgrove District remain low and well within target. Successes of Operation Ghost and other coordinated work of the CDRP have contributed including the ongoing efforts of each individual organisation. The CDRP Winter Safety Campaign has been completed and a full evaluation of its impact and crime and disorder will be carried out over the next few months. Bromsgrove CDRP are now developing their 2010/11 delivery plans to tackle crime and disorder priorities which include youth related ASB, Environmental Crime, Violent Crime and Acquisitive Crime.
NWBCU1	The number of domestic burglaries	M	C	438		260	171	293	194	326	233		296	389	I	There were 39 offences of domestic burglary in January. This increase is potentially due to offences carried out by two known offenders who have burglary offending habits. These suspects are currently being located by West Mercia Police.

Ref	Description	Reported?	Cum or Snap?	2008/09		2009/10		Comments					
				Actuals	Target & trend	Actual	Target & trend						
NWBCU2	The number of violent crimes	M	C	973	I	681	784	870	W	922	1,008	W	Violent Crime has increased during January which is an unexpected trend for this time of year. Levels of violent crime normally drop off following Christmas, however they have not. Violent Crime is a Bromsgrove CDRP priority and this increase in volume will be raised at the next pre-tasking meeting for consideration. Interventions for 2010/11 are currently under development to tackle levels of alcohol related violent crime and domestic incidents.
NWBCU3	The number of robberies	M	C	61	W	32	44	35	W	58	44	I	There were only two offences of Robbery during January, one more than the previous month and Robbery continues to be well under the target level. As previous months comments - This crime type is currently not a priority for Bromsgrove Community Safety Partnership or West Mercia Police. The low volume nature of this crime type means that any specific intervention are difficult to deliver; each incident will be dealt with accordingly our colleagues at West Mercia Police.
NWBCU4	The number of vehicle crimes	M	C	744	W	446	520	555	I	690	667	I	The level of vehicle crime in January has remained at a similar level to the previous month. The majority of offences related to theft from motor vehicles which has also become a 2010/11 priority for Bromsgrove CDRP. As a result interventions are being developed for delivery between April and June 2010 when an increase in theft from motor vehicles is often experienced in the car parks of beauty spots.
NWBCU6	The number of Criminal Damage Incidents	M	C	1,064	W	621	795	745	W	1041	914	I	The level of criminal damage has remained low in January since its significant drop in December. The majority of offences continues to be damage to vehicles. There has been significant reductions in Criminal Damage during 2009/10 however it is set to remain as priority for the Bromsgrove CDRP for 2010/11
LPI CS1a	CCTV incidents reported - Crime	M	C	3,407	I	2,148	2,547	2,602	W	3,400	3,400	I	Incidents of ASB were reduced to 67 from a recorded 101 in December. This appears to be due to the cold weather as less groups are gathering.
LPI CS1b	CCTV incidents initiated by CCTV	M	C	991	W	613	738	807	I	1,047	1,047	I	Despite the cameras being generally quiet there were a number of assaults spotted by operators
LPI CS4	No. of hate crime incidents (activity measure)	M	S			2	n/a						

Ref	Description	Reported?	Cum or Snap?	2018/09		2018/10		Comments			
				Actuals	Target & trend	Actual	Target & trend				
LPI CS5	% of reported hate crime incidents requiring further action that received further action	M	S			100	100	100.00			
LPI SC1	Number of attendances at arts events	M	C	20,642		23,141	21,272	21,324	23,640	S	The County Schools Cross Country Race should have taken place in January yet, due to the poor weather during January was rescheduled for February in Sanders Park. The event has schools represented from all the districts in Worcestershire and Worcester city.
SC3	Dolphin Centre Usage	M	C	627,404		275,367	354,245	401,980	337,215	I	usage for January has been improved. This is to be expected and happens across the industry. However, due to the inclement weather, it was not as high as had been expected. The main area that was impacted was the fitness classes.
SC4	Sports development usages	M	C	21,219		21,035	18,270	19,398	23,223	I	Although weather disruptions caused cancellations, new Sport Unlimited Sessions as well as the start continuation of regular sessions exceeded our monthly target of usages.
	Town Centre Car Park Usage	M	S	n/a		130,995	n/a	n/a	111,037	W	Both the number of car park tickets sold and the number of users of Shopmobility have been dramatically affected by the poor weather
	Shopmobility Centre Usage (Monthly)	M	S	n/a		156	150	150	91	W	Both the number of car park tickets sold and the number of users of Shopmobility have been dramatically affected by the poor weather
LPI LLL1	Life line units in use	M	S	547		728	720	730.00	730.00	W	Again 14 new installations but the snow grounded the installation staff for some time and again there were a lot of cancellations, resulting in a net gain of only 2.

M\* = in the months when available  
(3 times per year)

### Planning & Environment Services

NI 157	The percentage of major planning applications determined within 13 weeks	M	C	68.80		100.00	80.00	88.90	88.80	W	No applications determined in this category in October or November with 2 in December.
										S	No applications in this category for January.

Ref	Description	Report- ed?	Cum or Snap?	2018/09		2018/10		Target	Est. Outturn	Es.L Outturn Target	Comments										
				Actuals	Nov Target	Nov Actual	Target & trend					Dec Target	Dec Actual	Target & trend	Jan Target	Jan Actual	Target & trend				
NI 157	The percentage of minor planning applications determined within 6 weeks	M	C	76.50	85.00	86.00	I	85.00	85.00	85.00	85.30	I									In the summer around 16/17 applications were determined in this category in a month whilst September, October and November saw a reduction to 7/9 applications. December however saw a rise back up to 17 and this was sustained in January. Of those 17 applications 7 related to dwellings. In this category only 1 application went out of time and this related to neighbour notifications. (Samsara Road)
NI 157	The percentage of other planning applications determined within 8 weeks	M	C	89.50	90.00	90.00	I	90.00	90.00	90.00	90.40	W									The numbers of minor applications have remained fairly consistent this quarter with 42 and 47 applications submitted in Oct and November. December saw 49 applications with a reduction to 32 in January. Only one application went out of time and this related to a press notice at Darrs Fish bar

E-gov & Customer Services

CSC	Description	Report- ed?	Cum or Snap?	2018/09		2018/10		Target	Est. Outturn	Es.L Outturn Target	Comments												
				Actuals	Nov Target	Nov Actual	Target & trend					Dec Target	Dec Actual	Target & trend	Jan Target	Jan Actual	Target & trend						
CSC	Monthly Call Volumes Customer Contact Centre	M	S	n/a		7,161					9,915											n/a	
CSC	Monthly Call Volume Council Switchboard	M	S	n/a		4,295		3,585			6,711												n/a
CSCLP19.1	Resolution at First Point of Contact all services (percentage)	M	S	99.00	95.00	97	I	95.00	95.00	95.00	98.5	I										95.00	
CSCLP19.2	% of Calls Answered	M	S	87.00	85.00	92.00	S	85.00	85.00	85.00	88.00	W										85.00	
CSCLP19.3	Average Speed of Answer (seconds)	M	S	30.00	20.00	15.00	W	20.00	20.00	20.00	23.00	W										20.00	

Chief Executive's department

LP1 CQFP01	Description	Report- ed?	Cum or Snap?	2018/09		2018/10		Target	Est. Outturn	Es.L Outturn Target	Comments											
				Actuals	Nov Target	Nov Actual	Target & trend					Dec Target	Dec Actual	Target & trend	Jan Target	Jan Actual	Target & trend					
LP1 CQFP01	Number of complaints received (Council wide). Monthly. Source new complaints system.	M	C	270	n/a	119	I	n/a	n/a	n/a	163	W										n/a

Complaints received were: 17 about delayed refuse collections during adverse weather conditions, 5 about the Market Hall Closure, petition and Member behaviour at Overview and Scrutiny Meeting, 1 about a benefit claim, 2 about arrangements for funerals, 1 about car parking policy, 1 about a replacement bin, 2 about missed collections and 5 about changes to the recycling service.

Ref	Description	Report - ed?	Cum or Snap?	2020/09		2020/10		Comments					
				Actuals	Target & trend	Nov Target	Nov Actual		Target & trend	Jan Target	Jan Actual	Target	Est. Outturn
LPI CCPP03	Number of compliments received	M	C	70	W	n/a	34	I	n/a	n/a	n/a	n/a	Compliments received were 2 about the prompt and excellent service provided by the Street Cleansing Team, 3 about the service from the Refuse Team in the adverse weather conditions and 1 for the service from a member of the Business Support Team at the Depot.
LPI CCPP05	Community transport income (£)	M	C	n/a	W	525	673	I	825	875	n/a	n/a	

Financial Services

NH181	Time taken to process HB/CT benefit new claims or change events (days)	M	C	15.03	I	15.00	9.97	W	15.00	10.13	15.00	13.00	There has been a further dip in performance for January. This is due to a small backlog of work following the Christmas and new year period meaning there was a lot of older items that needed to be processed. Performance is monitored on a weekly basis and the last 2 weeks in January showed considerable improvement. I am therefore satisfied that there will be better performance figures reported for February. However, as stated last month we are now 1 full time assessment officer down due to the retirement of an assessment officer and the release of their temporary cover in preparation for recruiting for the role
	Percentage of invoices paid within 10 days of receipt	M	C	n/a	I	90.00	82.90	W	90.00	82.79	90.00	83.00	Although the cumulative total has decreased for the month the actual percentage for January has increased however we are still under target due to the delay of authorisation of invoices.
FP001	Percentage of invoices paid within 30 days of receipt	M	C	99.38	I	98.00	98.17	W	98.00	97.90	98.00	98.00	There has been a delay in authorisation of invoices which has lead to the slight decrease in the percentage of invoices being paid this month.

Ref	Description	Report - ed?	Cum or Snap?	2008/09		2009/10						Comments					
				Actuals	Actuals	Nov Target	Nov Actual	Target & trend	Dec Target	Dec Actual	Target & trend		Jan Target	Jan Actual	Target & trend		
LPI (formerly BV12)	The average number of working days lost due to sickness.	M	C	10.66	5.68	6.65	I	6.39	7.17	I	7.18	7.70	S	8.75	9.24	I	Sickness absence remains at the same low level as last month. The estimated outturn has improved again, but remains amber. If sickness absence remains at these low levels for the last two months of the year then the target will be met



Ref	Description	Freq	Cum or Snap	2009/10 Monthly Performance figures											
				Apr.	May.	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.

**Streetscene & Community**

NI 191	Residual Household waste per household	M	C	48.61	50.01	49.12	49.00	49.04	49.03	48.27	50.13	54.61	49.32	45.74	50.11	
			Actual	52.56	48.10	50.50	52.11	45.49	48.33	51.33	51.33	51.45	58.47	46.53	0.00	0.00
			numerator denominator	2,040.68 38,828	1,867.76 38,828	1,960.96 38,828	2,023.16 38,828	1,770.84 38,829	1,881.36 38,829	1,998.31 38,829	2,002.82 38,829	1,998.31 38,829	2,002.82 38,829	2,276.36 38,829	1,811.34 38,829	38,828
NI 192	Percentage of household waste re-used, recycled and composted	M	C	32.07	31.98	32.58	33.12	33.78	34.29	34.51	34.57	24.32	33.16	32.68	32.72	
			Actual	39.30	42.29	42.19	41.85	42.41	43.32	36.86	33.85	23.04	26.28			
			numerator denominator	1,321,289 3,361,969	1,368,698 3,236,478	1,430,866 3,391,822	1,455,837 3,478,997	1,303,929 3,074,769	1,437,871 3,319,231	1,166,589 3,164,899	1,024,906 3,027,726	681,460 2,957,818	645,868 2,457,204			
LPI Depot	Number of missed household waste collections	M	C	95	95	95	95	95	95	95	95	95	95	95	95	
			Actual	129	123	127	67	68	49	79	59	74				
LPI Depot	Number of missed recycle waste collections	M	C	20	20	20	20	20	20	20	20	20	20	20	20	
			Actual	18	6	20	18	9	5	9	13	18				
	Total crimes	M	C	459	475	459	475	475	459	475	459	475	475	475	475	
			Actual	459	409	427	488	473	431	408	415	402	437			
NWBCU1	The number of domestic burglaries	M	C	32	33	32	33	33	32	32	33	33	33	30	33	
			Actual	35	13	33	16	25	23	11	19	23	39			
NWBCU2	The number of violent crimes	M	C	76	85	85	82	85	79	77	71	69	70	63	76	
			Actual	81	81	75	93	103	107	83	66	87	104			
NWBCU3	The number of robberies	M	C	5	5	5	5	5	5	5	5	5	5	4	5	
			Actual	4	4	3	4	4	5	3	5	1	2			
NWBCU4	The number of vehicle crimes	M	C	58	59	57	59	59	57	59	57	59	59	53	59	
			Actual	59	37	65	77	66	49	38	57	55	54			
NWBCU6	The number of criminal damage incidents	M	C	84	99	92	85	75	103	77	84	96	77	73	96	
			Actual	75	79	60	95	76	83	75	78	60	64			
LPI CS 1a	CCTV incidents reported - Crime	M	C	283	283	283	283	283	283	283	283	283	283	283	283	
			Actual	258	257	228	250	248	353	345	216	253	201			

LPI CS1b	CCTV incidents initiated by CCTV	M	C	Target	82	82	82	82	82	82	82	82	82	82	82	82	82	82	82
				Actual	76	80	74	62	74	87	91	69	101	93					
LPI CS4	No. of hate crime incidents (activity measure)	M	S	Target	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
				Actual	1	3	1	2	1	1	2	2	2	2	2	2	2	2	2
LPI CS5	% of reported hate crime incidents requiring further action that received further action	M	S	Target	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00
				Actual	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00
LPI SC1	Number of attendances at arts events	M	C	Target	75	470	3,025	1,010	13,175	700	710	2,500	107	52					
				Actual	80	495	5,405	840	12,575	758	763	2,225	452	47					
SC3	Dolphin Centre Usage	M	C	Target	34,058	35,173	35,173	35,173	35,173	40,199	45,233	48,830	45,233	47,735					
				Actual	29,123	37,336	33,982	34,221	30,797	34,468	35,567	39,873	25,806	36,042					
SC4	Sports development usages	M	C	Target	1,804	2,030	2,481	2,481	2,256	2,030	2,030	1,804	1,128	1,128					
				Actual	1,966	2,514	2,849	2,686	2,351	1,941	3,064	3,664	1,171	2,027					
	Town Centre Car Park Usage	M	S	Target			n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a					
				Actual	127,106	129,167	130,092	135,965	125,458	124,060	134,654	130,995	120,254	111,037					
	Shopmobility Centre Usage	M	S	Target	150	150	150	150	150	150	150	150	150	150					
				Actual	130	136	178	166	156	196	163	156	116	91					
	Life line units in use	M	C	Target	640	650	660	670	680	690	700	710	720	730					
				Actual	643	644	657	682	687	725	733	728	728	730					

M\* = in the months when available  
( 3 times per year)

**Planning & Environment Services**

N1157	The percentage of major planning applications determined within 13 weeks	M	C	Target	80.00	80.00	80.00	80.00	80.00	80.00	80.00	80.00	80.00	80.00	80.00	80.00	80.00	80.00	80.00
				Actual	100.00	100.00	n/a	n/a	100.00	100.00	n/a	n/a	50.00	n/a					
				numerator	1	2	0	0	1	3	0	0	1	0					
				denominator	1	2	0	0	1	3	0	0	2	0					
N1157	The percentage of minor planning applications determined within 8 weeks	M	C	Target	85.00	85.00	85.00	85.00	85.00	85.00	85.00	85.00	85.00	85.00	85.00	85.00	85.00	85.00	85.00
				Actual	92.00	85.70	70.00	94.00	70.50	100.00	89.00	100.00	70.50	94.00					
				numerator	12	12	7	15	12	7	8	9	12	16					
				denominator	13	14	10	16	17	7	9	9	17	17					
N1157	The percentage of other planning applications determined within 8 weeks	M	C	Target	90.00	90.00	90.00	90.00	90.00	90.00	90.00	90.00	90.00	90.00	90.00	90.00	90.00	90.00	90.00
				Actual	89.00	98.00	85.00	89.00	89.00	81.00	90.00	98.00	92.00	91.00					
				numerator	41	54	41	50	49	39	38	46	45	29					
				denominator	46	55	48	56	55	48	42	47	49	32					

**E-gov & customer services**

CSC	Monthly Call Volumes Customer Contact Centre	M	S	Target	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	
				Actual	8,599	6,714	7,870	n/a	8,277	n/a	7,637	n/a	7,204	n/a	7,161	n/a	6,436	n/a	9,915	n/a	n/a	n/a	n/a
CSC	Monthly Call Volume Council Switchboard	M	S	Target	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	
				Actual	4,631	4,203	4,580	n/a	4,452	n/a	4,247	n/a	4,495	n/a	4,295	n/a	3,585	n/a	6,711	n/a	n/a	n/a	n/a
CSC LPI 3.1	Resolution at First Point of Contact all services (percentage)	M	S	Target	95.00	95.00	95.00	95.00	95.00	95.00	95.00	95.00	95.00	95.00	95.00	95.00	95.00	95.00	95.00	95.00	95.00	95.00	
				Actual	99.00	99.00	99.00	93.50	97.00	97.00	91.00	97.00	98.00	97.00	98.00	98.00	98.00	98.50	98.00	98.50	98.00	98.50	98.00
CSC LPI 3.2	% of Calls Answered	M	S	Target	85.00	85.00	85.00	85.00	85.00	85.00	85.00	85.00	85.00	85.00	85.00	85.00	85.00	85.00	85.00	85.00	85.00	85.00	85.00
				Actual	89.00	92.00	92.00	86.60	86.40	86.40	92.00	92.00	92.00	92.00	92.00	93.00	88.00	88.00	88.00	88.00	88.00	88.00	88.00
CSC LPI 3.3	Average Speed of Answer (seconds)	M	S	Target	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20
				Actual	21	16	16	29	24	13	15	11.00	23.00	15	11.00	23.00	20	20	20	20	20	20	20

**Chief Executive's**

LPI CCPP01 (SS)	Number of complaints received (Council wide) Monthly. Source new complaints system.	M	C	Target	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	
				Actual	25	22	20	12	12	5	11	10	34	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
LPI CCPP03 (SS)	Number of compliments received (Council wide)	M	C	Target	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
				Actual	4	2	4	5	1	6	7	6	6	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
LPI CCPP05 (DM)	Community transport income (£)	M	C	Target	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
				Actual	n/a	n/a	n/a	n/a	250	298	275	300	325	350	375	350	350	350	350	350	350	350	350

**Financial Services**

NI 181	Time taken to process HB/CT benefit new claims or change events	M	C	Target	15.00	15.00	15.00	15.00	15.00	15.00	15.00	15.00	15.00	15.00	15.00	15.00	15.00	15.00	15.00	15.00	15.00	15.00	
				Actual	11.17	10.29	14.58	9.28	12.73	6.38	6.74	10.98	11.86	12.047	12.047	12.047	12.047	12.047	12.047	12.047	12.047	12.047	12.047
	Percentage of invoices paid within 10 days of receipt	M	C	numerator	12,836	13,475	18,746	10,690	16,342	12,919	9,656	9,411	12,047	12,047	12,047	12,047	12,047	12,047	12,047	12,047	12,047	12,047	
				denominator	1,149	1,309	1,286	1,152	1,284	2,025	1,432	857	1016	1016	1016	1016	1016	1016	1016	1016	1016	1016	1016
FP001	Percentage of invoices paid within 30 days of receipt	M	C	Target	90.00	90.00	90.00	90.00	90.00	90.00	90.00	90.00	90.00	90.00	90.00	90.00	90.00	90.00	90.00	90.00	90.00	90.00	
				Actual	80.88	83.71	84.77	85.80	83.83	83.69	84.59	78.47	81.71	81.71	81.71	81.71	81.71	81.71	81.71	81.71	81.71	81.71	81.71
	Percentage of invoices paid within 30 days of receipt	M	C	Target	98.00	98.00	98.00	98.00	98.00	98.00	98.00	98.00	98.00	98.00	98.00	98.00	98.00	98.00	98.00	98.00	98.00	98.00	98.00
				Actual	99.34	98.39	97.97	98.42	98.02	98.17	98.49	96.32	95.47	95.47	95.47	95.47	95.47	95.47	95.47	95.47	95.47	95.47	95.47

**Legal, Equalities and Democratic Services**

**Human Resources & Organisational Development**

LPI (formerly BV12)	The average number of working days lost due to sickness.	M	C	Target	0.71	0.71	0.71	0.71	0.71	0.71	0.71	0.71	0.71	0.71	0.71	0.71	0.71	0.71	0.71	0.71	0.71	0.71
				Actual	0.85	0.93	1.15	1.16	0.84	0.51	0.50	0.53	0.53	0.53	0.53	0.53	0.53	0.53	0.53	0.53	0.53	0.53

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By virtue of paragraph(s) 7 of Part 1 of Schedule 12A of the Local Government Act 1972.

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