

West Devon Hub Committee



West Devon
Borough
Council

Title:	Agenda								
Date:	Tuesday, 30th January, 2024								
Time:	2.00 pm								
Venue:	Chamber - Kilworthy Park								
Full Members:	<p style="text-align: center;">Chairman Cllr Ewings Vice Chairman Cllr Renders</p> <p><i>Members:</i></p> <table style="margin-left: auto; margin-right: auto;"> <tr> <td>Cllr Bridgewater</td> <td>Cllr Leech</td> </tr> <tr> <td>Cllr Daniel</td> <td>Cllr Moody</td> </tr> <tr> <td>Cllr Edmonds</td> <td>Cllr Mott</td> </tr> <tr> <td>Cllr Jory</td> <td></td> </tr> </table>	Cllr Bridgewater	Cllr Leech	Cllr Daniel	Cllr Moody	Cllr Edmonds	Cllr Mott	Cllr Jory	
Cllr Bridgewater	Cllr Leech								
Cllr Daniel	Cllr Moody								
Cllr Edmonds	Cllr Mott								
Cllr Jory									
Interests – Declaration and Restriction on Participation:	Members are reminded of their responsibility to declare any disclosable pecuniary interest not entered in the Authority's register or local non pecuniary interest which they have in any item of business on the agenda (subject to the exception for sensitive information) and to leave the meeting prior to discussion and voting on an item in which they have a disclosable pecuniary interest.								
Committee administrator:	Democratic.Services@swdevon.gov.uk								

1. Apologies for absence	
2. Declarations of Interest	
In accordance with the Code of Conduct, Members are invited to declare any Disclosable Pecuniary Interests, Other Registerable Interests and Non-Registerable Interests including the nature and extent of such interests they may have in any items to be considered at this meeting;	
3. Items Requiring Urgent Attention	
To consider those items which, in the opinion of the Chairman, should be considered by the Meeting as matters of urgency (if any)	
4. Confirmation of Minutes	1 - 8
Minutes of meeting held 21 November 2023	
5. Public Questions	
a period of up to 15 minutes is available to deal with issues raised by the public	
6. Hub Committee Forward Plan	9 - 14
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12. Discretionary Rate Relief and Corporate Debt Policies	175 - 218
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15. Quarter 1 and Quarter 2 Write-Off Report 2023/24

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Agenda Item 4

At a Meeting of the **HUB COMMITTEE** held in the **Council Chamber, Kilworthy Park, Tavistock** on **TUESDAY** the **21st** day of **NOVEMBER 2023** at **2.00 pm**

Members in attendance

*** Denotes attendance**

∅ Denotes apology for absence

* Cllr A Bridgewater	∅ Cllr T Leech (<i>joined via Teams</i>)
* Cllr L Daniel	* Cllr J Moody
* Cllr C Edmonds	* Cllr C Mott
* Cllr M Ewings (Leader)	* Cllr M Renders (Deputy Leader)
* Cllr N Jory	

Other Member(s) also in attendance in a non-voting capacity:

Cllrs Calder (via Teams), Elliott (via Teams) Johnson (via Teams); Kimber; Leech (via Teams); Oxborough, Squire, Viney and West

Officers in attendance

Chief Executive; Deputy Chief Executive; Section 151 Officer; Monitoring Officer (via Teams); Head of Democratic Services; Assistant Director Strategy; Head of Finance; Head of Environmental Health & Licensing; Head of Head of Revenues & Benefits, Head of Housing (via Teams); Head of Economy & Place; Principal Environmental Health Officer; Community Digital Connectivity Officer; Principal Assets Officer; Principal Climate Change Officer and Principal Building & Facilities Officer (via Teams)

***HC 23/23 APOLOGY FOR ABSENCE**

An apology for absence had been received from Cllr Leech, who was in attendance remotely via Teams.

***HC 24/23 DECLARATIONS OF INTEREST**

Members were invited to declare any interests in the items of business to be discussed but there were none made.

***HC 25/23 MINUTES**

The Minutes of the Hub Committee meeting held on 19 September 2023 were confirmed as a correct record.

***HC 26/23 PUBLIC QUESTION TIME**

It was noted that no Public Questions had been received in accordance with the Hub Committee Procedure Rules.

***HC 27/23 HUB COMMITTEE FORWARD PLAN**

Members were presented with the latest version of the Hub Committee Forward Plan that set out items on the agenda for Hub Committee meetings for the next four months and proceeded to note its content.

***HC 28/23 DRAFT CORPORATE STRATEGY**

The Hub Committee considered a report that provided an update on the progress made in the preparation of the draft Corporate Strategy for the period 2024-2028.

During the ensuing debate, the following points were raised:

- (a) In respect of the development of the delivery plans, officers advised of the intention that the next round of Hub Advisory Groups would be held in the upcoming months. Furthermore, it was intended that the detailed delivery plans would be considered at the next Hub Committee meeting (to be held on 30 January 2024) alongside further consideration of the Corporate Strategy and draft Revenue and Capital Budget proposals for 2024/25;
- (b) It was noted that, as part of the public consultation exercise, a question would be included that sought the views of residents as to what the Strategy should be titled. In hoping that residents and local stakeholders would be fully engaged in the consultation exercise, officers confirmed that a 'Member Pack' (including a list of Frequently Asked Questions) would be issued to all Members upon the commencement of the consultation process;
- (c) The view was expressed that the Strategy should highlight (and cross reference) the 12 national missions that underpinned Central Government's Levelling Up agenda;

It was then:

RESOLVED

- 1. That the draft Corporate Strategy, as set out at Appendix B of the presented agenda report, be endorsed;
- 2. That authority be delegated to the Assistant Director - Strategy, in consultation with the Leader and Deputy Leader, to apply any final amendments to the draft Corporate Strategy prior to commencement of the public consultation exercise;
- 3. That the formal consultation on the draft Strategy be commenced; and
- 4. That the Senior Leadership Team and Assistant Director - Strategy support Lead Hub Committee Members in the development of detailed delivery and resourcing plans for the Strategy.

HC 29/23 REVIEW OF CAPITAL PROGRAMME (CAPITAL PROGRAMME MONITORING) AND REVIEW OF EARMARKED RESERVES

Members considered a report that set out the progress made on individual schemes within the approved capital programme, including an assessment of their budgets and financial position and how schemes might align with the emerging corporate priorities.

In the ensuing debate, particular reference was made to:

- (a) the Springhill project. In the event of Full Council ultimately approving the recommendations in the published agenda report, then the Business Case for the Springhill project would be reviewed with alternative options being explored as part of that process;
- (b) the Financial Stability Reserve. When questioned, the Section 151 Officer advised that releasing the funds within this Reserve would not affect the financial stability of the Council.

It was then:

RESOLVED

That Council be **RECOMMENDED** to:

- 1) withdraw three capital projects from the current Capital Programme, being Parklands Leisure Centre contribution to moveable floor (£50,000) and Tavistock Viaduct (£20,000). It is also recommended to withdraw the Springhill Temporary Accommodation budget from the capital programme, following the Hub Committee decision to put this project on hold whilst other options are explored, freeing up a further £193.2k. Therefore, the review of the capital programme is freeing up capital resources of £263.2k which is potentially available for future corporate priorities and can be re-purposed;
- 2) continue to progress all other capital projects, in line with the existing capital projects within the overall Capital Programme;
- 3) note the content of the Capital Programme Monitoring Report in Appendix C of the presented agenda report which shows the current expenditure on capital projects between April 2023 and September 2023 of £1.692m, being 21% of the profiled budget for 2023/24 (the first six months of the financial year);
- 4) note the revised capital allocation for the UK Shared Prosperity fund (UKSPF) scheme for 2023/24 and 2024/25 as set out in section 3.2 of the presented agenda report;
- 5) note the addition of £26,632 to the capital programme for a new boiler at Okehampton Business Centre to be financed from the Maintenance Earmarked Reserve, set out in section 3.3 of the presented agenda report; and
- 6) approve the outcome of the review of revenue reserves, releasing revenue reserves of up to £871,000 which is potentially available to support the delivery of the emerging Corporate Strategy.

***HC 30/23**

DRAFT REVENUE AND CAPITAL BUDGET PROPOSALS FOR 2024-25

The Hub Committee was presented with a report that outlined a series of draft revenue and capital budget proposals for 2024/25.

During discussion, the following points were raised:

- (a) It was noted that the projected budget gap for 2026/27 was sizeable;
- (b) The proposed flooding contingency budget of £50,000 was welcomed and, given recent climatic trends, was felt to be very pragmatic;
- (c) In echoing the views of the Audit & Governance Committee, Members expressed their disappointment over the increased External Audit fees;
- (d) Moving forward, a number of Members stated their hope that Central Government would provide greater clarity over the future of New Homes Bonus funding;
- (e) Members looked forward to receiving the views of the Overview & Scrutiny Committee on these draft proposals at the next Hub Committee meeting to be held on 30 January 2024.

It was then:

RESOLVED

1. That the forecast budget gap for 2024/25 of £142,030 (1.5% of the projected Net Budget of £9.265million) and the position for future years be noted; and
2. That the Senior Leadership Team work with Hub Committee Members to provide further options on how to close the predicted budget gap for 2024/25, for Members' consideration as part of future budget reports in early 2024 (once more detail of the Local Government Finance settlement is known).

***HC 31/23 SOCIAL HOUSING & PRIVATE SECTOR HOUSING LANDLORDS**

Members considered a report that set out a commitment by the Council to support tenants in social and private sector rented accommodation to take action against their landlords when there were unacceptable delays or challenges in remedying repairs.

During debate, particular reference was made to:

- (a) accessing those tenants considered to be 'hardest to reach'. When questioned, officers set out a series of measures that were being undertaken in an attempt to access the hardest to reach tenants;
- (b) improving methods of regulating landlords in West Devon. Officers informed that they were currently reviewing the merits of establishing a landlord / letting regulatory scheme. For clarity, the Committee noted that there was no evidence of systemic rogue landlords in the Borough area but some could be considered to be uneducated on housing standards;
- (c) close linkages between the Environmental Health and Housing teams. It was noted that regular dialogue took place between Environmental Health and Housing officers with steps that included properties not being able to be re-let until necessary remedial works had been carried out being in place.

It was then:

RESOLVED

1. That an enhanced approach to improving Social and Private Sector Housing standards in West Devon be approved; and
2. That an annual performance report on the investigations of housing standards complaints be brought to the Hub Committee.

***HC 32/23 UK SHARED PROSPERITY FUND & RURAL ENGLAND PROSPERITY FUND UPDATE**

The Hub Committee considered a report that provided an update on the projects that had so far benefitted from the UK Shared Prosperity and Rural England Prosperity Funds

During debate the following points were raised:

- (a) With regard to the Agri-Tech Innovation Project, officers committed to providing more information with regard to the level of interest to date from those farmers located in the West Devon area outside of this Committee meeting;
- (b) Through the Community Resilience Grant scheme, it was noted that parish councils were able to apply for monies to expand the range of services that could be delivered through their local parish, community and village hall facilities;
- (c) The ongoing need to publicise and promote the projects and schemes set out within the presented agenda report was recognised;
- (d) Officers highlighted the extent of interest already and, as a result, expressed their confidence that these monies would be spent before the prescribed deadline. Furthermore, it was hoped that additional funding opportunities would be made available by Central Government;
- (e) Whilst welcoming the Local Cycling and Walking Infrastructure Plan, Members also recognised the need for a co-ordinated approach between the Council and Devon County Council regarding their Highways maintenance programme and schedule of works;
- (f) It was recognised that this agenda item represented an excellent example of meaningful devolution from Central to Local Government.

It was then:

RESOLVED

1. That an all-Member Briefing session be convened to take place at the earliest opportunity enabling Members to further explore the work being delivered through the UK Shared Prosperity Fund (UKSPF) programme;

2. That the work of the UKSPF programme be disseminated and promoted to local communities; and
3. That the Rural England Prosperity Fund Grant Policies be supported.

***HC 33/23 LONG STAY PAY & DISPLAY CHARGES REVIEW**

Members were presented with a report that sought approval to amend the pay and display charges in long stay West Devon off-street car parks.

In his introduction, the lead Member informed that, at the appropriate time, he would be proposing an alternative form of wording to report recommendation 1.1 that would read as follows:

'1.1 To amend the Pay and Display Charges in accordance with Appendix A, with the exception of Hatherleigh and Chagford, which should be amended whereby there is no increases for charges up to and including 2 hours.'

During the ensuing discussion, particular reference was made to:

- (a) usage and income figures. Officers informed that both car parking usage and income figures had still not quite returned to pre-COVID levels;
- (b) car parking permit numbers. Whilst the permit scheme was particularly popular in Chagford, it was felt that there was scope to increase the promotion and marketing of parking permits across the remainder of the Borough area;
- (c) the proposals to remove Brentor and Lydford car parks from the Council's Parking Places Order 2022 (report recommendation 1.3 refers). Officers confirmed that these proposals were cost neutral to the Council;
- (d) support for the proposals. A number of Members expressed their support for the proposals contained within the agenda papers that were felt to strike the delicate balance between the Council's budgetary pressures and the need to support the local economy.

It was then:

RESOLVED

1. That the Head of Assets be authorised to publish notice of proposals for the West Devon Borough Council (Off-Street Parking Places) (Variation No.1) Order 2022 amendments to be made as follows:
 - 1.1 To amend the Pay and Display charges in accordance with Appendix A of the presented agenda report, with the exception of Hatherleigh and Chagford, which be amended whereby there is no increase for charges up to and including 2 hours;
 - 1.2 To change Abbey car park from a 4 hour maximum stay to a 6 hour maximum stay car park; and
 - 1.3 To remove Brentor car park and Lydford car park from the West Devon Borough Council (Off Street Parking Places) Order 2022;

2. That the Head of Assets be requested to prepare a report summarising any representations received in response to the notice of proposals for consideration by the Hub Committee before deciding whether to make the off-street parking places order as proposed or with modifications; and
3. That the Director of Place and Enterprise, in consultation with the Lead Hub Committee Member and the Leader of Council, be authorised to vary the charges payable in respect of off-street parking places to reflect annual changes in the September Consumer Price Index (inflationary uplift) subject to giving the public notice in accordance with Local Authorities Traffic Orders (Procedure)(England and Wales) Regulations 1996 specifying the charges payable when the notice comes into effect.

***HC 34/23 Q3 AND Q4 WRITE-OFF REPORT 2022/23**

A report was considered that informed Members of the proposal to write-off a series of debts with a value of more than £5,000 for the period from 1 October 2022 to 31 March 2023.

During debate, support was expressed for the excellent work being carried out by the Team.

It was then:

RESOLVED

1. That, in accordance with Financial Regulations, it be noted that the Section 151 Officer had authorised the write-off of individual debts totalling £77,279.31 as detailed in paragraph 3 of the presented report; and
2. That the write-off of the individual debts totalling £29,868.75, as shown in Appendix A of the presented agenda report, be approved.

HC 35/23 CLIMATE CHANGE – EV STRATEGY UPDATE

Members considered a report that set out an updated Electric Vehicle (EV) Strategy for 2023 - 2025.

During discussion, the following points were raised:

- (a) In reply to a question, officers confirmed that feasibility studies would take into account the local capacity and capability for EV rapid chargers;
- (b) Whilst in the infancy of the journey for the Council, Members felt that, in the future, the Council should explore providing an EV charger installation service to local residents and stakeholders as a means of income generation;
- (c) Having sought clarification, officers advised that there were mechanisms in place to prevent users from effectively blocking those car parking spaces that contained EV charging points.

It was then:

RESOLVED

That Council be **RECOMMENDED** to adopt the West Devon Borough Council Electric Vehicle Strategy 2023-2025 as set out at Appendix B of the presented agenda report.

(The meeting terminated at 4.00pm)

Chairman

(NOTE: THESE DECISIONS, WILL BECOME EFFECTIVE FROM 5.00PM ON THURSDAY, 30 NOVEMBER 2023, WITH THE EXCEPTION OF MINUTES HC 29/23 AND HC 35/23 WHICH ARE RECOMMENDATIONS TO THE COUNCIL MEETING TO BE HELD ON 19 DECEMBER 2023, UNLESS CALLED IN, IN ACCORDANCE WITH SCRUTINYPROCEDURE RULES)

Hub Committee Forward Plan

About the Forward Plan

This is the provisional forward plan for at least four months starting January 2024. It provides an indicative date for matters to be considered by the Hub Committee. Where possible, the Hub Committee will keep to the dates shown in the plan. However, it may be necessary for some items to be rescheduled and other items added.

The forward plan is published to publicise consultation dates and enable dialogue between the Hub Committee and all Councillors, the public, and other stakeholders. It will also assist the Council's Overview and Scrutiny Committee in planning their contribution to policy development and holding the Hub Committee to account.

The Plan is published on the Council's website (www.westdevon.gov.uk)

About the Hub Committee

The Hub Committee currently consists of nine Councillors. Each has responsibility for a particular area of the Council's work.

- Leader of the Council – Cllr Mandy Ewings
- Deputy Leader of the Council, with specific responsibility for Housing – Cllr Mark Renders
- Lead Hub Member for Enabling Inclusive and Accessible Services – Cllr Jeff Moody
- Lead Hub Member for the Economy – Cllr Neil Jory
- Lead Hub Member for the Natural Environment - Cllr Lynn Daniel
- Lead Hub Member for Leisure, Health and Wellbeing - Cllr Tony Leech
- Lead Hub Member for the Built Environment – Cllr Caroline Mott
- Lead Hub Member for Communities – Cllr Adam Bridgewater
- Lead Hub Member for Resources – Cllr Chris Edmonds

Further information on the workings of the Hub Committee, including latest information on agenda items, can be obtained by contacting Democratic Services on 01803 861105 or by e-mail to democratic.services@swdevon.gov.uk

All items listed in this Forward Plan will be discussed in public at the relevant meeting, unless otherwise indicated with *



Forward Plan from January 2024

Portfolio Area	Report Title and Summary	Lead Member / SLT lead / Report Author	Documents to be considered in making decision	Date of Decision	Consultees and means of consultation
Leader	<p>Title: West Devon Vision and Strategy 2024/28</p> <p>Purpose: To recommend to Full Council the adoption of the Strategy and supporting annual delivery plans.</p>	Cllr Ewings / Andy Bates / Neil Hawke	Report of the Assistant Director – Strategy and Organisational Development	30 January 2024	
Leader	<p>Title: Draft Revenue and Capital Budget Proposals 2024/25</p> <p>Purpose: To consider a report that sets out a draft set of Revenue and Capital Budget proposals for 2024/25.</p>	Cllr Ewings / Lisa Buckle	Report of the Section 151 Officer	30 January 2024	
Leader	<p>Title: Support for Care Leavers</p> <p>Purpose: To consider a report that sets out a range of measures to support Care Leavers, including into employment with the Council.</p>	Cllr Ewings / Andy Bates / Andy Wilson	Report of the Chief Executive and Head of Human Resources	30 January 2024	
Leisure, Health and Wellbeing	<p>Title: Council Tax Discounts and Council Tax Reduction Scheme 2024/25</p> <p>Purpose: To consider a report that seeks to recommend to Council a series of Council Tax Discounts and an updated Council Tax Reduction Scheme for 2024/25.</p>	Cllr Leech / Steve Mullineaux / Geni Hotchkiss	Report of the Head of Revenues and Benefits	30 January 2024	
Leisure, Health & Wellbeing	<p>Title: Discretionary Rate Relief and Corporate Debt Policies</p> <p>Purpose: To consider a report that presents updated Discretionary Rate Relief and</p>	Cllr Leech / Steve Mullineaux / Geni Hotchkiss	Report of the Head of Revenues and Benefits	30 January 2024	



Portfolio Area	Report Title and Summary	Lead Member / SLT lead / Report Author	Documents to be considered in making decision	Date of Decision	Consultees and means of consultation
	Corporate Debt Policies for approval.				
Resources & Performance	Title: Revenue Budget Monitoring Report to Month 7 Purpose: To consider a report that presents the Council's Revenue Budget Monitoring position to Month 7.	Cllr Edmonds / Lisa Buckle / Pauline Henstock	Report of the Section 151 Officer	30 January 2024	
Resources & Performance	Title: Capital Programme Monitoring Report to Month 7 Purpose: To consider a report that presents the Council's Capital Monitoring budget position to Month 7.	Cllr Edmonds / Lisa Buckle / Pauline Henstock	Report of the Section 151 Officer	30 January 2024	
Resources & Performance	Title: Quarter 1 and Quarter 2 Write-offs 2023/24 Purpose: To consider a report that seeks to write-off a series of debts for Quarters 1 and 2 for 2023/24.	Cllr Edmonds / Lisa Buckle / Geni Hotchkiss	Report of the Head of Revenues and Benefits	30 January 2024	
Housing	Title: Housing Crisis – Update Report Purpose: To consider a report that presents an update on the Council's progress against its declared Housing Crisis.	Cllr Renders / Chris Brook / Issy Blake	Report of the Head of Housing	30 January 2024	
Built Environment	Title: Joint Local Plan Review Purpose: To consider a report that sets out the proposals for the Joint Local Plan review.	Cllr Mott / Chris Brook	Report of the Strategic Planning Manager (Joint Local Plan)	5 March 2024	



Portfolio Area	Report Title and Summary	Lead Member / SLT lead / Report Author	Documents to be considered in making decision	Date of Decision	Consultees and means of consultation
Resources & Performance	<p>Title: Revenue Budget Monitoring Report to Month 10</p> <p>Purpose: To consider a report that presents the Council's Revenue Budget Monitoring position to Month 10.</p>	<p>CIlr Edmonds / Lisa Buckle / Pauline Henstock</p>	Report of the Section 151 Officer	5 March 2024	
Resources & Performance	<p>Title: Capital Programme Monitoring Report to Month 10</p> <p>Purpose: To consider a report that presents the Council's Capital Monitoring budget position to Month 10.</p>	<p>CIlr Edmonds / Lisa Buckle / Pauline Henstock</p>	Report of the Section 151 Officer	5 March 2024	
Built Environment	<p>Title: Conservation Area Appraisal: Tavistock</p> <p>Purpose: To consider a report that seeks to adopt the proposed new Conservation Area Appraisal for Tavistock.</p>	<p>CIlr Mott / Drew Powell / Ali Wagstaff</p>	Report of the Assistant Director / Planning	5 March 2024	
Leisure, Health & Wellbeing	<p>Title: Discretionary Housing Payments Policy</p> <p>Purpose: To consider a report that seeks approval of a revised Discretionary Housing Payments Policy.</p>	<p>CIlr Leech / Steve Mullineaux / Geni Hotchkiss</p>	Report of the Head of Revenues and Benefits	5 March 2024	
Natural Environment	<p>Title: Climate Adaptation Strategy</p> <p>Purpose: To consider a report that presents the draft Climate Adaptation Strategy.</p>	<p>CIlr Daniel / Drew Powell / Adam Williams</p>	Report of the Principal Climate Change Officer	5 March 2024	
				9 April 2024	



Portfolio Area	Report Title and Summary	Lead Member / SLT lead / Report Author	Documents to be considered in making decision	Date of Decision	Consultees and means of consultation
Built Environment	<p>Title: Okehampton Neighbourhood Plan</p> <p>Purpose: To consider a report that presents the draft Neighbourhood Plan and seeks approval for it to proceed to Referendum.</p>	Cllr Mott / Drew Powell / Graham Swiss	Report of the Senior Strategic Planning Officer	TBC	
Economy	<p>Title: UK Shared Prosperity Fund Update:</p> <p>Purpose: To consider a report that presents a progress update on the UK Shared Prosperity Fund.</p>	Cllr Jory / Chris Brook / Chris Shears	Report of the Head of Economy	TBC (Summer)	

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Report to: **Hub Committee**

Date: **30 January 2024**

Title: **The Council Plan 2024-2028**

Portfolio Area: **Councillor Mandy Ewings**
Leader of the Council

Wards Affected: **All**

Author: **Andy Bates** Role: **Chief Executive**
Neil Hawke **Assistant Director Strategy**

Contact: Directors@swdevon.gov.uk

RECOMMENDATIONS:

That the Hub Committee:

- 1. Consider the Council Plan 2024-2028 as set out in Appendix A and Year 1 (2024/25) delivery plan in Appendix B;**
- 2. RECOMMEND to Council to adopt the Council Plan and 2024-25 Delivery Plan at its meeting on 20 February 2024.**
- 3. RECOMMEND to Council to approve the funding for the 2024-25 Delivery Plan (as set out in section 5.4 of this report).**

1. Executive summary

- 1.1 The Hub Committee considered a draft of its vision and strategy, from this point forward known as The Council Plan, at its meeting at its meeting on 21 November 2023 and agreed to progress with public and partner consultation on the draft plan.
- 1.2 In parallel with the consultation, Advisory Groups have continued to meet in order to shape the delivery plans for 2024/25.
- 1.3 The final Council Plan and delivery plan for the 2024/25 are set out in Appendix A and Appendix B to this report.

2. Background

- 2.1 The Council Plan sets out our longer-term ambition for the borough. To support this ambition, we have developed thematic action plans for each of the key priority areas, which together form the Annual Delivery Plan, covering the period from 1 April 2024 to 31 March 2025.

- 2.2 The thematic action plans have been developed by Hub Lead Members in consultation with officers and have been informed by Advisory Groups open to all Members of the Council.
- 2.3 The delivery plan ensures that our resources are aligned to supporting Members' priorities and that our residents are clear about what we will do on their behalf. Wherever possible SMART (Specific, Measurable, Achievable, Relevant, Time-bound) targets have been developed to enable the Council to monitor progress against the plan.
- 2.4 Once adopted by Council, the delivery plan will be subject to regular monitoring, annual updates and reporting through the Hub and the Overview and Scrutiny Committee.

3. Public Consultation

- 3.1 The public consultation on the draft of The Council Plan commenced on Monday 27th November 2023 and ran through until 14th January 2024 – a total of seven weeks.
- 3.2 The consultation included a range of ways to seek views on the draft strategy including:
 - a. An online public consultation platform with survey.
 - b. A dedicated email address to send 'free-text' responses
 - c. An online Town and Parish Council briefing.
 - d. Resident engagement via Council presence at Okehampton Health and Wellbeing Alliance, Tavistock Dickensian Evening and Okehampton Edwardian evening.
- 3.3 While levels of response to the consultation were relatively low, the responses received were broadly in support of the priorities for the Council and provided helpful feedback to refine our proposals.
- 3.4 The key points from the consultation are set out in Appendix C to this report and have informed some minor amendments to the final strategy. A common theme emerging from the consultation was the wish for the Council to have greater clarity on exactly what it will deliver and to focus on delivering core services well.
- 3.5 The amendments made to the document include:
 - a. Clarifying some terms so that it's clearer what we mean – using less technical language.
 - b. Renaming the document to The Council Plan – to better reflect its purpose.
 - c. Reduced the Primary Aims under 'People and Communities' and 'Inclusive Services' to remove potential duplication.
 - d. Adding additional clarification to better explain some actions.

- e. Adding an additional action (based on feedback from Town and Council colleagues) around re-establishing Town and Parish Links meetings as a valued forum to address local issues across the area.

3.6 An updated version of The Council Plan can be found at Appendix A to this report.

3.7 The consultation responses received have informed the final delivery plan and the majority of points raised have been addressed in the delivery plans.

4. The Council Plan implementation and Performance Management

- 4.1 To ensure that the Council remains on track with delivering its plans, the delivery plan includes an outline of the Performance Management Framework for the Council.
- 4.2 The performance management framework sets out how the Council plans and organises its resources to achieve its vision and priorities.
- 4.3 Now that the Hub Committee have developed delivery plans, managers are ensuring that their service plans for the coming year align to those aims and ambitions. In turn, service plans will inform individual employee's objectives for the coming year which will ensure the whole organisation is aligned with the plan.
- 4.4 The framework also sets out how we will monitor progress against delivering the plans and ensures that there is clear accountability and clarity on corporate performance reporting.
- 4.5 Monitoring will be through a broad bundle of processes including:
 - 4.5.1 The timescales and measures of success set out in the delivery plans will be reviewed by the
 - 4.5.2 An updated suite of service key performance indicators (KPI's) which will be reported to
 - 4.5.3 A formal review process of Quarterly Integrated Performance Management reports to The Hub Committee; and
 - 4.5.4 Thematic action plan reports to Overview & Scrutiny Committee.

5. Resource Implications

- 5.1 At its meeting on 21 November 2023 the Hub Committee considered (Minute HC 29/23 refers) the outcome of a review of Earmarked Reserves and the Capital Programme. This report identified £0.871m of Earmarked Reserves which are potentially available to support the delivery of The Council Plan and £0.263m of capital resources. These are one-off amounts, so £1.134m in

total. This was subsequently approved at Council on 19 December 2023 (Item 8 (IV)).

- 5.2 The delivery of The Council Plan represents an overall financial commitment of £17,301,887 for 2024/25, with £16,914,387 financed from realignment of existing resources and allocations of government grants (such as UK Shared Prosperity Funding) and £387,500 of new monies from the £1.134m. The allocation against each theme area for the 2024/25 financial year is as follows:

Theme	24/25 Financial Year	
	<i>To be financed from £1.134m identified in 5.1 above (£)</i>	<i>To be financed from existing core budgets (£)</i>
Natural Environment	£87,000	
Built Environment	£100,000	£13,575,000
Housing	£50,000	£1,640,000
Health and Wellbeing	£25,000	£1,004,137
People and Community	£40,500	£120,000
Economy and Jobs	£60,000	£498,750
Performance and Resources	£22,000	£76,500
Inclusive Services and Communication	£3,000	
TOTAL (£17,301,887)	£387,500	£16,914,387

- 5.3 The analysis between Revenue and Capital expenditure is as below:

	<i>To be financed from £1.134m identified in 5.1 above (£)</i>	<i>To be financed from existing core budgets (£)</i>
Revenue expenditure	£337,500	£585,250 (of which £498,750 is UKSPF revenue funding)
Capital expenditure	£50,000	£16,329,137 (of which £15.4m is Government grant funding)
TOTAL (£17,301,887)	£387,500	£16,914,387

- 5.4 It is recommended that the £337,500 of revenue expenditure is funded from the £0.871m of Earmarked Reserves (as per the Hub report of 21 November 2023) which were identified as being

available to support the delivery of the emerging Council Plan. In addition, it is recommended that the £50,000 of capital expenditure is funded from the New Homes Bonus Earmarked Reserve (this is the £0.263m of capital resources identified for The Council Plan).

6. Proposed next steps

- 6.1 That the Hub Committee consider The Council Plan at Appendix A and Annual Delivery Plan at Appendix B; making any amendments prior to recommending it for adoption by full Council in February alongside the revenue and capital budget for 2024/25.

7. Implications

Implications	Relevant to proposals Y/N	Details and proposed measures to address
Legal/Governance	Y	The Council Plan is one of the plans and policies that comprise the Council's Policy Framework. Consequently, decisions to approve, adopt or amend the final Vision and Strategy and themes will be decisions of the Full Council.
Financial implications to include reference to value for money	Y	<p>The report recommends an overall financial envelope for each theme based on the actions set out within the delivery plan.</p> <p>The delivery of The Council Plan represents an overall financial commitment of £17,301,887 for 2024/25, with £16,914,387 financed from realignment of existing resources and allocations of government grants (such as UK Shared Prosperity Funding) and £387,500 of new monies from the £1.134m. The allocation against each theme area for the 2024/25 financial year is set out in section 5.2 above.</p>
Risk	Y	Having an agreed corporate plan ensures that Council resources are aligned to delivering on agreed priorities and plans. There is a risk that the plan is not agreed when finally considered by Council however this is mitigated through our consultation and engagement activity and by forming the West Devon Vision and Strategy and delivery plans.
Supporting Corporate Strategy	Y	This report sets out the progress in developing the four-year strategy for the Council.

Consultation & Engagement Strategy	Y	The Council Plan and delivery plan have been refined following a seven-week consultation and engagement period with the public and partners. This report sets out the responses to that consultation in Appendix C.
Climate Change - Carbon / Biodiversity Impact	Y	The Council Plan sets out our primary commitments to tackling climate change and increasing biodiversity as part of the Natural Environment theme. The investment in the Natural Environment Theme is shown in 4.2 of this report.
Comprehensive Impact Assessment Implications		
Equality and Diversity		Equality and Diversity Implications have been considered for The Council Plan and overall contribute to a positive impact for our residents. Equality Impact Assessments will be carried out for specific projects within the delivery plan as they commence delivery.
Safeguarding		No direct implications – specific implications will be considered alongside the delivery of specific projects within the plan
Community Safety, Crime and Disorder		No direct implications – specific implications will be considered alongside the delivery of specific projects within the plan
Health, Safety and Wellbeing		No direct implications – specific implications will be considered alongside the delivery of specific projects within the plan
Other implications		None at this stage

Supporting Information

Appendices:

Appendix A – The Council Plan;
Appendix B – Annual Delivery Plan 2024-25; and
Appendix C- Consultation Report

Background Papers:

Hub Committee 21 November 2023 – Minute HC 28/23

<https://democracy.swdevon.gov.uk/ieListDocuments.aspx?CId=221&MId=1866&Ver=4>

The Council Plan 2024-2028

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West Devon
Borough Council



Introduction from the Leader

West Devon is an incredibly special and important place, home to a World Heritage Site, bustling market towns and stunning moorland.

However, there are challenges which many residents face. The ongoing cost of living is putting a squeeze on household incomes and the affordability of housing means that many of our younger residents may struggle to access good quality housing in the future, in the area they have grown up in. There is also the real and current threat of climate change and biodiversity loss. We cannot wait to act; we must continue to deliver on our plans and make sure that we encourage others to do the same.

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Cllr Mandy Ewings

Leader
West Devon Borough Council

Our agricultural community is making great strides in exploring innovative ways to diversify, and we will continue to support them to do so by delivering our UK Shared and Rural Prosperity Funding programmes.

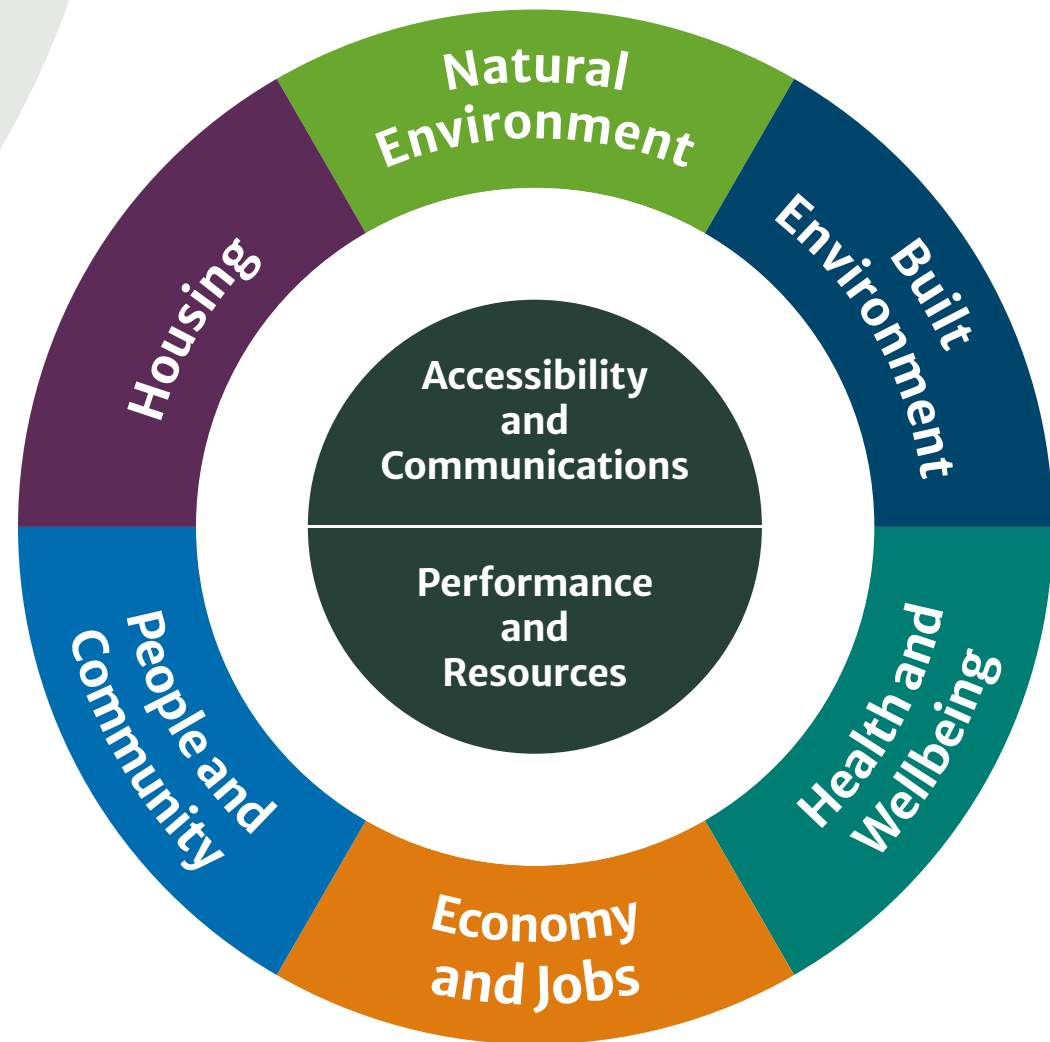
We will also make sure that we provide focused support for our less advantaged groups. We have already taken steps on this by buying our own temporary accommodation properties, developing a package of support for care leavers and guaranteeing interviews for ex-forces personnel.

To do all of this, we must make sure the Council is modern, efficient and innovative – delivering value for money and responsive services that meet the needs of our communities.

We must do all we can to support our residents and to protect West Devon for our future generations. The actions set out in this plan aim to deliver on our commitment.



Our priorities



We have eight key priorities to focus on for the next four years.

None of them can be delivered in isolation and all will contribute to the overall wellbeing of West Devon residents.

We know that we cannot achieve our ambitions for West Devon alone and so we will work with our communities and key partners in delivering this strategy.



Working together for West Devon.

Our priorities

Progressing our plans

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We are not
starting with
a blank sheet
of paper ...

Since May 2023, we have taken steps to deliver a number of schemes alongside the development of The Council Plan, which include:-

- Launching a Young Persons' Climate Award;
- Buying 5 properties for temporary accommodation for those displaced by conflict;
- Leading the Devon Housing Taskforce and been a founder member of a new Devon Housing Commission, a partnership of Devon Councils that will develop recommendations to start to address the broken housing market;
- Launching a £136k Household Support Fund for residents struggling with the cost of living;
- Attending community events such as Tavistock and Okehampton Community Health and Wellbeing Fairs, Chagford Show and Tavistock Pride to directly talk to our residents;
- Launching a new website to make it even easier for online residents to interact with us;
- Progressing delivery of a number of projects funded by the UK Shared Prosperity Fund.

While we are making positive progress on delivering our wider ambitions, The Council Plan builds on the above and sets out where we are going next.



Our plan will be underpinned by

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Financial Sustainability

Our financial sustainability is important in ensuring that we can deliver our priorities and good quality services to our residents. For many years local councils have received single year finance settlements. We will continue to lobby government for longer term certainty of our budgets, allowing us to make longer term plans.

Good Governance

We will make sure that we have a robust governance framework, effective decision making, and that we shape our policies and strategies in consultation with our communities and key stakeholders.

Community Development

We know that we cannot deliver a better future for West Devon alone. Our communities and the voluntary sector play a critical part in this. We will work with them and where we can, support them to deliver projects and schemes that will enhance the area for us all. We will also ensure that we invest in our own staff, making sure that they are equipped with the right skills and tools to provide responsive services.



Natural Environment

Our Ambition

The natural environment of West Devon is one of the things that makes it such a special place, one that we must protect for the future. Climate change and biodiversity loss continue to be a significant threat to our area and while any action we take will be small in terms of the required global change, we can and must do all we can. We will lead by example, encouraging our communities to also play their part.

The latest science from The Intergovernmental Panel on Climate Change (IPCC) and the UK Government's Climate Change Committee, as well as real world extreme weather events, have demonstrated how critical joined up action is at reducing the very worst of future climate change scenarios.

Having declared a Climate Change and Biodiversity crisis in 2020, we will now take steps to revise our action plan. This is aligned to the Devon Carbon Plan

which sets out a roadmap for how Devon can achieve net-zero carbon by 2050 at the latest. In the meantime, there is a target of 50% reduction (below 2010 levels) by 2030.

We have secured funding to deliver a number of projects to support the Borough on the journey to net zero. This includes developing plans for active travel schemes (walking and cycling) and importantly supporting our agricultural sector to consider opportunities to future proof their businesses in regenerative sustainable ways. We will also develop plans to support and incentivise renewable energy projects such as solar panels and wind turbines to reduce carbon emissions.

We will make sure that the climate and biodiversity impact of all decisions and service changes made is fully considered from the outset, doing all we possibly can to make climate-positive decisions.



Cllr Lynn Daniel
Lead Member for
Natural Environment

Our Primary Aims

1. An increase in biodiversity across the Borough over the next 4 years.

2. Continue to make reductions in eCO2 emissions across the Borough to stay on track for net zero by 2050.

3. To encourage others to take action to lessen their own climate impact.

Our Initial Actions

- Develop and begin to implement our Local Cycle and Walking Infrastructure Plan.
- Increase Electric Charging Points including exploring in-house delivery opportunities for EV charging point on council property.
- Implement a revised grounds maintenance programme for Council land to increase biodiversity.
- Update our 2020 Climate and Biodiversity Action Plan.
- Take a vigorous stance on the climate and biodiversity crisis leading by example and communicating what we are doing to encourage others to take similar steps, including a Use Less / Reuse / Recycle campaign.
- Promote the use of renewable energy sources within the West Devon Community.
- Launch a Thermal Imaging Camera lending scheme to enable residents and community facilities to identify areas for improving insulation in properties.
- Create allotments at South Tawton on West Devon Borough Council land – allowing residents to grow their own produce and reduce food miles.
- Organise visits to Energy from Waste plants and biodigesters to inspire improved levels of recycling and reduction in residual waste:-
 - Learn from successful regenerative farming and natural regeneration sites to inspire our future plans.
- Lobby and encourage partners to address issues not directly in the Council's control:-
 - Work with South West Water (SWW) and the Environment Agency (EA) with a 'Call for Evidence' on discharge of raw sewage into rivers;
 - Collaborate with relevant authorities and stakeholders to improve sewage treatment infrastructure;
 - Develop a plan for Wildlife Wardens.



Built Environment

Our Ambition

From the western edge of Dartmoor through to the east of Cornwall, West Devon has a built environment of global importance through the World Heritage Site. We will conserve and maintain existing historic fabric and retain and reflect locally distinctive features in the design of buildings, layouts and landscapes to ensure the authenticity and integrity of the World Heritage Site.

West Devon, together with South Hams and Plymouth, have a strategic plan for the area (Joint Local Plan) which sets out the future vision, policies and plans for our built environment up to 2034.

We will work with our communities to produce new visions for all our towns; setting out the opportunities and actions needed to make sure they remain thriving, active and accessible places. We will look to reflect these ambitions in the future Joint Local Plan.

In our urban centres, we will develop and review Conservation Area Appraisals and Management Plans to preserve and enhance important historic buildings and places across West Devon. We will also work with our communities to support the development of Neighbourhood Plans. These plans will reflect their hopes and aims and create local policies which will be considered in the determination of planning application to help them shape and manage their communities.



Cllr Caroline Mott

Lead Member for
Built Environment

Our Primary Aims

1. Conserve and enhance existing historic fabric and retain locally distinctive features in the design of building, layouts, street scene and landscapes to guarantee the authenticity and integrity of the World Heritage Site to maintain it for future generations.

2. Ensure that we have the infrastructure in place to meet the future needs of our communities and that these are secured and delivered by new development.

Our Initial Actions

- Support town and parish councils / neighbourhood forums in the making of at least two neighbourhood plans a year (including modifications required to existing plans) in West Devon.
- Support the refresh and expansion of Conservation Area Appraisals and Management Plans throughout the Conservation areas.
- Deliver Planning training sessions to Town and Parish Councils – upskilling them to understand what is important when considering applications.
- Update our enforcement procedures and strategy to ensure alignment with local priorities.
- Develop a plan for preserving the Duke of Bedford Cottages.
- Contribute to the World Heritage Site partnership and promote its importance to West Devon.
- Support the delivery of more affordable housing through the planning process.
- Deliver on our Planning Improvement Plan to make sure applicants continue to receive a better service.
- Progress with the Local Cycle and Walking Infrastructure Plan.
- Delivery of Okehampton Transport Hub.
- Support community infrastructure and facilities through timely allocation of developer contributions to community schemes.
- Support Network Rail and Devon County Council with the development of the business case to reinstate five miles of track and deliver a new single platform station at Tavistock, which would serve communities in Tavistock, Horrabridge, Lamerton, and Mary Tavy.

Housing

Our Ambition

West Devon Borough Council has been striving to tackle the 'housing crisis'; the real term cost of housing compared to earnings and the critically low availability of rented accommodation. Strong headwinds in the private rented sector as government legislation bites, are forcing landlords to sell or increase their rents, making it difficult to find houses which are available and affordable.

The cost of energy is placing an ever greater strain on essential income, leaving many in fuel poverty. The quality of our existing housing stock is some of the worst performing, in terms of energy efficiency, in northern Europe. This mirrors the rest of the UK, which, as a whole, is responsible for around 40% of all of the country's carbon emissions.

Tens of thousands of homes already exist in West Devon, whereas only a few thousand new ones have been built in the last 5 years, and even fewer of those are affordable. To improve housing outcomes, we must therefore apply our efforts proportionally to where the biggest challenges lie.

We are, and will continue to be, a force for good, looking for opportunities to improve housing outcomes that make the greatest difference to our residents.



Cllr Mark Renders

Deputy Leader and
Lead Member for Housing

Our Primary Aims

1. Help our communities to bring affordable housing in their areas.
2. Support the needs of Homeless households and provide good quality temporary accommodation and value for money.
3. Improve outcomes for care-experienced young people by supporting them to access the housing they need.
4. Tackle damp and disrepair in rented homes.
5. Decarbonise the existing social and affordable housing stock to improve living standards, lift people out of fuel poverty and reduce energy costs for residents.

Our Initial Actions

- Progress plans with redevelopment of Council owned office space (Plymouth Road, Tavistock) for temporary accommodation.
- Work with housing associations and community land trusts to improve the number of affordable, safe and good quality homes delivered for our residents.
- Lobby government for:-
 - Changes to Right to Buy legislation to reduce the loss of existing rented housing stock particularly in rural areas;
 - An increase in the local area housing allowance, which does not reflect the true cost of rented accommodation.
- Work with residents, social and private landlords to promote better standards of housing in West Devon.
- Update our Housing Strategy and Homelessness Strategy Delivery plans.
- Develop new policies that influence the proportion of new development that is affordable and social rented accommodation particularly in rural areas.
- Implement 200% Council Tax charging on second homes as soon as Government allows in 2025.
- Help where possible in the delivery of affordable homes where conditions for housing need, finance, partner involvement, deliverability and social outcomes align:-
 - Support communities to bring forward housing within their locality which may include Council land;
 - Support Registered Providers (RPs) with grant applications, planning applications and communities, Towns & Parishes (Enabling Housing Team).

Health and Wellbeing

Our Ambition

The health, wellbeing and safety of residents is vitally important to achieving a better quality of life and promoting independence across the Borough.

We will support healthier, safer and fairer communities through a range of measures and by working in partnership with other agencies. We will also play a direct role in this through delivery of a range of Council services such as inspecting food premises, carrying our environmental protection schemes and responding to concerns about private sector housing standards.

Enabling residents to remain as independent as possible in their own community will continue to be a focus for us. We will achieve this through delivering of grant schemes such as disabled facility grants and supporting residents who may be struggling financially by making sure that they access benefits and grants that they are entitled to.

We will deliver this by working, and actively participating, with partner agencies like Citizens Advice and the Community Safety Partnership to support the health and wellbeing of our residents. This will mean West Devon is a place where all residents and visitors feel safe, happy and healthy.



Cllr Tony Leech
Lead Member for
Health and Wellbeing

Our Primary Aims

1. To protect and improve the health and wellbeing of residents and visitors.
2. Provide direct support to residents through the provision of schemes such as Homes Upgrade Grant, Disabled Facilities Grants and energy grants.

Our Initial Actions

- Efficiently deliver schemes that will directly contribute to the health and wellbeing of residents – Disabled Facilities Grants, Energy Efficiency Grants and Household Support Funding.
- Support young people with their Mental Health by commissioning a programme of support in schools.
- Delivery of Junior Life Skills Programme.
- Work with the Community Safety Partnership to maximise impact in the Borough to deal with anti-social behaviour and safeguarding, violence prevention, domestic abuse, drugs, changing youth culture, exploitation and hate crime.
- Implement a Council Tax Discount Scheme and Leisure Centre Access Schemes for Children in Care and Care Leavers.
- Lobby the NHS to financially support exercise referral for those unable to pay and work with Fusion Leisure to promote activities already available.



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Cllr Adam Bridgewater
Lead Member for
People and Community

People and Community

Our Ambition

Our communities are the beating heart of West Devon, they work together to overcome local challenges and deliver action to improve the Borough for our future generations.

As a Council, our role is to enhance community action and to support local groups to deliver their own ambitions. We will increase our capacity and ability to support our communities to bring forward projects that are important to them including a focus on delivering projects promoting arts and culture within the Borough.

Looking to our own services, we will ensure that our frontline services (such as Grounds Maintenance and Localities) are responsive, keeping West Devon's open spaces tidy and enabling them to be enjoyed by residents.

We know that our communities are at the forefront of making West Devon the best place to live, and we will make sure we celebrate the work of individuals and organisations.

Finally, many causes of frustration for our residents, such as poor condition of roads and provision of youth services, are outside of our direct control, but we can, and will, lobby those responsible organisations for action.

Our Primary Aims

1. To ensure that we provide responsive support and good quality frontline services.

2. Build effective relationships with key partners, working together to address local challenges.

3. Be a voice for our communities, calling partners to action.

Our Initial Actions

- Progress with the Okehampton and Sydenham Damerell Community Governance Reviews.
- Implement enhanced council community services.
- Support our communities to deliver projects to enhance open spaces, parks, play pitches and other community assets by awarding funding from developer contributions (Section 106) and capital projects funds.
- Carry out a review of funding for key partners to ensure alignment to our aims and ambitions.
- Work with the Council for Voluntary Service (CVS) to co-produce a Community Development Action Plan.
- Raise the profile of the Council within the community by attending a range of events to promote Council services.
- Introduce a Young Persons' Climate and Biodiversity Award (Mayor).
- Lobby partners for better service provision in West Devon – for example Devon County Council (DCC) for Potholes and youth provision.
- Develop an Equality, Diversity and Inclusion Commitment for the Council, so that we can be sure we're able to meet the needs of all residents in the future.
- Support communities to develop community resilience plans.
- Develop an Arts and Culture Plan for the Borough.
- Re-establish Town and Parish Council Link meetings to facilitate sharing of best practices and collaboration to address local issues.



Cllr Neil Jory

Lead Member for
Economy and Jobs

Economy and Jobs

Our Ambition

We will create the environment for all sizes of business to flourish, through direct and indirect support and policy. This will include infrastructure and development aligned to our priorities.

We will strengthen our visitor economy, maximising the promotion of our unique cultural and heritage offer. We will identify opportunities to lobby for the best outcomes for our agricultural sector and make sure that we seize on future opportunities to attract additional funding through the Government's UK Shared Prosperity, Community Renewal Funds and other sources.

As a Council, we have a good track record of securing government funding for schemes and we will continue to leverage and improve strategic infrastructure as a means of attracting business and higher earning jobs for our residents. For example, by championing for improvements to broadband and mobile connectivity across the area.

We will also support the delivery of town plans to shape the economy of West Devon and take steps to enrich the Borough through promotion of cultural, heritage and sport activities to draw people into the area.

Our Primary Aims

1. Deliver on the UK Shared Prosperity and Rural Prosperity Funding programmes.
2. Ensure improvements to strategic infrastructure (including digital connectivity) and influencing partners to act.
3. Create an environment in which business in all sectors can innovate.

Our Initial Actions

- Deliver our UK Shared Prosperity Fund and Rural Prosperity Fund (UKSPF) programmes across West Devon.
- Support the progress of the Local Cycling Walking and Infrastructure Plan and work towards its implementation.
- Focus on boosting digital connectivity across the Borough – including broadband and 4G services.
- Delivery of Okehampton Transport Hub by March 2025.
- Support key business sectors in West Devon:-
 - Work with partners such as Devon Agri-tech alliance to facilitate networking between and with farms to support the implementation of regenerative farming methods;
 - Explore ways to support local farms through grants and funding opportunities to support agricultural diversification;
 - Develop a culture and arts support plan for the borough.
- Work with Town Councils and partners to develop town plans to help shape the economy of our places.
- Consult on the formation of a Okehampton Business Improvement District or Chamber of Commerce.



Performance and Resources

Our Ambition

At the core of delivering on our ambitions for West Devon, is the need for us to deliver good quality services that respond to the needs of our residents and that we demonstrate value for money through everything we do.

Delivering rural services is expensive and we will continue to lobby Government for fairer funding for rural authorities.

Recruiting and retaining skilled employees is difficult, more so since the changing working practices coming from the pandemic – you can now live in the Southwest but work for an organisation anywhere in the country. We will focus on ensuring we invest in training and support for our employees, with the aim of being an employer of choice, where each and every employee has the right skills and tools to deliver the best service for our residents.

We will also ensure we make the best use of Council assets including our buildings, taking steps to ensure we maximise occupancy at our Kilworthy Park offices.

Only by delivering good quality, value for money services can we achieve our wider ambitions for the Borough.

Cllr Chris Edmonds

Lead Member for
Performance and
Resources

Our Primary Aims

1. Support the wellbeing of our staff with training and development, the right tools to do the job and recognition of successes.

2. Make sure that we manage Council finances and assets well.

3. Guarantee efficiency in service delivery by managing performance.

4. Lead by example, ensuring that Council assets respond to our climate ambitions.

Our Initial Actions

- Deliver targeted and refreshed recruitment approaches to overcome local government job challenges.
- Identify further areas for service reviews to make sure our teams provide a good quality service.
- Carry out an annual staff survey to get feedback from staff on how we are doing.
- Apply an IT Strategy which includes a clear roadmap to adopting developing technology such as artificial intelligence (AI).
- Work with the Rural Services Network to lobby Government for fairer funding for rural services.
- Respond to the Government consultation on the Finance Settlement.
- Set a balanced budget for 2024/2025 and 2025/2026.
- Update our procurement strategy to guarantee greater emphasis on reducing climate impact of the Council supply chain and increased social value.
- Hold a 'Meet the Buyer' event to support local businesses bid for future Council contracts.
- Prepare an asset management strategy to set out how we will maximise use of our assets.

Accessibility and Communications

Our Ambition

As a Council, it is important that we constantly consider how best to deliver our services, making sure that all residents can access the services they need as easily as possible.

Most West Devon residents are able to interact with us online, and we have taken proactive steps to make our website easy to use. We have also implemented online accessibility tools to help as many people as possible to find online support. We encourage a digital first approach – which means that residents can carry out tasks with the Council 24 hours a day, seven days a week. However, we are aware that some residents in West Devon, whether by choice or due to the lack of internet access in rural area, do not have internet access. For these residents, we will do all we can to assist them to access Council services in alternate ways.

We will ensure that West Devon residents will be consistently updated regarding Council business and services, and any local issues involving the Council – putting our community at the centre of our communications.

We will continue to be a Council that takes pride in listening and responding to our residents' concerns, ideas and aspirations.



Cllr Jeff Moody

Lead Member for
Accessibility and
Communications

Our Primary Aims

1. To communicate the work of the Council and how it benefits our communities.
2. To strive for, and achieve, a high level of customer satisfaction.

Our Initial Actions

- Digital Accessibility 24/7 – Continuing Website enhancement, continuing to give customers around the clock access to Council services online.
- For those residents who are unable to access Council services digitally or by phone, we will offer, where necessary, a Face to Face service. This service will be promoted through key partners such as Citizens Advice.
- Proactively and continuously improve our customer communication channels so they are fully accessible and inclusive for all residents.
- Continuous review of our new Consultation & Engagement Portal.
- Engage with our community through Customer Satisfaction Surveys.
- Provide a planned programme of regular ‘Customer Engagement Roadshow Events’ to promote Council Services and to obtain feedback from residents.
- Implement a regular ‘information programme’ featuring important Council information through the local press, online videos, social media and various digital platforms.

Our contribution to a global blueprint

Adopted by the United Nations Members States in 2015, the sustainable development goals provide a shared blueprint for peace and prosperity for people and the planet now and into the future.

They are an urgent call to action by all countries, recognising that ending poverty and other deprivations must go hand-in-hand with strategies that improve health and education, reduce inequality, and spur economic growth – all while tackling climate change and working to preserve our oceans and forests. This plan directly contributes to 11 of the 17 goals as highlighted throughout the document.

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West Devon
Borough
Council

SUSTAINABLE
DEVELOPMENT
GOALS

West Devon Borough Council supports the Sustainable Development Goals

Want to know more?
<https://sdgs.un.org/goals>

www.westdevon.gov.uk

West Devon Borough Council Delivery Plans				2024/25		2025/26	
Theme	Action Reference	Action Description	Specific Deliverables	New Strategy Request	Other source (Existing)	New Strategy	Other existing sources
Natural Environment							
Natural Environment (Mow)	NE0.1	Refresh our 2020 Climate and Biodiversity Action Plan in line with the Devon Carbon Plan	A refreshed plan				
		Support Devon Climate Emergency Partnership	Support for the communications and engagement function of the Devon Climate Emergency Partnership	£ 2,000		£ 2,000	
Primary Aim 1 - An increase in biodiversity across the borough in the next 4 years							
Natural Environment	NE1.2	Implement a revised grounds maintenance programme for council land to increase biodiversity	Develop specification and identify route to procure / lease equipment				
Natural Environment	NE1.3	Promote successful regenerative farming and natural regeneration sites to inspire our future plans	Create a baseline of agriculture activity				
Natural Environment	NE1.4	Develop a plan for Wildlife wardens with the intention this becomes self-funding in future years	Part-time (2.5 days pw) Wildlife Warden Officer Appointed (12 month fixed term)	£ 20,000			
		Work with Plymouth and South Devon Community forest to identify opportunities for tree planting and biodiversity in the borough	Develop the plan for increasing within WD and to understand the carbon credits	£ 50,000		£ 50,000	
Primary Aim 2 - Continue to make reductions in eCO2 emissions across the Borough to stay on track for net zero by 2050							
Natural Environment	NE2.1	Develop, review and adopt a Local Cycle and Walking Infrastructure Plan for the Borough to inform future strategic planning	An adopted LCWIP				
Natural Environment	NE2.2	Implement the Councils adopted Electric Vehicle charging strategy	Delivery of EV Strategy delivery plan				
Natural Environment	NE2.3	Promote the use of renewable energy sources within the West Devon community	Delivered through the UK Shared Prosperity Fund				
Natural Environment	NE2.4	Promote a thermal imaging camera lending scheme to enable residents and community facilities to identify areas for improving insulation in properties	Review trial and extend (including additional cameras)	£ 5,000		£ 5,000	
Natural Environment	NE2.5	Work with communities, Town and Parish Councils to understand existing plans for, and Identify any future areas within the borough that could be used as allotments	Identify sites that could potentially be used for allotments (such as South Tawton) Develop proposals for consideration				
Natural Environment	NE2.6	Implement a decision making tool to assess climate and biodiversity (in addition to social value / other implications)					
Primary Aim 3 - Lead by example to promote positive action on climate change and biodiversity							
Natural Environment	NE3.1	Reduce Scope 1 and 2 Emissions to Net Zero by 2030 and work towards reducing scope 3 emissions by working with suppliers	Net zero 2030				
			Complete feasibility study for fleet conversion and costs, bringing proposals forward to Council during 2024/25	£ 10,000			
			Develop plans for Decarbonisation of buildings - Kilworthy and wider estate, bringing proposals forward to Council during 2024/25			tbc	
Natural Environment	NE3.2	Improve recycling rates and reduction in residual waste.	Organise visits to Energy from Waste plants and biodigesters to inspire improved levels of recycling and reduction in residual waste				
			Delivery of capital improvements (such as Hayedown) and infrastructure to support an increase in recycling				

			Deliver a communications campaign to promote reduce / reuse / recycle / garden waste collections etc				
Natural Environment	NE3.3	Work with South West Water and the Environment Agency with a 'Call for Evidence' on discharge of raw sewage into rivers	SWW & EA to attend Overview and Scrutiny				
			Collaborate with relevant authorities and stakeholders to encourage improvement of sewage treatment infrastructure				
Total				£ 87,000	£ -	£ 57,000	£ -
Built Environment							
Primary Aim 1 - Conserve and enhance existing historic fabric and retain locally distinctive features in the design of building, layouts, street scene and landscapes to guarantee the authenticity and integrity of the World Heritage Site to maintain it for future generations							
Built Environment	BE1.1	Support Town and Parish Councils/ neighbourhood forums in the making of at least two neighbourhood plans a year (including modifications required to existing plans)	Two neighbourhood plans made / modified each year Develop proposals to promote Neighbourhood Plans to Towns and Parishes including case studies of where they have positively supported communities				
Built Environment	BE1.2	Plan and prepare for the review of the Local Plan (JLP) to ensure that this supports the Council's plan and meets the needs of our communities.	JLP review preparation and work programming (Phase 1). Review Climate Emergency Impact Statement (DEV32 requires all development to contribute to the 50% carbon reduction target by 2034, against a 2005 baseline, as well increasing the use and production of decentralised energy). Housing Position Statement	£ 100,000		£ 100,000	
Built Environment	BE1.3	Support the refresh and expansion of conservation area appraisals and management plans throughout conservation areas	Rolling programme of 2-3 CAA's coming forward each year based on prioritisation in line with the JLP hierarchy set out in Policy TTV1, where they contain a Conservation Area: - Main towns - Smaller Towns and Key villages - Sustainable Villages - smaller village hamlets				
Built Environment	BE1.4	Develop a plan for preserving Duke of Bedford Cottages	Plan, developed and agreed to create a Local Listed Development Order with design code to positively manage the Duke of Bedford Cottages				
Built Environment	BE1.5	Contribute and promote the World Heritage Site and partnership and provide a longer-term funding agreement	Invite WHS to O&S / Planning Board in order to support and align to the WHS Management Plan Take steps to raise the profile of the World Heritage Site				
Built Environment	BE1.6	Deliver on our planning improvement plan to make sure applicants continue to receive a better service	Review and update as necessary our Planning Customer Charter. Deliver a planning training session to Town and Parish Councils within 6 months following elections. Enabling them to understand what is important when considering applications Review the current Planning Enforcement policy to ensure we improve transparency of the process Consider progress against the Planning Improvement Plan through future meetings of the Built Environment Advisory Group				
Primary Aim 2 - Ensure that we have the infrastructure in place to meet the future needs of our communities and that these are secured and delivered by new development							

Built Environment	BE2.1	Support the delivery of more affordable and social housing through the planning process	Challenge viability studies to ensure we maximise the amount of affordable and social housing delivered in the borough					
Built Environment	BE2.2	Ensure that through our planning processes that the natural environment is fully considered and managed	Delivering Biodiversity net gain through the planning process					
			Managing trees and hedgerows positively through the consideration of PLanning and other applications to preserve important trees and hedgerows and protect trees through appropriate legislation.					
Built Environment	BE2.2	Progress with the Local Cycle and Walking Infrastructure Plan	Delivery of the Local Cycle and Walking Infrastructure Plan (linked to Economy Deliverable)					
			Promoting accessible routes to/from the Transport Hub - promoting them to residents.					
Built Environment	BE2.3	Delivery of Okehampton Parkway Station and Integrated Transport Hub	Progress with the delivery of the Transport Hub		£ 13,575,000		Balance of 2024/25	LUF funding plus our contribution
Built Environment	BE2.4	Support community infrastructure and facilities through timely allocation of developer contributions to community schemes	Securing funding through S106 (Developer Contributions) towards local facilities and ensuring contributions are received and directed towards delivering these.					
			Work with WDBC Members, town and parish councils to identify appropriate schemes for S106 allocation					
Built Environment	BE2.5	Support Network Rail and Devon County Council with the development of the business case to reinstate five miles of track and deliver a new single platform station at Tavistock, which would serve communities in Tavistock, Horrbridge, Lamerton, and Mary Tavy	Co-ordinate and champion local support for the project including with local MP's and other stakeholders					
Total				£ 100,000	£ 13,575,000	£ 100,000	£ -	
Housing								
	H0.1	Update our Housing Strategy delivery plans						
Primary Aim 1 - Help our communities to bring forward affordable housing in the area								
Housing	H1.1	Work with housing associations and community land trusts to improve the number of affordable, safe and good quality homes delivered for our residents	Develop a package of support for adoption by the council to deliver these outcomes. Including WDBC working with landowners etc to identify opportunities pre-planning and to understand from Housing Associations their future plans for acquisitions and disposals within the borough.	£ 50,000		£ 50,000		
Housing	H1.2	Lobby government for changes to right to buy legislation to reduce the loss of existing rented housing stock particularly in rural areas						
Housing	H1.3	Lobby Government for an increase in the local housing allowance, which does not reflect the true cost of rented accommodation	increased LHA already implemented					
Housing	H1.5	Develop new policies that influence the proportion of new development that is affordable and social rented accommodation particularly in rural areas.	Council policies to support outcomes					
Housing	H1.6	Implement 200% Council Tax Charging on second homes in 2025.	Countywide discussion on utilising the additional Council Tax contributions					

			The Council will continue to lobby for legislative and regulatory change to address the challenges that the district faces around second homes and shortterm let holiday accommodation. Specifically, the Council will lobby for the ability to register shortterm lets and to licence them. The Council will then seek the ability to limit the number of holiday lets in a particular area when market penetration of shortterm holiday lets exceeds a given proportion of total homes. Finally, we'll continue to lobby to Support the introduction of a new use class for short term lets, and not to allow changes between the new use class and residential properties without planning permission				
			Policy report to Council to implement 100% premium charging				
Primary Aim 2 - Support the needs of homeless households and provide good quality temporary accommodation and value for money							
Housing	H2.1	Develop new temporary accommodation	Progress plans with the redevelopment of Council owned office space (20 Plymouth Road, Tavistock) for temporary accommodation		£ 650,000		
			Delivery of Local Authority Housing Fund properties for temporary accommodation initially for refugees (Homes for Ukraine / Afghan Resettlement scheme)				
			Consider options for submitting a further bid to Local Authority Housing round 3 in order to secure additional temporary accommodation within the Borough				
			Identify future potential opportunities for temporary accommodation within the Borough with business cases brought forward to Hub and Council			TBC	
Housing	H2.2	Update our Homelessness strategy delivery plans					
Primary Aim 3 - Improve outcomes for care-experienced young people by supporting them to access the housing they need							
Housing	H3.1	Work with Devon County Council and districts through the Corporate Parenting Group to support care leavers access housing					
Housing	H3.2	Promote Council Tax reduction scheme for care-experienced young people					
Primary Aim 4 - Tackle damp and disrepair in rented homes							
Housing	H4.1	Deliver on our Housing Standards Commitment - working with residents and social and private landlords to promote better quality housing in West Devon	Deliver a campaign to educate private and social landlords to be aware of their responsibilities by promoting good housing standards via newsletters				
			Ensure all registered providers understand requirements at an operational level				
			Evaluate the introduction of the Social Housing Bill through to legislation and seek to carry out any opportunity that the legislation presents to				
			Provide an annual update to Members on numbers of Housing Standards issues the Council have addressed				
Primary Aim 5 - Decarbonise the existing housing stock to improve living standards, lift people out of fuel poverty and reduce energy costs for residents							

Housing	H5.1	Improve the efficiency of the existing housing stock within the borough, removing people from fuel poverty and having a positive impact on climate change	Plan to retrofit 55 properties (subject to installer quotes)		£ 990,000		
Total				£ 50,000	£ 1,640,000	£ 50,000	£ -
Health and Wellbeing							
Primary Aim 1 - To protect and improve the health and wellbeing of residents and visitors							
Health and Wellbeing	HW1.1	Support young people with their mental health by commissioning a programme of support in schools	Programme of Mental Health Assemblies	£ 10,000		£ 10,000	
Health and Wellbeing	HW1.2	Delivery and enhancement of Junior Lifeskills programme	Junior Lifeskills delivered annually		£ 10,000		£ 10,000
Health and Wellbeing	HW1.3	Work with the Community Safety Partnership to maximise impact in the Borough to deal with anti-social behaviour and safeguarding, violence prevention, domestic abuse, drugs changing youth culture, exploitation and hate crimes	An agreed annual plan for the Community Safety Partnership working across West Devon				
Health and Wellbeing	HW1.4	Lobby the NHS to financially support exercise referral for those unable to pay and work with Fusion Leisure to promote activities already available	Continue to support the work of CVS particularly around Social Prescribing Communicate the existing programmes available from Fusion Leisure				
Health and Wellbeing	HW1.5	Develop a strategy for the longer-term sustainable delivery plan for leisure services within the borough	Commissioned report into longer term solutions	£ 10,000		£ 10,000	
Primary Aim 2 - Provide direct support to residents through the provision of schemes such as Homes Upgrade Grant, Disabled Facilities Grants and energy grants							
Health and Wellbeing	HW2.1	Efficiently deliver schemes that will directly contribute to the wellbeing of residents	Provision of Disabled Facilities Grants to enable residents to remain in their own homes		£ 994,137		£ 994,137
Health and Wellbeing	HW2.2	Implement a leisure centre access schemes for Children in Care and Care Leavers	Scheme promoted with our leisure provider	£ 5,000		£ 5,000	
Health and Wellbeing	HW2.3	Work with organisations supporting elderly and isolated residents to promote support that is available	Conversations with organisations via Health and Wellbeing alliances to understand existing support in our communities Promote available support through our online support directory				
Total				£ 25,000	£ 1,004,137	£ 25,000	£ 1,004,137
People and Community							
Primary Aim 1 - To ensure that we provide responsive support and good quality frontline services							
People and Community	PC1.1	Carry out a review to ensure we continue to provide good quality, responsive frontline services	Review of our Localities Service to ensure they remain responsive to our priorities.				
			Implement recommendations of Localities Service review to deliver good quality services				
			Monitor the impact of 2023 car parking review				
People and Community	PC1.2	Continue to monitor our commissioned frontline services	Contract monitoring and performance of our Waste and Street Scene services (FCC)				
Primary Aim 2 - Build effective relationships with key partners, working together to address local challenges							
People and Community	PC2.1	Formation of Community Development Team	Develop service action plan for the Community Development Team				
			Review of partners aligned to new corporate strategy. Potential inflationary increase (not applied for 5 years)	£ 10,000		£ 10,000	
			Support Community projects through Member Locality budget including reviewing the criteria. Extra £500 each (£1,000 each total per year)	£ 15,500		£ 15,500	
			Develop a plan to support Arts and Culture across the Borough	£ 10,000		£ 10,000	

			Work with the Council for Voluntary Service (CVS) to co-produce a Community Development Action Plan.				
			Support communities to develop community resilience plans.				
			Raise the profile of the Council within the community by attending a series of events to promote Council Services and support	£ 5,000		£ 5,000	
People and Community	PC2.2	Support our communities to deliver projects to enhance open spaces, parks, play pitches and other community assets by awarding funding from developer contributions (Section 106) and capital projects funds.	Utilisation of developer contributions through the planning process for recreation and leisure schemes within the borough.		£ 120,000		
People and Community	PC2.3	Community Governance Reviews	Progress with the Okehampton Community Governance Review				
People and Community	PC2.3	Community Governance Reviews	Progress with Sydenham Damerell Community Governance Review				
People and Community	PC2.4	Provision of Rural England Community Resilience Grants	Grants provided up to £10,000 match funded		uk repf		
People and Community	PC2.5	Introduce a Young Person's Climate and Biodiversity Award to promote positive community action	Continue with awards				
People and Community	PC2.6	Lobby partners for better service provision in West Devon - for example Devon County Council for potholes and youth provision					
People and Community	PC2.7	Develop an Equality, Diversity and Inclusion Commitment for the Council					
Total				£ 40,500	£ 120,000	£ 40,500	£ -
Economy and Jobs							
Primary Aim 1 - Maximise on the benefits for business and communities from the successful UK Shared Prosperity and Rural Prosperity Funding Programmes							
Economy and Jobs	EJ1.1	Decarbonisation Plans provided through contract with Libraries Unlimited	Provision of decarbonisation support planning for businesses		£ 30,000		£ 30,000
Economy and Jobs	EJ1.2	Support community energy groups to promote and maximise the impact of their work for West Devon communities			£ 25,000		£ 25,000
Economy and Jobs	EJ1.3	Enable the development of local food and drink distribution projects,			£ 22,500		£ 22,500
Economy and Jobs	EJ1.4	Construction sector decarbonisation support	Audit and support programme for construction businesses		£ 25,000		£ 25,000
Economy and Jobs	EJ1.5	Support businesses to decarbonise	Grants of up to £10,000 (match funded) to businesses		£ 75,000		£ 75,000
Economy and Jobs	EJ1.5	Support businesses to decarbonise	Clean diversification grants programme		£ 75,000		£ 75,000
Primary Aim 2 - Ensure improvement to strategic infrastructure (including digital connectivity) and influencing partners to act							
Economy and Jobs	EJ2.1	Support the progress of the Local Cycling Walking and Infrastructure Plan and work towards its implementation	Delivery of LCWIP and behaviour change strategy		£ 30,000		£ 30,000
Economy and Jobs	EJ2.2	Review the opportunities provided by the Government's new Digital access programme and what that means for broadband and 4g services across the borough					
Primary Aim 3 - Create an environment in which business in all sectors can innovate							
Economy and Jobs	EJ3.1	Work with partners such as Devon Agri-Tech alliance to facilitate networking between and with farms to support the implementation of regenerative farming methods	Provision of agri-tech innovation grants of up to £10,000		£ 75,000		£ 75,000
Economy and Jobs	EJ3.2	Work with local farms to support agricultural diversification	Delivery of Agri-Tech Innovation Project		£ 80,000		£ 80,000

			Regenerative Farming Support (up to a year of support to diversify per Farm from the Apricot Centre)		£ 36,250		£ 36,250
			Provision of Land Management Support consultancy to WD farms from The Apricot Centre		£ 15,000		£ 15,000
Economy and Jobs	EJ3.3	Work with Town Councils and partners to develop town plans to help shape the economy of our places.	Support each of our Towns to develop Economic Plans should they wish to do so	£ 25,000		£ 25,000	
Economy and Jobs	EJ3.4	Work with businesses in Okehampton to develop plans for a Business Improvement District.	Consult on the formation of a Okehampton Business Improvement District or Chamber of Commerce. Ballot	£ 25,000		£ 10,000	
Economy and Jobs	EJ3.5	Continue to support Tavistock BID	Continuation of existing support for BID operation - WDBC costs for collection of Levy fees	£ 10,000		£ 10,000	
Economy and Jobs	EJ3.6	Continue with advice and support for businesses looking to start-up or scale-up within the Borough	Continuation of Business Advice		£ 10,000		£ 10,000
				£ 60,000	£ 498,750	£ 45,000	£ 498,750
Performance and Resources							
Overarching Aim		Be the best organisation we can be to deliver for our communities					
Primary Aim 1 - Implement the Councils Organisational Development Plan to support our people							
Performance and Resources	PR1.1	Implement Year 2 of the Council's Organisational Development Plan	Deliver targeted and refreshed recruitment approaches to overcome local government recruitment challenges				
			Carry out an annual staff survey to get feedback from staff on how we are doing		£ 1,500		£ 1,500
			Implement our guaranteed interview scheme for Care Leavers, Ex-Forces personnel and candidates with disabilities where they meet the minimum requirements for the role				
			Implement our Equality, Diversity and Inclusion Commitment and plan				
			Promote apprenticeship opportunities to develop our own talent.				
Primary Aim 2 - Make sure that we manage the Council's finances well							
Performance and Resources	PR2.1	Set a balanced budget for 2024/25 and 2025/26	Work with the Rural Services Network to lobby Government for fairer funding for rural services				
			Respond to the Government consultation on the Finance Settlement				
			Regular all Member briefings on financial matters and budget setting including via formal reporting process - Capital, Revenue and Treasury Management monitoring reports				
			Carry out a consultation of businesses on our Council Tax setting				
			Annual training or Members on Treasury Management				
Performance and Resources	PR2.2	Demonstrate value for money and efficiency of services through independent assessments	Maintain a high standard judgement from our external auditors on their Annual Audit Report.				
			Continue to make improvements in internal audit assessments				
			Work with Devon Audit Partnership to decide priority internal audit focus for coming year				
Primary Aim 3 - Guarantee efficiency in service delivery by managing performance							
Performance and Resources	PR3.1	Identify further areas for service reviews to make	Localities and Frontline service review				

Resources		sure our teams provide a good quality service	Ensure that our KPI's reflect our Council plan and the needs of our communities - launching updated KPI's from April 2024				
	PR3.2	Develop and implement systems that support our staff to deliver the best services for our residents.	Maximise the IT systems currently in use eg. the new Planning and Landcharges systems				
			Develop the resilience of our IT systems		£ 75,000		£ 75,000
			Secure Council resilience for emergency planning, business continuity & safety. One off piece of work	£ 20,000			
PR3.3	Develop and implement a sustainable procurement strategy to secure value for money and support local businesses	Update our procurement strategy to guarantee greater emphasis on reducing climate impact of the Council supply chain and increased social value					
		Commission updated spend and supply chain analysis to inform future strategies	£ 2,000		£ 2,000		
Primary Aim 4 - Council buildings and land meet our future needs							
Performance and Resources	PR4.1	Prepare an asset management strategy to set out how we will maximise the use of our assets	Agree Asset Management Strategy and develop delivery plan				
Total				£ 22,000	£ 76,500	£ 2,000	£ 76,500
Accessibility and Communications							
Primary Aim 1 - To communicate the Councils work and how it benefits the community							
Accessibility and Communications	AC1.1	Proactively and continuously improve the Council communication channels	Develop an annual communications plan aligned to the Councils new priorities including how we'll use all communication channels to promote key messages				
			Refresh the 'Who Does What' Council tax leaflet so that our residents know who to go to in order to get things done				
			Develop a clear commitment to our customers, setting out what they can expect and what we expect of them in working with the Council				
Accessibility and Communications	AC1.2	Continue to enhance our online communications	Monitor satisfaction of online processes and webpages and make improvements where required				
			Improve clarity on our website so customers know when they need to contact someone else (such as Devon County or Town and Parish Councils)				
	AC1.3	Develop other (offline) communication channels	Launch a 'Leaders' Column supported by Lead Members in local newspapers to share key Council news				
			Develop a refreshed Annual Report for the Council setting out what we've delivered in the past 12 months				
			Improve signage and facility of the Kilworthy Park reception area and entrance to the site to include opening days / hours	£ 3,000			
			Review our Member resources to enable our Members to actively engage with residents on key council priorities				
			Measure the effectiveness of our outreach programmes - monitoring levels of engagement				

One-off piece of work to establish requirements

			Consider plans for highlighting how residents can access Council services to those not online - for example posters for parish noticeboards and promote the locality support to partners				
Accessibility and Communications	AC1.2	Review the effectiveness of consultations	Ensure that our platform is user friendly with good response rates				
			Include a summary of our consultations within our Annual Report				
Accessibility and Communications	AC1.3	Planned programme of community event attendance to promote the work of the Council	Health and Wellbeing Conferences / Okehampton Show / Chagford Show / Dickensian /				
Primary Aim 2 - To strive for and achieve a high level of customer satisfaction							
Accessibility and Communications	AC2.1	Customer satisfaction survey	Carry out an annual Institute of Customer Service satisfaction survey				
Accessibility and Communications	AC2.2	Digital Accessibility - continue to monitor online uptake and improve functionality online	Enhance our KPI's to include a measure of satisfaction with online processes				
Accessibility and Communications	AC2.3	Respond to complaints in a timely manner, and implement learning	Refresh our KPI to report on complaints performance				

Total Inclusive and Accessible £ 3,000 £ - £ - £ -

Natural Environment Total	£ 87,000	£ -	£ 57,000	£ -
Built Environment Total	£ 100,000	£ 13,575,000	£ 100,000	£ -
Housing Total	£ 50,000	£ 1,640,000	£ 50,000	£ -
Health and Wellbeing Total	£ 25,000	£ 1,004,137	£ 25,000	£ 1,004,137
People and Community Total	£ 40,500	£ 120,000	£ 40,500	£ -
Economy and Jobs Total	£ 60,000	£ 498,750	£ 45,000	£ 498,750
Performance and Resources	£ 22,000	£ 76,500	£ 2,000	£ 76,500
Accessibility and Comms	£ 3,000	£ -	£ -	£ -
	£ 387,500	£ 16,914,387	£ 319,500	£ 1,579,387

Total Strategy Commitment
£ 19,200,774.00

New Requests total (24/25 and 25/26)	£	707,000.00
Total Funding	£	1,134,000.00
Funding Remaining	£	427,000.00

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The Council Plan– Consultation Responses

The Council commenced its consultation on The Council Plan on Monday 27th November and ran through until Sunday 14th January 7 full weeks although it is acknowledged that one of these weeks was Christmas). The recommended good practice for running consultation is 6 weeks.

The survey consisted of:

- Online Survey on the full plan (hosted on our consultation website CommonPlace)
- Social Media quick polls on specific topics
- A Town and Parish Briefing session to gain feedback
- Directly inviting Town and Parish Councils to send responses to the Council
- Asking residents what they consider to be important for the Borough via attendance at pre-booked events taking place during the consultation (Okehampton Health and Wellbeing Fayre, Tavistock Dickensian and Okehampton Edwardian).

Overall, the levels of response were low which is typical for consultations on Corporate plans – given the broad coverage of priorities. Plans are in place to develop a Community Development and Engagement team to support future engagement activity and enable better coverage of face-to-face engagement.

While overall a low level of response, it is important to highlight that the Delivery Plans for The Council Plan have been developed with Councillors through Advisory Group meetings. Councillors have a wealth of knowledge and understanding of local issues and opportunities from residents and local partnership working. This has heavily shaped our plans.

Section 1 – Online Survey

1. Did you find the strategy easy to read and understand?

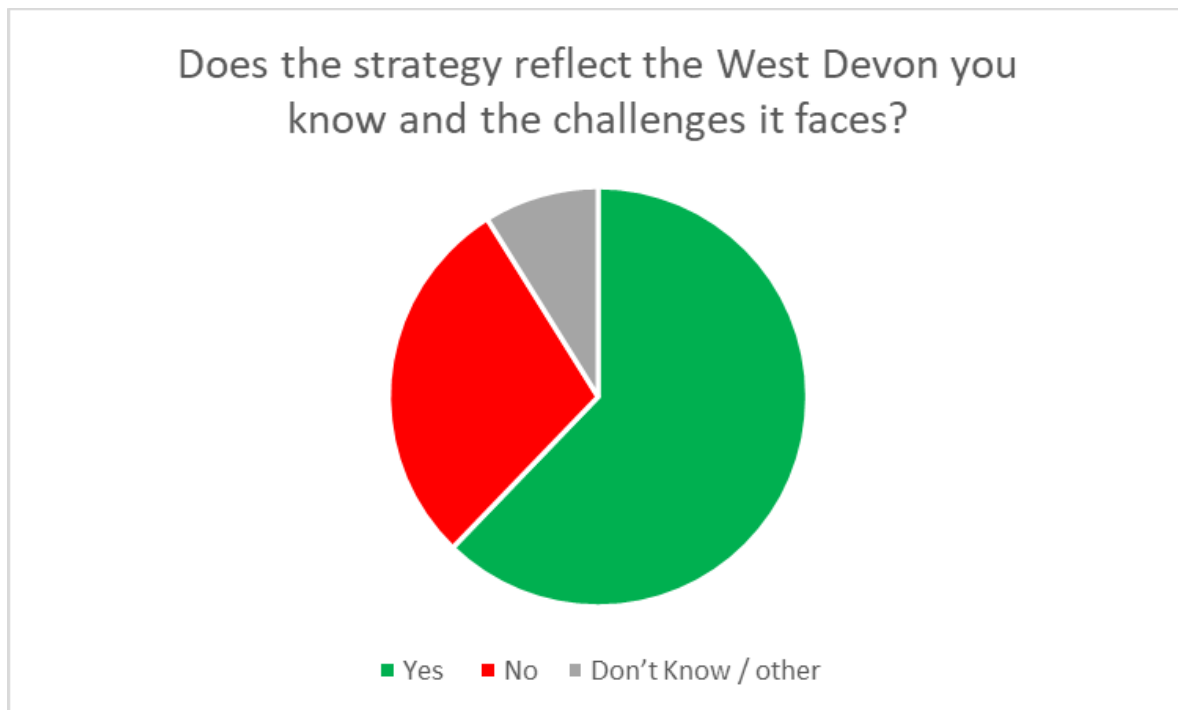


Yes – 38 No – 4 No decision – 3

Comments:

- It is written in "local government speak", which doesn't engage and too often assumes a knowledge of issues and organisations that ordinary people are unlikely to have.
- It would be good to have more detail on how the lead members are aligning primary aims and initial actions. Overall the strategy was good and any follow on work would be good to baseline and prioritize based on impact.
- More could be done to make it accessible to all residents.
- Reasonably so, but there is a fair amount of repetition, particularly around environmental topics. Personally prefer keeping it more concise and direct.
- The strategy mainly consists of vague aspirations with little detail of specific goals.

2. Does the strategy reflect the West Devon you live or work in and the challenges it faces?

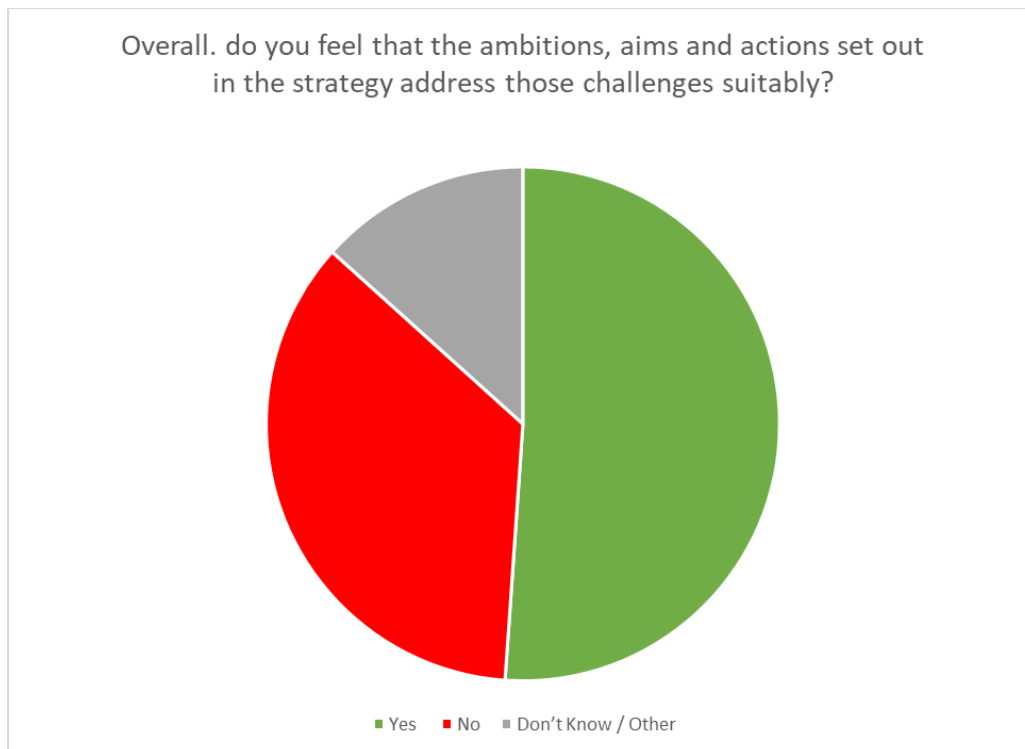


Yes – 28 No – 13 Don't Know / Other – 4

Comments:

- I agree with the choice of eight key areas of work.
- I feel the strategy does reflect the challenges and would like to see a more joined up approach to planning with the DNPA and how to enhance the energy efficiency of our homes given the challenges seen from our housing stock and prevailing climatic conditions in the SW.
- It is a good reflection of West Devon but I feel it sadly misses that strong sense of community that we already have and doesn't demonstrate the great ways in which communities support each other. It also doesn't demonstrate the diversity of our communities or reflect individual experiences within West Devon.
- In part, though I find it woefully lacking in local business/traders support, in the last week 2 more shops in Tavistock have said they are closing. Tavistock should be a destination town, nobody will come if it gets Holsworthy or Callington vibes..
- There is an over reliance upon digital means of contact and seeing appropriate members of staff is, from personal experience, virtually impossible.
- Strategy must consider local people first.

3. Overall, do you feel that the ambitions, aims and actions set out in the strategy address those challenges suitably?



Yes – 23 No – 16 Don't Know / Other – 6

Comments

- I agree with the overall aims, but too many of the actions lack ambition . There needs to be much stronger and more specific measures to tackle climate change, improve biodiversity and to ensure that we have a good stock of new affordable and social housing.
- I think a programme of joined up thinking in the delivery of the services and infrastructure is needed. work packages should look at interdependencies and analysis assessment done to identify the greatest impact and widest reach from council spending.
- I've put yes, because I understand the restraints on public services, however, the actions are limited and its possible that more could be done with better consultation and community engagement.
- There are lofty ambitions with few specifics and no details of actual steps to be taken to achieve goals within stated time-frames
- It's not a strategy which I think is about putting things in place now that will enable the big changes and ambitions happen. It all feels very short term, 6-18 months, and little changes.
- Better quality of shops in town centre. Poorer shops less footfall
- No, I feel there could be more tangible actions listed to address challenges such as climate change and the cost of living. I appreciate the council has limited funding but

this strategy seems weak in it's substance - what are you actually going to do to achieve your aims?

- I think it can go further in meeting Climate and Ecological responsibilities in house building, using localised materials and innovative insulation and renewable energy. You haven't addressed the issue of lack of burial provision. Every community should and could have a natural burial site to reduce and eventually eliminate damaging energy misuse and high emission levels.
 - I think there are too many ambitions to be realistically achieved in the current financial climate - why not do a few cote things well like prioritise housing and education first - -also there are no deliverables with timescales so at the moment it's just words – don't fall into that trap - the council is making good progress but people aren't interested in glossy strategies that don't deliver anything
4. Please let us know if you feel we haven't got any specific areas right
- Greater and more specific commitment to build social housing.
 - Support and information service for sustainable farming practices, e.g. for regenerative agriculture.
 - Support for more green burial sites
 - Ensuring effective network of EV charging points
 - Adopt and support energy advise programmes as developed by Tamar Community Energy
 - Support for 20 mph traffic zones in all built up areas
 - Support for community transport schemes
 - I would like to see more localized work places set up in towns and villages, we have a population that may work further afield post Covid 19 and providing collaboration space and community hot spots could help drive local business and industry. We have some hard to reach residents and siloed communities and if we can access further funding from central government for innovation and community cohesion (or even engagement) would be good. I would like to see more sports and recreations policys like static fitness equipment in sports fields as this would allow broad sections and ages of our society to maintain a healthy and active lifestyle. I would like to see electric vehicle and electric bicycle charging stations made available as this would bring people further from more dense urban environments and provide opportunities for rural industry growth if we can increase sustainable foot fall. On housing is there an oportunity to create canton style planning policy that restricts the purchase of a significant percentage of new build to that of local residents as this inflates the cost of the minority if new build whilst allowing most homes to be sold at reasonable prices. To take this even further if this was possible at resale to limit who could buy like the channel isles or Switzerland this would allow locals or those who have stayed and contributed to our society a realistic chance to work up our housing ladder as our families grow and then allow our homes to be kept for other families as we down size. I agree that

council tax should be increased for second home owners and properties that have lain unused could also have a ratcheting up of cost applied to release.

- Its a shame that the vision doesn't show specific peoples experience of West Devon, simple quotes about what its like living in West Devon would show that there had been some engagement with the community.
- What about children (0-11), young people (11-19) young adults (19-25) what are their experiences of West Devon? Are we retaining our younger generation or are they moving away at the first opportunity?
- What about ethnic diversity? What is it like living in West Devon if you have moved from the Ukraine? What about other asylum seeking families?
- The Vision and Strategy goes some of the way in highlighting some of the issues faced by West Devon but it doesn't show the people of West Devon, their experiences and how they can be part of the solutions.
- The people who wrote these plans must feel very proud of themselves. Unfortunately it is written in such a way that the vast majority of West Devon residents will not get beyond page one I am sure it will meet all targets for communication but in reality will serve little purpose.
- Firstly, this webpage is defective as there are no buttons to click to "add something else to make a comment" for questions 1-3 above
- In general terms, the strategy is far too vague with just lofty ambitions and no detail as to the precise aims and actions to be taken to achieve such aims
- There is insufficient emphasis on the agricultural sector and how to support the needs of rural communities.
- Whilst active travel cycle routes may be suitable for more urban areas, they are clearly unsuitable for more rural areas in view of often challenging terrain and , for example, eco friendly buses servicing villages would be a better use of resources and would be accessible by all including the less mobile and elderly
- stop geoengineering and chemtrails and take down the dangers cancer causing 5g towers and most of us don't want the net zero draconian restrictions on the lie of climate change
- There is insufficient emphasis on the agricultural sector and rural communities . Instead of just prioritising active travel (which is not accessible to all and has limitations for example in hilly areas), consideration should be given to eco friendly electric buses linking rural areas which could be used by all
- The ambitions are motherhood and apple pie and don't feel ambitious at all.
- There needs to be a balance between "conserve existing historic fabric" and climate change imperatives, i.e. the installation of better insulation (including windows etc) and, for example, solar panels on roofs.
- Natural environment - Needs to include stronger support for agriculture including meat production using sound farming methods. Wind Turbines - do not support these. They end up in landfill at the end of their lives. Allotments

in South Tawton. These should be provided and funded by the parish council as it falls within their duties rather than WDBC.

- Housing - we need social housing in villages. Include building relationships with registered providers who are prepared to develop small numbers of houses such as Hastoe. Deliver social housing on the Wonnacotts site in Okehampton.
- Economy & Jobs - I should like to see the ambition to establish a BID in Okehampton strengthened in the Strategic Plan with a clear commitment of support. Currently it simply states that WDBC will consult on the formation of a BID or Chamber of Commerce.
- Accessibility & Comms - those who are unable to engage digitally are being seriously disadvantaged. The Annual Council Tax Bill should include a paper copy of the waste collection calendar for the year. WDBC should consider having a Localities Officer providing a regular face to face presence - at least in the larger towns.
- Fiscal prudence is essential.
- Insufficient emphasis on supporting the agricultural sector
- Too much emphasis on active travel - whilst sensible to have cycling and walking routes in urban areas -no recognition that a large proportion of the population are unable to walk or cycle in view of age, disability etc. Small electric buses, for example, serving rural areas would provide access to more and be environmentally friendly
- No actual targets for new housing. There seemed to me to be no detail on what you want to achieve.
- Your strategy reflects aims not actions
- I am very concerned about the potential for renewable project being forced on local affected people without due consideration on the impact they will have on individuals. Local opinion should mean within an affected parish and not at borough or district level.
- Firstly, this is a very poorly designed/implemented webpage. Questions 1-3 state "click add something else to make a comment". There is NO Add Something Else button below these questions! So the basics are not right.
- Neither are the basics in the document. Never mind about eg. "Our contribution to a global blueprint", what about the efficient provision of core Council functions?
- These are very lofty ambitions but it would be nice if the basics could be got right first. How about phone numbers for departments so that people can easily get through? How about being open to the public so they can talk to you? None of the focus is on little parishes in the area unless the Mayor lives there. How about stop wasting money on replacement ceremonial robes and use it towards small parish projects. Help the residents with things you can do rather than lofty statements increasing biodiversity throughout the borough.

- There are a number of new estates built in Tavistock but no more doctors' surgeries or schools. Also the space where Woolworths used to be needs to be filled. This could mean flats for single homeless people.
- How does/will WDBC interface with DNPA. Living in a WDBC within the National Park, I can see conflicts
- There are many mentions, quite rightly, regarding the challenges facing young people in West Devon - but I was surprised there was no mention of rural isolation and loneliness faced by older people, particularly as the borough has an elderly population.
- Traffic congestion in Okehampton
- Buying 5 properties for temporary accommodation for those displaced by conflict; Where? Why just Tavistock?
- Increase Electric Charging Points including exploring in-house delivery opportunities for EV charging point on council property. Mandatory for Developers ?
- Work with South West Water (SWW) and the Environment Agency (EA) with a "Call for Evidence" on discharge of raw sewage into rivers; 2. Collaborate with relevant authorities and stakeholders to improve sewage treatment infrastructure; Okehampton Treatment works upgrade to cope with new housing is desperately needed (since 1984!)
- Support the delivery of more affordable housing " Pioneer Hamlets. Yet you turn down plans for sensitive and well designed barn conversions if there is no bus stop in the vicinity? How can this help provide more rural housing?
- Delivery of Okehampton Transport Hub. Has land been set aside/ acquired to enable new businesses to be built to enable the hub to be incoming as well as outgoing for workers?
- Support community infrastructure and facilities through timely allocation of developer contributions to community schemes. Can we stop the slopey shoulders blame game and actually ensure infrastructure is in place as soon as possible " that developers do not weasel their way out of the commitments they made when allocated the land to develop.
- Improve outcomes for care-experienced young people by supporting them to access the housing they need.
- 1 Bedroom small modular housing is ideal for these young people. A place of their own but manageable on low incomes. A mix of 1 and 2 bedroom modular would enable young couples and families to mix and help stabilize young adults.
- You won't have clean water with all the extensive house building that is going on in the communities. The populations are expanding too rapidly putting too many pressures roads and all services.
- Higher parking fees will drive people away from the town centre. Supermarkets car parks are free. Shops in the town centre can't compete.

- Little mention of culture in this strategy. Culture plays a key part in wellbeing and community cohesion. Will there be a separate cultural plan for each town/ West Devon as North Devon and East Devon have or are putting together?
- Referring to my last comment, currently 80% bodies are cremated PA causing 115m kg of CO2 every year in the UK alone. It has become a convenient default. Our farming communities can increase their incomes AND increase biodiversity by providing Natural Burial sites. It is possible to earn Â£1.7m per hectare pa in this way (figure produced by the Association of Natural Burial Grounds). This is not set-aside land but can be incorporated into grazing, sylvo pasture, wildflower meadow, woodland. Every village in the country has/had a cemetery or churchyard. Burial provision increases local employment, habitat, nature connection and so much more to a regional economy. Sheepâ€™s wool for burial being one!
- Most of your photos are of heritage buildings and yet you want to destroy that look by putting parking meters In Tavistock. How will parking meters increase jobs ? The shops will close and the parking attendants will be out of work. Say what you mean and mean what you say.
- If you need more money tarmac the waste ground next to Superdrugâ€™s and make it a car park. No shop is going to be built there because we already have empty units. Make a car park. You get more money and thereâ€™s parking for the town . Win win.
- I think there should be a specific section on children young people and families (even though the legal accountability sits with DCC) - I also think you should address the impacts of an aging population-
- Okehampton Town Council feels that the strategy is an overview document of WDBCâ€™s priorities but that it needs to be evidenced with more detail, although it is understood that there may or will be associated documents that will do this in relation to each identified priority.
- The Council does not feel that the strategy adequately addresses all of the particular problems experienced at this time, both in Okehampton and across West Devon, particularly in relation to the economy and employment.
- With regards to the economy and employment, more could be done to promote Okehampton/West Devon as a location for businesses to relocate to, especially with the good rail and road links now available in Okehampton, and the planned West Devon Transport Hub. Development of home-grown businesses could also be encouraged with help provided for those who wish to improve their skills and/or set up their own businesses. This would help to enable the economic sustainability of the area as a whole.
- Reference to the 'agricultureâ€™ community should be more specific to reflect different farming patterns
- The eight key priorities diagram should be proportionate the Council spending on each element.

- Reference is made to address the 'broken housing market'. How? Isn't the market driven approach the problem?
- No mention is made of the need to retain Okehampton Hospital and its beds. The Hospital is an important issue in the community.
- The launch of a new website does little to help older persons or the disabled.
- Welcome the plan for Wildlife Wardens'
- Parking 'enforcement'™ strategy needed in Okehampton, not parking meters!
- Okehampton transport hub is no the name for the new station which it is understood is yet to be agreed.
- The paper needs to show the house price / income ratio. This would enable people to compare wages with affordability or lack off!
- Need to urgently implement the 200% Council tax for second homes.
- Agree road surfaces are a priority.
- Replace the old picture of the railway with the modern 158 units.
- Housing. The empty council office in plymouth road is still empty. Loads of unused empty flats above shops in tavistock need to be tackled and addressed.
- Lobby gvt to make the insulation of listed properties possible and affordable
- the whole net zero agenda and getting rid of carbon is insane we need carbon and co2 to live without it we will all die
- Same old ***** thats not in peoples best intrests.
- No mention of the severe lack of NHS Dentistry, this is a massive problem for my family and so many others

4. Finally do you have any further comments you would like to make about the draft strategy?

- The overall aims of the strategy are fine as far as they go and the 8 key areas selected are I think correct. But there needs to be more targeted and ambitious actions to achieve these aims. I think the consultation is poorly conceived - it's not altogether surprising that so few have completed the questionnaire. It doesn't feel like a genuine consultation, but rather an exercise in eliciting comments on a document that's already written. There exist plenty of models for genuine participatory consultations, which can properly engage with people. It's a pity that WDBC hasn't adopted one of these. And why are all but two of the lead councillors middle-aged white men?
- The strategy is focused in the right direction and would like to see more innovation in delivery.
- If this is a draft strategy, how will the views shared in this survey be used to influence the next edit? Also, how do you intend on involving more in developing this strategy? An online survey is not accessible to all, how might the overall process of engagement be more inclusive?

- Resources would be better spent on producing a strategy with specific and detailed aims and the actual steps and actions to be taken to deliver such aims
- Some of the strategy should be reduced, overall bring at least half of it back to the basics needed to allow people to enjoy their lives with a degree of contentment. Minimize their deeper concerns. I didn't see anything about the growing trend of anti social behaviour? Many people I know would choose not to walk alone in the dark, we should be doing better on this front, West Devon is not Plymouth city centre
- It is of note that the survey has now been rectified to allow additional comments to be added to questions 1-3 but as this facility was not available for some time and problems were also experienced in submitting responses to the survey, consideration should be given to extending the consultation period. It would appear that problems may have been encountered in participating in the survey bearing in mind that only 20 responses have been received to date from the entire population of West Devon!
- Retain our national park and existing green areas/spaces. Do not build more homes unless on brownfield /redundant trading/retail sites.
- More detail on what you propose and what would the extra cost to council tax payers
- Please make your plans people focused and compassionate looking to the needs of the rural poor and those who simply cannot afford to rent or buy in West Devon as locals.
- There is not enough detail or clarity about the plans in the strategy to make an informed comment. Details of each proposal and any actions the Council are making should be made publicly available on the West Devon website for comment and challenge.
- Entries to make the heart sink:
 1. Under People and Community - "Develop an Equality, Diversity and Inclusion Commitment for the Council". Please, no!
 2. Under Performance and Resources - Under "Our Primary Aims", the FIRST aim listed is "Support the wellbeing of our staff.." This should be the last aim, if mentioned at all.
The first (and possibly only Primary Aim should be the present no. 3 - "Guarantee efficiency in service delivery by managing performance:
As for the existing no. 4, "Responding to our climate ambitions", only an !!! will suffice.
As an additional point to "Performance and Resources", the most important thing the Council could do would be to get employees back in the office. The data is in on WFH and it's less productive/efficient.
- It is a waste of paper and nothing will change
- It's a good start - for me the key issues facing people in this area is lack of housing. In an ideal world all the suggestions above are desirable.
- Unfortunately you cannot develop and increase the population one hand and address climate change on the other, no such thing as sustainable development which is why the world is as it is.

- Don't spend too much of the budget on climate change and biodiversity. Local care of all residents should come first
- The emphasis on the climate emergency is to be welcomed. Also the focus on truly affordable homes.
- This feels like a good start but it could do much more and overall has left me disappointed in the level of ambition and action the council will be taking.
- Sounds good. Hope you can deliver.
- A focus on encouraging use of local natural resources such as timber for building houses (instead of sensitive outside our region), wool for clothing, insulation, natural burial, peat bog restoration and so much more. Focus on circular economy. More community renewable energy provision.
- Yes - put deliverables in so that you can be held to account
- The rat problem in Tavistock needs to be sorted. They are everywhere. This should be in your environmental proposals.
- The council needs to forget the climate agenda it's a globalist agenda man-made climate change is a fraud and we do not need to get rid of carbon or CO₂ we need it to survive and the electric points for electric cars is pointless as most people won't touch them there are many times these electric cars and buses catch on fire and are a lot harder to put out than petrol car fires and the batteries used for them are a lot more damaging to the environment than a petrol car it's all a big scam to control our lives and make us all poor also the council needs to take down every 5G tower I have emailed my local town council with evidence from many doctors and scientists that these things are dangerous to our health so look into taking these down also the constant chemtrailing and spraying our sky with chemicals and heavy metals we are all breathing in you need to look into that also and do something to try and get it stopped all this will affect everyone in the council and their families and it all needs to stop
- Please please add something about the complete lack of NHS Dentistry, it affects wellbeing in such a massive way yet always seems to be forgotten

Section 2 – Social Media Polls

During the consultation, the Council held a number of quick polls on social media to gain insight from residents. Again, the levels of response were relatively low.



FACEBOOK Comments

No to net zero stop chemtrails get rid of the cancer causing 5g towers that's what me and many others want

I'd start by having a word with DCC to stop them installing parking meters

Multi storey or additional parking for residents with none.

No parking meters

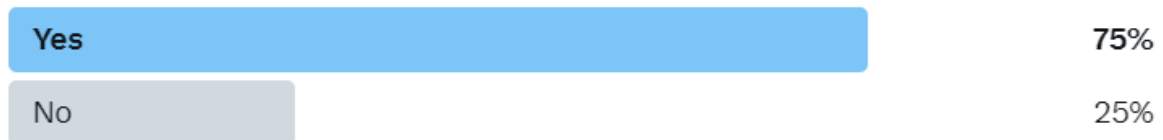
You better not be one of the councils signed up to the draconian net zero 2030 agenda

Well you won't create any new retail jobs in Tavi if you put parking meters in



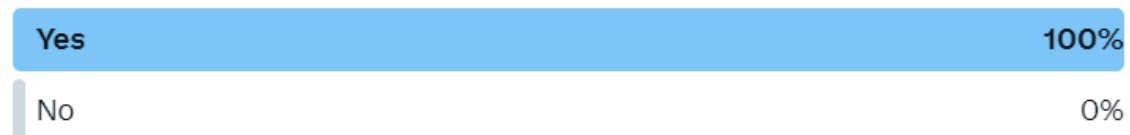
Twitter

Does poor broadband connectivity impact on your life, running a business, keeping in touch with friends, or just browsing online?



4 votes · Final results

Are you looking forward to better transport links with the Okehampton Transport Hub?



5 votes · Final results

With the cost-of-living crisis, it's more difficult than ever to make ends meet. Are you worried about paying your rent/mortgage payments in the coming months or years?



Are you worried about energy bills increasing this new year?



Is the history and heritage of West Devon important to you?



Are you concerned about the affordability, and/or availability, of houses in West Devon?



Are you thinking about, or have you already, switched to an all-electric car?



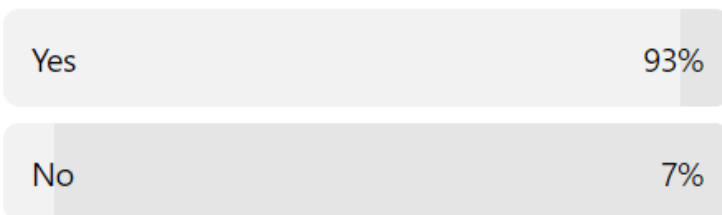
Are you worried about your carbon footprint?



4 votes · Final results




Does poor broadband connectivity impact on your life, running a business, keeping in touch with friends, or just browsing online?



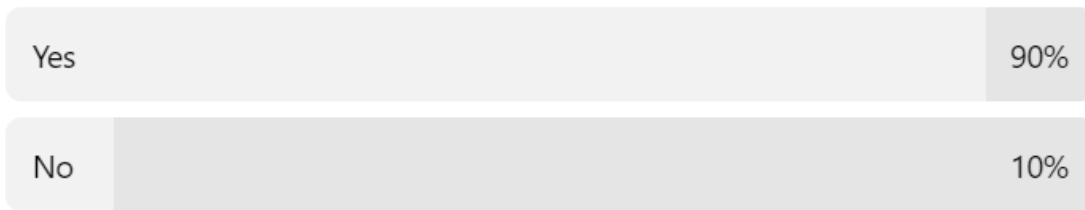
30 votes

- And even having a fibre connection has not helped.
- we are waiting for a call back from Wildanet, heard they are one of the best and local, office hq in Liskeard
- I need a landline sadly and was pushed into BT when John Lewis stopped providing the service. But BT no better than before!

We have set out our goals to help support our local economy, encourage more visitors, and create more jobs. Is there something you or your business needs to flourish? Have your say on our Vision for West Devon. Let's Talk! 

- Don't increase the Council Tax.
 - Don't put parking meters in Tavistock. It'll ruin trade even more.
-

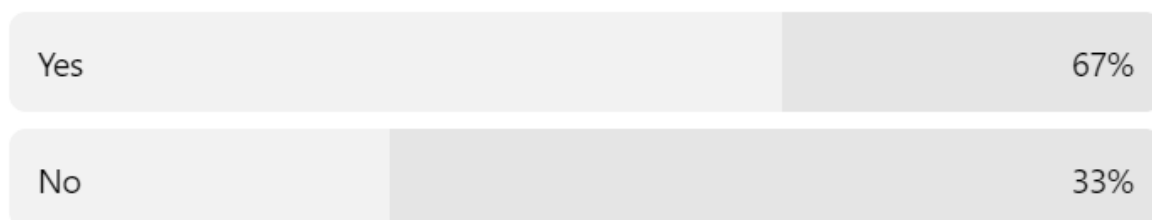
Are you looking forward to better transport links with the Okehampton Transport Hub?



40 votes

- There also needs to be connected local services to and from the said Transport hub
- Don't stop at Okehampton, continue to Yelverton area which used to have a railway connection but it was closed years ago.
- Yes, we need to have a train to Okehampton from Tavistock, and preferably Bere Alston!
- We are cut off with only 1 bus on a Thursday to go from Inwardleigh into Okehampton please give us a bus service
- We need a better bus services in the more rural areas like Dousland. There is one small bus that goes to Princetown and other places I believe but it's very infrequent and I've never used it myself so can't give a full assessment of the service. The 101 could extend its service a little further than the Yelverton shopping village to assist people that can't drive anymore through age or disabilities.
- Please please please open Sampford Courtenay rail station

With the cost-of-living crisis, it's more difficult than ever to make ends meet. Are you worried about paying your rent/mortgage payments in the coming months or years?.



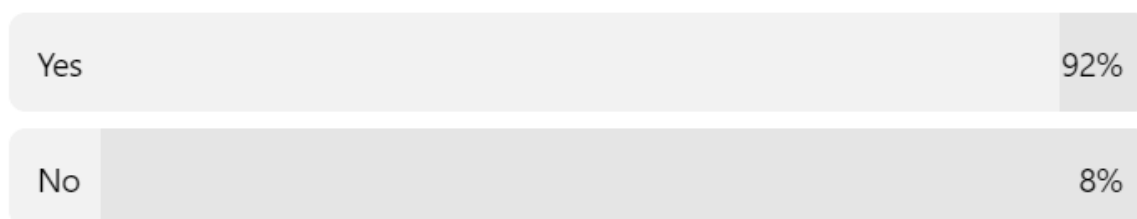
6 votes

Are you worried about energy bills increasing this new year?



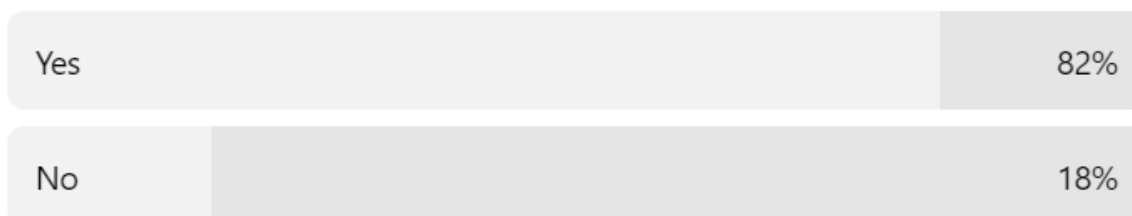
6 votes

Is the history and heritage of West Devon important to you?



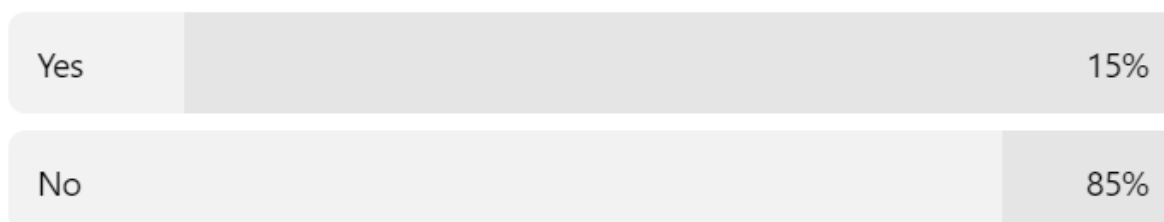
24 votes

Are you concerned about the affordability, and/or availability, of houses in West Devon?



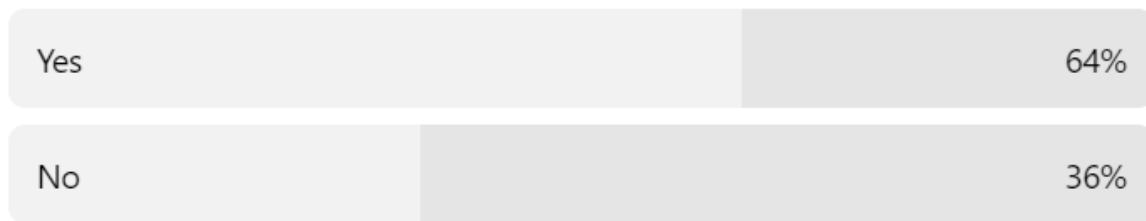
17 votes

Are you thinking about, or have you already, switched to an all-electric car?



13 votes

Are you worried about your carbon footprint?



11 votes

Section 3 – Face to Face Engagement

During the consultation, the Council undertook engagement with residents by attending events happening in the Borough.

Through the sessions, the most common feedback was frustration at a lack of access to other services such as dentistry and GP appointments. Another common theme was the need for the Council to do all it could to respond to climate change and biodiversity loss.

Housing came up as a topic during a number of conversations, with a particular focus on ensuring associated infrastructure was in place to meet the future needs of communities as they grow.

It is proposed that further engagement with residents be undertaken throughout the year to help shape future plans. This will include attendance at community events across the Borough where there will be good levels of footfall to ensure the best possible level of engagement.

Members and Officers have also met with key partner throughout the consultation period to understand their future ambitions. This has included meetings with Housing Associations to set out our priority areas and other Devon Councils to shape future support offerings for Care Leavers.

Section 4 – Town and Parish Council engagement

Town and Parish Councils were each sent a copy of the draft vision and strategy and invited to submit their comments and thoughts on the plan. To enable a conversation about the priorities, a Town and Parish briefing was held on Microsoft Teams which saw 14 Town and Parish colleagues join from across the Borough. Some of the key points raised include:-

- Understanding which properties are eligible for Home Upgrade Grants (with the request that this be clarified in the Strategy)
- While agreement that landlords should be held to account where a property is sub-standard, the strategy should also reflect that the borough will support those

landlords who are working hard to provide tenants with good housing but may need some additional support – particularly around difficult tenants

- Consideration around how adaptable the plan would be to the opportunities or challenges presented by a change in national government during the first year of the plan.
- Feeling that Town and Parishes still need a space to come together and share positive practice, challenges and to receive updates from key partners.
- While broadly supported, many felt that more detail was needed on the specifics and to ensure that there was accountability in delivering what the plans say
- A request for us to consider signaling strong support for the reinstatement of the Tavistock – Bere Alston railway link
- Pleased to see focus on supporting digital connectivity in WD but keen to know what can be done
- Many Parish Councils are unsure how to consider local reorganisation. Community Governance reviews have been brought forward by some parishes but a query as to whether a more strategic approach is required from the Borough to encourage local reorganisation to offer better service to residents.

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NOT FOR PUBLICATION

Appendix E to this report contains exempt information as defined in Paragraph 3 of Part 1 of Schedule 12A to the Local Government Act 1972

Report to: **Hub Committee**

Date: **30 January 2024**

Title: **Draft Revenue and Capital Budget Proposals for 2024-25**

Portfolio Area: **Cllr M Ewings – Budget Setting Process**

Wards Affected: **All**

Urgent Decision: **N** Approval and clearance obtained: **Y**

Author: **Lisa Buckle** Role: **Corporate Director for Strategic Finance**

Contact: Email: lisa.buckle@swdevon.gov.uk

RECOMMENDATIONS

That the Hub Committee RESOLVES to RECOMMEND to Council:

- i) To increase Council Tax for 2024/25 by 2.99% (This would increase a Band D council tax for 24/25 from £254.00 to £261.59 – an increase of £7.59 per year or under 15pence per week);**
- ii) The financial pressures shown in Appendix A of £1,655,500;**
- iii) The savings/additional income of £(705,000) as shown in Appendix A; and**
- iv) The revenue expenditure (£337,500) and capital expenditure (£50,000) for the Year 1 delivery plan of the Council Plan (2024/25), totalling £387,500, as set out in section 3.30 of the report.**
- v) The net contributions to/(from) Earmarked Reserves of £(45,500) as shown in Appendix A, including using £150,000 from the Business Rates Retention Earmarked Reserve as set out in 3.14 of the report;**
- vi) The proposed use of £309,180 of New Homes Bonus funding to fund the 2024/25 Revenue Budget as set out in 3.20 of the report.**

vii) The proposed two capital bids (total of £140,000) set out in 8.4 and the proposal to finance these from New Homes Bonus funding.

viii) That Unearmarked Reserves should continue to have a minimum level of £900,000 (as set out in the Medium Term Financial Strategy in September 2023), but an operating level of a minimum of £1.25million.

1. Executive summary

- 1.1 The Council's Medium Term Financial Strategy (MTFS) is based on a financial forecast over a rolling three-year period to 2026/27. The Hub Committee considered the MTFS at its meeting on 19 September 2023.
- 1.2 The Council, along with other local authorities, has faced unprecedented reductions in Government funding. Between 2009/10 and 2020/21, the Council's Core Government funding has reduced by £3 million. The Council now receives minimal Government Grant (Revenue Support Grant) of £94,416 in 2024/25 to fund its services and the Council must be self-sufficient.
- 1.3 The Council has continued to work in partnership with South Hams District Council which has allowed West Devon to achieve annual savings of £2.2 million and more importantly protect all statutory front line services. Between both Councils the annual shared services savings being achieved are over £6 million per annum. However, the Councils continue to face considerable financial challenges because of uncertainty in the wider economy and constraints on public sector spending.
- 1.4 It is important to note that the MTFS set out the budget strategy for the Council for the next three years, with regular reviews (at least annually) and updates when items are further known or are announced by the Government. Prudent financial management in the past, has meant that the Council was in a relatively healthy position financially before the pandemic hit. The management of risk and promoting financial resilience is a key principle of our budget strategy and this has helped facilitate our response. Key to the Council's financial resilience is its reserves, which are at a prudent level.
- 1.5 The Fair Funding Review, business rates baseline reset, and other funding reforms now look set to be pushed back to 2026/27 although this has not been confirmed by the Government so the MTFS and Budget Proposals for 2024/25 assumes that these changes will happen in 2026/27.
- 1.6 The key assumptions within the Budget Proposals for 2024/25 are as below. Each of these is described in more detail in Section 3.

- The business rates baseline reset will be deferred until 2026/27 at the earliest (with no negative Revenue Support Grant in 2024/25 or 2025/26)
- There will be a phasing in of negative Revenue Support Grant as part of the business rates baseline reset (predicted to be in 2026/27) with a transition period, to avoid Local Authorities losing/gaining too much in one go. The modelling assumes negative RSG of £117,000 in 2026/27.
- It is assumed Council Tax limits for District Councils will remain at the higher of 2.99% or £5 for the next three years.
- 2024/25 is another roll over settlement, which will give an amount of £309,180 of New Homes Bonus funding that it is proposed is used to fund the 2024/25 revenue base budget (see 3.20).
- A business rates pooling gain of £200,000 has been modelled for 2024/25 and 2025/26, with no further gains for 2026/27 onwards.
- A council tax surplus of £151,000 for 24/25 has been assumed, with a council tax collection rate of 97.75% built into the 24/25 TaxBase calculation (98.34% was achieved in 2022/23 which was in the top quartile nationally)
- Rural Services Delivery Grant will continue annually at the same level for 24/25 (£544,625)
- A 4% pay increase has been modelled from 2024/25 onwards (4% equates to £216,000 on total pay of £5.4m). The pay assumption has been reduced to 3% in 2025/26 and 2026/27.

1.7 The report sets out proposals for the Council to achieve a balanced budget for 2024/25, as shown in **Appendix B**. The Council is currently forecasting a £418,937 budget gap by the following year, 2025/26. The cumulative aggregated Budget Gap by 2026/27 is £1.7 million, if no action has been taken in each individual year to close the budget gap.

Budget Gaps	2024/25 £	2025/26 £	2026/27 £	Total Aggregated Budget Gap £
'New' Budget Gap each year	Nil – Balance budget proposed	418,937	874,174	1,293,111
*Cumulative Budget Gap	Nil – Balance budget proposed	418,937	1,293,111	1,712,048

* (Cumulative Budget Gap assumes annual new budget gaps have not been addressed)

1.8 The budget gap for 2025/26 of £418,937 is very much in line with the level expected at this point in the financial planning cycle. In the year after, the budget gap is £0.87million, due to the local government reforms that are expected (see 3.14). These are the reset of the business rates baseline, the fair funding review and the impact of negative RSG

(Revenue Support Grant), coupled with the loss of the business rates pooling gain.

- 1.9 Below shows the summary of proposed changes to the Budget report for 2024/25, following the announcement of the Draft Local Government Finance Settlement. Proposals for a balanced budget are shown below:

	£
Budget gap for 24/25 reported in the Hub Committee Budget report on 21st November 2023	142,030
Additional cost pressures identified £80,000	
Cost pressure for business continuity and cyber security (This is 50% of the total cost – SHDC will also pay 50%)	75,000
Stepped increase of another 5% to the contribution to the Maintenance Management and Risk Management Reserve (MMRM Reserve) for Investment properties. This would increase the contribution from 10% of annual rental income of £1.1m to 15% in 24/25 (with an aim to increase it to 20% for 2025/26 financial year). There was a recommendation to review the reserve contribution from the Audit and Governance Committee.	55,000
Reduce the proposed annual contribution into the Vehicles Replacement Reserve from £350K per annum to £300K per annum, with an options report being brought to Members in early 2024.	(50,000)
Changes to Financing of the Base Budget £(32,030)	
Increase the amount of New Homes Bonus used to fund the Base Budget from £300,000 to £309,180 (see section 3.20 of the report)	(9,180)
The 2024/25 Council Tax Base has been calculated at 21,512.23 Band D equivalent properties (which is slightly lower than the estimate at November 23 of 21,525). This difference in the modelling generates slightly less council tax income of £3,568.	3,568
Extra Revenue Support Grant (Actual amount is £94,416 which is £1,416 higher than the previous estimate of £93,000)	(1,416)
More funding from Funding Guarantee (3% increase in Core Spending Power) - Actual amount is £93,067 which is £69,329 higher than the previous estimate of £23,738. This is based on a complicated formula that takes into account other Government grants such as New Homes Bonus (which has increased for 24/25).	(69,329)
Less funding from Services Grant – Actual amount is £10,488 which is £56,162 less than the previous estimate of £66,650	56,162
Increase the amount of funding from business rates income from £2,316,000 to £2,327,835	(11,835)
Additional income/savings identified (£190,000)	

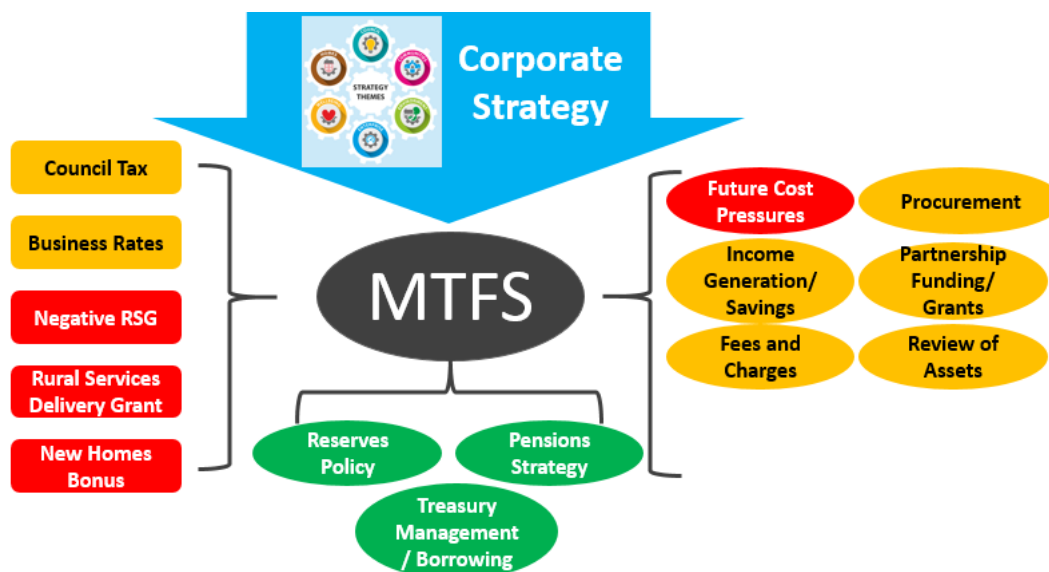
Introduce a vacancy saving target on salaries – equates to around 1.5% of salaries (total pay of £5.4m)	(80,000)
Increase the income target for income from treasury management investments from an extra £350,000 to an extra £400,000. This would set a base budget of £800,000 income target for 2024-25.	(50,000)
Environmental Health fees and charges – increase in line with inflation	(20,000)
Garden Waste charges – Increase the amount of extra garden waste income from an increased customer base and an inflationary increase in the annual subscription amount.	(30,000)
Reduce the cost pressure for national insurance and national living wage from an extra £40,000 to an extra £30,000 for 2024-25	(10,000)
<i>Revised Budget gap for 2024/25 as set out in this report (as at January 2024) - (A balanced budget position is presented for Members' consideration)</i>	Nil (Balanced Budget)

- 1.10 A meeting of the Overview and Scrutiny Committee was held on 16th January 2024. The Committee recommended to the Hub Committee the recommendations in this report of i), ii), iii), v), vi) and vii). Recommendations iv), viii) are new recommendations within this report.

2 COMPONENTS OF THE MEDIUM TERM FINANCIAL STRATEGY

- 2.1 The Diagram below sets out all the component parts which constitute the make-up of the MTFS. Items in Green denote those elements where the Council has a large degree of control in the setting of policies and strategies. Items in Amber denote those components of the MTFS where the Council has a degree of control. Red items signal components where the Council has hardly any control over funding allocations which are decided by the Government and future cost pressures which can be outside of the Council's control or influence.

2023/24 Net Budget £8.59 million



2.2 The key assumptions within the Budget Proposals are set out in Section 3.

OVERALL POSITION – BUDGET GAP

2.3 Financial modelling has been undertaken for the next three years to predict the Council’s financial situation for the short and medium term.

2.4 **Appendix A** to the Budget report sets out the Budget Pressures forecast for the next three years and the additional savings and income forecast. **Appendix B** illustrates the overall financial forecast for the forthcoming five years. The Council’s Net Budget is £8.59 million in 2023/24.

2.5 A Summary forecast is shown below of the potential budget situation if all the budget pressures and the savings and income generation in Appendix A were approved. It also shows the situation if the Council Tax is increased by 2.99% per annum (shown in Appendix B).

2.6 The report sets out proposals for the Council to achieve a balanced budget for 2024/25, as shown in Appendix B. The Council is currently forecasting a £418,937 budget gap by the following year, 2025/26. The cumulative aggregated Budget Gap by 2026/27 is £1.7 million, if no action has been taken in each individual year to close the budget gap annually.

Budget Gaps	2024/25 £	2025/26 £	2026/27 £	Total Aggregated Budget Gap £

'New' Budget Gap each year	Nil – Balance budget proposed	418,937	874,174	1,293,111
*Cumulative Budget Gap	Nil – Balance budget proposed	418,937	1,293,111	1,712,048

* (Cumulative Budget Gap assumes annual new budget gaps have not been addressed)

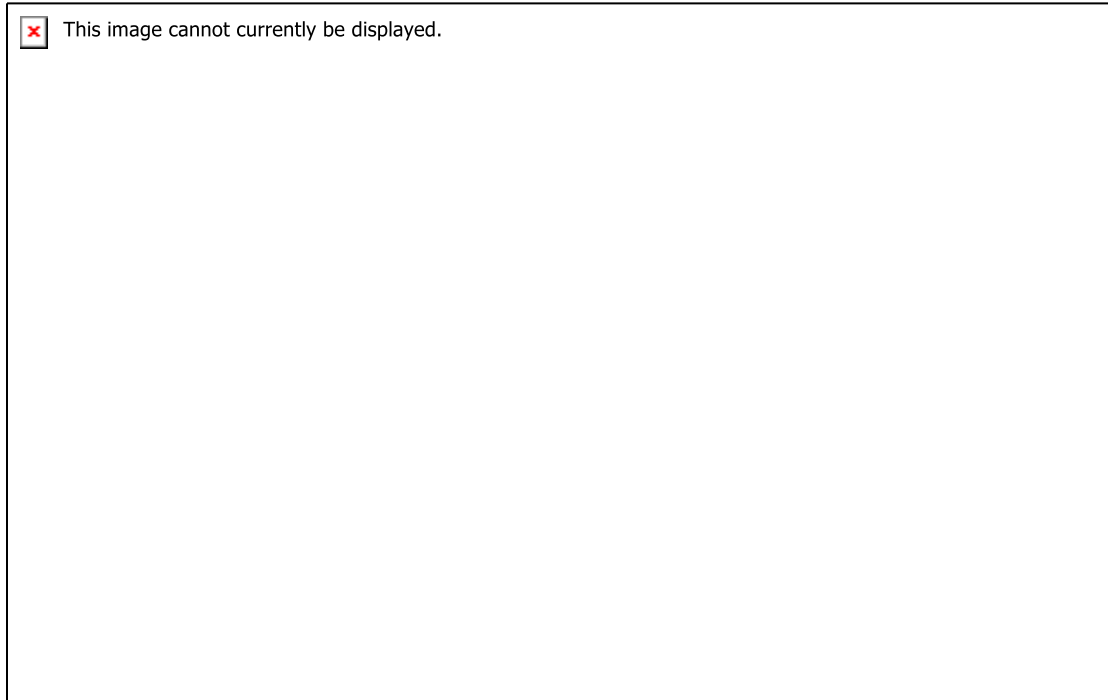
- 2.7 The Council will continue to assess various options for closing the budget gap for 2025/26 onwards, and in the longer term, to achieve long term financial sustainability and further reports will be presented to Members.

3 LOCAL GOVERNMENT FINANCE SETTLEMENT FOR 2024/25

- 3.1 On 18th December 2023, the Government published for statutory consultation, the provisional local government finance settlement for 2024/25. This followed a policy statement published on 5th December.
- 3.2 The provisional settlement is once again a holding position, designed for stability and certainty for planning purposes for 2024/25. The broad approach is based on a uniform roll-over of the core elements of the settlement. No announcements were made regarding funding reform and this has been deferred.
- 3.3 Detailed numbers are only available for 2024/25 in the Finance Settlement and there remains significant uncertainties for 2025/26, particularly for District Councils. These include the future of the New Homes Bonus Scheme, which is now simply a one-year retrospective payment.
- 3.4 The 'Core Spending Power' is a headline figure used by the Department for Levelling-Up, Housing and Communities (DLUHC) to represent the key revenue resources available to local authorities, including an estimate of actual and potential council tax, as below. The Council now receives minimal Government grant (Revenue Support Grant of £94,416 for 2024/25 (see 1.2).
- 3.5 ***Core Spending Power for West Devon (which is a measure of how much extra funding a Council has received for next year) increased by 4.9% for 2024/25 from £8.527m to £8.947m as shown below.***
- 3.6 Core Spending Power (CSP) is the term the Government use to say how much money Councils have to run their services. CSP includes Business rates, Council Tax, NHB and the various different Grants. On average


nationally Core Spending Power is increasing by 6.5% for 2024/25. The average for Shire Districts is a Core Spending Power increase of 4.9%. Shire Counties are increasing by 6.7% in their CSP. A large part of the increase in CSP is an assumed increase in Council Tax, which the Government build into the CSP calculation, as shown below.

Table 1 - Core Spending Power (CSP), £m



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Table 2 – Analysis of Core Spending Power % increases by Authority Type

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Council Tax

- 3.7 The Council Tax Referendum limits for District Councils for 2024/25 is the higher of 2.99% or £5. A 2.99% increase is higher for West Devon Borough Council as this equates to an increase of £7.59 on a Band D property.

An increase in council tax of 2.99% for the next three years has been modelled for council tax purposes in the budget report. This would equate to a Band D council tax for the Borough Council of £261.59 in 2024/25 as shown in Appendix B (an increase of £7.59 for the year or under 15 pence per week), which equates to a 2.99% increase. The Council's share of the council tax for 2024/25, will be set at the Council meeting on 20th February 2024.

(A 1% increase in council tax generates £55,000 of extra council tax income). A 2.99% increase in council tax generates extra council tax income of £0.165m.

Council Tax legislation sets out that Council Tax is partly a form of general taxation on a property and partly a tax on the people living in a property. Council Tax funds essential services in an area and the cost of public services is spread across all taxpayers in the same way, regardless of which services residents use or receive. Council Tax is a form of general taxation rather than a service charge.

- 3.8 The table below shows how an average Band D council bill is made up for West Devon Borough Council for 2023/24, compared to 2022/23. Of an average Band D Council Tax within the Borough of £2,346.79, **an amount of £254.00 is the element of a council tax bill set by West Devon Borough Council.** Therefore 11pence of every £1 paid (11%) in council tax is received by West Devon Borough Council to pay for our

services. The rest of the council tax bill is set by Devon County Council, the Fire, the Police and Town and Parish Councils to fund the services they provide. In 2023/24, the council tax for an average Band D property in West Devon increased by £116.15 per annum (5.21% as shown below).

Precepting Authority	Band D 2022/23	Band D 2023/24	£ Increase	% Increase
West Devon Borough Council	£246.63	£254.00	£7.37	2.99%
Devon County Council Precept	£1,372.59	£1,419.21	£46.62	4.99%
Adult Social Care Precept *	£183.87	£214.92	£31.05	
Devon & Cornwall Police & Crime Commissioner	£246.56	£261.56	£15.00	6.08%
Devon & Somerset Fire & Rescue	£91.79	£96.79	£5.00	5.45%
Average Parishes/Towns	£89.20	£100.31	£11.11	12.46%
TOTAL	£2,230.64	£2,346.79	£116.15	5.21%

Town and Parish Precepts for 2023/24 are shown in Appendix D. The largest Parish Precepts are North Tawton (£203.24), Okehampton Town (£186.42) and Tavistock (£204.72), with the smallest Precept being Gidleigh (£0.00) for a Band D property.

3.9 The Council Tax Referendum Limits that will apply for 2024/25 are as follows:

- Shire Districts – 2.99% limit or £5, whichever is the higher
- Police - £13 referendum limit.
- Fire – 2.99% limit
- Upper Tier – 4.99%
- No referendum limits will be set for Town and Parish Councils for 2024/25

3.10 A council tax collection rate of 97.75% has been assumed for 2024/25 within the TaxBase calculation. **The Council collected 98.34% in council tax in 2022/23 which was in the top quartile of all Councils nationally.** It has been assumed that the number of properties within the Borough will increase by 300 per annum from 2024/25 onwards.

Business Rates and Negative Revenue Support Grant (RSG)

- 3.11 It has been assumed that the Business Rates Reset will be delayed to 2026/27. Whilst this change is not confirmed by the Government, a reset based on the current taxbase would appear very unlikely.
- 3.12 Estimates have been made of the business rates baseline funding levels for 2024/25 onwards and the relative deductions for negative RSG in 2026/27. For example in 2024/25, the £2.4m is the amount the Council is projected to retain from its business rates income collected of around £9 million (this equates to around 27p in every £1 collected of business rates). The 2022/23 collection rate for West Devon for business rates was 98.95%, which was in the top quartile of all Councils nationally. It was announced, as part of the Autumn Statement 2023, that the small business rates multiplier for 2023/24 will remain frozen at 49.9p and there will be an increase to the standard rate multiplier of 6.7% (from 51.2p to 54.6p).
- 3.13 It is recommended to take £150,000 funding from the business rates retention on an annual basis to fund the base budget. This would reduce the business rates retention reserve by £0.45m over the next 3 years to smooth the impact of the business rates baseline reset and the future loss of pooling gains. This reserve is predicted to have more business rates income being set aside into the reserve in 23/24, due to the way that business rates income flows through the collection fund over a period of years.
- 3.14 The Fair Funding Review, business rates baseline reset, and other funding reforms now look set to be pushed back to 2026/27 although this has not been confirmed by the Government so the MTFS assumes that these changes could happen in 2026/27. The 2025/26 finance settlement will be the first year of a new spending review period.

The table below shows the modelling of business rates income over the next three financial years.

Business Rates Income	2024/25 (£m)	2025/26 (£m)	2026/27 (£m)
			Potential Baseline Reset
Business Rates Income	2.402	2.440	2.550
Less: Negative Revenue Support Grant (RSG) due to the Baseline reset			(0.117)
Anticipated Pooling Gain (Nil in 26/27 due to the baseline reset)	0.200	0.200	Nil
Funding proposed to be taken from the Business Rates Retention Reserve to smooth the volatility in business rates income	0.150	0.150	0.150
Total Business Rates Income	2.752	2.790	2.583

It is this reduction in Business rates income predicted in 2026/27 which is increasing the budget gap in 2026/27 to £0.874million. A part of the 26/27 budget gap is caused by the predicted drop in business rates income of around £200,000. This is due to the potential business rates baseline reset and the loss of the pooling gain from being in a Devon business rates pool at the same time. It is very uncertain as to when the baseline reset will happen. This has been anticipated for a number of years but the timetable has continually been put back. This modelling assumes it will happen in 2026/27 but there has been no firm timescale announced by the Government.

3.15 The MTFs assumes that the full range of changes from the Fair Funding Review will be implemented based on the proposals in the December 2018 consultation paper, plus the latest population estimates (2022) and the latest council tax data. It is assumed that the business rates baseline reset will happen in 2026/27.

3.16 This means the Council wouldn't have to forego some of its business rates income (£117,000) by paying some of it back to Government in the form of 'negative government grant' in 24/25. Negative RSG is effectively the Council's further predicted funding cuts. The modelling assumes negative RSG of £117,000 in 2026/27. Some of the negative RSG could be offset by growth. The Government consultation paper on the Finance Settlement for 2024/25 states (under para 1.3.1) that: "We are confirming that we have no plans to introduce negative Revenue Support Grant".

Devon Business Rates Pool

3.17 West Devon Borough Council has elected to remain part of the Devon-wide Business Rates Pool for 2024/25. The latest modelling shows that a pooling gain in the region of £9.7million is forecast for 2024/25, with the Council's share of the pooling gain being in the region of £200,000.

Rural Services Delivery Grant

- 3.18 Rural Services Delivery Grant will continue for 2024/25 at previous levels (WDBC share of £544,625) and the methodology for distribution is assumed to remain unchanged from 2023/24. This is Government grant to recognise the additional cost of delivering services in rural areas.

New Homes Bonus (NHB)

- 3.19 NHB has been ‘rolled over’ for another year, with no legacy payments being paid. The Council’s provisional allocation is **£449,180 for 2024-25** (higher than the amount estimated in the previous budget report of £440,000).
- 3.20 This is based on a property increase of 371 properties. (The amount received is 371 less the baseline of 0.4% (103 properties) at 80% of £2,065 which is an average national council tax). It is proposed that the allocation of NHB for 2024/25 could be used in the way set out below.

NHB Provisional allocation for 2024/25	£449,180
Amount used to fund the 2024/25 revenue base budget	£(309,180)
Funding for capital projects for 2024/25, to set aside an annual provision for the roof at Kilworthy Park and a capital budget for the bank reconciliation software. (see 8.4)	£(140,000)

Other Government Grants

- 3.21 The ‘Funding Guarantee’ has been continued, which ensures every Authority has at least a 3% increase in Core Spending Power. A Funding Guarantee grant of £93,067 has been announced for 2024-25 for West Devon (this is higher by £69,329 than the previous budget report which estimated £23,738). This is based on a complicated formula that takes into account other Government grants such as New Homes Bonus (which has increased for 24/25).
- 3.22 Revenue Support Grant (RSG) will be £94,416 for 2024/25. The Council now receives minimal main Government Grant in the form of RSG. See 1.2 of the report.

Other Budget Items

- 3.23 The Consumer Price Index (CPI) was 3.9% (November 2023 CPI), which is down from 4.6% in October. Inflation over the past 18 months has been at a 40 year high. An extra £150,000 cost pressure for inflation on goods and services and increases in utility costs has been included within the cost pressures in Appendix A. The previous minutes from the meeting of the Monetary Policy Committee (MPC) state that it is

expected that inflation will drop back to 4.8% by the end of 2023, accounted for by lower energy, and to a lesser degree, food and core goods price inflation. At present, there is no indication from Government of any additional funding to meet inflationary cost pressures.

- 3.24 A provision for the 2024/25 pay award has been modelled in the MTFS at 4% (£216,000), with total pay being £5.4million. This has been reduced to 3% in 2025/26 and 2026/27. The Medium-Term Financial Strategy is not an expression of Council Policy on pay awards, but a means of ensuring an appropriate provision is made as part of the overall financial planning of the Council. The Council is particularly affected by inflation in terms of the Local Government Pay Award as staffing forms a significant proportion of the Council's budget.
- 3.25 The pay award for 2023-24 has now been agreed. This is for £1,925 per Scale Point or a 3.88% increase for Scale Point 44 upwards. This would cost an extra £147,000 and this amount also needs to be built into the Base Budget for 2024-25 as a 'catch up' as the budget for 23/24 has already been set.
- 3.26 The current Bank Base Rate will increase the Council's income from treasury management investments and additional income of £400,000 has been built into the Budget for 2024/25. This would set an income target of £0.8million for 2024/25 for treasury management income and it is proposed to reduce the target to £0.6million for 2025/26. It is predicted that bank base rate will remain at 5.25% until September 2024 when it is predicted to reduce to 5%, with a predicted reduction to 4.5% by December 2024 and 4% by March 2025.
- 3.27 Cost pressures for insurance (£30,000) and IT inflation cost pressures for increases in prices and additional software and security (£110,000) have been built into the Budget Proposals for 2024/25.
- 3.28 A cost pressure of £75,000 has also been built in for business continuity and cyber security.

COUNCIL PLAN

- 3.29 The Council Plan 2024-2028 and the Year 1 (2024/25) delivery plan is also an item on this agenda. Proposals will be recommended to Full Council to adopt 'The Council Plan' and delivery plan at its meeting on 20 February 2024. The Council Plan and delivery plans have been refined following a seven week consultation and engagement period with the public and partners.
- 3.30 The delivery of The Council Plan represents an overall financial commitment of £17,301,887 for 2024/25, with £16,914,387 financed from realignment of existing resources and allocations of government grants (such as UK Shared Prosperity Funding) and £387,500 of new monies from the £1.134m. The allocation against each theme area for the 2024/25 financial year is as follows:

Theme	24/25 Financial Year	
	<i>To be financed from £1.134m identified in 5.1 above (£)</i>	<i>To be financed from existing core budgets (£)</i>
Natural Environment	£87,000	
Built Environment	£100,000	£13,575,000
Housing	£50,000	£1,640,000
Health and Wellbeing	£25,000	£1,004,137
People and Community	£40,500	£120,000
Economy and Jobs	£60,000	£498,750
Performance and Resources	£22,000	£76,500
Inclusive Services and Communication	£3,000	
TOTAL (£17,301,887)	£387,500	£16,914,387

3.31 The analysis between Revenue and Capital expenditure is as below:

	<i>To be financed from £1.134m identified in 5.1 above (£)</i>	<i>To be financed from existing core budgets (£)</i>
Revenue expenditure	£337,500	£585,250 (of which £498,750 is UKSPF revenue funding)
Capital expenditure	£50,000	£16,329,137 (of which £15.4 m is Government grant funding)
TOTAL (£17,301,887)	£387,500	£16,914,387

3.32 It is recommended that the £337,500 of revenue expenditure is funded from the £0.871m of Earmarked Reserves (as per the Hub report of 21 November 2023) which were identified as being available to support the delivery of the emerging Council Plan. In addition, it is recommended that the £50,000 of capital expenditure is funded from the New Homes Bonus Earmarked Reserve (this is the £0.263m of capital resources identified for The Council Plan).

3.33 Once adopted, the strategy will be the Council's overarching strategic document setting out our ambitions and priorities for the Borough.

Climate and Biodiversity

- 3.34 The Council Plan sets out the Council's primary commitments to tackling climate change and increasing biodiversity as part of the Natural Environment theme. The proposed financial commitment and investment for this Theme is set out in 3.30. This will then be recommended to Full Council on 20th February 2024.

Second homeowners council tax premium

- 3.35 The Levelling Up and Regeneration Act 2023 allows Billing Authorities the discretion to charge second homeowners a council tax premium of 100% (so a second home dwelling would pay double the council tax charge). The Act requires Billing Authorities to have a minimum period of 12 months between making its first determination and the financial year in which it takes effect. That means the earliest that Councils can introduce it is for the start of the 2025-26 financial year, i.e. 1 April 2025. At Council on 21 February 2023, Council approved charging up to an extra 100% council tax in second homes.
- 3.36 Now that the legislation has been passed, it is recommended to Council to adopt a further resolution to charge a council tax premium on second homes from 1 April 2025. This will be a separate report to the Hub Committee in January 2024 and a recommendation to Council in February 2024. The estimated additional yield from council tax would be £1.6m of which the Council's share would be approximately £0.17m (11%) – see Memorandum Note in Appendix A. There are currently 692 properties on our council tax records classified as a second home.
- 3.37 The key impact of second homes is to remove a significant number of homes from the local housing market, with properties that would otherwise be available to provide permanent homes for local people being used as holiday homes by people whose primary residency is outside the Borough. For this reason, the Council believes that the additional money raised by the second homes premium should be invested back into housing. West Devon Borough Council is working with other councils across Devon to make the case that all the additional tax raised should be ringfenced to address housing challenges, including to acquire existing properties to provide temporary accommodation, to support people with complex needs and the provision of specialist accommodation with supported facilities for care leavers.
- 3.38 There was a separate report on the Hub Committee agenda on 21st November 2023 regarding the long stay car parking pay and display charges review. It must be noted that in the 2023/24 Budget the Council reduced its income target for car parking income by £150k. Therefore, the review of car parking charges as is proposed in this report by an inflationary amount (since March 2021) is taking the Council's car parking income back to pre-pandemic levels and a pre pandemic budget position. It is proposed to increase the long stay car parks tariffs only, ensuring that short stay shopping opportunities are not impacted.

4. Treasury Management and Borrowing Strategy

- 4.1 The Council has previously taken external treasury management advice on the Council's overall borrowing levels and debt levels. The Council set an Upper Limit on External Borrowing (for all Council services) as part of the Medium-Term Financial Strategy of £50 million in 2019 and it is not proposed to change this limit at present.
- 4.2 In 2022/23 the long-term borrowing of the Council decreased from £27,726,000 (2021/22) to £27,012,000. Short-term borrowing increased from £615,000 to £714,000. This is due to the profiling of the debt repayments where long term borrowing has moved to short term borrowing. Total borrowing as at 31 March 2023 has reduced from £28,341,000 to £27,726,000. No further external borrowing took place during 2022/23.

5 FEES AND CHARGES

- 5.1 As part of the budget process, fees and charges will be reviewed. A delegation is in place to enable service managers to increase fees and charges by inflation where these are not material changes or increases.
- 5.2 DEFRA has confirmed that the implementation of the Extended Producer Responsibility (EPR) will be deferred from October 2024 to October 2025.

6 BUDGET FOR 2025/26 AND TIMESCALES

- 6.1 The Council will continue to assess the options for closing the budget gap for 2024/25 onwards, and in the longer term, to achieve long-term financial sustainability and further options will be presented to Members in further budget reports. This will consider ways to reduce the Council's operating costs and generating further income and savings.
- 6.2 Making the best use of our resources and setting a balanced budget annually is within the 'Delivering Quality Services' Delivery Plan.
- 6.3 The revenue budget monitoring report to the Hub Committee on 19th September shows an overall projected deficit of £37,000 for the 2023/24 financial year. This is 0.4% of the overall net budget set of £8.588million and this is very close to a break-even position.

7 Earmarked and Unearmarked Reserves Policy

- 7.1 Unearmarked Reserves total £1.569 million at 31 March 2023. There was a surplus of £79,000 on the outturn position for 2022/23 (1.0% of the net budget of £7.770m) as shown in the Draft Statement of Accounts for 2022/23 published by the end of June 2023. In accordance with normal accounting practice, this underspend has gone into Unearmarked Reserves.

- 7.2 At Council on 21 February 2023, Members set a minimum balance for Unearmarked Reserves of £900,000, with an operating level of a minimum of £1.25million (Minute reference CM 66/22). This was based on a risk assessment basis and a sensitivity analysis. Therefore, the current level of Unearmarked Reserves of £1.569million at 31 March 2023 is still above these minimum levels to be held which are set annually. An updated risk assessment and sensitivity analysis will be presented to Council in February 2024.
- 7.3 Legislation does not prescribe how much the minimum level of reserves should be. The Section 151 Officer is tasked with recommending the minimum level of reserves required as part of the budget setting process having regard to elements of risk in the Council's finances (this was recommended at £900,000 being the minimum level in February 2023, with an operating level of £1.25million). Section 25 of the Local Government Act 2003 requires the Section 151 officer to report on the adequacy of the Council's financial resources on an annual basis.
- 7.4 **Earmarked Reserves** have reduced by £0.287m in 2022/23 moving from £9.189m on 1 April 2022 to **£8.902m at 31 March 2023 as shown in Appendix C**. This is an extract from the report to the Hub Committee on 21.11.23 on the review of Reserves. See 3.30 of this report which gives further detail.
- 7.5 Reserve levels will be kept under constant review and will be reviewed throughout the budget setting process to consider commitments against Earmarked Reserves, their unallocated balance, and the contributions to/from Earmarked Reserves for 2024/25 and future years also. This will be further set out in the Budget report to the Hub Committee in January 2024.
- 7.6 The proposed contributions to/from Earmarked Reserves for 2024/25 are shown in Appendix A. It is recommended to make an annual contribution of £50,000 to a JLP reserve, to commence the JLP review and to also commence making a £300,000 annual contribution to the vehicle replacement reserve for the future replacement of the waste fleet. An options report on waste vehicles will be presented to Members in 2024.
- 7.7 The Council currently puts 10% of its annual income from investment properties into a Management, Maintenance and Risk Earmarked Reserve. It is recommended to have a stepped increase of another 5% to the contribution to the Maintenance Management and Risk Management Reserve (MMRM Reserve) for Investment properties. This would increase the contribution from 10% of annual rental income of £1.1m to 15% in 24/25 (with an aim to increase it to 20% for 2025/26 financial year). There was a recommendation to review the reserve contribution from the Audit and Governance Committee. Increasing the contribution from 10% to 15% would be an extra annual cost of £55,000 per annum.

7.8 The provision of an appropriate level of balances is a fundamental part of prudent financial management, enabling the Council to build up funds to meet known and potential financial commitments.

7.9 As highlighted above there is a high degree of uncertainty about future levels of funding for local government. However, the Section 151 Officer is keeping a close watch on developments and planning for this longer-term uncertainty.

8 CAPITAL PROGRAMME AND PRUDENTIAL BORROWING

8.1 The Capital Programme is set by the Council and may be funded by sale proceeds from the disposal of assets (capital receipts), external grants and contributions, directly from revenue or from borrowing.

8.2 Capital projects will be scored on the following criteria:

- Health and Safety compliance
- Essential to keep operational assets open
- Fit with the Council's Delivery Plans for the new emerging Council Plan
- To rationalise service delivery or service improvement
- To generate income, capital value or to reduce revenue costs

8.3 It is important that capital bids are aligned with the emerging Council Plan. There is a recommendation within the Council Plan report that £50,000 of capital expenditure is funded from the New Homes Bonus Reserve (this is the £0.263m of capital resources identified for the Council Plan).

8.4 In addition there are two capital bids for 2024/25 (total of £140,000) that it is recommended form part of the Capital Budget Proposals for 2024/25 and be funded from New Homes Bonus funding. These are as below: -

- £90,000 – to renew and upgrade the Councils' bank reconciliation software (This is 50% of the projected cost, which is shared with SHDC)
- £50,000 – Annual amount set aside for a provision for the roof at Kilworthy Park

This will be a recommendation as part of the Budget Proposals report to Council in February 2024.

8.5 Appendix E sets out the Council's current capital programme for 2023/24 and new capital projects for 2024/25 will be added to the existing Capital Programme. ***The Capital Budget Proposals for 2024/25 will be set out within the Council report on 20th February and will include the***

capital budget proposals within the Council Plan (£50,000) being recommended to Council.

- 8.6 The Council's Asset Base is £38.3 million at 31 March 2023. The Council will continually review and challenge its asset base in order to deliver the optimum value for money from the Council's Assets.

9 FINANCIAL SUSTAINABILITY AND TIMESCALES

- 9.1 The MTFs is the starting point for developing a meaningful three year strategy that sets out the strategic intention for different strands of funding available to the Council (Hub Committee 19th September 2023).
- 9.2 The Council's budget is essentially fixed in cash terms and its ability to raise income is limited as there are national controls in place around council tax and business rates.
- 9.3 The Council will continue to assess various options for closing the budget gap for 2025/26 onwards, and in the longer term, to achieve long term financial sustainability and further reports will be presented to Members.
- 9.4 On 5th December 2023, the Audit and Governance Committee considered an interim Auditor's Annual Report from the Council's external auditors, Grant Thornton. This gave commentary on the Council's arrangements to secure economy, efficiency and effectiveness in its use of resources (see Section 10 of this report). It also gave commentary on financial sustainability.
- 9.5 Under the category of 'Financial sustainability', the report stated: that 'West Devon Borough Council (the Council) continues to perform well with regard to financial sustainability, with a record of stable financial and budgetary management. Despite the challenging environment in which it continued to operate in during 2021/22 and 2022/23, the Council has maintained a good financial position and achieved a balanced budget. Our work has not identified any significant weaknesses in arrangements to secure financial stability.'
- 9.6 An All Member Briefing on the Draft Budget Proposals for 2024/25 will take place on **Wednesday 10th January 2024**.
- 9.7 The table below shows the budget timetable for the 2024/25 Budget process.

19 th September 2023	Hub Committee – To consider the three-year MTFs (Medium Term Financial Strategy) for 2024/25 to 2026/27
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21st November 2023	Hub Committee – To consider draft proposals for the Revenue and Capital Budget for 2024/25.
Wednesday 10 th January 2024 (4pm)	All Member Briefing on the Budget Proposals for 2024/25
16th January 2024	Overview & Scrutiny Committee - To consider draft proposals for the Revenue and Capital Budget for 2024/25.
30 th January 2024	Hub Committee – To recommend Final Budget Proposals to Council for 2024/25
15th February 2024 (9am)	Date which Council Procedure Rule 16 applies
20th February 2024	Full Council – To approve Final Budget Proposals for 2024/25 and set the WDBC share of the Council Tax
22 February 2024	Council Tax Setting Panel – to agree the Council Tax Resolution for 2024/25 (This is WDBC share plus all other precepting authorities share).

Note 1- Council Procedure Rule 16 states that ‘Where a member intends to move a motion or amendment in relation to the Budget, the text of that motion or amendment must be put in writing and submitted to the Head of Paid Service by 9am on the third working day before the meeting, in order that officers may have sufficient time to consider and advise the Council of the financial implications of any such motion or amendment’. As per the timetable above, this would need to be submitted by 9am on Thursday 15 February 2024.

10. Implications

Implications	Relevant to proposals Y/N	Details and proposed measures to address
Legal/Governance		<p>The Hub Committee is responsible for recommending to Council the budgetary framework. It is the role of the Overview and Scrutiny Committee to scrutinise the Budget proposals being proposed by the Council on an annual basis. In accordance with the Financial Procedure Rules, Council must decide the general level of Reserves and the use of Earmarked Reserves.</p> <p>The preparation of the Budget report is evidence of whether the Council has considered all relevant information and proper advice when determining its</p>

		<p>financial arrangements in accordance with statutory requirements, and, that it will set a lawful budget.</p> <p>Appendix E to this report contains information relating to the financial or business affairs of any particular person (including the authority holding that information) and is therefore exempt information as defined in paragraph 3 of Schedule 12A to the Local Government Act 1972.</p> <p>The public interest in whether the information should be made public has been assessed and it is considered that the public interest will be better served by not disclosing the information.</p>
Financial implications to include reference to value for money		<p>The report sets out proposals for the Council to achieve a balanced budget for 2024/25, as shown in Appendix B. The Council is currently forecasting a £418,937 budget gap by the following year, 2025/26. The cumulative aggregated Budget Gap by 2026/27 is £1.7million, if no action has been taken in each individual year to close the budget gap annually.</p> <p>On 5 December 2023, the Audit and Governance Committee considered an interim Auditor's Annual Report from the Council's external auditors, Grant Thornton. This gave commentary on the Council's arrangements to secure economy, efficiency and effectiveness in its use of resources.</p> <p>The report stated that 'The Council has demonstrated a good understanding of its role in securing economy, efficiency and effectiveness in its use of resources. Our work has not identified any significant weaknesses in arrangements.'</p>
Risk		<p>Each of the budget options taken forward by Members will consider the risks of the option.</p>
Council Plan		<p>At the Hub Committee meeting on 30 January 2024, the Hub Committee will consider the Council Plan and the Year 1 (2024/25) delivery plan.</p>

		Once adopted, the Council Plan will be the Council's overarching strategic document setting out our ambitions and priorities for the Borough.
Climate Change - Carbon / Biodiversity Impact		<p>A report was presented to Council on 8th December 2020 'Climate Change and Biodiversity Strategy and Action Plan update'.</p> <p>In March 2021, Council approved to set up an Earmarked Reserve for £200,000 for the Recovery Plan and Corporate Strategy.</p> <p>The proposed financial commitment and investment for this Theme will be set out in the report to the Hub Committee on 30th January 2024. This will then be recommended to Full Council on 20th February 2024.</p>
Comprehensive Impact Assessment Implications		
Consultation and Engagement Strategy		<p>External consultation and engagement have not been undertaken regarding this report.</p> <p>The Council Plan and delivery plans have been refined following a seven-week consultation and engagement period with the public and partners.</p>
Equality and Diversity		Equality Impact Assessments are completed for the budget proposals.
Safeguarding		None directly arising from this report.
Community Safety, Crime and Disorder		None directly arising from this report.
Health, Safety and Wellbeing		None directly arising from this report.
Other implications		None directly arising from this report.

Supporting Information

Appendices:

Appendix A – Budget pressures and savings

Appendix B – Modelling of the Budget Position

Appendix C – Schedule of Earmarked Reserves – Extract of the Hub Committee report of 21st November 2023.

Appendix D – Town and Parish Precepts for 2023/24

EXEMPT Appendix E – Current Capital Programme for 2023/24

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WEST DEVON BOROUGH COUNCIL

BUDGET PRESSURES

	BASE 2023/24 £	Yr 1 2024/25 £	Yr 2 2025/26 £	Yr 3 2026/27 £
Waste collection, recycling and cleansing contract inflation (estimate) - assume 7.5% 2023/24 onwards (23/24 also includes some extra inflation provision from 22/23)	345,000	245,000	245,000	245,000
Waste collection, recycling and cleansing contract - Council 19 July 2022	400,000	0	0	0
Waste collection, recycling and cleansing - additional properties	50,000	100,000	100,000	100,000
Triennial Pension revaluation (increase in Pension Employer primary rate contributions)	50,000	0	0	75,000
Inflation on goods and services	150,000	150,000	150,000	150,000
Salaries - provision for pay award at 4% (£216,000) for 2024/25 (total pay of £5.4m), reducing to 3% in 25/26 and 26/27	0	216,000	170,000	170,000
Salaries - 22/23 award of £1,925 per Scale point has been modelled (an extra £210,000 on top of the 2% provided for)	360,000	0	0	0
Pay award 2023-24 - Initial figures of £1,925 per Scale Point or a 3.88% increase for Scale Point 44 upwards. (£147,000 is the amount over the current budget provision). This will need to be built into the Base Budget in 2024-25.	0	147,000	0	0
Increase in salaries - increments and pay and grading	175,000	75,000	75,000	75,000
IT inflationary cost pressures - increases in prices	0	110,000	0	0
Flooding - recent events have highlighted the need to add a cost pressure for dealing with the impacts of climate change, such as flooding, on our communities	0	50,000	0	0
Business continuity and cyber security	0	75,000	0	0
Extra insurance costs	0	30,000	0	0
Reduction in car parking income - Income targets were reduced in 2023/24 - There is a report to the Hub Committee in November 2023 on fees and charges for car parking - This is shown in the savings section further down.	150,000	0	0	0
Increase in external audit fees	60,000	30,000	0	0
Housing Delivery Team - Hub Committee 7th June 2022	29,800	0	0	0
Head of Revenues and Benefits - Hub Committee 12th April 2022	30,000	0	0	0
The Planning Improvement Plan, Hub Committee 7 June 2022, noted that the cost of the restructure, £33K per annum, will be funded for the first three years from the additional planning income held in the planning earmarked reserve.	33,000	0	0	0
A Plan for West Devon - Council 28.9.21 - £122,000 cost pressure for 22/23 and £168,000 for 2023/24 (Base Budget of £168,000 in 2024/25 onwards)	46,000	0	0	0
Reduction in Housing Benefit administration subsidy	10,000	10,000	0	0
National Insurance and National Living Wage (NLW increases)	40,000	30,000	20,000	20,000
Revenue and capital expenditure for Year 1 delivery plan of the Council Plan (2024/25)	0	387,500	(387,500)	0
TOTAL IDENTIFIED BUDGET PRESSURES	1,928,800	1,655,500	372,500	835,000

WEST DEVON BOROUGH COUNCIL

Contribution to Earmarked Reserves
(This line shows the annual contributions into the Reserve)

	BASE 2023/24 £	Yr 1 2024/25 £	Yr 2 2025/26 £	Yr 3 2026/27 £
Contribution from Earmarked Reserves to fund the revenue and capital expenditure within the Year 1 Delivery Plan of the Council Plan (2024/25)	0	(387,500)	0	0
Contribution to IT Development Reserve (£50K per annum)	50,000	50,000	50,000	50,000
Contribution to Planning Reserve (£25K per annum)	25,000	25,000	25,000	25,000
Contribution to Elections Reserve (20K per annum)	20,000	20,000	20,000	20,000
Contribution to a Joint Local Plan Earmarked Reserve - to commence the JLP review	0	50,000	50,000	50,000
Contribution from the Planning Reserve for the cost of the restructure within the planning service - Hub Committee 7 June 2022 - to be funded for the first three years from the additional planning income held in the planning earmarked reserve	(33,000)	(33,000)	(33,000)	0
Contribution from Business Rates Retention Reserve to smooth the volatility in business rates income from the baseline reset	(150,000)	(150,000)	(150,000)	(150,000)
Contribution from Strategic Change Earmarked Reserve	(32,567)	0	0	0
Contribution to Vehicles Replacement Reserve (£50K per annum) - An increase to £300,000 per annum per year has been built in as a cost pressure. An options report will be brought to Members in early 2024.	50,000	300,000	300,000	300,000
Increase the contribution to the Management, Maintenance and Risk Management Reserve for investment properties - This increases the contribution from 10% of annual rental income in 23/24 to 15% in 24/25 and 20% for 25/26 onwards.	0	55,000	110,000	110,000
Contribution to Joint Local Plan Earmarked Reserve (staffing costs)	25,000	25,000	25,000	25,000
Total Contribution to/ (from) Earmarked Reserves	(45,567)	(45,500)	397,000	430,000

SAVINGS AND INCOME GENERATION IDENTIFIED

	BASE 2023/24 £	Yr 1 2024/25 £	Yr 2 2025/26 £	Yr 3 2026/27 £
Income from Investment properties (£350,000 is in the Base Budget for 2023/24) - periodic upwards rental reviews on investment properties	50,000	0	0	0
Management fee income from external contracts such as leisure - Council 15 February 2022	45,500	0	0	200,000
IT FIT Project - software savings	10,000	0	0	0
Establishment savings (salary savings) gained from IT and digital communications	50,000	0	0	0
Extra recycling income - this income has already been achieved in 2021-22 (Base budget of £515,000 in 2023-24)	190,000	0	0	0
Extra trade waste income (Base budget of £45,000 in 2023-24)	30,000	0	0	0
Extra treasury management income to reflect increases in the Bank Base rate (Base Budget of £400,000 in 2023-24)	375,000	400,000	(200,000)	0
Car parking income (Hub Committee report 21st November 2023 - inflationary increases since March 2021)	0	150,000	0	0
Vacancy saving target on salaries - equates to around 1.5% of salaries (total pay of £5.4m)	0	80,000	0	0
Extra garden waste income from an increased customer base and an inflationary increase in the annual subscription amount (Base budget of £305,000 in 2023-24)	60,000	55,000	0	0
Environmental Health fees and charges - inflationary increases	0	20,000	0	0
Savings on staff and Member travel and expenses	30,000	0	0	0
Housing Benefit overpayments	40,000	0	0	0
Additional Employments estates income (Base budget of £427,000 in 2023-24)	50,000	0	0	0
Funding from Homelessness prevention government grant (this funds housing posts - funding to be reflected within the base budget)	180,000	0	0	0
TOTAL SAVINGS AND INCOME GENERATION	1,110,500	705,000	(200,000)	200,000

Memorandum note on Planning Fee Income

The Government has confirmed that a 35% increase for major applications and 25% for all other applications will apply from 6th December 2023. This is expected to generate around £60,000 to £70,000 of additional planning income. In 2022-23, the Council experienced a shortfall in planning income of £185,000 (39%) against the budgeted income target of £473,000. Therefore no additional income has been built into the base budget for 2024/25.

Second Homes 200% council tax - Projected Income and Expenditure	BASE 2023/24 £	Yr 1 2024/25 £	Yr 2 2025/26 £	Yr 3 2026/27 £
Discretion to charge up to an extra 100% extra council tax on Second Homes (timescale is that legislation has been introduced for 25-26). There was a separate report on the Council agenda of 21 February 2023 regarding this. The estimated additional yield from council tax would be £1.6m, of which the Council's share would be approximately £0.17m (11%).		0	(170,000)	(170,000)
Expenditure: The Council is experiencing additional temporary accommodation costs		150,000	150,000	150,000
This has been identified in the latest Budget Monitoring report (19.9.23) as being an on-going cost pressure. Significant increases are anticipated in the expenditure on temporary accommodation over and above what is claimable back through DWP (Department for Work and Pensions) subsidy. This is reflective of the national picture.				

Modelling assumptions: Assumes Council Tax is increased by 2.99% annually				
Line	BASE	Yr 1	Yr 2	Yr 3
No.	2023/24 £	2024/25 £	2025/26 £	2026/27 £
1	7,769,695	8,587,995	9,538,495	9,692,058
2	1,928,800	1,655,500	372,500	835,000
3	(1,110,500)	(705,000)	200,000	(200,000)
4 Projected Net Expenditure:	8,587,995	9,538,495	10,110,995	10,327,058
<u>Funded By:-</u>				
5	5,391,371	5,627,384	5,876,433	6,135,259
6	377,000	151,000	150,000	150,000
7		60,000	60,000	60,000
8	1,761,000	2,327,835	2,350,000	2,450,000
9		75,000	90,000	100,000
10	0	0	0	(117,000)
11	89,000	94,416	100,000	0
12	200,000	200,000	200,000	0
13	544,625	544,625	544,625	544,625
14	51,044	93,067	398,000	0
15	(88,262)	0	0	0
16	0	0	0	250,000
17	150,000	309,180	310,000	310,000
18	66,650	10,488	10,000	0
19	45,567	45,500	(397,000)	(430,000)
20 Total Projected Funding Sources	8,587,995	9,538,495	9,692,058	9,452,884
21 Budget gap per year (Projected Expenditure line 4 - Projected Funding line 20)	0	0	418,937	874,174
Actual Predicted Cumulative Budget Gap				
	0	0	418,937	1,293,111
Aggregated Budget Gap (if no action is taken in each individual year to close the budget gap annually)				
	0	0	418,937	1,712,048

Modelling Assumptions: (Assumes an increase in Band D Equivalent properties of 300 per annum)				
Council Tax (Band D) (an increase of 2.99% per annum has been modelled)	254.00	261.59	269.41	277.46
Council TaxBase	21,225.87	21,512.23	21,812.23	22,112.23

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ANALYSIS OF RESERVES (EARMARKED RESERVES AND UNEARMARKED RESERVES)

APPENDIX C

Extract of the Hub Committee report 21.11.23 on the review of Earmarked Reserves

EARMARKED RESERVES	Closing balance 31.03.2023	Future Commitments	Funding needed to hold a prudent provision	Unallocated spend	Annual reserve contribution	Comments
Specific Reserves - General Fund	£000s	£000s	£000s	£000s	£000s	
Earmarked Reserves which are essential for operational core service delivery (for example programmed renewal and replacement of plant and equipment)						
Business Rates Retention Reserve (remainder of the reserve needed to manage business rates volatility each year)	(971)	150	821	0		This relates to a timing issue on the accounting adjustments required for the localisation of business rates. This reserve deals with any volatility in Business Rate income. In 2023/24 £150,000 is budgeted to be used of this reserve to smooth the volatility in business rates income used to finance the revenue budget.
Car Park Maintenance Reserve	(534)	38	496	0		The majority of this reserve is uncommitted. Future commitments are for the provision of electric car charging points and resurfacing of car parks.
Elections	(61)	61	0	0	(20)	This reserve is held to fund the cost of Borough Council elections, an annual contribution of £20,000 is made into this reserve.
Environmental Health Initiatives	(104)	104	0	0		The additions to this reserve applied in 2022/23 relate to savings on Environmental Health salaries, and are committed to fund a post for the next two years (2023/24 & 2024/25).
Grounds Maintenance	(99)	99	0	0		A reserve set up in 2019/20 to hold the Grounds Maintenance in year surpluses to be reinvested back into the service.
Homelessness Prevention Reserve	(184)	141	43	0		This reserve has been created following underspends on Homelessness Prevention Costs. The future commitments of £74k are £50k towards the part funding of capital works at Springhill, and the future funding of service salary costs £31k.
ICT Development Reserve	(45)	45	0	0	(50)	An annual contribution of £50k is made into this reserve. Commitments in 23/24 are for the new website and planning system.
Leisure Services	(133)	86	47	0		A reserve set up in 2016/17 to support non recurring costs of the leisure service. The future commitments of £86k are contributions towards the cost of capital works at Parklands Leisure Centre and Tavistock Viaduct Walk.
Maintenance Funds	(436)	95	341	0		A reserve set up in 2016/17 to support potential non recurring maintenance costs of property assets held by the authority. The future commitments of £95k are contributions towards the cost of capital works at Heron Rd, Exeter and Hayedown Depot.
Maintenance, Management and Risk Management Reserve (MMRM) - 10% of annual income from investment properties is set aside into this reserve	(418)	0	418	0		This reserve was set up in 2018/19 to manage the ongoing maintenance costs of the Council's Investment Property. The contributions to this reserve equate to 10% of the rental income on an annual basis. This is being reviewed for the future.
New Homes Bonus (Revenue Base Budget funding)	(150)	150	0	0		Funding set aside to finance the 2023/24 revenue budget.
New Homes Bonus	(363)	363	0	0		Commitments for capital programme funding from allocations approved in previous years, such as Springhill, Tavistock and other capital projects.
Planning Policy & Major Developments	(123)	118	5	0	(25)	This reserve is for all planning matters and is also required to put funding aside to meet any future appeal costs. Commitments mainly relate to the Planning restructure. A contribution of £25,000 is made into the reserve annually.
Joint Local Plan	(25)	25	0	0	(25)	This reserve is to fund the salary costs of the JLP team. An annual contribution of £25k is made into this reserve.
Section 106 Monitoring and technical support	(3)	3	0	0		This reserve funds the costs of staff to oversee the administration of S106 deposits and how they are spent.
Organisational Development Strategy	(20)	20	0	0		This reserve was created from external work carried out in other Councils e.g. HR work with Councils also embarking on a Transformation Programme. This funding is now earmarked for implementing the Council's Organisational Development Strategy.
Vehicle Replacement	(376)	376	0	0	(50)	Earmarked for the Vehicle Fleet Replacement Programme. An annual contribution of £50k is made to this reserve.
Waste & Cleansing Options Review	(678)	450	228	0		This reserve was established in 2016/17 to support and promote changes in service provision and capital investment. Amounts have been committed to fund capital expenditure for an additional waste fleet vehicle and for the upgrade of Hayedown Depot.
Tree Maintenance	(14)	14	0	0		This reserve was set up in 2021/22 to hold underspends in the revenue budget and to support longer term ongoing costs of the tree maintenance programme.
Affordable Housing Reserve	(159)	98	0	(61)		This is a new reserve set up in 2022/23 to support the delivery of affordable housing initiatives. £98k has been committed to support the continuation of the tenants incentive scheme and capital works to modernise 3 Springhill, the balance of the reserve is currently uncommitted.
Tamar Trails	(55)	55	0	0		This is a new reserve set up in 2022/23 to support the delivery of capital improvement works to the trail. The reserve is fully committed as detailed in capital monitoring report to Hub Committee 07/03/23.
Sub - Total	(4,951)	2,491	2,399	(61)	(170)	
Earmarked Reserves which are being used to fund new corporate initiatives and corporate priorities						
Broadband Community Support Reserve	(50)	50	0	0		The set up of this reserve was approved by Hub on 01/12/20, min ref HC40, funded by a £50k contribution from the Business Rates Retention Reserve to support the council's economic and health & wellbeing objectives.
Business Rates Retention Reserve (Corporate Strategy)	(104)	104	0	0		£104k has been committed to fund initiatives included in the Corporate Strategy, including supporting enhancements to Tavistock & other towns.
Innovation Fund (Invest to Earn)	(376)	287	0	(89)		This reserve was set up in 2016/17, current commitments are for a contribution towards the upgrade of Hayedown Depot and Corporate Strategy projects £80k.
Recovery Plan & Corporate Strategy Reserve	(159)	159	0	0		This was a reserve established at the end of 2020/21 to support the costs of the Recovery Plan & Corporate Strategy (Hub 16/03/21), it is fully committed to fund the cost of various initiatives as detailed in the Corporate Strategy.
Strategic Change (T18)	(67)	33	0	(34)		£33k has been committed to finance the 2023/24 revenue base budget.
Sub - Total	(756)	633	0	(123)	0	
Earmarked Reserves which is Government Grant funding being used for the purposes of the grant determination letter						
Neighbourhood Planning	(45)	45	0	0		This is Neighbourhood Planning Grant funding received in previous years yet to be applied to finance relevant expenditure.
Revenue Grants	(1,303)	1,303	0	0		This reserve comprises of government grants received for specific initiatives or new burdens, and are held in the reserve for accounting purposes.
Ukraine Humanitarian Crisis (Government Grant funding)	(669)	669	0	0		This reserve was set up in 2022/23 to hold funding received to support the Ukraine Humanitarian Crisis which will be spent in 2023/24. An amount of £496,583 will be spent in 2023/24 on the purchase of five properties through the Local Authority Housing Fund (LAHF) as approved by Hub Committee (07/03/23).
Sub - Total	(2,017)	2,017	0	0	0	
Notional Earmarked Reserves which are held for a technical accounting purpose for the Collection Fund (this is not funding available to the Council to spend)						
S.31 Compensation Grant (Business Rates Section 31 Grants for business rates relief)	(307)	307	0	0		This is a new reserve set up to hold the business rates S31 grants received in 2020/21 and 2021/22 to offset the business rate reliefs given to businesses during lockdown. Under current Collection Fund accounting rules, the S31 grants received will not be discharged against the Collection Fund deficit until the following year in 2023/24. This reserve is not money which is available for the Council to spend and it is important that this is not misinterpreted in the Accounts, as this is a national issue.
Sub - Total	(307)	307	0	0	0	
Uncommitted Earmarked Reserves and available for Members to decide how to allocate these funds for future priorities (This potentially releases £871,000 for the West Devon Vision and Strategy 2024-2028 - see Section 3.30 of the covering report)						
COVID-19	(254)	0	0	(254)		This was a reserve set up at the end of 20/21 used to hold grant funding provided by central government to finance costs & income losses incurred as a direct result of dealing with the COVID-19 pandemic. The current balance in this reserve is uncommitted for these purposes.

Financial Stability	(617)	0	0	(617)		This was a new reserve set up in 2018/19, which is to be available for any future financial pressures arising from local government funding reforms and any other budget pressures. It is currently uncommitted funding.
Sub - Total	(871)	0	0	(871)	0	
TOTAL EARMARKED RESERVES	(8,902)	5,448	2,399	(1,055)	(170)	
TOTAL UNEARMARKED RESERVES (General Fund Balance)	(1,569)	0	1,569	0		This Unearmarked Reserve has a minimum balance of £0.9 million and an operating level of £1.25 million (set by Members as part of the budget process). The 2022/23 surplus of £79,000 from the 2022/23 Accounts has been transferred to Unearmarked Reserves, in accordance with normal accounting practice. The £1.569m includes the surplus of £79,000 for the 2022/23 financial year outturn.
TOTAL REVENUE RESERVES (EARMARKED AND UNEARMARKED RESERVES)	(10,471)	5,448	3,968	(1,055)	(170)	

COMPARISON OF PARISH/TOWN PRECEPTS IN 2022/23 and 2023/24

Parish/Town	2022/23 Parish Precept £	2023/24 Parish Precept £	2022/23 Parish Band D council tax £	2023/24 Parish Band D council tax £	Increase/ (Decrease) Band D council tax £	Increase/ (Decrease) Band D council tax %
Beaworthy	4,261	4,261	49.51	49.45	(0.06)	-0.1%
Belstone	3,408	3,500	27.87	28.36	0.49	1.8%
Bere Ferrers	70,520	77,371	65.55	71.87	6.32	9.6%
Bondleigh	200	200	3.39	3.14	(0.25)	-7.4%
Bratton Clovelly	6,558	6,924	38.12	39.58	1.46	3.8%
Brentor	15,250	15,750	81.27	82.89	1.62	2.0%
Bridestowe	7,511	8,260	33.08	35.59	2.51	7.6%
Broadwoodkelly	2,721	2,721	23.17	22.35	(0.82)	-3.5%
Buckland Monachorum	59,907	61,814	35.71	36.63	0.92	2.6%
Burrator	5,000	5,500	7.69	8.40	0.71	9.2%
Chagford	54,000	60,000	70.63	75.14	4.51	6.4%
Dartmoor Forest	17,995	17,995	48.62	48.17	(0.45)	-0.9%
Drewsteignton	13,410	11,900	37.93	33.51	(4.42)	-11.7%
Exbourne & Jacobstowe	7,490	10,500	33.67	46.00	12.33	36.6%
Germansweek	4,727	4,970	59.98	60.26	0.28	0.5%
Gidleigh	0	0	0.00	0.00	0.00	0.0%
Gulworthy	5,855	6,733	29.41	32.90	3.49	11.9%
Hatherleigh	25,000	35,000	41.11	53.11	12.00	29.2%
Highampton	4,830	4,896	39.65	39.65	0.00	0.0%
Horrabridge	41,400	46,506	58.38	64.84	6.46	11.1%
Iddesleigh	5,000	5,000	58.20	55.97	(2.23)	-3.8%
Inwardleigh	4,750	5,200	29.06	30.07	1.01	3.5%
Kelly	450	450	8.64	8.45	(0.19)	-2.2%
Lamerton	8,799	10,805	27.00	32.99	5.99	22.2%
Lewdown	8,196	8,524	24.22	23.72	(0.50)	-2.1%
Lifton	14,769	15,138	34.67	34.87	0.20	0.6%
Lydford	12,050	8,508	67.67	46.87	(20.80)	-30.7%
Mary Tavy	17,928	19,382	48.97	51.43	2.46	5.0%
Meeth	2,300	2,415	33.99	35.67	1.68	4.9%
Milton Abbot (including Bradstone)	5,324	5,457	14.54	14.88	0.34	2.3%
Monkokehampton	4,598	4,600	88.66	87.44	(1.22)	-1.4%
North Tawton	134,029	144,971	191.92	203.24	11.32	5.9%
Northlew	11,111	13,600	39.19	45.19	6.00	15.3%
Okehampton Town	313,086	421,893	140.26	186.42	46.16	32.9%
Okehampton Hamlets	24,200	27,850	41.14	42.54	1.40	3.4%
Peter Tavy	11,000	11,500	85.58	89.39	3.81	4.5%
Plasterdown	4,369	4,942	15.46	17.45	1.99	12.9%
Sampford Courtenay	10,682	10,682	42.55	41.57	(0.98)	-2.3%
Sourton	8,511	9,252	50.80	51.31	0.51	1.0%

COMPARISON OF PARISH/TOWN PRECEPTS IN 2022/23 and 2023/24

Parish/Town	2022/23 Parish Precept £	2023/24 Parish Precept £	2022/23 Parish Band D council tax £	2023/24 Parish Band D council tax £	Increase/ (Decrease) Band D council tax £	Increase/ (Decrease) Band D council tax %
South Tawton	22,432	24,291	48.47	51.85	3.38	7.0%
Spreyton	3,500	4,535	18.21	23.17	4.96	27.2%
Sticklepath	5,732	6,088	36.74	38.34	1.60	4.4%
Stowford	3,014	3,105	24.50	25.19	0.69	2.8%
Sydenham Damerel	2,673	2,244	23.35	19.33	(4.02)	-17.2%
Tavistock	852,554	968,870	186.54	204.72	18.18	9.7%
Throwleigh	4,280	5,000	28.31	32.63	4.32	15.3%
Total	1,845,380	2,129,103				

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

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Report to: **Hub Committee**

Date: **30th January 2024**

Title: **Housing Crisis update - Housing & Homeless Strategy Action Plan**

Portfolio Area: **Housing – Cllr Mark Renders**

Wards Affected: **all**

Author: **Isabel Blake** Role: **Head of Housing**

Contact: Telephone/email: Isabel.blake@swdevon.gov.uk

RECOMMENDATIONS:

That the Hub Committee:

- 1. review the progress on the previous Housing Strategy Action Plan; and**
- 2. agree the refreshed Action Plan.**

1. Executive summary

- 1.1 The Council adopted the current Housing Strategy in 2021. This was a joint plan between South Hams & West Devon and reflected Housing as a priority for both Councils. In May 2023 there was a change in administration at both Councils and the focus on Housing remains a top priority for both.
- 1.2 It is a statutory requirement to have a Homeless strategy, and best practice to have a Housing Strategy, particularly when it is a priority for the Council. It has been the practice to review the action plan each year and this report recommends that Members agree the refreshed Action Plan which considers the commitments of the Council vision and strategy and links to specific actions within the plan.
- 1.3 Due to the close links between the homeless and housing strategies, the 2 action plans have been merged to avoid duplication and demonstrate clearly the steps the Councils are taking to eradicate homelessness and support those in housing need. There is a legal duty placed on the Council through the Homelessness Act 2002 to review

homelessness, the influencing factors that cause homelessness and to develop a strategy which addresses the findings of the review.

- 1.4 The review and new action plan can be found appended to this report (Appendix 1 & 2)

2. Background

- 2.1 The South Hams & West Devon joint housing strategy – Better Homes, Better Lives was adopted in April 2021 as the Country began to emerge from the Covid-19 global pandemic. At that time there were still many unknowns about the longer-term impacts, so the strategy was purposefully designed to be able to flex to changing needs. As part of the requirement of the strategy an annual action plan is brought back to the Hub to agree and endorse.
- 2.2 Both South Hams & West Devon held local elections in May 2023, which resulted in changes in administration in both Councils. Housing remains a priority for the Council, however it is important to reflect that it has been a universally championed issue for all members, culminating in a unanimously supported motion to declare a Housing Crisis in West Devon in February 2022. A new council plan for West Devon is currently under development. The 5 draft primary aims for the Housing priority are.
 - Help our communities to bring forward affordable housing in their areas.
 - Support the needs of homeless households and provide good quality temporary accommodation and value for money.
 - Improve outcomes for care-experienced young people by supporting them to access the housing they need.
 - Tackle damp and disrepair in rented homes
 - Decarbonise the existing social and affordable housing stock to improve living standards, lift people out of fuel poverty and reduce energy costs for residents.
- 2.3 The priorities of the Housing Strategy are already in synergy with the corporate plan with the 4 priorities remaining as
 - Homes that support the health and wellbeing of our residents
 - Make the best use and improve the quality of our existing housing
 - Promote balanced and sustainable communities

- Ensuring that homes support the health and wellbeing of our area

2.4 Alongside the Housing Strategy there is a statutory requirement under the Homelessness Act 2002 to review homelessness in the District and develop an action plan to address the causes identified. Appendix 1 sets out the review of both the homelessness and Housing strategies, which has been amalgamated to avoid duplication and bring together all the detailed action the Council is taking in relation to housing.

2.5 The Housing Strategy review sets out the progress against the strategy targets and gives examples of work undertaken, all statistics relate to the financial year 2022/23 and it is recommended that a further update on 23/24 progress is subject to a housing report to the Executive in early summer 2024.

2.6 Appendix 2 contains the draft detailed action plan.

3. Proposal and Next Steps

3.1 It is recommended that the Hub review the progress of actions to date and agree and endorse the action plan for 2024/25

4. Implications

Implications	Relevant to proposals Y/N	Details and proposed measures to address
Legal/Governance		<p>The Homelessness Act 2002 places a duty on local authorities to review homelessness, and the influencing factors that cause homelessness, and to develop a strategy which addresses the findings of the review.</p> <p>It is not a statutory requirement to have a housing strategy, however it is a corporate priority for the Council, therefore it is essential there is a plan for delivery.</p>

Financial implications to include reference to value for money		<p>None as a direct implication of this report. All new initiatives requiring finance will be subject to separate reports.</p> <p>It is important to note that Local Authorities still receive a prevention of homeless grant from central Government. For the year 2023-24 West Devon has been awarded £179,442 in prevention grant, with an additional £115,047 in Ukraine homeless prevention grant top up. The grants must be spent in year. And this pays for some core service delivery and temporary accommodation costs. The action plan contains a number of actions around reducing the reliance on pay nightly bed and breakfast type accommodation, which it is anticipated will bring down these costs. This not only offers the best service for the customer but is the most efficient in terms of the Local Authority</p>
Risk		The Council has prioritised housing in its Vision and strategy. Failure to produce an action plan detailing housing activity would undermine these commitments, It is a statutory requirement to have a current Homelessness Strategy.
Supporting Corporate Strategy		Housing
Consultation & Engagement Strategy		Members of the Housing Advisory Group have been consulted and participated in the formation of the Action Plan. Both the Homeless strategies and housing strategies were publicly consulted on when they were first adopted.
Climate Change - Carbon / Biodiversity Impact		No direct impact as a result of this report, however individual projects will have their impact assessed, and commitments to new houses being carbon neutral wherever possible is part of the Vision and strategy.
Comprehensive Impact Assessment Implications		
Equality and Diversity		The original Housing strategy has been the subject of an equality impact assessment
Safeguarding		As the Homeless Strategy Action Plan concerns work with very vulnerable people and one of

		the priorities is around Health and Wellbeing, the corporate safeguarding policy will underpin the work of officers who regularly work with homeless households
Community Safety, Crime and Disorder		Devon & Cornwall Police contributed to the development of the strategy and will remain significant partners during the delivery of relevant actions in the action plan
Health, Safety and Wellbeing		No direct implications as a result of this report, however there is activity within the action plan that is designed to respond positively to health and wellbeing.
Other implications		

Supporting Information

Appendices:

Appendix 1- Review and progress of the 22/23 Action Plan

Appendix 2 – 24/25 Action Plan

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South Hams & West Devon

Better Homes, Better Lives

Page 115
Housing Strategy 2021-2026

Review 2022 - 2023



South Hams
District Council



West Devon
Borough Council



Background

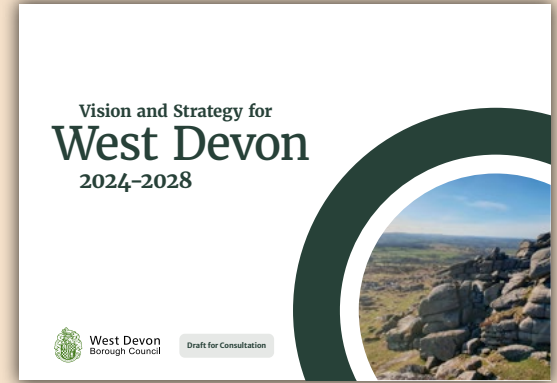
South Hams District Council and West Devon Borough Council adopted their new Housing Strategy “Better Homes, Better Lives” in April 2021 which set out the Councils housing ambitions for the next 5 years.

One year later, our 2022 – 27 Homelessness Strategy was also adopted. The year since their adoption have not been without their challenges; with a housing crisis being declared in the South Hams in October 21 and in West Devon shortly after; in February 22. These two events were quickly followed by the humanitarian crisis in the Ukraine in February 22 and the cost of living crisis which has been developing over the past 6-12 months. Each of these events have had a profound effect on the lives of our residents and the direction that our work is taking.

Whilst it is impossible to anticipate some of these major events, experience has taught us that one can never become complacent about the maintenance of the status quo, particularly when designing and establishing a 5 year strategy. For this reason our Housing Strategy and our Homelessness Strategy are reviewed annually and have been designed to respond flexibly to changing need and demand whilst remaining in line with the councils overarching corporate strategies.



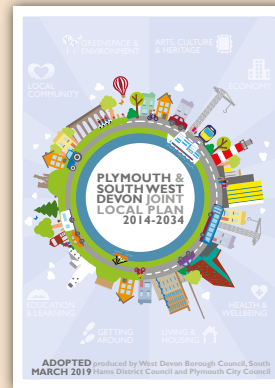
Corporate Strategy and Strategic Themes



Corporate Strategy and Strategic Themes



Underpinning Documents





Housing and Homelessness – the way forward



The Housing Strategy “Better Homes, Better Lives” and the Homelessness Strategy are both now well established documents, both leading and shaping the direction of our service.

The elections in May 2023 introduced a new political direction in South Hams and many new members across both South Hams and West Devon. Considering this, we have taken the opportunity to collaborate with members to re-evaluate our priorities and ensure that the direction of our Housing and Homelessness services remains an accurate reflection of the area’s current needs and challenges.

The resulting action plan is intended to build on our achievements and address the new and existing challenges the current financial, political, and housing landscape hold.

As a response to the Housing Crisis declarations in South Hams and West Devon, the decision was taken to review our current housing resource and to consider how it may be tailored to best meet the needs of our residents. The outcome of this review was the combining of existing housing related work streams to create a single housing focussed team; designed to find solutions to the immediate housing crisis as well as work together to effectively prevent future crises occurring.

In reflection of this enhanced, joined up approach, our 2021-26 Housing Strategy “Better Homes, Better Lives” and our Homelessness Strategy 2022-27 have been brought into alignment for review within this document. The outcome of this Joint review strategy will be the enablement of a full and thorough review of all elements relating to and impacting on housing provision and homelessness, alongside how we are working together to ensure best outcomes.

The Housing Strategy

The objectives identified in the Housing Strategy “Better Homes, Better Lives” are framed around two key themes of what makes a home, a community, a society; the Place and the People.

Housing for Place



Driving the delivery of new homes that people can afford and meeting the diverse needs of our communities.

Under this theme our focus is around provision of housing, identifying future needs and ensuring that developments in rural locations support the needs of those communities. Encouraging provision of a diverse range of housing options to include; social housing, shared & low-cost ownership, extra care housing, housing to promote independent living for those with additional needs, options for gypsy and traveller communities, and those wishing to pursue a self-build option.

Housing for People



Ensure the best use and improved quality of existing housing.

Under this theme our focus is around the improvement of the lives of people in our communities; ensuring their homes are warm, energy efficient and meet their health and wellbeing needs.

2022 – 27 Joint Homelessness Strategy

The 2022–27 Homelessness strategy is designed around the needs of four distinct groups of people who make up our community:

- singles & couples;
- families;
- those with additional needs; and
- rough sleepers.

The strength in this approach is in being able to identify where needs overlap and can be met simply for all groups, and recognising where differentiation in need and delivery of solutions is required. This approach has enabled us to identify and monitor changing needs within each group, and to find creative and targeted solutions; designed to meet specific need.

The objectives in the 2022–27 Homelessness Strategy outline the four major activities undertaken within our area of work. Our aims are to:

- **Prevent** – identifying and addressing issues early to ensure households can remain in their homes or make a planned move without becoming homeless;
- **Relieve** – where homelessness cannot be avoided, support people to find accommodation;
- **Sustain** – where complex needs are identified, we will work with partner agencies to ensure people are supported to sustain their homes;
- **Provide** – to work to improve access to a range of accommodation options suitable for household needs.



Objective alignment and complementary practice

When read in parallel with our Homelessness Strategy 22-27 the alignment of our objectives can be clearly identified.

The key aims of provision of suitable housing, and the focus on identifying and meeting the needs of the people within our community, form a well-defined thread throughout our work. To accurately review the progress, we have made we have pulled the various complementary threads of work together so that they can be reviewed as a whole.

Working in partnership, these shared housing-related disciplines have enabled us to work together more effectively to address the challenges currently faced across our two local authority areas. This has enabled a collaborative approach toward meeting immediate housing need and homelessness, whilst planning for future housing supply and demand and whilst ensuring existing and future homes meet quality homes standards.

Overview of our aligned objectives

People Priority 1: Homes that support the Health and Wellbeing of our residents.

The Councils are compelled to addressing hardship, deprivation, ill health and inequalities that exist within our areas.

Sustain

We will work with our residents and partner agencies to ensure people are supported to sustain their homes.

Focus areas:

- Energy efficiency;
- Promoting independent living through adaptations and improvements;
- Ensure adapted housing is matched to those with a need for adaptations to ensure best use of stock;
- Develop a Fuel Poverty Action Plan;
- Ensure access to good quality financial and independent living advice and support to ensure people are empowered to sustain their tenancies;
- Work proactively with landlords in both the private and social rented sector to ensure early identification of tenancy sustainment issues including financial, affordability and property quality issues.

People Priority 2: Make the best use and improve the quality of existing housing.

The Council are committed to making better use of already existing housing to meet the needs of residents.

Prevent

identifying and addressing issues early to ensure households can remain in their homes or make a planned moved without becoming homeless.

Focus areas:

- Improve and enhance housing standards across the private and social housing sector through landlord engagement;
- Expand SeaMoor Lettings to improve access to the private rented sector;
- Promote the Tenants Incentive Scheme to encourage and incentivise tenants under occupying tenants in social housing to downsize;
- Work with registered providers and private landlords to enable early identification of families at risk of homelessness to enable provision of appropriate support and access to housing options;
- Work closely with partner agencies to ensure those in housing need are identified and referred to us quickly to enable early intervention measures can be put in place; including support to downsize or move to more suitable accommodation.

Place Priority 1: Promote Balanced and Sustainable communities.

The long-term resilience of rural communities depends upon having a diverse housing stock that can meet the needs of a wide range of households. By ensuring that new development adds diversity to the housing stock we can help ensure our communities are inclusive and equitable places to live, and that can create communities that are well prepared to respond to change.

Provide

To work to improve access to a range of accommodation options suitable for household needs.

Focus areas:

- Work with DCC to provide specialist accommodation for those requiring support;
- Work with developers to encourage provision of social, managed shared, intermediate private rental, part ownership and market sale housing;
- Promote effectively partnership working to meet the needs of Gypsy and Travellers;
- Encourage opportunities for people interested in Self Build;
- Using the Council's resources, increase the number of affordable private rented and council owned properties available to families, to include quality temporary housing;
- Maximise the number of properties made available as a result of successful downsizing in the social rented sector;
- work with Devon County Council to support the delivery of housing for those with support needs through a property management service offer with intensive housing support.

Place Priority 2: Ensuring that homes support the Health and Wellbeing of the area.

The Council wants to meet the housing needs of all communities and the challenges of an ageing population. This Strategy aims to promote the best use of current housing stock, whatever the tenure, and enable new housing that is built to a standard that will enhance the health and wellbeing of future occupants.

Relieve

Where homelessness cannot be avoided, support people to find accommodation.

Focus areas:

- Plan for current and future housing needs to include consideration of:
 - Health needs;
 - Energy efficiency;
 - Wheelchair standard housing;
 - Extra care housing provision;
 - Quality temporary housing provision for those facing homelessness.
- Ensure provision of quality temporary housing and access to support services to holistically address the needs of those facing homelessness;
- Work with partner agencies to deliver accommodation and services which support young people facing homelessness;
- Develop a range of accommodation and support options for people rough sleeping or at risk of rough sleeping to make long term accommodation sustainment realistic and meet unmet needs.

Key achievements

St Anne's Chapel



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People Priority 1: Homes that support the Health and Wellbeing of our residents

The Councils are compelled to address hardship, deprivation, ill health, and inequalities that exist within our areas.

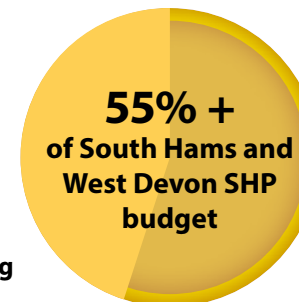
Sustain

We will work with our residents and partner agencies to ensure people are supported to sustain their homes:

- Over 55% of the South Hams and West Devon DHP budgets were used to support tenants struggling with their rent.
- 85 Green homes grants paid in South Hams and 38 in West Devon to improve homes.
- We have referred 290 customers to our joint contracted financial advice services to maximise their incomes, get support with debt and help with accessing grants for essential everyday items.

- 683 Household support fund payments made to residents requiring essential household items in South Hams and 396 in West Devon.
- 4 Notices issued in South Hams and 3 in West Devon to landlords to support tenants in poor housing conditions.
- Introduced a specialist Support Worker to provide holistic support for people in temporary accommodation.

Used to support tenants struggling with their rent



Specialist Support Worker introduced

People Priority 2: Make the best use and improve the quality of existing housing

The Councils are committed to making better use of already existing housing to meet the needs of residents.

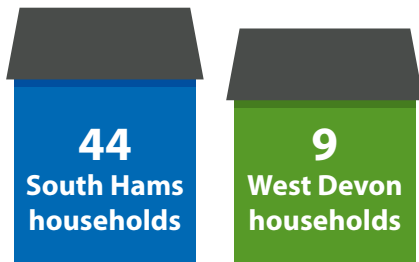
Prevent

Identifying and addressing issues early to ensure households are able to remain in their homes or make a planned move without becoming homeless:

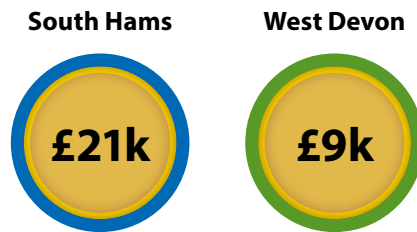
- Supported 44 households in South Hams and 9 households in West Devon to either secure alternate adapted housing, or access adaptations to existing housing through the Disabled Adapted Panel.

- Working closely with the Devon Wide homeless prevention panel for young people and care leavers to ensure a coordinated response to those at risk of homelessness in Devon.
- Paid over £21k in South Hams and 9k in West Devon toward rent arrears to ensure tenants did not lose their homes.
- Developed and promoted tenancy guides to ensure tenants and landlords are aware of their rights and responsibilities.
- Improved landlord engagement through promotion of advice services through the SeaMoor webpages to include support for landlords with tenants who are struggling.
- Improved disrepair reporting mechanisms, in particular around Damp and Mould issues, to ensure a fast and effective response to help people remain safely in their homes.

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Supported to either secure alternate adapted housing, or access adaptations to existing housing through the Disabled Adapted Panel



Paid towards rent arrears to ensure tenants did not lose their homes

Place Priority 1: Promote Balanced and Sustainable communities

The long-term resilience of rural communities depends upon having a diverse housing stock that can meet the needs of a wide range of households. By ensuring that new development adds diversity to the housing stock we can help ensure our communities are inclusive and equitable places to live, and that can create communities that are well prepared to respond to change.

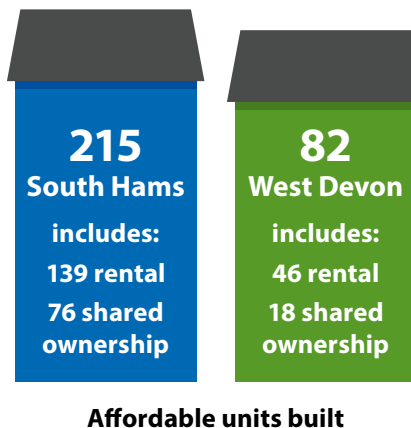
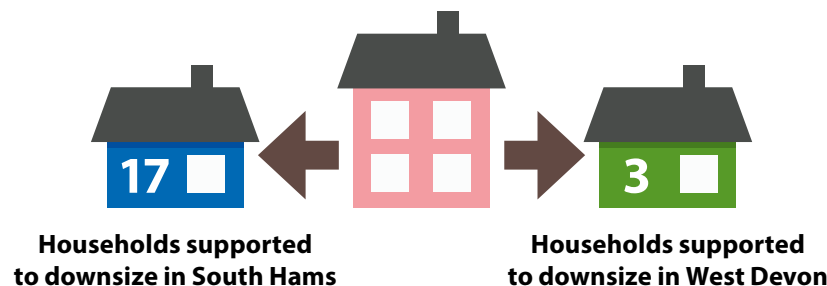
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Provide

To work to improve access to a range of accommodation options suitable for household needs:

- 17 South Hams households supported financially to downsize to appropriate accommodation through the Tenants Incentive Scheme releasing family properties for re let.
- A further 3 West Devon Households supported to downsize releasing family homes.

- 215 affordable units built in South Hams to include 139 rent and 76 shared ownership.
- 82 affordable units built in West Devon to include 46 rental and 18 shared ownership.
- Consistently achieving 30% social housing contributions from developers across both districts.
- 3 new family properties taken on as part of SeaMoor lettings in South Hams and 2 in West Devon.



- Work towards the development of Council owned land at Wonnacots Rd, Okehampton, Plymouth Rd Tavistock and Ropewalk in Kingsbridge has commenced with a view to increasing the affordable housing delivery across the two districts.
- Developed the framework to launch and manage St Ann’s Chapel to meet the existing and forthcoming Regulatory Guidance, the first council housing developed in a generation.



St Ann’s Chapel

- Through the Local Authority Housing Fund, we delivered 11 properties in South Hams and 5 in West Devon for refugees and future temporary accommodation for homeless households.
- Secured planning permission for 125 homes, including 46% Affordable Homes of different tenures at Collaton Cross through the Different Approach Model. 18 of these homes are secured for the CLT.
- Secured a further 17 Affordable Social Rented homes at Butts Park in Newton and Noss in partnership with the CLT.
- Received £77,825 for offsite Affordable Housing Contributions in West Devon and £49,003 in South Hams
- Introduced new Software to assist with the assessment of the viability of affordable housing schemes.
- Developed new procedures to better define our approach to engaging with the Gypsy, Traveler and Caravan Dweller communities.

Properties for refugees

11

5



Place Priority 2: Ensuring that homes support the Health and Wellbeing of the area

The Council wants to meet the housing needs of all communities and the challenges of an ageing population. This Strategy aims to promote the best use of current housing stock, whatever the tenure, and enable new housing that is built to a standard that will enhance the health and wellbeing of future occupants.

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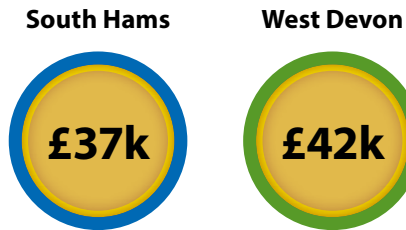
Relieve

Where homelessness cannot be avoided, support people to find accommodation:

- Enabled provision of disabled adapted accommodation within South Hams temporary accommodation stock.
- Provided over £22k in South Hams and £8.5k to households requiring financial support with Rent in advance and deposits to access the housing from our Homelessness Prevention Fund.

- Provided a further £37k in South Hams and £42k in West Devon to meet the costs of rent in advance, deposit, and other moving costs.
- Purchase of two one bedroom properties for use as intensive support housing for rough sleepers.
- Established regular gypsy and traveller forums to engage with those requiring a site.
- Secured planning permission for 20 Plymouth Rd, Tavistock to be redeveloped into three flats to be used as supported accommodation for homeless households.

Financial support with Rent in advance and deposits to access the housing from our Homelessness Prevention Fund



Further support to meet the costs of rent in advance, deposit, and other moving costs



One bedroom properties as intensive support housing for rough sleepers

Headlines



We are investing in more housing

We are boosting our stock of homes to address the district's immediate and future housing needs, a top priority for our new administration.

Help us to understand the housing situation in

Bridestowe & Sourton



South Hams District Council
Published by Sprout Social · November 30, 2023 ·

As part of our drive to deliver more affordable homes, we are investing an initial £100,000 to help local communities and landowners deliver more houses in the areas which need it most.

Our new Housing Offer will launch early next year and will offer communities advice and support with forming housing groups, finding suitable sites for development and help with planning.

Find out more <https://www.southhams.gov.uk/.../supporting-communities...>

#shdc #southhams

Help us to understand the housing situation in

Stoke Gabriel



West Devon Borough Council
Published by Sprout Social · November 21, 2023 ·

Tenants are now able to report housing disrepair issues online with our new and simplified online service.

You can now report and upload photos of issues such as damp and mould through our online reporting form, providing a clear contact for support and advice.

Tenants can report issues here www.westdevon.gov.uk/housing-disrepair

Find out more about the actions we are taking to improve the quality of housing for tenants across West Devon https://www.westdevon.gov.uk/_/new-online-service-help...

#housing #wdbc

West Devon Borough Council
Published by Sprout Social · July 7, 2023 ·

It's #RuralHousingWeek! It aims to highlight the important role affordable housing plays in maintaining rural communities.

We work with partners to deliver affordable homes for local people, including older or sick residents to enable them to live independently for longer. Helping our younger families to stay in the place where they have grown up.

If you cannot afford to rent or buy a home on the open market, affordable or low-cost housing could help.

Find out more www.westdevon.gov.uk/article/3519/Affordable-Housing

#ruralhousing

South Hams District Council
Published by Sprout Social · November 27, 2023 ·

- ✓ Own your own home?
- ✓ Have heating that isn't mains gas?
- ✓ Have an EPC rating of D, E, F, G?
- ✓ Have a gross household income of less than £31k per year?

If so, you could be eligible for help with improving the energy efficiency of your home.

We are working with partners [South Dartmoor Community Energy](#) to help those who are on lower incomes in the most need of upgrading.

The improvements will also help reduce carbon emissions across the District - our top priorities.

Find out more here - <https://www.southhams.gov.uk/.../helping-residents-...>

#southhams #housing #climate #community

NEWS

Home | Israel-Gaza war | Cost of Living | War in Ukraine | Climate | UK | World | Business | Politics | Culture

England | Local News | Regions | Devon

Energy efficiency help for 100 homes in west Devon

28 November 2023



Save on your energy bills this year



We have joined over 100 councils to address the homelessness crisis

We have joined forces with councils across the country to urge the Government to take action to support people facing homelessness and in need of shelter.



Is your home draughty and expensive to heat?


With utility bills expected to rise this year, now is the time to think about the energy efficiency of your home.

If you own your house, have a household income of less than £31k and have heating that isn't mains gas with an EPC rating of D, E, F or G, you could be eligible for some home improvements. This could include better insulation and a carbon heating system.

We are working with partners [South Dartmoor Community Energy](#) to help lower income households in the most need of upgrading.

Don't know your EPC rating? You can [look it up](#).

Check whether you are eligible and [apply online](#).




BBC NEWS

Home | Israel-Gaza war | Cost of Living | War in Ukraine | Climate | UK | World | Business | Politics | Culture

England | Local News | Regions | Devon

Devon council-built affordable homes a 'generation first'

24 November 2023 · Comments



West Devon Borough Council
Published by Sprout Social · July 12, 2023 ·

We are joining forces with organisations across Devon to help solve crisis.

As part of the new Devon Housing Commission - a partnership between authorities and supported by the University of Exeter, we can start to address housing issues which are having an impact on people's health and wellbeing.

Have your say on issues related to housing by responding to a survey <https://bit.ly/461632A>

Find out more <https://bit.ly/3PY14GR>

#westdevon #wdbc #housing #devonhousingcommission

PL News · Plymouth News · South Hams

New Plymouth houses can't be used as holiday second homes

Work is due to start at Collaton Cross on the edge of the city with many of the 125 houses...

By [William Telford](#) Business Editor
14:31, 26 SEP 2023

Enter your postcode for local news and info Enter your postcode In



Supporting Communities To Deliver More Homes

In our drive to provide more affordable homes, we have today (30 November) announced we will invest an initial £100,000 to help local communities deliver more houses in the areas which need it most.

30 November 2023



News Release
Communications and Media Team

Tel: 01803 961368 Email: communications@swdevon.gov.uk

New Council Homes Opened in St Anns Chapel

Issued: 24 November 2023

For the first time in a generation, South Hams District Council has built its own affordable homes which will help tackle the District's housing crisis.

The development of eight new affordable homes in St Anns Chapel was officially opened yesterday (23 November), giving some of the prospective tenants the opportunity to view the homes.

The Next Steps

The next steps in delivering the Housing Strategy 2022-2027 are outlined in the Housing Strategy Action Plan 2023/24.



Your pathway to home ownership

Rentplus is a new company based in Plymouth that will tackle the housing crisis and give thousands of people the chance to own their home for the first time.

- We will:**
- Build 5,000 affordable homes across England by 2020
 - Offer affordable five-year tenancies with the opportunity to buy every five years
 - Give tenants a gifted deposit of 10% of the property value
 - Increase affordable housing stock without need for grant funding
 - Reduce local authority waiting lists
 - Work in partnership with house builders, developers, housing associations and local authorities in the South West and across the UK
 - Provide high quality, energy efficient homes.

For more information, visit www.rentplus-uk.com

Let's talk about housing



Community drop in HERE today



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South Hams
District Council

www.southhams.gov.uk



West Devon
Borough Council

www.westdevon.gov.uk

South Hams & West Devon

Better Homes, Better Lives

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Housing Strategy 2021-2026

Action Plan 2024 - 2025



South Hams
District Council



West Devon
Borough Council





Action Plan 2024 – 2025

South Hams & West Devon Councils have worked in partnership for a number of years. The partnership has enabled the creation of a Joint 5 year Housing Strategy For South Hams and West Devon; ‘Better Homes, Better Lives’ which was launched in 2021.

Both Councils have declared a Housing Crisis and the strategy outlines the aspirations of the councils and the actions we will be taking to achieve these during the five year lifespan of the strategy.



Following the change in administration in both Councils in May 2023, Housing was reaffirmed as a top priority for both South Hams & West Devon. This action plan reflects these election campaigns and the aspirations of elected members and their communities.

The landscape continues to present challenges ranging from properties being unaffordable for local people to rising numbers of homeless households with complex needs. This action plan sets out our ambitions to help tackle the housing crisis locally.

Housing for People

Priority 1 – Homes that support the health and wellbeing of our residents

Housing Strategy Task	Aim	Timescale	Department	Housing Strategy Policies
Conduct targeted activity to ensure maximum uptake of Home Upgrade Grant.	To improve efficiency, removing people from fuel poverty and having a positive impact on climate change.	Mar-25	Environmental Health	<p>Promote and support energy efficiency in homes.</p> <p>https://democracy.swdevon.gov.uk/documents/s29448/Housing%20Crisis%20Changes%20to%20Financial%20Assistance%20and%20Enforcement%20Policies.pdf</p> <p>https://democracy.swdevon.gov.uk/documents/s29637/Housing%20Crisis%20-%20Changes%20to%20Financial%20Assistance%20and%20Enforcement%20Policies.pdf</p>
Enforce reasonable standards in rented accommodation.	To improve energy efficiency in the private sector.	Sept 2024 for 1 year review of new approach	Environmental Health	<p>Ensure the Private rented sector meets the requirements of The Domestic Minimum Energy Efficiency Standard (MEES) Regulations.</p> <p>https://democracy.swdevon.gov.uk/documents/s31039/Social%20Housing%20Private%20Sector%20Housing%20Landlords.pdf</p> <p>https://democracy.swdevon.gov.uk/documents/s29637/Housing%20Crisis%20-%20Changes%20to%20Financial%20Assistance%20and%20Enforcement%20Policies.pdf</p>

Housing Strategy Task	Aim	Timescale	Department	Housing Strategy Policies
Support residents live more safely in their home.	Investigate opportunities to promote independent living.	Dec 2024	Environmental Health	Proactively support independent living and support people with disabilities to remain in their homes through disabled facility grants and make better use of the better care fund.
Review Better Care Fund Financial Policy annually and explore ways to increase grant amounts.	To bring more flexibility to the grant process.	Annual policy review	Environmental Health	Proactively support independent living and support people with disabilities to remain in their homes through disabled facility grants and make effective use of the better care fund. https://democracy.swdevon.gov.uk/documents/s29638/Appendix%202%20-%20BCF%20Financial%20Assistance%20Policy.pdf
Review and update the allocations policies for existing and new Extra care* facilities.	Improve partnership working, deliver consistent outcomes and standards, and ensure best use of stock.	Aug-25	Housing Enabling	Support an appropriately located planning application for an Extra Care housing scheme in West Devon.
Breaches of minimum energy standards and electrical safety standards can be dealt with under civil penalties.	Effective enforcement of the private rental sector.	Ongoing for the lifetime of this strategy	Environmental Health	Ensure the Private Rented Sector meets the requirements of The Domestic Minimum Energy Efficiency Standard (MEES) Regulations. https://democracy.swdevon.gov.uk/documents/s29640/Appendix%204-%20Minimum%20Energy%20Standard%20and%20Energy%20Performance%20Certificate%20Enforcement%20Policy.pdf

* Extra Care is purpose built accommodation designed to enable independent living with access to 24 hour care services. It can provide a higher level of support than sheltered accommodation but usually less than a residential home.

Housing Strategy Task	Aim	Timescale	Department	Housing Strategy Policies
Promote the Seamoor Lettings service, to potential landlords.	Ensure full use of social media and other platforms to promote properties.	Dec 2024	Housing Advice Housing Enabling	Seek to expand our own in-house private lettings service Seamoor Lettings.
Develop a property offer for refugees and asylum seekers.	Maximise opportunities for accommodation and support provision for resettlement through robust understanding of opportunities and funding.	June 2024	Housing Advice	Proactively support independent living.
Investigate the introduction of a holistic support worker for those in temporary accommodation.	Provide focussed support to address issues preventing access to housing and learn to sustain and manage tenancies effectively.	Apr-24	Housing Advice	Proactively support independent living.

Housing for People

Priority 2 – Make the best use and improve the quality of our existing housing

Housing Strategy Task	Aim	Timescale	Department	Housing Strategy Policies
Continue to lead on the Devon wide development of the Care Leaver Protocol to support care leavers to plan for their housing needs.	Through effective collaboration ensure that quality partnership working is central to our approach to meeting care leavers housing needs.	Dec-24	Housing Advice	Plan for future health needs.
Deliver accommodation that reflects local housing need through delivery of smaller properties with a focus on 1 bedroom properties.	To meet the highest need on the councils housing register and to maximise opportunity for best use of stock through downsizing.	Ongoing for the lifetime of this strategy	Housing Enabling	Address under occupation and overcrowding within social housing stock and by doing so reduce length of time on the housing register.
Work with business owners and registered providers to ensure best use of buildings available through regeneration.	To increase housing supply on predominantly brownfield sites where buildings and the area are in need of regeneration.	Ongoing for the lifetime of this strategy	Housing Enabling	Work with our partners to seek re-development opportunities to enhance the current housing stock and to meet the needs of the residents.

Housing Strategy Task	Aim	Timescale	Department	Housing Strategy Policies
The Council will continue to lobby for legislative and regulatory change to address the challenges that the district faces around second homes and short-term let holiday accommodation. Specifically, the Council will lobby for the ability to register short-term lets and to licence them. The Council will then seek the ability to limit the number of holiday lets in a particular area when market penetration of short-term holiday lets exceeds a given proportion of total homes.	To increase the amount of affordable Private Rented accommodation available for local residents to access to enable them to remain in their communities and work towards housing being for primary residence only.	Mar-25	Elected Members Housing	Restrict second home ownership and holiday lets. https://democracy.swdevon.gov.uk/ieListDocuments.aspx?Cid=151&Mid=1692 https://democracy.swdevon.gov.uk/documents/s29771/Council%20Tax%20Discounts%20and%20Premiums.pdf
Work with DCC and other partners to deliver accommodation for people with disabilities and support needs (such as Care Leavers with support needs and those on the Disabled Adapted Needs Panel).	To ensure a diverse mix of tenures and property type to meet the needs of our most vulnerable residents.	Ongoing for the lifetime of this strategy	Housing Enabling	Work with our partners to seek re-development opportunities to enhance the current housing stock and to meet the needs of residents.
Assist Neighbourhood Plan groups with preparing a Principal Residence policy in parishes where such an approach can be justified to protect housing for local people.	To ensure that new open-market homes are occupied on a permanent basis, and help to minimise the social and economic impacts of second and holiday homes.	Ongoing	Housing Enabling Planning	Restrict second home ownership and holiday lets.

Housing for Place

Priority 1 – Promote balanced and sustainable communities

Housing Strategy Task	Aim	Timescale	Department	Housing Strategy Policies
Invest in Council owned Temporary Supported Accommodation to meet local needs.	Reduce reliance on pay nightly bed and breakfast accommodation, ensure homeless people are accommodated within the area.	South Hams 10 bed April 25 West Devon 1 x 3 bed Feb 24 West Devon 3 x 1 bed Oct 24	Housing Enabling	Encourage provision of a wide range of housing options including social housing, managed shared accommodation and managed intermediate assured short hold private rental, part ownership and market sale. Redevelop existing homeless provision in West Devon to ensure good quality accommodation for people when they need it the most. https://democracy.swdevon.gov.uk/documents/s29846/Housing%20Crisis%20Update.pdf https://democracy.swdevon.gov.uk/ieListDocuments.aspx?CId=271&MId=1846
Work in partnership with other public bodies to maximise use of existing and redundant assets & buildings to deliver affordable housing.	To increase the delivery of Affordable Housing by making best use of publicly owned assets.	Ongoing for the lifetime of this strategy	Housing Enabling	Work creatively with Devon County Council to provide quality specialist adapted housing and housing for people requiring support to live independently.
Roll out the South Hams Housing Offer and investigate the feasibility of a similar scheme in West Devon.	To support Communities to deliver Affordable Housing Schemes through CLTs and other partnerships.	Jan–25	Housing Enabling	Support alternative ways to deliver affordable housing and manage local housing needs, such as co-operatives and community land trusts. https://democracy.swdevon.gov.uk/documents/s31091/Housing%20Policy%20Update.pdf

Housing Strategy Task	Aim	Timescale	Department	Housing Strategy Policies
Support the objectives of the Devon Housing Task force, and the Devon Housing Commission.	Work collaboratively across the county to take an interventionist approach and lobby for change to meeting long term housing needs.	2025	Elected Members Housing	Use strategic planning policy to ensure sustainable housing growth. https://www.exeter.ac.uk/about/regionalengagement/impact/devonhousingcommission/
Maximise opportunities to attract grant funding to invest and deliver affordable housing in towns and villages where financially viable.	Increase the amount of good quality affordable housing available.	Ongoing for the lifetime of this strategy	Housing Enabling	Invest in affordable housing with and without Joint Venture (JV) partners where it improves affordable housing and “placemaking” outcomes.
Investigate a number of varied options in size and location for Gypsy & Traveller sites based on need.	To investigate the need for a suitable site to inform the JLP review.	Dec 2024	Housing Enabling	Promote effective partnership working to meet the needs of Gypsy and Travellers.
Relaunch the Gypsy, Traveller and Caravan Dweller Forum and enhance by the inclusion of external partners.	To ensure the voice of the G&T community is heard and has direct input into potential outcomes.	May-24	Housing Enabling	Promote effective partnership working to meet the needs of Gypsy and Travellers.
Implement a Devon Wide approach to responding to reports of Gypsy, Traveller, and Caravan Dweller encampments.	To maximise cross boundary partnership working.	June-24	Housing Enabling Planning	Promote effective partnership working to meet the needs of Gypsy and Travellers. https://www.devon.gov.uk/educationandfamilies/family-support/gypsies-and-travellers/

Housing Strategy Task	Aim	Timescale	Department	Housing Strategy Policies
Build an evidence base of the number and condition of unauthorised Gypsy and Traveller sites within the area.	Ensuring that we have current knowledge of standard of dwellings and H&W of occupants to enable us to deliver targeted outcomes.	Dec 2024	Housing Advice Housing Enabling	Promote effective partnership working to meet the needs of Gypsy and Travellers.
Work with the land owners / developers of allocated sites and review who could bring forward sites for self-build purposes. Consider opportunities on Council's own land.	To maximise opportunities to diversify the way in which affordable housing targets are achieved.	Ongoing for the lifetime of this strategy	Housing Enabling	Encourage opportunities for people interested in custom build / self-build development, both within community housing schemes and wider housing delivery.
Work in partnership with DCC to develop a specialist accommodation offer for those care leavers with very high needs.	Maintain a focus and collaborative creative solutions approach toward those young people currently experiencing significant unmet needs.	April 2025	Housing Advice	Work creatively with Devon County Council to provide quality specialist adapted housing and housing for people requiring support to live independently.
Work with DCC to provide accommodation for perpetrators of domestic abuse engaged with children's services to support survivors of domestic violence to remain in their homes.	Ensure perpetrators of domestic abuse are supported to resolve their housing and behaviour needs to ensure the best outcomes for the family unit.	Sep-24	Housing Advice	Work creatively with Devon County Council to provide quality specialist adapted housing and housing for people requiring support to live independently.

Housing Strategy Task	Aim	Timescale	Department	Housing Strategy Policies
Develop a process to evidence Housing Need, tailored to local parishes and communities which include more than the single settlement.	To ensure local communities remain central to the delivery of housing in their area.	Jun-24	Housing Enabling	Work collaboratively with communities in the formation of Neighbourhood Plans to deliver the right development available to meet local needs.
Work with partners to identify key worker roles which have remained vacant due to lack of affordable housing/distance to travel to work.	Support the economies and communities by ensuring that those vital to making them thrive are able to access accommodation.	Mar-25	Housing Enabling	Innovate the delivery of key worker housing to meet localised need.
Proactively apply Office of National Statistics data as part of our DEV8 – (Meeting Local Housing Need in the Towns and Thriving Villages policy area) policy requirement to resist applications for large dwellings in areas that are already over-supplied.	To ensure a resilient housing mix that isn't skewed by large, expensive dwellings that don't meet local needs.	Ongoing	Planning	Use strategic planning policy to ensure sustainable housing growth.
Review affordable housing thresholds as part of any plan review process to ensure the highest defensible level of provision is written into future policy	To reflect the most up-to-date position of need, supported by the housing crisis declaration and housing strategy to justify a higher onsite percentage.	JLP review	Planning Housing Enabling	Continue to drive the JLP affordable homes agenda.

Housing Strategy Task	Aim	Timescale	Department	Housing Strategy Policies
Consider affordable housing being the priority section 106 developer contributions where there is justification above other S106 asks where a viability consideration could reduce the available contributions	To reflect local priorities in decision making	Ongoing	Housing Enabling	Continue to drive the JLP affordable homes agenda.
Provide ongoing strategic planning support for the preparation and adoption of neighbourhood plans that identify sites for housing co-ops and CLTs, or that have positive and proactive policies that seek to promote the delivery of these types of development	To diversify the supply of new homes, benefitting small and medium sized enterprises and local supply chains	Ongoing	Housing Enabling Planning	Support alternative ways to deliver affordable housing and manage local housing needs, such as co-operatives and community land trusts.
Consider implementation of an Article 4 Direction breaking the proposed permitted development between use classes C3 and new use class C4 'Short Term Lets' should it be implemented Nationally.	To protect existing housing from use as short term Lets.	Upon introduction of new use class C4 and associated Permitted development.	Planning	Restrict second home ownership and holiday lets. https://www.gov.uk/government/consultations/introduction-of-a-use-class-for-short-term-lets-and-associated-permitted-development-rights/introduction-of-a-use-class-for-short-term-lets-and-associated-permitted-development-rights

Housing Strategy Task	Aim	Timescale	Department	Housing Strategy Policies
<p>Provide dedicated Affordable Housing Planning Officer to manage Pre-applications and Planning Applications for Affordable Housing, Community Lead Housing schemes.</p>	<p>To support affordable housing scheme in the Planning Process to expedite the delivery of Affordable housing.</p>	<p>Ongoing</p>	<p>Planning</p>	<p>Support alternative ways to deliver affordable housing and manage local housing needs, such as co-operatives and community land trusts.</p> <p>https://democracy.swdevon.gov.uk/documents/s28444/Housing%20Crisis%20Update%20Report.pdf</p> <p>https://democracy.swdevon.gov.uk/documents/s28396/Housing%20Crisis%20Update%20Strengthening%20Housing%20Delivery.pdf</p>
<p>Planning Officers will consider the Housing crisis as a significant material consideration, in the determination of Planning Applications for Affordable Housing Schemes and areas with identified housing needs.</p>	<p>Seek to ensure that Affordable housing provision is an important consideration in planning applications.</p>	<p>Ongoing</p>	<p>Planning</p>	<p>Use strategic planning policy to ensure sustainable housing growth.</p>

Housing Strategy Task	Aim	Timescale	Department	Housing Strategy Policies
<p>Encourage and support the preparation of Neighbourhood Plans for parishes that have a Sustainable Village (as identified in Fig. 5.8 in the JLP),. Encourage the inclusion of site allocations including affordable housing models to help meet the provision of the 550 dwellings allocated in JLP Policy TTV25 and set-out as indicative levels in Fig. 5.8.</p>	<p>To deliver the dwellings allocated in JLP Policy TTV25, thus making an important contribution towards the overall housing requirements across the plan area including affordable housing. This represents a key element of housing supply in the TTV Policy Area and would deliver affordable housing in the rural areas. It would also help to diversify the supply of new homes, benefitting small and medium sized enterprises and local supply chains.</p>	Ongoing	Planning	Continue to drive the JLP affordable housing agenda.
<p>Engage with Town/Parish Councils and NP groups in parishes with an adopted plan to consider undertaking a full or partial review of the plan. Specifically, to address affordable housing issues where evidence supports this and opportunities may exist.</p>	<p>To provide for specific locally identified housing needs and to help ensure that our communities are inclusive and equitable places in which to live.</p>	Ongoing	Planning Housing Enabling	Continue to drive the JLP affordable housing agenda.

Housing Strategy Task	Aim	Timescale	Department	Housing Strategy Policies
<p>Encourage and support Town/Parish Councils and Neighbourhood Plan groups to liaise with and pro-actively support their communities to establish CLTs and to seek to identify sites that could be delivered under the provisions of Policy TTV27.</p>	<p>To provide for specific locally identified housing needs and to help ensure that our communities are inclusive and equitable places in which to live.</p>	<p>Ongoing</p>	<p>Housing Enabling</p>	<p>Support alternative ways to deliver affordable housing and manage local housing needs, such as co-operatives and community land trusts.</p> <p>https://plymswdevonplan.co.uk/policy</p>
<p>Encourage and support the preparation of Neighbourhood Plans in parishes that do not have one of the Sustainable Villages. To encourage the inclusion of site allocations including affordable housing models commensurate with the identified local housing need. Where the level of Local Housing Need is low, encourage collaboration with neighbouring parishes on a 'cluster' basis.</p>	<p>To provide for specific locally identified housing needs including affordable housing and to help ensure that our communities are inclusive and equitable places in which to live.</p>	<p>Ongoing</p>	<p>Planning</p>	<p>Continue to drive the JLP affordable housing agenda.</p>

Housing for Place

Priority 2 – Ensuring that homes support the health and wellbeing of our area

Housing Strategy Task	Aim	Timescale	Department	Housing Strategy Policies
Explore partnership and site options to enable the delivery of specialist accommodation for older residents to remain in their communities.	To plan for future health needs and support our most vulnerable residents to find a home.	Ongoing for the lifetime of this strategy	Housing Enabling	Work collaboratively with providers to respond to a need for an extra care facilities. https://www.devonhealthandwellbeing.org.uk/jsna/
Tackle damp and disrepair in rented properties.	To improve the health and wellbeing of our communities and to improve standards in RP housing stock. More robust triage and investigation into D & M reports.	Sept 2024 for 1 year review of new approach	Environmental Health Housing Enabling	Develop proactive relationships and work collaboratively with Registered Provider for mutual benefit and to improve standards in Registered Provider housing stock.
Make best use of stock by further promotion of success of the TIS scheme.	To work with RPs to identify tenants for whom downsizing would be an advantage to ensure best use and occupation of existing stock.	Review annually	Housing Enabling	Promote the Tenants Incentive Scheme to encourage and incentivise tenants in social housing to downsize. https://democracy.swdevon.gov.uk/documents/s27159/Response%20to%20the%20Housing%20Crisis.pdf https://democracy.swdevon.gov.uk/documents/s27487/HOUSING%20CHALLENGES%20WD.pdf

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Housing Strategy Task	Aim	Timescale	Department	Housing Strategy Policies
Work with RPs to minimise unnecessary disposals of social housing stock, particularly in rural locations where the impact is most acute.	To maintain the supply and condition of social housing and make best use of existing stock.	Continue to monitor	Housing Enabling	Develop proactive relationships and work collaboratively with Registered Providers for mutual benefit and to improve standards in Registered Provider housing stock.
Collaborate on the development of the Young Persons Protocol to ensure positive outcomes for young people.	Ensure collaborative working practices are central to the approach taken toward young people needing to leave the family home age 16 & 17.	Jun-24	Housing Advice	The Councils are compelled to addressing hardship, deprivation, ill health and inequalities that exist within our areas.
Work with DCC to develop a portfolio of 'Places of Safety' to meet the housing and support needs of families fleeing violence.	Develop a Devon wide property portfolio with attached support to specifically meet the needs of those families fleeing domestic abuse.	Dec-25	Housing Advice	Work creatively with Devon County Council to provide quality specialist adapted housing and housing for people requiring support to live independently.



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South Hams
District Council

www.southhams.gov.uk



West Devon
Borough Council

www.westdevon.gov.uk

Report to: **Hub Committee**
Date: **30 January 2024**
Title: **Support for Care Leavers**
Portfolio Area: **Leader of the Council**

Wards Affected: **All**

Date next steps can be taken: N/A

Author: **Andy Bates** Role: **Chief Executive**
Andy Wilson **Head of Human Resources**

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RECOMMENDATIONS

That the Hub Committee NOTE:

- 1. the measures implemented to support care leavers into employment;**
- 2. the intention for the Council to sign up to the Care Leaver Covenant; and**
- 3. the steps taken to support Council employees who are seeking approval to be a foster carer and following the placement of a child.**

1. Executive summary

- 1.1 West Devon Borough Council is working in partnership with Devon County Council and the Devon districts to meet its corporate parenting responsibilities by seeking to provide young people leaving the care system and living in the borough the support they need and deserve.
- 1.2 At its meeting on 3 October 2023, full Council agreed that it will award a council tax discretionary discount of 100% to care leavers up to their 25th birthday (Item Min CM 43/24 refers).
- 1.3 The Council also offers a free pass to its leisure centres to young people in care resident in the district (plus a carer) and to care leavers living within the district up to the age of 25.
- 1.4 The Council is playing an important role in working with colleagues across the two-tier system to improving housing options for care leavers as well as to better understand the

interface between social care and housing and to add capacity to the housing system as a whole (see para 3.2).

- 1.5 Since the decision at Council, we have been looking at other ways to provide support, including access to work experience and employment and to how we can best support our staff who are planning to become foster parents or to adopt children, which are the subject of this report. This forms part of a wider review to improve the way in which apprenticeships are designed and managed by the Councils which is aimed at increasing opportunities and developing our own talent.
- 1.6 Following consultation with staff side representatives, a new employment policy has been introduced to provide employment opportunities with the Council for care leavers.
- 1.7 The policy consists of four main employment commitments to care leavers living within the borough:
 - The offer of a two to four-week paid work placement.
 - The support of a senior manager as a mentor to help care leavers working with the Council to adapt to the working environment and secure permanent employment.
 - The ring-fencing of identified entry-level apprenticeship opportunities.
 - The guarantee of an interview to any care leaver who meets the minimum requirements of a vacant post.
- 1.8 Alongside these practical measures it is proposed the Council sign up to become a signatory to the Care Leaver Covenant.

2. Background

- 2.1 Research has identified numerous contributory factors for the poor experience that care leavers have in education and in finding employment, including mental health, learning and behaviour problems, trauma, attachment issues, stigma, disruption in living placements and schools, poverty, chaotic living arrangements, and low expectations from social workers, teachers, and carers.
- 2.2 In July 2016, the Government published a major policy document 'Keep on Caring' to support young people from care to independence.
- 2.3 A key policy commitment in the paper was a strategic pledge to introduce a Care Leaver Covenant. The Covenant is a promise made by the private, public and voluntary sector organisations to provide support for care leavers aged 16-25 to help them live independently; provide education, employment and training opportunities; support their safety and security, promote their physical and mental health; and support their financial

independence.

- 2.4 The aim of the Care Leaver Covenant is to provide additional support for those leaving care, making available a different type of support and expertise from that statutorily provided by local authorities.
- 2.5 The Council intends to submit an application to become a signatory to the Care Leaver Covenant with the offer made to care leavers published on the Care Leaver Covenant website.
- 2.6 The Council also identified that there are potential barriers preventing existing and future employees becoming foster carers because of the requirement to attend meetings and training as part of the commitment and is working with the recognised trade unions to agree and implement a new policy to provide additional paid time off.

3. Work to Support our Corporate Parenting responsibilities

- 3.1 The Council has made a positive commitment to working with Devon County Council and the other Devon districts to do its best to ensure that it meets its 'corporate parenting' responsibilities and to do our best for care leavers living in the district/ borough. The Council has already taken steps to support Care Leavers in its area by agreeing to provide an exemption from Council Tax and access to leisure facilities.
- 3.2 Council officers are also heavily involved in the work of the Devon Corporate Parenting Board, with the chief executive acting as the lead officer on the Care for Me Sub-Group which is focussed on housing and accommodation for young people leaving the Devon care system. The focus of the Group is on addressing the immediate challenges of the numbers of care leavers in short-term and temporary accommodation, developing pathways to plan ahead for those leaving care who are able to go into mainstream housing system and designing and building facilities for those who are most vulnerable and with complex needs who require 'supported housing' with wrap around support. The head of Housing and Housing Options Manager are key contributors to this important work. As members will be aware the leader of the Council chairs the Devon Housing Task Force and is also a member of the group. Providing a strategic link to wider housing initiatives.
- 3.3 These plans will take time to come to fruition and the purpose of this paper is to focus on the support the Council can offer as a medium-sized public employer to care leavers to access employment
- 3.4 In order to support care leavers to find employment, an employment policy has been introduced to provide employment opportunities with the Council for care leavers who live within the

borough up to the age of 25. This forms part of a wider review to improve the way in which apprenticeships are designed and managed by the Council which is aimed at increasing opportunities and developing our own talent.

- 3.5 The policy consists of four main employment commitments to care leavers living within the borough:
- The offer of a two to four-week paid work placement;
 - The support of a senior manager as a mentor to help care leavers working with the Council to adapt to the working environment and secure permanent employment;
 - The ring-fencing of identified entry-level apprenticeship opportunities; and
 - The guarantee of an interview to any care leaver who meets the minimum requirements of a vacant post.
- 3.6 It is our intention to work with partners, including Devon County Council, to encourage large employers within the district to adopt supportive policies.
- 3.7 The Care Leaver Covenant is a national inclusion programme funded by the Department of Education set up to create meaningful opportunities for care leavers in five key areas, including Education, Employment and Training. The Council has provided information on its offer with a view to sign up to the Care Leaver Covenant. This in turn ensures the details of our offer to care leavers is promoted on their website and in promotional materials.
- 3.8 The Council recognises and values the contribution that foster parents make to our communities and especially to the lives of children in care. We understand that foster carers in employment need flexibility in their working arrangements in order to become foster carers and meet the needs of their fostered children.
- 3.9 In addition to the existing policies and procedures to support employees with family commitments, including flexible working arrangements and the Adoption Policy, the Council proposes to implement a new employment policy to provide further support for employees who are foster carers or are going through the application process to become a foster carer.
- 3.10 The new policy proposes up to 5 working days paid time off for an employee who is applying to become a foster carer to attend assessment meetings and initial training prior to approval and attend the approval panel.
- 3.11 After the placement of a child with an employee who is an approved foster carer, the employee proposes for up to 5-days paid time off in each 12-month period to attend child review

meetings, the annual foster carer review meeting, and any related training.

4. Outcomes/outputs

- 4.1 The policies seek to improve the life chances of care leavers within the borough and to support employees who are foster carers. It is the Council's ambition to employ a number of the care leavers living within our community and to help them successfully transition into independent living.
- 4.2 A number of entry-level apprenticeship opportunities have been ring-fenced for care leavers and the Council is working with Devon County Council and the Care Leaver Covenant to identify suitable candidates for the positions in early 2024 and each year thereafter.
- 4.3 The proposed support for foster carers is designed to remove barriers preventing people in work becoming a foster carer and to enable existing and future employees balance the support they provide for young people with the demands of their employment with the Council.

5. Proposed Way Forward

- 5.1 The Council signs up to become a signatory to the Care Leaver Covenant and promotes employment opportunities to all care leavers living within the district with the support of partner organisations.
- 5.2 It is anticipated that the Council will adopt the new policy on Supporting Foster Carers at work from February 2024 following the completion of negotiations with the recognised trade unions.

6. Implications

Implications	Relevant to proposals Y/N	Details and proposed measures to address
Legal/Governance		Whilst being a care leaver is not a protected characteristic under the Equalities Act 2020, the offer of support for care leavers securing employment is consistent with good employment practice.
Financial implications to include reference to value for money		There are no significant financial implications. There will be some additional salary costs when a care leaver accepts the offer of a short-paid work placement.

Risk		Support will be put in place to mitigate any risk arising from the employment of a vulnerable person.
Supporting Corporate Strategy		The report supports the Council's strategic commitment to supporting care leavers who live within the district
Consultation & Engagement Strategy		The Council engaged with, and secured the support of Care Leaver Covenant and is working with partner organisations to support care leavers.
Climate Change - Carbon / Biodiversity Impact		No direct carbon/biodiversity impact arising from the report.
Comprehensive Impact Assessment Implications		
Equality and Diversity		The measures identified in the paper will provide support for a vulnerable group within the district and increase the representation of care leavers within the Council's employment establishment.
Safeguarding		Individual safeguarding plans will be drawn up as necessary depending on personal circumstances.
Community Safety, Crime and Disorder		The opportunity to gain meaningful employment may contribute to greater inclusion of care leavers and reduce any instances disruptive of community safety, crime and disorder.
Health, Safety and Wellbeing		The opportunities afforded by this policy should support the health, safety and wellbeing of a vulnerable group of residents.
Other implications		

Supporting Information

Appendices:

A: Supporting Care Leavers into Employment

B: Supporting Foster Carers (Draft employment policy)

Background Papers:

None



Supporting Care Leavers into Employment

Introduction

1. It is established that young people leaving care to begin an independent life are amongst the most vulnerable groups in society. They are more likely to face poverty and lower earnings, higher rates of unemployment, encounter difficulties securing housing and face homelessness, and face greater physical and mental health issues. Recent figures from the Department of Education (2019) show that 38% of those who leave care aged 19 to 21 are not in education, employment, or training compared with under 12% of all young people.
2. Research has identified numerous contributory factors for the poor experience care-experiences individuals have in education and in finding employment, including mental health, learning and behaviour problems, trauma, attachment issues, stigma, disruption in living placements and schools, poverty, chaotic living arrangements, and low expectations from social workers, teachers, and carers.
3. Further research has shown that these disadvantages can persist into middle age for many care leavers if they cannot obtain secure employment. The role of secure employment can be critically important in a care leavers transition to social and economic independence because work is associated with stability and social integration. Care leavers are more likely to face difficulties securing employment and often work in unskilled and precarious jobs, with lower earnings and fragmented and weak support networks.
4. For many care leavers, the prospect of getting a job, or even applying for one, can be overwhelming without the support networks in place that many young people can take for granted. There are many barriers to care leavers joining the secure employment market, such as navigating an application process and attending an interview, having the right clothing, inability to travel to less accessible workplaces, and integration into the social fabric of a workplace.

Eligibility

5. This policy sets out our two Councils' joint commitment to providing employment opportunities for care leavers who live within the South Hams and West Devon up to the age of 25.
6. It sits alongside other commitments the Councils have made to support our care leavers and to assist employees who are themselves foster parents or have adopted children from the care system or are applying to do so.

Working with Partner Organisations

7. We will work constructively with partner organisation to support care experienced young people in our locality, such as Devon County Council and the Care Leaver Covenant and are committed to extending the network of organisations that provide support and opportunities for care experienced young people.



Our commitment

- ★ The Councils will offer a two-to-four-week work placement with pay to all care experienced young people living in South Hams and West Devon. The offer will be made via the Devon County Council Employment Training and Education Personal Advisors (ETAPA) and via the Care Leaver Covenant. We will work with the young person and their Personal Adviser (PA) to identify a suitable position and will agree reasonable adjustments to remove any barriers to the young person taking up the placement or being able to maximise the opportunity the placement affords, such as assistance with transport, working hours and putting in place an effective support network.
- ★ The Councils will identify apprentice opportunities and ring fence them to be offered, in the first instance, to care experienced young people each year as part of our apprenticeship programme (see HR Apprenticeship Strategy).
- ★ The Councils will nominate a senior officer to act as a mentor for each care experienced young person that takes up the placement opportunity to help them through the period and to provide on-going assistance in securing further employment opportunities, such as help with job applications, producing a curriculum vitae and general advice and support. The senior officer will be nominated from the Line Managers Development Pathway.
- ★ The Councils will guarantee every care experienced young person who lives on our area an interview for a vacancy where they meet the required person specification (or could meet it with support).

8. In addition, the Councils will publish their commitment on the Care Leaver Covenant website and join the employer's accreditation scheme being developed by Devon County Council in association with Exeter College.



SUPPORTING FOSTER CARERS

Introduction

1. South Hams District Council and West Devon Borough Council (The Councils) recognise and value the contribution that foster parents make to our communities and especially to the lives of children in care. We understand that foster carers in employment need flexibility in their working arrangements in order to become foster carers and meet the needs of their fostered children.
2. Alongside the support that the Councils provide to care leavers within our communities, the Councils are committed to becoming a fostering friendly organisation that offers flexible working arrangements and additional time off to support any employee who is being assessed or who is a foster carer or an approved kinship carer.

Foster Carers

3. A foster carer is someone who is approved to take on the role of a parent. It could be for a day, a week, a month, a year or until the child reaches the age of 18 or when the child's care plan elapses.

Kinship Carers

4. A Kinship Carer is anyone who is looking after another person's child on a full-time basis. There are different ways an employee can become a kinship carer:
 - ❖ A **Special Guardianship Order** (often known as an SGO) is a legal order where the court appoints a carer – usually a relative – as the 'Special Guardian' of a child until they turn 18. The Special Guardian then shares parental responsibility for the child with the parents and can make nearly all the major decisions about the child without having to consult them.
 - ❖ The person named in a **Child Arrangements Order** shares parental responsibility for the child with the parents and can make the most important decisions on behalf of the child without needing the permission of the parents.
 - ❖ **Kinship foster care** is when a friend or family member becomes an official foster carer for a child. This is different to other forms of kinship care as the child is then considered 'looked after, and the employee won't have parental responsibility.

Fostering to Adopt

5. Under a local authority approved Fostering to Adopt scheme (sometimes known as Early Permanence) a child is placed with potential adopters who are also approved as temporary foster carers while decisions are made about the child's future within the family court process. The Councils' Adoption Policy is applicable to employees entering a Fostering to Adopt arrangement.
6. References to "Foster Carers" in this policy include Foster Carers, Kinship Carers and those employees Fostering to Adopt

Eligibility

7. This policy applies to all Council employees who:
 - Are applying to become foster carers, or



- Are approved foster carers and have a child in placement, or
- Are an approved kinship carer of a looked after child.

Time Off Work for Foster Carers

8. Foster carers and approved kinship carers may request paid time off work to support them in their role as foster carers.
9. All leave must be approved by the foster carer's line manager and recorded as Fostering Leave.
10. The leave is attached to the employee who is the foster carer and not to the child in placement, and therefore the foster carer of two children is not entitled to the paid time-off twice.
11. The paid time-off for a foster carer should be taken to attend specific meetings or training events and is not intended to be additional leave to be taken for a reason not related to the role as a foster carer.
12. All paid time-off is expressed for a full-time employee and should be pro rata for a part-time employee.
13. The foster carer should discuss with their line manager alternative means of taking time off if they require time off in addition to the provisions in this policy, such as annual leave, flexitime, or other forms of special leave.

Employees who are in the application and approval process to become foster carers

14. The Councils acknowledge that the application and approval process to become a foster carer can be lengthy and time consuming. To support employees, up to 37 hours (5 days) paid time-off may be taken to attend assessment meetings, initial training prior to approval as a foster carer and attend the approval panel.

After the placement of a child

15. Beginning on the day the child is placed with the foster carer, an employee may take up to 37 hours (5 days) of paid time-off in each 12-month period to attend child review meetings, the annual foster carer review meeting, and any related training.

Employees who are Fostering to Adopt

16. Employees who are in 'fostering to adopt' arrangements with a local authority can take the following leave in accordance with the Councils' Adoption Policy:
 - Up to 37 hours (5 days) paid leave to attend adoption appointments after being matched with a child
 - Once the child is placed for adoption, the Councils' Adoption Pay is applicable, including the right to adoption pay and adoption leave.
 - An employee can choose to start their Statutory Adoption Leave and Pay (where applicable) at the point when a fostering for adoption placement is made, or at a later date when the child is matched with them for adoption. However, employees are only entitled to one set of leave and pay per placement.
17. An employee can choose to start their Statutory Adoption Leave and Pay (where applicable) at the point when a fostering for adoption placement is made, or at a later date when the child is matched with them for adoption. However, employees are only entitled to one set of leave and pay per placement.



18. Further details can be found in the Councils' Adoption Policy

Requesting Foster Carer Leave

19. Foster carers should request the appropriate leave using the Foster Care Leave application form that can be found under the HR Forms page on the intranet. Requests should be submitted to the line manager.
20. The line manager will consider the request, taking into account the individual circumstances of each request and the operational requirements of the service. Leave will be approved wherever possible, however may be declined where its approval would cause excessive pressure to the service or a colleague(s).
21. The line manager should seek advice from HR before declining any request. If the request is declined, every effort should be made to find a suitable time when the leave can be taken if the meeting or training can be rescheduled.

Application for Foster Carer Leave

22. This needs to include a requirement to specify the event/meeting/training that the employee is attending.
23. Also needs to identify whether employee is at approval stage, within first 12 months of placement or post 12 months.

Further or Additional Support from the Council

24. The Councils offer all employees the opportunities to work flexibly where this is compatible with the requirements of the job, and there are a number of policies that provide support to foster carers and approved kinship carers, including:
 - The ability to purchase additional annual leave
 - A career break policy that protects an employee's employment if they take an extended break from work
 - A flexitime scheme that provides the opportunity for employees to vary their working hours within parameters
 - The right to request flexible working, including new working patterns or hours of work
 - The ability to take flexible retirement that allows employees to draw down their pension whilst still working part-time
 - Parental leave that provides additional time off for parents and carers
 - A Special Leave policy that provides additional time off for employees who need to provide unforeseen care for a dependant
- The Adoption Policy for employees who adopt a child through a fostering to adopt arrangement.

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Report to: **Hub Committee**

Date: **30 January 2024**

Title: **Council Tax Discounts and Council Tax Reduction Scheme 2024/25**

Portfolio Area: **Cllr Mandy Ewings - Leader of The Council**

Wards Affected: **ALL**

Urgent Decision: **N** Approval and clearance obtained: **Y**

Date next steps can be taken: The recommendations will be considered by Full Council at its meeting to be held on 20 February 2024.

Author: **Geni Hotchkiss** Role: **Head of Revenues and Benefits**

Contact: **geni.hotchkiss@swdevon.gov.uk**

RECOMMENDATIONS:

It is RECOMMENDED that the Hub Committee:

- 1. NOTES the contents of the report.**
- 2. RECOMMENDS to Council a local Council Tax Reduction Scheme for 2024/25 as follows:**
 - Make no changes to the bands of the current banded scheme.**
 - Removes the Minimum Income Floor (MIF) for self-employed Claimants.**
 - Disregards 100% of the of the 'Limited Capability for Work' element of Universal Credit.**
- 3. RECOMMENDS to Council the adoption of the following Council Tax discounts effective from 1 April 2024:**
 - (a) The discount for unoccupied and substantially unfurnished properties is 100% for a maximum period of 1 month.**
 - (b) The discount for unoccupied and substantially unfurnished properties for 1 month to 1 year is zero.**
 - (c) The discount for properties which require major repair work to render them habitable is 50% for a maximum period of 12 months.**

- (d) The discount for unoccupied furnished properties (second homes) is zero.**
- (e) An empty homes premium of an additional 100% is levied on properties that have remained unoccupied and unfurnished for at least one year, but less than five years.**
- (f) An empty homes premium of an additional 200% is levied on properties that have remained unoccupied and unfurnished for at least five years, but less than ten years.**
- (g) An empty homes premium of additional 300% is levied on properties that have remained unoccupied and unfurnished for at least ten years.**

4. RECOMMENDS to Council the adoption of a Second Homes Premium of 100% with effect from 1 April 2025.

1. Executive summary

- 1.1 There is a requirement to have a Local Council Tax Reduction Scheme (LCTRS) to support residents who qualify for assistance in paying Council Tax. The Local Government Finance Act 1992 (as amended) requires each billing authority in England to have a scheme specifying the reductions which are to apply to amounts of council tax payable by persons, or classes of persons, whom the authority considers are in financial need ("a council tax reduction scheme").
- 1.2 The LCTRS must be approved by 11 March for the following year and the billing authority must consult with major preceptors and any other person who may have an interest in any proposed changes to the scheme.
- 1.3 At its meeting on 19 September 2023, Hub Committee gave its approval to consult on changes to the LCTRS for 2024/25, to ensure the Council continues to provide as much support as possible to residents during the Cost-of-Living crisis (Min 18/23).
- 1.4 This report provides Members with a summary of the consultation responses. Members are asked to consider the content of this report and to recommend to Council a local Council Tax Reduction Scheme for the financial year 2024/25.
- 1.5 The report also sets out the current council tax discounts and premiums and reaffirms the Council's intention to levy a 100%

premium on Second Homes as allowed by the Levelling-Up and Regeneration Act 2023.

2. Background

- 2.1 Since April 2013, the Council has been required to establish a local Council Tax Reduction Scheme to help working age residents on a low income pay their council tax. This scheme replaced the national scheme for Council Tax Benefit which was fully funded by central government.
- 2.2 The Council is also required to administer the prescribed Government Council Tax Reduction Scheme for pension age residents and is not able to make any changes to this scheme.
- 2.3 It is an annual requirement for Councils to review their working age Council Tax Reduction Scheme and decide whether to continue with the same scheme or revise it.
- 2.4 In 2019, the Council introduced a banded scheme which assessed the maximum level of Council Tax Reduction based on the net income of the claimant and their partner, if applicable. The income bands were amended for the 2023/24 scheme with some bands being uplifted by 20% to reflect additional cost of living pressures.
- 2.5 At its meeting of 19 September 2023, Hub Committee agreed to public consultation on two proposed changes to the CTRS for 2024/25. The two proposed changes are to remove the Minimum Income Floor (MIF) for self-employed claimants and to disregard 100% of the Limited Capability for Work element of Universal Credit.

3. Outcomes/outputs

Proposed Council Tax Reduction Scheme for 2024/25

- 3.1 The public consultation Let's Talk "Have your say on our Council Tax Reduction Scheme 2024/25 ran from 17 October to 28 November.
- 3.2 The proposals consulted on were as follows:
 - **Removal of the Minimum Income Floor (MIF)**

The Minimum Income Floor is where the scheme (following an exemption for the first 12 months) assumes a certain level of self-employed profit, which is linked to the national minimum wage, even if the claimant did not earn that amount.
 - **Disregard 100% of the 'Limited Capability for Work' element of Universal Credit.**

Currently claimants receiving Employment and Support Allowance are treated as a 'passported' claim and receive 85% council tax reduction. When they transfer to Universal Credit, they are awarded a Limited Capability for Work element of £390.06 per month. Universal Credit is not a passported benefit and the Limited Capability for Work element is treated as income.

- 3.3 There were 297 visitors to the Consultation portal, however only 43 of these visitors took the opportunity to respond to the consultation questions.
- 3.4 The Council also wrote to all major preceptors seeking their views on the proposed changes to the scheme. Devon and Somerset Fire and Rescue and the Office of the Police and Crime Commissioner for Devon and Cornwall have both confirmed they are happy with the proposals. Devon County Council have confirmed, on balance, they support the proposed changes, but would like us to consider providing support to care leavers through the local Council Tax Reduction Scheme.

Summary of consultation responses

- 3.5 The public consultation received 43 responses, with 27 of respondents saying they live in West Devon This question was optional.
- 3.6 There were 43 responses to the proposal to remove the Minimum Income Floor, broken down as follows with all respondents answering the question.

Question:
Do you agree with the proposal to remove the Minimum Income Floor?

Response	Response number	Percentage
Yes	31	72%
No	12	28%
Did not answer	0	0%

- 3.7 The proposal to disregard 100% of the 'Limited Capability for Work' element of Universal Credit, received 43 responses with 1 respondent choosing not to answer this question. The responses can be summarised as follows:

Question:
Do you agree with the proposal to disregard 100% of the 'Limited Capability for Work' element of Universal Credit?

Response	Response number	Percentage
Yes	36	84%
No	6	14%
Did not answer	1	3%

- 3.8 Although the overall number of responses to the consultation was low, there was a majority in favour of the proposals, with 72% of respondents supporting the proposal to remove the minimum income floor for self-employed claimants.
- 3.9 The second proposal, which was to disregard 100% of the Limited Capability for Work element of Universal Credit, had a higher level of support with 84% of respondents in favour of this proposal.
- 3.10 Having taken into consideration the responses to the public consultation, the Council recognises that one of the best ways it can continue to support residents during the current cost of living crisis it to make the proposed changes to the CTRS.
- 3.11 The weekly income bands, effective from 1 April 2023, and which will remain unchanged from 1 April 2024, are detailed in the table below:

Band	Reduction	Single	Couple	Family 1	Family 1+
1	85%	£0.00 to £95.00	£0.00 to £138.00	£0.00 to £220.00	£0.00 to £355.00
2	80%	£95.01 to £132.00	£138.01 to £180.00	£220.01 to £282.00	£355.01 to £385.00
3	50%	£132.01 to £192.00	£180.01 to £240.00	£282.01 to £342.00	£385.01 to £435.00
4	25%	£192.01 to £246.00	£240.01 to £294.00	£342.01 to £396.00	£435.01 to £480.00

Council Tax Discounts and Premiums

- 3.12 The Local Government Finance Act 2012 abolished certain council tax discounts with effect from 1 April 2013 and replaced them with discounts which can be determined locally. The table below details the existing discounts the Council has in place and it recommended that these discounts remain the same for 2024/25.

Class	Description	2023/24 Discount	Proposed discount from 1 April 2024

A - Second Homes	Dwellings which are no one's sole or main residence and which are substantially furnished and subject to a 28-day planning restriction.	0% discount	0% discount
B - Second Homes	Dwellings which are no one's sole or main residence and are substantially furnished.	0% discount	0% discount
Class C	Dwellings which are unoccupied and substantially unfurnished.	100% discount for a period of 1 month.	100% discount for a period of 1 month.
Class D	Dwellings which are unoccupied and require major repair work to render them habitable.	50% discount for a maximum period of 12 months.	50% discount for a maximum period of 12 months.

Empty Homes Premium

3.13 Prior to 1 April 2013, billing authorities could charge up to a maximum 100% council tax on dwellings that had been empty for more than two years. From 1 April 2013, billing authorities were given new powers to charge a premium of up to 50% of the council tax payable. Further legislation was then introduced allowing a 100% empty homes premium to be levied from 1 April 2019.

3.14 There were then further incremental changes leading to the current position which is as follows:

Description	Premium
Dwellings left unoccupied and substantially unfurnished for two years or more.	100%

Dwellings left unoccupied and substantially unfurnished for 5 years or more.	200%
Dwellings left unoccupied and substantially unfurnished for 10 years or more.	300%

- 3.15 The original legislation and subsequent amendments were introduced with the express intention of encouraging owners to bring empty properties back into use and the Council charges the maximum premium in all cases.
- 3.16 The Levelling-Up and Regeneration Act 2023 gives the Council additional powers to apply the empty property premium of 100% after 12 months rather than the current two years.
- 3.17 If agreed, this would be effective from 1 April 2024. There are currently 87 dwellings which would become subject to the premium. The estimated additional yield from council tax would be £0.2m of which the Council's share would be approximately £22,000 (11%).

Second Homes Premium

- 3.18 The Levelling-Up and Regeneration Act 2023 also amends the Local Government Finance Act 1992 to give billing authorities the discretion to charge additional council tax of up to 100% on dwellings which are occupied periodically, substantially furnished and where no one is resident for council tax purposes, i.e., second homes.
- 3.19 The Council declared a housing crisis in September 2021 and backed the declaration with a 12-point action plan, which included lobbying the Government to allow councils to charge a 100% premium, i.e., 200% council tax, on second or holiday homes, to ensure they contribute fairly to the services they receive.
- 3.20 Under Section 11C (3) of the 1992 Act, any decision to increase the council tax on second homes must be made at least one year prior to the beginning of the financial year to which it relates, hence it can only take effect from 1 April 2025 at the earliest.
- 3.21 There are currently 692 properties on our council tax records classified as a second home. It should be noted that the Government consulted on 'Proposals to exempt categories of dwellings from the council tax premiums' in August 2023. At the time of writing, the outcome of the public consultation has not been published. Once regulations and/or guidance is issued confirming the exemptions, there may be a number of dwellings which are exempt from paying the premium.

- 3.22 If the recommendation to charge a council tax premium on second homes is adopted, from 1 April 2025, the estimated additional yield from council tax would be £1.6m of which the Council's share would be approximately £0.17m (11%).
- 3.23 The key impact of second homes is to remove a significant number of homes from the local housing market, with properties that would otherwise be available to provide permanent homes for local people being used as holiday homes by people whose primary residency is outside the borough. For this reason, the Council believes that the additional money raised by the second homes premium should be invested back into housing. West Devon Borough Council is working with other Councils across Devon to make the case that all additional council tax raised should be ringfenced to address housing challenges, including to acquire existing properties to provide temporary accommodation, to support people with complex needs and the provision of specialist accommodation with supported facilities for care leavers.

4. Options available and consideration of risk

- 4.1 The Council could choose not to charge the local Council Tax Reduction Scheme for working age residents. In doing so we would continue to provide support for the wider cohort of residents through our income-banded scheme, however it would mean we wouldn't be providing additional support to residents who are trying to set up their own business or who have a disability or health condition which affects how much they can work.
- 4.2 The outcome of the public consultation undertaken in October and November 2023, is that both the major preceptors and the public are broadly supportive of the proposed changes.
- 4.3 The Council could choose not to charge a 100% premium on second homes. This option is not recommended for the reasons outlined in the report.
- 4.4 The Council could choose not to increase the council tax empty homes premium to 100% for dwellings empty for between 1 and 5 years (currently between two and five years), from 1 April 2024. This decision would not align with the Council's clear ambition to bring empty properties back into use to increase the supply and affordability of housing in the borough.

5. Proposed Way Forward

- 5.1 The Council Tax Reduction Scheme for 2024/25 is agreed as set out in the consultation. The revised scheme will ensure the Council provides as much support as possible to low-income households.
- 5.2 The Council confirms the council tax discounts and premiums applicable from 1 April 2024 and the premium on second homes which will be charged from 1 April 2025.
- 5.3 The approach taken by the Council is to encourage council taxpayers to use a dwelling as their main residence or allow others to do the same. It also seeks to bring empty properties back into use to increase the supply and affordability of housing in the borough.
- 5.4 The implementation of revised and additional council tax premiums will provide additional income from council tax which will be used to provide services to residents.

6. Implications

Implications	Relevant to proposals Y/N	Details and proposed measures to address
Legal/Governance		<p>The Welfare Reform Act 2012 abolished Council Tax Benefit and instead required each billing authority to design a scheme for working age residents specifying the reductions which are to apply to amounts of council tax.</p> <p>All billing authorities in England are required to have a scheme identifying the reductions payable by residents who are in financial need under Section 13A of the Local Government Finance Act 1992 (updated in 2012). Schedule 1A paragraph 5 of the Act states that for each financial year, Councils must consider whether to revise their scheme or replace it with another scheme and that such decisions need to be made by 11 March in the financial year preceding that for which the revision or replacement scheme is to take effect. If the Council does not make/revise its scheme by 11 March 2024, a default scheme will be imposed on the Council which will be effective from 1 April 2024.</p> <p>The Levelling-Up and Regeneration Act 2023 makes amendments to the 1992 Act, and these are explained in the body of the report.</p>
Financial implications to include reference to value for money		<p>The cost of the Council Tax Reduction Scheme is met by West Devon Borough Council, and the major presenting authorities, in proportion to their share of the council tax. The CTR Scheme is reflected within the Tax Base calculation as a discount.</p>

		<p>Previous CTR schemes have always been modelled on a cost neutral basis, in that the cost of the scheme was the equivalent of the level of Government funding.</p> <p>Removing the Minimum Income Floor and disregarding the Limited Capability for Work element will increase the cost of the scheme by around £164,825. The scheme is projected to cost £3.981 million as opposed to the current cost of £3.186 million. WDBC's share of the increase in cost is around 11% of this i.e., £18,131.</p> <p>The Council Tax Collection Fund is in surplus by £3.16m as at 31.3.2023. A distribution of the surplus will be made to all major precepting authorities as part of the 2024/25 Budget setting process. This can be a way of financing the additional cost of the 2024/25 CTR scheme of £164,825, as although the scheme will cost more, preceptors will be receiving a larger distribution of a collection fund surplus than usual due to the level of the surplus on the fund.</p>
Risk		To reduce the cost to the Council, changes would have to be made to the level of support made to working age claimants. Most local authorities have already incorporated a reduced level of support into their local schemes and they should be reviewed on an annual basis. There is a risk that the cost of maintaining the current local scheme will increase if the number of claimants rises due to the state of the local and national economy.
Supporting Corporate Strategy		Supporting the Council's response to the Cost-of-Living Crisis.
Consultation & Engagement Strategy		Public consultation has been carried out on the proposed Council Tax Reduction Scheme to inform the content of this report.
Climate Change - Carbon / Biodiversity Impact		No direct carbon/biodiversity impact arising from the recommendations.
Comprehensive Impact Assessment Implications		
Equality and Diversity		The local Council Tax Reduction Scheme only impacts a specific group of people, namely working age residents on a low-income. The proposals set

		out will provide additional support to those residents.
Safeguarding		None as a direct result of this report, however the local Council Tax Reduction Scheme may help keep vulnerable children and adults safe.
Community Safety, Crime and Disorder		None as a direct result of this report, however some of the recommendations may help to reduce crimes such as domestic violence.
Health, Safety and Wellbeing		Financial wellbeing is crucial to the wellbeing of our residents and the recommendations in this report are designed to support this.
Other implications		None.

Supporting Information

Appendices:

None.

Background Papers:

None.

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Report to: **Hub Committee**

Date: **30 January 2024**

Title: **Discretionary Rate Relief and Corporate Debt Policies**

Portfolio Area: **Cllr Mandy Ewings – Leader of the Council**

Wards Affected: **All**

Urgent Decision: **N** Approval and clearance obtained: **Y**

Author: **Geni Hotchkiss** Role: **Head of Revenues and Benefits**

Contact: **geni.hotchkiss@swdevon.gov.uk**

Recommendations:

That the Hub Committee:

- 1. Approves the Discretionary Rate Relief Policy attached at Appendix A.**
- 2. Approves the Business Rates Relief: 2024/25 Retail, Hospitality and Leisure Scheme Policy attached at Appendix B.**
- 3. Approves the Corporate Debt Policy attached at Appendix C.**
- 4. Approves the amendment to the Council Tax, Non-Domestic Rates (Business Rates) and Housing Benefit Overpayments Write-Off Policy, to incorporate Sundry Debt attached at Appendix D.**

1. Executive summary

- 1.1 The report seeks approval for revised and updated policies in respect of key areas impacting on the Council's financial position. It is good practice to review policies at appropriate intervals to ensure they reflect current legislation and remain fit for purpose.
- 1.2 A revised Discretionary Rate Relief Policy, which sets out proposals for awarding discretionary rate relief to business ratepayers, is required because of the Non-Domestic Rating Act 2023 which repeals and re-enacts provisions of the Local Government Act 1988 including those relating to the administration of discretionary rate relief.

- 1.3 The report sets out changes to discretionary rate relief for business rates announced as part of the Autumn Budget. Although the Council intends to implement the changes, it is a discretionary decision and it is therefore good practice for the Council to endorse the implementation of the relief scheme through a policy document which clearly sets out the eligibility criteria for awarding the relief.
- 1.4 The current Corporate Debt Policy was approved by Hub Committee on 20 March 2016. The policy has been reviewed and amendments have been made to reflect current best practice in income collection.
- 1.5 The 2022/23 Debtors Audit included a recommendation that there should be a review of the Debt Recovery Policy and write-off procedures for all services responsible for the issue and collection of sundry debts and that documents should be available to users. The Council Tax, Non-Domestic Rate (Business Rates and Housing Benefit Overpayments Write-Off Policy, agreed by Hub Committee, on 7 March 2023 has been amended to include the writing-off of sundry debt.

2. Background

Discretionary Rate Relief Policy

- 2.1 The Non-Domestic Rating Act 2023 removes the restriction preventing billing authorities from deciding to award discretionary relief more than 6 months after the end of the relevant financial year.
- 2.2 The current Discretionary Rate Relief Policy was agreed by Hub Committee in December 2018. Considering the change to the legislation, Revaluation 2023 and the changes to the business landscape in recent years, it is considered best practice to review and refresh the policy to ensure it gives support to ratepayers in a way aligned to the Council's current ambitions.

Business Rates Relief: 2024/25 Retail, Hospitality and Leisure Policy

- 2.3 At the Autumn Statement on 22 November, the Chancellor announced a package of support worth £4.3 billion over the next 5 years to support small businesses and the high street. This included confirming the 2024/25 Retail, Hospitality and Leisure (RHL) scheme will be extended for a fifth year into 2024/25.
- 2.4 Although the Council intends to follow Government guidance in implementing the scheme, it is a discretionary decision and therefore good practice for the Council to endorse the implementation of the relief scheme through a policy document which clearly sets out the criteria for awarding the relief.

- 2.5 The 2024/25 Retail, Hospitality and Leisure (RHL) scheme will provide eligible, occupied retail hospitality and leisure properties with 75% relief up to a cap of £110,000 per business.
- 2.6 As this is a temporary measure for 2024/25, the Government is not changing the legislation relating to relief available to hereditaments. Instead, the Government will, in line with the eligibility criteria set out in the guidance, reimburse local authorities that use their discretionary powers under section 47 of the Local Government Finance Act 1988 (as amended) to grant relief. It will be for individual billing authorities to adopt a local scheme and determine each individual case when, having regard to the guidance, they can grant relief under section 47.

Corporate Debt Policy

- 2.7 The Council has a duty to recover outstanding debt and, in doing so, should ensure that its policies and processes are fair, transparent and consistent in their application. The policy attached at Appendix C, covers the collection of Council Tax, Business Rates, Housing Benefit Overpayments and Sundry Debts due to West Devon Borough Council.
- 2.8 The current Corporate Debt Policy was approved by Hub Committee on 22 March 2016. The policy has been reviewed and amendments made to cover legislative and changes to best practice in income collection.
- 2.9 It is good practice for the Council to detail its approach to the collection of all debt owed to the Council. This will ensure that residents, businesses, advice agencies, Officers and Members are clear about the Council's approach to debt collection. It also ensures that a fair and consistent approach is taken to recovery and enforcement and that the Council identifies and assists more vulnerable groups to manage their payments.
- 2.10 The Corporate Debt Policy will ensure that debts are minimised and collection rates are maximised whilst ensuring that debtors are helped based on their individual financial circumstances. It will further ensure that officers are clear on the recovery, reporting and monitoring of debt.

Write-Off Policy

- 2.11 The 2022/23 Debtors internal audit report included a recommendation that there should be a review of the Debt Recovery Policy and write-off procedures for all services responsible for the issue and collection of sundry debts and that documents are available to users.
- 2.12 The Council Tax, Non, Domestic Rate (Business Rates) and Housing Overpayments Write-Off policy, which was approved by

Hub Committee on 7 March 2023, has been updated to include sundry debt.

3. Outcomes/outputs

- 3.1 A Corporate Debt Policy will ensure that all service areas have consistent debt recovery processes and fully understand their role and responsibilities in the process.
- 3.2 A decision to adopt the Business Rates Relief: 2024/25 Retail, Hospitality and Leisure Policy will mean the Council will continue to be able to support businesses who are continuing to experience difficult trading conditions post pandemic and through the cost of living crisis.
- 3.3 By agreeing a scheme now we will be able to award the relief to ratepayers 2024/25 annual bills which will have an immediate benefit in reducing the amount of business rates payable.
- 3.4 Initial estimates suggest that we will be able to support approximately 395 businesses through Retail, Hospitality and Leisure relief.

4. Options available and consideration of risk

- 4.1 The Council could choose not to update the Discretionary Rate Relief Policy, however this would mean that there wouldn't be a clear policy framework for decision making based on the current legislation. This may leave the Council susceptible to complaints and possible legal challenge.
- 4.2 The Council could choose not to access the Government funding and exercise its discretionary powers in awarding rate relief to retail, hospitality and leisure businesses. This means that businesses would more business rates than they need to and may cause the Council unnecessary reputational damage.
- 4.3 The Council could choose not to adopt a new Corporate Debt Policy and amend its write-off policy to incorporate sundry debt, however in doing so this would mean we would be unable to demonstrate efficient and effective financial management.
- 4.4 Relevant officers from across the Council have contributed to the updated policies.

5. Proposed Way Forward

- 5.1 Approve the Discretionary Rate Relief policy attached at Appendix A. In doing so the Council will continue to provide support to businesses, charities and non-profit making organisations.

- 5.2 Approve the Business Rates Relief: 2024/25 Retail, Hospitality and Leisure Scheme attached at Appendix B.
- 5.3 Approve the Corporate Debt Recovery Policy at Appendix C.
- 5.4 Approves the amendment to the Council Tax, Non-Domestic Rates (Business Rates) and Housing Benefit Overpayments Write-Off Policy, to incorporate Sundry Debt attached at Appendix D.

6. Implications

Implications	Relevant to proposals Y/N	Details and proposed measures to address
Legal/Governance		<p>Regulation 16 of The Non-Domestic Rating (Consequential and Other Amendments etc.) (England) Regulations 2023, revokes the Non-Domestic Rating (Discretionary Relief) Regulations 1989 to remove constraints on the powers for local authorities in England to award discretionary relief.</p> <p>The 2024/25 Retail, Hospitality and Leisure Scheme will be administered through discretionary relief powers, introduced by the Localism Act 2011, which amended section 47 of the Local Government Finance Act 1988.</p>
Financial implications to include reference to value for money		<p><u>Discretionary Relief</u></p> <p>The rates retention scheme requires the cost of Discretionary Relief to be split in percentage shares as follows:</p> <p>Central government – 50%. West Devon Borough Council – 40%. Devon County Council – 9%. Devon and Somerset Fire and Rescue – 1%.</p> <p><u>Retail, Hospitality and Leisure Scheme</u></p> <p>The Council will be fully compensated for the cost of granting this relief via a section 31 grant from Government. We will also receive New Burdens funding for the software, staffing and administration costs associated with delivering the scheme.</p> <p><u>Corporate Debt Policy</u></p> <p>By having a clear, fair and transparent approach to debt collection we will avoid uncertainty and challenge which may have a detrimental effect on collection rates. Having a clear policy will help</p>

		improve collection rates, reduce the level of debt owed to the Council and minimise the level of unrecoverable debt.
Risk		<p>Failure to have a clearly defined policy for debt collection will leave the Council vulnerable to complaints about the process and the impact on individual debtors. It is important to have a clearly defined policy to protect both staff and debtors.</p> <p>The Council may also miss opportunities to act early and in accordance with published procedures which may impact on the success in recovering debts owed.</p>
Supporting Corporate Strategy		
Consultation & Engagement Strategy		As the discretionary relief policies are due to a legislative or central Government change, no consultation is required.
Climate Change - Carbon / Biodiversity Impact		There is no direct carbon/biodiversity impact arising from the recommendations, however we are committed to implementing and encouraging all council taxpayers to sign up for e-billing once live.
Comprehensive Impact Assessment Implications		
Equality and Diversity		These policies have a positive or neutral impact on all protected characteristics.
Safeguarding		There are no safeguarding implications directly related to this policy, however having a Corporate Debt Policy which considers individual circumstances we will be able to actively support people struggling with debt.
Community Safety, Crime and Disorder		Non-payment of council tax and non-domestic rates (for sole traders and partnerships only) may ultimately result to committal to prison.
Health, Safety and Wellbeing		Providing advice, support and signposting to those struggling with debt will promote health, safety and wellbeing.
Other implications		None.

Supporting Information

Appendices:

Appendix A – Discretionary Rate Relief policy

Appendix B - Business Rates Relief: 2024/25 Retail, Hospitality and Leisure Scheme

Appendix C – Corporate Debt Recovery Policy

Appendix D – Write Off Policy

Background Papers:

None



**West Devon
Borough
Council**

Discretionary Rate Relief Policy

1. Introduction and scope

- 1.1 West Devon Borough Council recognises the importance of supporting local businesses, charities and voluntary organisations to promote the provision of local facilities, support economic growth and investment and improve prosperity.
- 1.2 Billing authorities have the power to award relief from the payment of Non-Domestic Rates (Business Rates) to organisations and businesses that meet certain criteria. Public funds are not, however, unlimited and a proportion of any relief granted is met by the council taxpayers of West Devon. We therefore need to be satisfied that money invested this way will be repaid in economic or community benefit.
- 1.3 The primary power for granting discretionary rate relief is provided for by Section 47 of the Local Government Finance Act 1988. This has been amended by subsequent legislation which gives wider powers to grant discretionary rate relief to any ratepayer where the authority considers the granting of such relief would benefit the local community.
- 1.4 This policy is designed to provide guidance to Council officers and ratepayers on the award of discretionary rate relief. This policy covers the following types of discretionary rate relief:
 - Charitable rate relief
 - Community Amateur Sports Clubs (CASCs)
 - Rate relief for not-for-profit organisations
 - Small rural businesses
 - Hardship relief
 - Temporary relief for partly occupied properties
 - Local discounts and incentives
 - Local newspaper relief
 - Supporting small business scheme
- 1.5 This policy document outlines the various areas of local discretion and the Council's approach to the various reliefs. This has regard to the impact:
 - of granting relief on the Council's wider financial position and the impact on its council taxpayers;
 - on the organisations and businesses that currently receive or may apply for relief in the future;
 - on the residents of West Devon if relief is awarded and the economic benefits to the borough.

2. The Discretionary Rate Relief Scheme

- 2.1 Discretionary rate relief (DRR) is awarded in accordance with Section 43 of the Local Government Finance Act 1988 and Sections 47 and 49 of the Local Government Finance Act 1988 as amended by the Localism Act 2011.
- 2.2 Section 69 of the Localism Act 2011 amended the Local Government Finance Act 1988, to allow billing authorities to award local discounts to any ratepayer as they see fit. These powers can be used to encourage new business and investment as well support local shops or services to the community.
- 2.3 The legislation requires the Council to maintain a Discretionary Rate Relief (DRR) Scheme to award up to 100% rate relief to certain organisations and businesses which operate within specified criteria. This includes:
- charitable bodies already receiving mandatory relief of 80%. The Council has a discretion to 'top-up' this relief to 100% of the business rates due;
 - registered community amateur sports clubs (CASCs) already receiving mandatory relief;
 - non-profit making organisations – the Council has the discretion to grant relief of up to 100% of the business rates due;
 - discretionary rate relief for 'other rural businesses';
 - Relief on the grounds of hardship;
 - Relief for part-occupied premises;
 - Local discounts and incentives;
 - Local newspaper relief;
 - Supporting small business scheme
- 2.4 In making decisions the Council may:
- Grant relief up to a maximum of 100% of the business rates due;
 - Grant relief for a sum less than 100% of the business rates due; or
 - Refuse an application for relief.
- 2.5 Whilst mandatory relief can be backdated to previous financial years, legislation permits discretionary relief only to be awarded back to the start of the previous financial year where the application is submitted and assessed prior to the end of September in a relevant year.
- 2.6 With effect from 1 April 2024, this restriction is removed, and the Council will be able to consider applications for 2023/24 after 30 September 2024 and backdate any award. Each case will be considered on its own merits, but generally we will only backdate to the start of the financial year.
- 2.7 It is the Council's policy that discretionary rate relief will be only awarded from the date of application or, in the case of hardship relief, where the hardship occurred at that point in time. Only in exceptional circumstances will consideration be given to awarding relief for a prior period. The ratepayer must provide valid reasons for not having submitted their application at an earlier date.

2.8 In most cases, discretionary rate relief will be granted for a period of two financial years only.

3. The application process

3.1 Applications for relief must be made using the Council's online application form.

3.2 Applications must be submitted with the relevant supporting information which includes:

- Details of the applicant's main purposes and objectives (where applicable) as set out in a written constitution, memorandum of understanding or membership rules;
- A full set of audited accounts relating to the two years prior to the date of application;
- Details of how the business or organisation meets the relevant criteria detailed in these guidelines.

3.3 Any applications which are made without the supporting evidence will be subject to a decision being made solely on the information that is available at the time of the decision.

3.4 As a guide, to be eligible for discretionary rate relief a charity/organisation must not have enough unrestricted funds/reserves available to continue to operate for more than 12 months unless a business plan exists detailing how these additional funds are to be used for the benefit of the local community.

3.5 In exceptional cases, discretionary rate relief will be awarded to charities/organisations who have enough financial resources in unrestricted funds/reserves to continue to operate for more than 12 months. This may include charities and community organisations who require a large amount of available reserves to sustain the service they deliver to the local community. In such cases, the applicant will need to be able to prove it offers a service which the borough's residents depend on and they would be unlikely to find elsewhere in the Borough.

3.6 The Council will aim to make a decision within 20 working days of the application and all supporting evidence being received. Decisions to award all types of discretionary rate relief will be made by the Council's Rate Relief Panel. Ratepayers are required to continue to pay business rates whilst their application is being considered. Failure to make payment will result in the Council pursuing collection through the usual enforcement procedures which could result in legal proceedings.

4. Appeals

4.1 There is no statutory right of appeal against a decision other than by way of judicial review. An unsuccessful applicant may ask the Council to review the decision, but only where:

1. Additional information relevant to the application that was not provided at the time of the application becomes available.
 2. There are good grounds the application or supporting information was not interpreted correctly at the time the decision was made.
 3. A request for review must be within 28 days of notification of the decision and must set out the reason for the request and any supporting information.
- 4.2 The decision will be reviewed by the Head of Revenues and Benefits and the Strategic Director for Finance in consultation with the Leader and Deputy Leader of the Council.

5. Subsidy Limits

- 5.1 The Government has confirmed in their guidance that discretionary relief to ratepayers is likely to amount to a subsidy. Any relief provided by local authorities will need to comply with the UK's domestic and international subsidy control obligations. Discretionary rate relief will not be awarded in any circumstances where it appears that an award will result in the ratepayer exceeding the subsidy control thresholds.

6. Financial implications

- 6.1 The cost of awarding discretionary rate relief is apportioned as follows:

Central government – 50%.
West Devon Borough Council – 40%.
Devon County Council – 9%.
Devon and Somerset Fire Authority – 1%

7. Other administrative matters

- 7.1 Any decision regarding discretionary rate relief will be communicated to the applicant in writing. Where the decision is a refusal, the reason will be provided in the letter.
- 7.2 A review of the guidelines will take place in line with the Valuation Office Agency's revaluation cycle, or if NNDR (National Non-Domestic Rates) legislation is amended, or as necessary to ensure it complies with current legislation and West Devon Borough Council's priorities.
- 7.3 The ratepayer must inform the Council immediately of any change in their circumstances which may affect their eligibility for relief.

8. Charitable Rate Relief

- 8.1 Mandatory rate relief is granted to charities where:
- The ratepayer is a charity or the trustees of a charity; and

- The property is wholly or mainly used for charitable purposes (including charity shops where the goods sold are mainly donated and the proceeds are used for the purposes of the charity).
- 8.2 Registration under the Charities Act 1993 is conclusive evidence of charitable status. Bodies which are excepted from registration or are exempt charities are also eligible for mandatory relief.
- 8.3 In cases where a charity is receiving mandatory relief of 80%, the Council has discretion to grant up to 20% discretionary relief. This is also known as discretionary relief ‘top-up.’
- 8.4 The Council will consider applications for discretionary relief from charities on their own merits and on a case-by-case basis. The principal consideration in awarding relief is that it is in the best interests of the residents and council taxpayers of West Devon Borough to do so. It must also produce a benefit to the local community as the Council must contribute to the cost of each award.
- 8.5 Each case will be assessed on its own merits, but generally top-up discretionary relief will only be awarded to the following charities or excepted organisations:
- Scouts, Guides, Cadets and other clubs and organisations for young people.
 - Organisations providing support in the form of advice, employment training and counselling;
 - Community schemes including those providing support for those of state pension age, community transport and volunteer organisations;
 - Armed Forces Veterans Associations;
 - Locally based leisure and cultural organisations.
- 8.6 The following general exclusions will apply:
- ‘Top-up’ relief will only be granted to local charities (defined as those set up with the sole purpose of assisting residents of West Devon Borough and whose head office is situated in the Borough);
 - Unless a special case for financial hardship can be proved, ‘top-up’ relief to national charities (including charity shops) will not be granted;
 - Academy, free, grant maintained, faith and trust schools are classified as charities and therefore receive 80% mandatory relief. ‘Top-up’ relief for schools and other educational establishments which receive central or local government support will not be granted unless a special case for hardship can be shown;
 - ‘Top-up’ relief for registered social landlords will not be granted.
- 9. Registered Community Amateur Sports Clubs (CASCs)**
- 9.1 Registered Community Amateur Sports Clubs (CASCs) are entitled to 80% mandatory relief. The Council will consider applications for ‘top-up’ discretionary relief from CASCs based on their own merits on a case-by-case basis.

- 9.2 The Council will consider applications that can demonstrate:
- The contribution the club makes to the West Devon borough;
 - The club is open to the whole community and its membership fees are not excessive;
 - It is a non-profit making organisation;
 - Evidence that every effort is made by the club to encourage open membership from groups such as young people, disabled persons, women and those of state pension age; and
 - How the CASC supports and links into the Council's priorities.
- 9.3 The Council will also take into consideration if any building used is accessible to disabled people or if reasonable attempts have been made to improve its accessibility.
- 9.4 Applications will only be considered where the club has an unrestricted access policy. If the club only accepts members who have reached a certain standard, rather than seeking to encourage the development of sporting aptitude, it does not fulfil the requirements.
- 9.5 All clubs should be open to all without discrimination, single sex clubs may be eligible for relief where such restrictions are a genuine result of physical constraints (such as changing room facilities) or the requirement of the sport. In such cases the applicant will be required to provide proof of these factors.
- 9.6 It should be noted that sports clubs which run a bar are unlikely to be awarded discretionary relief if their main purpose is the sale of food or drink. If the sale of food and drink aids the overall operation and development of the club meaning it can achieve its objectives, this may be permissible if the principal objectives of the club meet the eligibility criteria detailed at 5.2. If the bar makes a profit, this relief must be reinvested to help the club meet its principal objectives. Financial information will be required to evidence any profit and its use.

10. Not for profit organisations

- 10.1 Not for profit organisations which are not classed as charities (registered or otherwise) or CASCs can apply for discretionary relief of up to 100%. Such organisations include those which are philanthropic, religious, concerned with education or social welfare, science, literature, the fine arts, recreation or are otherwise beneficial to the community.
- 10.2 The Council will consider applications from organisations which can demonstrate:
- Its activities support at least one of the Council's priorities;
 - It promotes its service for the benefit of the residents of West Devon;
 - Membership of the organisation is regardless to all members of the community regardless of ability;

- The facilities of the organisation are made available, where practicable, to other organisations and groups;
- Operates in such a way that it does not discriminate against any section of the community;
- It is not established or conducted for the primary purpose of profit.

10.3 **Membership and entry fees**

If the organisation applying for discretionary relief requires membership or an entry fee the Council will consider whether:

- Membership is open to everyone regardless of race, ethnicity, sex, marital or parental status, sexual orientation, creed, disability, age, religious affiliation, or political belief;
- The subscription or fee is set at a level which is not prohibitively high and is affordable by most sections of the community;
- Fee reductions are offered to certain groups, for example the under 18s and over 60s;
- Membership is encouraged from the unemployed, young people not in employment, education, or training, those of state pension age and people with disabilities;
- Where the applicant organisation requires membership, at least 50% of members should reside within West Devon. Proof of this will be required.

10.4 The organisation must provide a copy of their constitution and copies of their latest two years of audited annual accounts.

11. **Small Rural Businesses**

11.1 Applications for discretionary rural rate relief can be made by any business in a designated rural settlement area that are not eligible for mandatory rural rate relief.

11.2 Discretionary rural rate relief for 'other rural businesses' will be considered where:

- The rateable value of the property is not more than £16,500;
- The property is used for purposes which benefit the local community; and
- The award of the relief is in the interests of the residents of West Devon and its council taxpayers.

11.3 As a general guide, a ratepayer must not have enough resources available in reserves (excluding those which are being held for a specific purpose which can be evidenced) to continue to operate for more than 12 months, unless it can be shown that these additional reserves are to be used to benefit the local community.

11.4 The following factors will be considered when assessing an application for discretionary rural rate relief:

- The number of staff employed the business who live within 2 miles of the rural settlement where the business is located; and
 - Whether there are any suppliers of the same goods or services which are easily accessible to residents of the rural settlement.
- 11.5 Every application must be accompanied by the latest trading accounts and evidence of the proportion of expenditure attributable to business rates. In determining the application, the Council will consider the financial viability of the business concerned, thereby having regard to the interests of council taxpayers in general. This will be balanced against the detrimental effect on the rural settlement should the business cease trading either as a direct or indirect result of not awarding relief.
- 11.6 The amount of discretionary relief awarded will be up to 100% of the total business rates payable.

12. Hardship relief

- 12.1 The Council has discretion under Section 49 of the Local Government Finance Act 1988 to grant relief of up to 100% where hardship can be demonstrated. Hardship relief can only be considered if it would be reasonable to do so in the interests of council taxpayers in general.
- 12.2 Hardship relief will be awarded where the business is suffering from unexpected hardship which is outside the normal risks associated with the business. Reduction or remission of business rates on the grounds of hardship will only be made in exceptional circumstances.
- 12.3 Hardship relief is awarded at the total discretion of the Council, provided it is satisfied that:
1. The ratepayer would sustain hardship if it did not do so; and
 2. It is reasonable to do so having regard to the interests of its council taxpayers.
- 12.4 The following factors will be considered in assessing the application:
- The test of hardship needs not to be confined strictly to financial hardship. All relevant factors affecting the ability of the business to meet its rate liability will be considered.
 - The interests of the council taxpayers in the area may be wider than direct financial interests. Examples of this include where employment prospects in the area would be worsened by a company going out of business or the amenities of the area being reduced.
 - The ratepayer must provide evidence of hardship, for example a severe loss or marked decline in trade compared to similar periods in previous years.
 - The business must show evidence of its viability for the future which is two years for these purposes.

- 12.5 A business will not be considered for hardship relief in the following circumstances:
- Where the business is profitable.
 - Where the business has experienced a minor loss in trade
 - Where the drawings/remuneration of directors, partnerships or sole traders are of an amount not deemed reasonable by the Council.
 - Where the business is new and hardship relief is being requested to fund the initial progression of the business.
 - Where the property is empty.
 - Where similar goods or services are already being provided in the locality or within a reasonable distance.
- 12.6 Prior to any award being made, the applicant is expected to act to mitigate or alleviate their hardship by:
- Contacting the Council's Economic Development Team for general business advice and support;
 - Considering other options such as renegotiating with its creditors;
 - Having a business plan in place to address the hardship.
- 12.7 Applications for hardship relief shall be regarded as a last resort and will only be accepted after consideration of any other forms of rate relief for which the applicant may be eligible.
- 12.8 The period and amount of any award will be determined on a case-by-case basis but may be up to 100% of the business rates liability.
- 12.9 Hardship relief will only be granted for short periods of time and usually up to a maximum of 6 months.
- 13. Hereditaments partly occupied for a temporary period**
- 13.1 There may be a period of time where a property is only partly occupied for a short period of time. This may be due to a business relocating to a new property. In certain circumstances, the Council may use its discretion to award part-occupied relief, also known as Section 44A relief as provided for by Section 44A of the Local Government Finance Act 1988.
- 13.2 In these circumstances the Council may request the Valuation Office Agency apportion the rateable value of the property between occupied and unoccupied parts.
- 13.3 Section 44A relief may be awarded in the following circumstances:
- Where the occupied and unoccupied parts of the hereditament can be easily separately assessed; or
 - Where there are short term practical or financial difficulties in either occupying or vacating the premises.
- 13.4 The part occupation must be for a temporary period only.

- 13.5 Rate relief will not be awarded where the partial occupation is due to the normal day to day operation of the business, for example where a warehouse has despatched a large order and no longer needs to store stock.
- 13.6 For the purposes of this policy a period of up to 6 months will be temporary. Periods of time exceeding 6 months will be treated as a permanent change and will not be eligible for partly occupied relief.
- 13.7 Relief will not be awarded where it appears to the Council that part of the property is being kept empty for the sole purpose of claiming rate relief.
- 13.8 Prior to an award being made, a visit to the premises will be made by a Council Officer to establish the exact area of the property that is empty. The application must be supported by a plan of the property which clearly marks the boundary of the occupied and unoccupied parts. This plan will be given to the Valuation Office Agency to apportion the rateable value.
- 13.9 Further visits may be made to the property throughout the duration of the relief award to confirm the property is still partly occupied.
- 13.10 Further applications for part occupied relief may be considered where there is a change to the area which is unoccupied.
- 13.11 Part occupied relief will end if one of the following applies:
- The financial year comes to an end; or
 - The end of the award; or
 - Where part or all the unoccupied parts become occupied; or
 - Where the whole of the property becomes unoccupied; or
 - Where the liability for the property changes.

14. Local discounts and incentives

- 14.1 The Council can grant business rates discounts and incentives entirely as it sees fit within the limits of primary legislation and the UK's domestic and international subsidy control obligations. These powers may be used to complement the strategic priorities and key objectives of the Council increasing employment at strategic employment sites, investing in town centres and encouraging new business and investment to the borough.
- 14.2 In considering applications, the Council will take into account how the award of rate relief will support opportunities for new business growth, expansion, employment and the safeguarding of jobs in the borough. We will also consider the effect the award of relief will have on competing local businesses.
- 14.3 Where applicants seek rate relief under Localism Act powers, they should include information about how the business complements the strategic priorities and key objectives of the Council.
- 14.4 Each application will be considered on its own merits, however the following factors will be considered by the Council when assessing an application:

- Will the relief incentivise the creation of new permanent contract jobs (not zero hours contracts) for local people and paying the living wage as a minimum;
 - Will the relief provide a return on investment from higher business rates income;
 - Are there are social or economic implications for the area if discretionary relief is not awarded e.g. the loss of a substantial number of jobs or skills from the area;
 - Is the request for temporary relief only and will not be repeated year after year.
- 14.5 To be considered for an award under this policy, the applicant must be either:
- A new business starting up in the area;
 - A business relocating to the area; or
 - An existing business expanding within the area and creating additional or safeguarding existing jobs.
- 14.6 Relief will not normally be considered until the applicant has all required permissions, licences, leases and other provisions in place in order to begin lawfully trading from the premises at which the rate relief will be applied.
- 14.7 The applicant must sign a statement of intent to operate the business in the borough for a minimum of five years.

15. Local newspaper relief

- 15.1 From 1 April 2017, the Government has provided funding to billing authorities to provide a discount of £1,500 per year to office space occupied by local newspapers. This relief is specifically available for local newspapers and is not available to magazines.
- 15.2 To qualify, the property must be occupied by a local newspaper and wholly or mainly used as office premises for journalists and reporters. The amount of relief is limited to a maximum discount of one discount per newspaper title and per property.
- 15.3 This relief is fully funded by central Government and will end on 31 March 2025 unless extended by legislation.

16. Supporting Small Business Scheme

- 16.1 At the Autumn Statement 2022, the Chancellor announced that a new Supporting Small Business (SSB) relief scheme which caps bill increases at £600 per year for any business losing eligibility for Small Business Rate Relief or Rural Rate Relief following the 2023 Revaluation.
- 16.2 The Council will award automatically without the completion of an application form.
- 16.3 Full details of the Local Authority Guidance can be found at <https://www.gov.uk/government/publications/business-rates-relief-2023-supporting-small-business-relief-local-authority-guidance>

16.4 The Supporting Small Business Relief scheme will be awarded under Section 47 of the Local Government Finance Act 1988. The Council is fully reimbursed for the costs of granting this relief through Section 31 grant.

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West Devon Borough Council

1. Introduction

- 1.1 At the Autumn Statement on 22 November 2023, the Chancellor announced the extension of the business rates relief scheme for retail, hospitality and leisure properties worth an estimated £2.4billion in 2024/25.
- 1.2 The 2024/25 Retail, Hospitality and Leisure business rates relief scheme will provide eligible, occupied, retail, hospitality and leisure properties with a 75% relief up to a cash cap limit of £110,000 per business.
- 1.3 This document explains how the scheme will operate and the eligibility criteria for businesses in the West Devon Borough Council area.

2. Eligibility for the Retail, Hospitality and Leisure Relief Scheme

- 2.1 Hereditaments that meet the eligibility criteria for the Retail, Hospitality and Leisure Scheme 2024/25 will be occupied hereditaments which meet all the following conditions for the chargeable day:
 - a. they are wholly or mainly being used:
 - i. as shops, restaurants, cafes, drinking establishments, cinemas or live music venues,
 - ii. for assembly and leisure; or
 - iii. as hotels, guest and boarding premises or self-catering accommodation.
- 2.2 We consider shops, restaurants, cafes, drinking establishments, cinemas and live music venues to mean:
 - i. Hereditaments that are being used for the sale of goods to visiting members of the public:**

- Shops (such as florists, bakers, butchers, grocers, greengrocers, jewellers, stationers, off licences, chemists, newsagents, hardware stores, supermarkets etc)
- Charity shops
- Opticians
- Post offices
- Furnishing shops/display rooms (such as carpet shops, double glazing and garage doors)
- Car/caravan show rooms
- Second hand car lots
- Markets
- Petrol stations
- Garden centres
- Art galleries (where art is for sale/hire)

ii. Hereditaments that are being used for the provision of the following services to visiting members of the public

- Hair and beauty services (such as hairdressers, nail bars, beauty salons, tanning shops etc)
- Shoe repairs/key cutting
- Travel agents
- Ticket offices e.g. for theatre
- Dry cleaners
- Launderettes
- PC/TV/domestic appliance repair
- Funeral directors
- Photo processing
- Tool hire
- Car hire

iii. Hereditaments that are being used for the sale of food and/or drink to visiting members of the public:

- Restaurants
- Takeaways
- Sandwich shops
- Coffee shops
- Pubs
- Bars

iv. Hereditaments which are being used as cinemas

v. Hereditaments that are being used as live music venues

- Live music venues are hereditaments wholly or mainly used for the performance of live music for the purpose of entertaining an audience. Hereditaments cannot be considered a live music venue for the purpose

of business rates relief where a venue is wholly or mainly used as a nightclub or a theatre, for the purposes of the Town and Country Planning (Use Classes) Order 1987 (as amended).

- Hereditaments can be a live music venue even if used for other activities, but only if those other activities (i) are merely ancillary or incidental to the performance of live music (e.g. the sale/supply of alcohol to audience members) or (ii) do not affect the fact that the primary activity for the premises is the performance of live music (e.g. because those other activities are insufficiently regular or frequent, such as a polling station or a fortnightly community event).
- There may be circumstances in which it is difficult to tell whether an activity is a performance of live music or, instead, the playing of recorded music. Although we would expect this would be clear in most circumstances, guidance on this may be found in [Chapter 16 of the statutory guidance](#) issued in April 2018 under section 182 of the Licensing Act 2003.

2.3 We consider assembly and leisure to mean:

i. Hereditaments that are being used for the provision of sport, leisure and facilities to visiting members of the public (including for the viewing of such activities)

- Sports grounds and clubs
- Museum and art galleries
- Nightclubs
- Sport and leisure facilities
- Stately homes and historic houses
- Theatres
- Tourist attractions
- Gyms
- Wellness centres, spas and massage parlours
- Casino, gambling clubs and bingo halls

ii. Hereditaments that are being used for the assembly of visiting members of the public

- Public halls
- Clubhouses, clubs and institutions

2.4 We consider hotels, guest and boarding premises and self-catering accommodation to mean:

i. Hereditaments where the non-domestic part is being used for the provision of living accommodation as a business:

- Hotels, guest and boarding houses
- Holiday homes
- Caravan parks and sites

2.5 To qualify for the relief the hereditament should be wholly or mainly being used for the above qualifying purposes. In a similar way to other reliefs (such as charity relief), this is a test on use rather than occupation. Therefore, hereditaments which are occupied but not wholly or mainly used for the qualifying purpose will not qualify for the relief.

2.6 The list set out above is not intended to be exhaustive as it would be impossible to list the many and varied uses that exist within the qualifying purposes. We will consider if particular properties not listed are broadly similar in nature to those above and, if so, the Council considers them eligible for relief. Conversely, properties that are not broadly similar in nature to those listed above should not be eligible for relief.

3. Properties not eligible for relief

3.1 Hereditaments that are being used for the provision of the following services to visiting members of the public

- Financial services (e.g. banks, building societies, cash points, bureaux de change, short-term loan providers and betting shops)
- Medical services (e.g. vets, dentists, doctors, osteopaths and chiropractors)
- Professional services (e.g. solicitors, accountants, insurance agents/financial advisers, employment agencies, estate agents and letting agents)
- Post office sorting offices

4. Duration of relief awards

4.1 This relief will apply effective from 1 April 2024 for the 2024/25 financial year only.

4.2 If a ratepayer moves out of a property, the relief will be apportioned on a daily basis for the number of days the property is occupied.

4.3 Ratepayers are required to notify the Council immediately of any change in circumstances which may affect their entitlement to the relief.



West Devon Borough Council

Corporate Debt Policy

1. Introduction

- 1.1 This policy sets out the Council's approach to the billing, collection and recovery of all monies due to the Council.
- 1.2 The Corporate Debt Policy identifies where the responsibility for the collection of different debts owed to the Council lie and sets out the sets out the principles and standards, we will adhere to in relation to contact, the recovery and enforcement process, repayments and benefit and money and debt advice.
- 1.3 The policy sets out the framework for a consistent and sensitive approach to collecting debt whilst ensuring that the Council continues to maximum income collection and arrears recovery performance.
- 1.4 Sums due to the Council can be a mixture of statutory and non-statutory charges. The methods of billing and recovery for statutory charges are prescribed by the relevant legislation. The specific rules and regulations which govern the recovery and collection of debt are set out in the relevant appendix.

2. Policy objectives

- 2.1 The Council has a duty to ensure it collects income and recovers debt efficiently and effectively to ensure it fulfils its financial responsibilities to its residents and businesses and maximises its capacity to provide our services.
- 2.2 The Council is also required to collect on behalf of other organisations including Devon County Council, The Police and Crime Commissioner for Devon, Devon and Somerset Fire and Rescue and town and parish councils. Central Government also retain a proportion of Business Rates income.
- 2.3 In collecting income and recovering debt, the Council is committed to adhering to best practice. This best practice includes the recognition that some customers may be temporarily or permanently vulnerable and need protection and support.
- 2.4 Where possible, the Council will act to prevent debt arising or escalating by offering payment options and signposting customers with debt issues to debt advice agencies. We will also use discretionary funds where possible and appropriate to do so to assist with specific pressures.
- 2.5 This policy identifies where the responsibility for collection of different debts lies and sets out the principles and standards in relation to customer contact, recovery processes, repayments and benefit, debt and money advice. It also explains how the Council and its partners can offer help, advice and support in the management of debt for our residents and businesses.

3. Scope of the Policy

- 3.1 The policy covers the following debts owed to the Council:

- Council Tax
- Housing Benefit Overpayments
- Non-Domestic Rates (Business Rates)
- Sundry Debts

4. Factors common to all types of debt

- 4.1 In developing this policy, the Council has considered national best practice guidance relevant to the type of debt. The Council will ensure it acts in a consistent, proportionate and transparent manner in collecting debt.
- 4.2 Every demand for payment will be correctly addressed to the person, business or other legal entity liable for payment.
- 4.3 The Council will encourage the most cost-effective payment methods with the emphasis being on electronic means where possible.
- 4.4 Where the potential for a statutory relief, discount or exemption may apply in relation to the debt, efforts will be made to make the debtor aware of this and they will be encouraged to apply for them.
- 4.5 The Council recognises that prompt recovery action is essential for good financial management and maximising income. In support of this, the Council will:
- Have clear written recovery and enforcement procedures.
 - Have clear targets for the recovery of debt.
 - Regularly monitor the age and level of debt.
 - Regularly review irrecoverable debt for write-off.

5. Our commitment

- 5.1 When dealing with customers who owe us money, we will
- Treat all customers fairly and objectively.
 - Ensure that there is no discrimination against customers because of their race, nationality, colour, ethnic origin, religious belief, gender, marital status, sexual orientation, age or disability.
 - Encourage customers to make early contact with us about any debt related matters.
 - Use Plain English in all correspondence.
 - Assist with communication needs where appropriate, including translating and interpretation services.
 - Promote the advice and support services available.
 - Set out and explain our charges clearly.

6. What we expect from you

- 6.1 In response, our staff expect to be treated with courtesy and respect. Our staff and other customers should not be expected to deal with violent, rude or

disruptive customers. Where staff are subjected to violent, rude or aggressive behaviour

- 6.2 To contact the Council or take appropriate debt advice if they are unable to pay the amount due or to pay on time.
- 6.3 If the debtor does not think the bill or invoice is correct, they must contact the Council as soon as possible to explain why.
- 6.4 The debtor is also required to notify the Council as soon as possible about any change in circumstances such as a change in address.

7. Accessing advice and support

- 7.1 The Council will advise residents and businesses about the discounts, reliefs and reductions they may be entitled to. This information is also readily available on the Council's website.
- 7.2 We will signpost customers to where they can obtain advice on managing debt in a way appropriate to their needs. We ensure that written communications use Plain English as the standard wherever possible. We will explain complex terminology when we are required to use it by law.
- 7.3 We will assist people with language and communication needs by offering translation, interpreting and other services when required.
- 7.4 During face-to-face and telephone contact, we will direct residents and businesses to where they can obtain further specialist advice on benefits and debt matters appropriate to their needs.

8. Multiple debts

- 8.1 The Policy promotes a flexible approach to working with residents who have multiple debts to agree the steps which need to be taken to address them. In taking this approach, debt management will vary from debt to debt as different solutions will be required. Staff are not trained debt counsellors, however we are able to signpost them to the appropriate organisation for help and support.
- 8.2 The Debt Respite Scheme (Breathing Space Moratorium and Mental Health Crisis Moratorium) (England and Wales) Regulations 2020 came into force on 4 May 2021. The Council will ensure that recovery of qualifying debts is suspended for the relevant moratorium period as set out in the regulations. Further, where appropriate, the Council will engage with the debtor's debt advice provider regarding all debts owed to the Council.
- 8.3 Multiple debts are where the debtor has significant debts in more than one service area e.g. council tax and overpaid housing benefit. This can present problems in determining the priority of individual debts for the different service areas and the individuals concerned. In such cases, officers are expected to liaise and agree a coordinated approach to recovery.

9. Assessing ability to pay

- 9.1 During the recovery process, we will act in accordance with the relevant legislation and any advice on best practice which is relevant to the particular debt.
- 9.2 When recovering multiple debt, we will endeavour to break the cycle of debt. For Council Tax and Business Rates we will encourage payment for the current year and work with the customer to achieve an acceptable payment arrangement reflective of the customer's means, whilst ensuring a satisfactory level of repayment for the Council.
- 9.3 We will offer flexible options, including different payment dates and amounts where possible to assist those on irregular incomes.
- 9.4 We will endeavour to make payment arrangements with customers who are unable to settle their debt(s) in full. However, this may involve legal action being taken against the customer to secure the debt.
- 9.5 We will take a common approach in assessing a customer's overall financial position, by considering all their income and expenditure, to assess their ability to pay. Where arrangements to pay by instalment can be entered into which consider the customer's individual financial circumstances.

10. Supporting vulnerable customers

- 10.1 We will ensure that arrears are pursued in a timely manner whilst also being firm, fair and consistent. We will balance customer care with the responsibility to collection income efficiently and effectively and respond to individual circumstances wherever possible.
- 10.2 We recognise that everyone will need to be treated in a sensitive way as we know that customers do not pay their debts for a variety of reasons. As this may be because of financial hardship, we will balance individual circumstances against our duty to collect.
- 10.3 Vulnerability does not mean that a person will not be required to pay amounts they are legally obliged to pay. The cause of vulnerability may be temporary or permanent in nature and the degree of vulnerability will vary from person to person.
- 10.4 Whilst there are several characteristics which may cause an individual to be considered vulnerable, we will consider each case on an individual basis and take all relevant factors into account.
- 10.5 There is no legal definition of vulnerability, however we consider the following groups of people may be vulnerable:
 - The elderly.
 - Those who appear to be physically or mentally ill or are severely disabled.
 - The heavily pregnant.
 - Those who have experienced a recent bereavement of a close family member.

- Those who may have difficulty communicating due to profound deafness, blindness or language difficulties.
- Those who are suffering from long term sickness or serious illness or are terminally ill.

11. Debt recovery and processes

- 11.1 Invoices and bills will be issued in accordance with the relevant statutory requirements which may be through instalment plans or arrangements.
- 11.2 At each stage of the recovery process, the customers are signposted to debt advice and other support services. Where applicable, we will also make sure customers are receiving any discounts and other reductions they may be entitled to.
- 11.3 Where the debt remains unpaid or if instalment plans or arrangements are broken we will follow the appropriate statutory recovery process depending on the type of debt.
- 11.4 Depending on the type of debt, we will consider the use of all enforcement remedies including referring the debt to enforcement agents and debt collection agencies as applicable.

12. Complaints

- 12.1 The Corporate Complaints process provides the Council with opportunity to investigate and, where appropriate, provide a remedy in circumstances where the Council is alleged to have been guilty of maladministration resulting in injustice and where there is no other reasonable avenue to the complainant to appeal or seek redress.
- 12.2 It is important to note, however, that the complaints system cannot entertain objections against the merits of a decision which has been properly taken and which the complainant does not agree with.
- 12.3 If the complainant remains dissatisfied after the Council has investigated the complaint and, the complainant may refer their complaint to the Local Government and Social Care Ombudsman who is independent of the Council.

13. Council Tax

- 13.1 The Council has a statutory duty to bill and collect tax from 27,112 households in West Devon. The Council also collects Council Tax on behalf of Devon County Council, the Police and Crime Commissioner for Devon and Cornwall, Devon and Somerset Fire and Rescue and town and parish councils.

- 13.2 Council Tax is set each year by a resolution of West Devon Borough Council. The Revenues and Recovery Team assess who is liable for Council Tax and award any discounts and exemptions. The Benefits team assess applications for Council Tax Reduction.
- 13.3 The Council must follow regulations, namely the Council Tax (Administration and Enforcement Regulations) 1992 to collect Council Tax in an economic, effective and efficient manner.
- 13.4 Demand notices and adjustment notices will be issued in accordance with regulations and as soon as reasonably practicable once the liable party has been identified.
- 13.5 The Council follows the statutory instalment scheme for collection of Council Tax which requires payment in ten monthly instalments. With effect from 1 April 2013 council taxpayers have been able to request to pay by twelve monthly instalments.
- 13.6 An annual recovery timetable will be drawn up before the beginning of the financial year following consultation with the Ministry of Justice, with reminders and final notices being issued a minimum of 7 days after an instalment has fallen due. If the instalment is paid as requested, no further action will be taken. If the instalment is not paid or only partly paid a summons will be issued. Only two reminders will be issued per financial year for the late payment of instalments.
- 13.7 If the taxpayer fails to pay the full balance as detailed on the final notice, a summons to the magistrates' court is issued incurring additional costs of £77.50. This figure may be revised on an annual basis.
- 13.8 The Council will make arrangements at this stage, but the Council will still seek a liability order to secure the debt.

Council Tax Enforcement

- 13.9 Following the granting of a liability order the debtor will be given an opportunity to make a suitable payment arrangement. Should the debtor not make or adhere to a suitable payment arrangement, further recovery action will be taken.
- 13.10 We will send a request for information form asking for details of a person's earnings and benefits entitlement as well as an income and expenditure form prior to taking any other form of enforcement action.
- 13.11 If this form is completed and returned by the debtor, we will have a better understanding of the debtor's circumstances and will be able to apply for an attachment of earnings or benefit or make an appropriate payment arrangement.
- 13.12 The most appropriate method of enforcement will be dependent on the individual circumstances of the case, with the following enforcement remedies available to the Council.

Attachment of Earnings

Deductions are made from the debtor's earnings at a rate determined by regulation. The Council has no discretion to amend this.

Attachment of Benefits

Deductions from Income Support, Job Seeker's Allowance, Employment and Support Allowance, Pension Credit or Universal Credit.

Attachment of Allowances

Deductions are made from Elected Members' Allowances.

Enforcement Agents

Enforcement Agents instructed by the Council are required to comply with the Enforcement Agent Code of Practice, Service Level Agreements and the Tribunals, Courts and Enforcement Act 2007.

Charging Orders

An order may be placed on the debtor's property to secure the debt. The Council is then able to apply for an order for sale.

Bankruptcy/Liquidation

If sufficient assets are available to discharge the outstanding debt the Council can petition for bankruptcy/liquidation.

Committal

An application can be made to the magistrates' court to commence action which can ultimately result in the debtor being committed to prison.

Enforcement Agents

13.13 The Council will pass a case to enforcement agents for collection in the following circumstances:

- No contact has been received from the taxpayer.
- The taxpayer has failed to adhere to payment arrangements made.
- The taxpayer is unwilling to enter a meaningful discussion about their income and expenditure and agree a realistic and appropriate payment arrangement.
- The Council cannot issue an attachment of earnings or benefit order.

Recall of cases from Enforcement Agents

13.14 The Council will generally not recall a case once it has been sent to enforcement agents, but we may review this in the following circumstances.

- The debtor subsequently appears to be a vulnerable person.
- Where a council taxpayer has sought debt advice and is committed to repaying their council tax arrears, the Council will take this into account and may instruct the enforcement agent to accept a reduced offer of payment.

14. Non-Domestic Rates (Business Rates)

- 14.1 The Council has a statutory duty to bill and collect Business Rates from 2,447 businesses in West Devon. The Revenues and Recovery Team assess liability and award any reliefs and exemptions which are applicable.
- 14.2 The Council must follow regulations in the collection of Business Rates. The relevant regulations are the Non-Domestic Rating (Collection and Enforcement) (Local Lists) Regulations 1989.
- 14.3 The Council follows the statutory instalment scheme for the collection of Business Rates which requires payment in ten instalments, however ratepayers are able to request 12 monthly instalments.
- 14.4 An annual recovery timetable will be drawn up before the beginning of the financial year following consultation with the Ministry of Justice, with reminders and final notices being issued a minimum of 7 days after an instalment has fallen due. If the instalment is paid as requested, no further action will be taken. If the instalment is not paid or only partly paid a summons will be issued. Only two reminders will be issued per financial year for the late payment of instalments.
- 14.5 If the ratepayer fails to pay the full balance as detailed in the final notice, a summons to the magistrates' court is issued incurring court costs of £77.50. This figure is reviewed on an annual basis.
- 14.6 The Revenues and Recovery team will seek to enter arrangements at this stage, but the Council will still proceed to court for a liability order.

Enforcement

- 14.7 A liability order gives the Council additional powers to seek to recover the debt. These include:
- Passing to an enforcement agent for collection
 - Bankruptcy or winding up proceedings.
 - Obtaining a charging order
 - Committal to prison (sole traders and partnerships only)

Recall of cases from enforcement agents

- 14.8 The Council will not generally recall a case once it has been sent to enforcement agents, but will review the case if it is found that the ratepayer appears to be vulnerable.

15. Housing Benefit Overpayments

- 15.1 Housing Benefit overpayments result where residents have a change in their circumstances (such as an increase in their income) which results in the claimant being awarded more Housing Benefit than they are entitled to.
- 15.2 Accurate and prompt identification of overpayments is important to ensure that the incorrect payment ceases and the chances of successful recovery are

maximised. To ensure there is minimal loss to the public purse, firm, fair and consistent action must be taken by the Council in recovering overpaid Housing Benefit.

15.3 In most cases overpayments will arise due to one of the following:

- Late disclosure of a change in circumstances
- Errors made by the claimant when completing an application form or review form.
- Official errors made by the Council or the Department for Work and Pensions
- Fraud

15.4 Official error overpayments are only recoverable where the claimant or the person from which recovery is sought could reasonably have known that an overpayment was occurring at the time of the overpayment.

Classification of overpayments

15.5 The correct classification of overpayments is essential as, depending on the type of overpayment, the Council will receive a percentage of the overpayment from government through Housing Benefit subsidy.

15.6 A full record will be retained of the classification of the overpayment.

Decisions on Recoverability

15.7 Where an overpayment has occurred, the Council shall consider if an official error has caused or contributed to the overpayment. Where the overpayment has been caused or contributed to by official error, the Council will decide if recovery is appropriate using the guidance issued by the Department for Work and Pensions.

15.8 Before recovery action commences, consideration will be given as to who the appropriate person is to recover the overpayment from. This may be:

- The claimant.
- The person to whom the payment of benefit was made.
- The person who misrepresented or failed to disclose a material fact.
- The partner of the claimant if they were living with the claimant at the time of the overpayment and at the time the decision to recover was made.

Recovery of Overpayments

15.9 In all cases where recovery of an overpayment is sought, the Council will have regard to its statutory duty to protect the public purse.

13.5 Only after all remedies for recovering the overpayment have been exhausted, shall the debt be recommended for write-off.

16. Sundry Debts

- 16.1 The Section 151 Officer has overall responsibility for the collection and recovery of sundry debt which covers the collection of amounts due to West Devon Borough Council.
- 16.2 All sundry debtor invoices will be raised using the corporate sundry debtor's system by the Finance Team, following the completion of a Sundry Debt form. Prompt invoicing is vital in ensuring effective debt collection.
- 16.3 Full details of the charge will be clearly stated on the invoice including the date the goods or services were provided. The Council accepts a range of payment methods including direct debit, by telephone, online and by BACS.
- 16.4 The Council's payment terms are shown on the invoice. Payment terms will only be considered where the customer is not able to settle the debt in full in one payment. On receiving an invoice, a customer can request to make an arrangement to clear the amount outstanding in instalments.
- 16.5 If an arrangement to pay is entered into, this will be monitored by the Finance Team.
- 16.6 Reminder letters may be issued at intervals relevant to the type of debt and the Finance Team will endeavour to contact the debtor when chasing the debt.
- 16.7 A pre-legal letter (letter before action) may be issued.
- 16.8 An arrears analysis report is run quarterly for all outstanding aged debts. This is sent to the relevant Head of Service for a decision on the next recovery action they would like to take.
- 16.9 The Finance Team will attempt to trace any debtors who have absconded or liaise with the Revenues and Benefit team where it is necessary to use external agents to do so.

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West Devon Borough Council

Council Tax, Non-Domestic Rate (Business Rates) and Housing Benefit Overpayments and Sundry Debt Write-Off Policy

1. Introduction

- 1.1 This document sets out the procedure to be followed when writing-off irrecoverable amounts of Council Tax, Non-Domestic Rate (Business Rates) and Housing Benefit overpayments and Sundry Debt.
- 1.2 Under the Accounts and Audit Regulations 2003 (as amended by subsequent regulations) bad debts should not be written-off without approval of the responsible financial officer or such member of staff who is nominated by them for this purpose. There is no equivalent requirement for credit balances, although it is prudent to write them off on a regular basis.
- 1.3 Both internal and external audit need to be satisfied any write-off policy is both robust and transparent. At the same time, there needs to be a mechanism for reporting write-offs through Members. A debt should only ever be written-off in accordance with a policy agreed by Members.
- 1.4 Officers are required to take robust action to collect all debts, however in some cases this might not be possible and debts do become irrecoverable. Where a debt is deemed to be non-recoverable (or a credit non-refundable) it needs to be identified at the earliest possible opportunity and properly dealt with in accordance with the financial regulations.

1.5 Writing-off irrecoverable items represents good financial management. It allows officers to concentrate on recoverable debts and ensures that the level of debtors/arrears within the accounts is accurate and represents a true and fair view of the Council's financial position.

1.6 Any debt written-off can be reinstated at a later date if there is a fresh opportunity to recover all or part of the debt.

2. Policy objectives

The Council's debt write-off policy has the following objectives:

- To promote a fair and consistent approach to the writing-off of debt across the Council.
- To enable debts to be written-off in a timely and efficient manner.
- To provide a framework that sets the criteria for writing-off debt.
- To ensure that action is appropriate to the level of debt and maximises the use of resources.

3. Reasons for write-off

3.1 Every effort will be made to recover a debt owed to the Council before it is considered for write-off. This includes using tracing agents, visiting the property, contacting occupiers and owners and cross-referencing against internal databases. Only where all recovery action has failed is a debt regarded as irrecoverable.

3.2 This policy covers West Devon Borough Council's policy and approach in the following areas:

- Remission by the magistrates' court
- Imprisonment
- Insolvency
- Unenforceable debts
- Other write-off situations
- Credit balances
- Housing benefit overpayments
- Sundry debt

4. Remission by the magistrates' court

4.1 If the magistrates' court finds that the failure to pay council tax or Non-Domestic Rates is not due to either wilful refusal or culpable neglect, the debt can be remitted. Remission may in full or in part and the debt becomes irrecoverable. Even though a debt or debts may be remitted, liability for future years will continue. Following the decision of the magistrates the write-off will be processed on the debtors' account and we will store a copy of the Court Remission Sheet in our document management system.

5. Imprisonment

- 5.1 If a debtor is committed to prison for non-payment of council tax or non-domestic rates the debt has to be written-off once the term of imprisonment has been served. No further recovery action can be taken with regard to the relevant amount as the enforcement process has come to an end. Liability for future years will continue.

6. Bankruptcy

- 6.1 Upon notification of a bankruptcy, a proof of debt will be completed for the outstanding debt that is due at the date of the bankruptcy order and submitted as a claim to the trustee in bankruptcy. In the event of payment being received in full or in part from the bankrupt's estate, this will be credited to the relevant account.

7. Individual Voluntary Arrangement

- 7.1 A voluntary arrangement is an alternative available to a debtor where they wish to avoid a bankruptcy order. The debtor makes an offer to all creditors, which is less than the outstanding debt, and agrees that it will be paid over a period of time in full and final settlement. If 75% (in value) of creditors agree to the offer, an insolvency practitioner will be appointed to administer the voluntary arrangement. If payment is received in full or part, the money will be credited to the account.

8. Liquidation

- 8.1 Liquidation may either be compulsory or voluntary. Upon notification that a company has gone into liquidation, a proof of debt will be submitted for the outstanding debt due at the date of the winding up order and submitted as a claim to the liquidator. In event of payment being received in full or in part, this will be credited to the account.

9. Company has ceased trading

- 9.1 Limited companies may cease to trade on the grounds of having no assets to pay outstanding and/or on-going debts. There is no formal winding-up process which have both a cost and legal implications. The Council could take steps to put the company into compulsory liquidation which is costly and is unlikely to secure payment.
- 9.2 In these circumstances, and if an enforcement agent has failed to recover the monies due or identify assets on which to levy distress, it is recommended that the debt is written-off.
- 9.3 In the event of a successful bankruptcy petition or successful winding up proceedings for limited companies, no further recovery action can be taken

once the court has made the order. This only applies to debts outstanding at the time and future action can be taken where there is an ongoing liability.

9.4 In the majority of bankruptcy and insolvency cases where the Council has not instigated the action there is a small or no dividend payable to the Council. On receipt of the statement of affairs from the trustee in bankruptcy or the liquidator it is usually clear how much money is available to creditors. After taking into account any payments received or due, the balance is written-off as irrecoverable.

9.6 Debts will also be written-off where limited companies have been dissolved and no assets have been identified.

10. Debt Relief Order

10.1 Debt Relief Orders are a way a person can deal with their debts if they can't afford to pay them. It means the debtor doesn't have to pay certain kinds of debt for a specified period (usually 12 months). At the end of the DRO period, the debts included in it will be written-off ('discharged').

11. Statute barred debts

Certain debts will become uncollectable if a summons is not issued within 6 years of a demand notice being issued.

12. Death of a debtor

12.1 In the majority of cases the debt remains collectable either from a joint liable person or the debtor's estate. In certain circumstances it is not possible to collect the debt and it will be written-off. This is usually where there are no assets or where the debtor dies intestate.

12.2 If there are assets and the executors fail to make payment to clear the debt, we can take separate action to recover the debt through civil enforcement proceedings.

13. Debtors who cannot be traced

13.1 There are occasions when debtors abscond from a property leaving debts. In all cases every effort is made to locate the debtor. This includes:

- A check of records using internal and external tracing tools;
- A visit to the property if it is cost effective to do so; and
- Passing the debt to an enforcement agency to see if they are able to trace the debtor.

13.2 If the debtor cannot be traced there is no alternative but to write-off the debt, however debts will be reviewed every 6 to 12 months in case any further information has come to light which means they can be collected.

14. Debts which are uneconomical to collect

14.1 Enforcement action is taken in respect of debts of more than £77.50. Where debtors are no longer in the local area, it is considered uneconomic to pursue these small balances and the debts are written off on an annual basis. If the debtor returns to the district, the write off will be reversed and recovery action will continue.

15. Court, enforcement agent and other costs

15.1 When the debt is being written-off for one of the reasons above, legal fees and costs incurred in recovering the debt need to be written off separately as their accounting treatment is different.

15.2 There are a small number of cases which may be taken to court and the debt passed to enforcement agents before it transpires that the liability is incorrect, but the Council was unaware at the time the action was taken. In correcting the liability, it may be necessary to cancel costs and other fees depending on the individual circumstances of the case.

16. Miscellaneous

16.1 The Council has some debts which it is unable to pursue for other reasons, such as it not being in the public interest or due to local authority error. These will be exceptional in nature and approved by the Director of Strategic Finance with full details of the reason for the decision held on file.

17. Credit balances

17.1 There will be instances where an account is closed and a credit balance remains on the account. If it has not been possible to refund the credit (for example because a forwarding address is not known) the credit will be written-off after a period of 9 months has elapsed.

18. Housing benefit overpayments

18.1 In certain circumstances it may not be practical or appropriate to recover an overpayment. In those cases, consideration will be given to the non-recovery or write-off of the debt.

18.2 Non-recoverable write-offs – local authority error

As part of the claim assessment process, housing benefit overpayments caused by local authority error are identified.

The decision as to whether they are recoverable or not is made using guidance contained in the housing benefit regulations. This considers whether the claimant could not, at the time of the payment or notification of payment reasonably be expected to realise they had been overpaid. If they could not, the overpayment is not legally recoverable and will be classed as non-recoverable.

18.3 Non-recoverable write-offs – DWP error

Overpayments will be classified as DWP error as part of the claim assessment process if the DWP have confirmed that they are responsible for the overpayment. In these circumstances the debt will be written-off.

19. Sundry debts

- 19.1 Sundry debt includes outstanding income for various charges such as Estates Management, Licensing, Trade Waste and Housing. The Council will make every effort to recover these debts through the means accessible to it. However, the Council will recognise when it is not likely to receive the income and/or where it is not cost-effective to pursue the debt.
- 19.2 In considering if a debt should be written off, Officers will review each debt on a case-by-case basis. This will include the value of the debt, the age of the debt and the status of the debtor (e.g. if the company has gone into liquidation).
- 19.3 All debt write-offs will be charged back to the budget that initially received the income, even if it was received during a prior year.
- 19.4 In the event a debtor is traced and payment of the debt becomes a realistic possibility, the debt will be written-on and pursued.

20. Bad debt provision

- 20.1 The Director of Strategic Finance (Section 151 Officer) must ensure there is adequate provision for bad debts, in accordance with the relevant CIPFA Code of Practice.
- 20.2 Debts should be reviewed on a timely basis with effective recovery methods applied. Where debts are irrecoverable, suitable evidence should be provided and retained to justify the write-off of the debt.

21. Processing a write off request

- 21.1 This is covered by separate staff procedure notes and by using appropriate computer system transaction codes so that the reason for write off can be identified and monitored.

22. Management checks

- 22.1 Management controls are in place to ensure that debt is only written off in accordance with the Council's Financial Procedure Rules.
- 22.2 Debts up to the value of £5,000 can be written off by the Section 151 officer or Deputy Section 151 officer, under delegated authority. Permission needs to be obtained from the Hub Committee to write-off individual debts over £5,000. Debts referred to Hub Committee for approval to write-off will be submitted with a full supporting summary detailing the efforts taken to recover the debt.

23. Policy Review

- 23.1 The implementation and effectiveness of this policy and its supporting procedures will be checked and monitored by the Head of Revenues and Benefits and associated management team.
- 23.2 The implementation and effectiveness of this policy and its supporting procedures relating to Sundry Debt will be checked and monitored by the Head of Finance.
- 23.3 The policy will be reviewed on an annual basis to ensure it remains valid, effective and relevant.

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Report to: **Hub Committee**

Date: **30 January 2024**

Title: **Month 7 Revenue Budget Monitoring
2023/2024**

Portfolio Area: **Performance & Resources – Cllr C Edmonds**

Wards Affected: **All**

Urgent Decision: **N** Approval and clearance obtained: **Y**

Date next steps can be taken: Any recommendation(s) will be presented to Full Council at its meeting on 20 February 2024

Author: **Pauline Henstock** Role: **Head of Finance Practice and Deputy S.151 Officer**

Lisa Buckle **Corporate Director for Strategic Finance (S151 Officer)**

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RECOMMENDATION:

That the Hub Committee:

- 1. RESOLVES to NOTE the forecast income and expenditure variations for the 2023/24 financial year and the overall projected surplus of £54,000 (0.6% of the total Budget £8.588 million). This is very close to a break-even position; and**
- 2. RECOMMEND to Council to update the current virement limits within the Constitution, as shown in paragraph 10 of the report.**

1. Executive summary

- 1.1 This report enables Members to monitor income and expenditure variations against the approved budget for 2023/24 and provides a forecast for the year end position.
- 1.2 The gross service expenditure budget for 2023/24 was set at £25.8 million (£8.588 million net). This report identifies a projected surplus of £54,000 which is 0.6% of the overall Budget set for 2023/24 of

£8.588 million. This is a slightly improved position from the month 4 monitoring report when a small deficit of £37,000 was forecast.

2. Background

2.1 Regional and national context

2.2 The Covid-19 pandemic drew into sharper focus the financial challenges faced by Local Authorities which have existed for some years. There remains outstanding a number of Local Authority Government reviews into Local Authority funding to reset the way local Councils are funded and the mechanism for the distribution of funding.

2.3 Financial Monitoring arrangements

2.4 The Council's financial procedure rules require that reports must be made on budget monitoring on a regular basis to the Hub Committee as part of the Council's arrangements for budget management.

3. Outcomes/outputs

3.1 **Budget overview** - Table 1 below provides an analysis of the projected variances against budget.

TABLE 1: 2023/24 BUDGET FORECAST

	2023/24 Budget expenditure /(income)	Budget variations			Note
		£000	%	£000	
				£000	
APPROVED BUDGET				8,588	
Reductions in expenditure/additional income					
Customer Service & Delivery					
Salary Savings	5,400	5%	(250)		A
Garden Waste Income	(305)	11%	(35)		B
Place and Enterprise					
Car Parking Income (including payment to a third party)	(997)	9%	(85)		C
Other Comprehensive Income & Expenditure					
Investment Income	(400)	175%	(700)		D
Sub total of variations				(1,070)	
Increases in expenditure/ reductions in income					
Customer Service & Delivery					

Waste Contract, inflation and increased contract costs	2,665	4%	106		E
Waste Contract, increase in number of households and collections	2,665	4%	115		F
Pay Award	150	87%	130		G
ICT Software & Support Contracts	488	25%	120		H
Place and Enterprise					
Employment Estates Income	(427)	18%	75		I
Homelessness – temporary accommodation costs	298	84%	250		J
Utility costs	190	21%	40		K
Strategy and Governance					
Planning Income	(473)	32%	150		L
Insurance	83	36%	30		M
Sub total of variations				1,016	
PROJECTED OUTTURN				8,534	
PROJECTED SURPLUS FOR 2023/24				(54)	

There is projected to be an overall surplus of £54,000 when compared against the Revenue Budget set for 2023/24.

Notes

- A. **Salary Savings** – a saving of £250,000 (5% of the salaries budget) is currently projected for 2023/24 mainly resulting from vacancies.
- B. **Garden Waste income** – income is currently anticipated to exceed the 2023/24 target by £35,000 which equates to 11% of the annual income budget of £305,000.
- C. **Car Parking income** – additional income of £40,000 has been received as at 31 October 2023. Car parking income levels have reduced slightly since the last budget monitoring report when additional income of £80,000 had been received at the end of July. For the purposes of the 2023/24 projection it has been assumed that income will be on budget for the remainder of the year. In addition a saving of £45,000 is anticipated on a car parking third party payment based on current income levels, generating an overall saving in respect of car parking income of £85,000 for 2023/24.
- D. **Investment income** – investment income is currently anticipated to be up by 175%, which equates to additional income of £700,000 in 2023/24. The latest forecast is projecting investment income of £1.1million in 2023/24. This follows the increases in interest rates as the Bank of England (base rate is currently 5.25%) looks to tackle surging inflation.

- E. **Waste Recycling and Cleansing Contract - inflation and increased contract costs** – costs are currently anticipated to exceed the contract budget by £106,000 in 2023/24. This is mainly due to additional contract inflation and an increase in the base contract price. Contract inflation is based on the latest published indices for fuel inflation, wage inflation and consumer price index (CPI).
- F. **Waste Recycling and Cleansing Contract – increase in number of households and collections** – it is anticipated that there will be an uplift in the waste collection, recycling and cleansing contract costs of £115,000 in 2023/24 to reflect the increase in the number of properties across the Borough. The 2023/24 budget was increased by £50,000 and a further £100,000 has been built into the 2024/25 budget.
- G. **Pay Award** – the impact of the proposed local government employer’s pay offer for 2023/24 of £1,925 per scale point or a 3.88% increase for Scale Point 44 upwards, is significantly higher than the current budget provision of £150,000 (3%). The proposed pay award will currently result in additional salary costs of approx. £130,000.
- H. **ICT Software & Support Contracts** – There are additional costs in respect of ICT support contracts mainly due to,
- Price increases which equal or exceed the peak in the inflation rate earlier in the year
 - Additional costs for new software licenses, laptops and accessories due to an increase in the number of officers and new intake of Members in 2023/24.
- I. **Employment Estates income** – an additional income target of £50,000 built into the 2023/24 budget is unlikely to be achieved in 2023/24. There is currently a shortfall in income of £45,000 as at 31 October 2023, and this is projected to increase to £75,000 for the full financial year.
- J. **Homelessness** – significant increases are anticipated in the expenditure on temporary accommodation in 2023/24 over and above what is claimable back through DWP subsidy. This is reflective of the national picture and due to a number of factors outside the Council’s control including:
- The housing crisis and lack of accommodation
 - High numbers of second homes and holiday lets
 - Affordability of private rented accommodation and challenges facing private landlords and increases in their costs.
 - More single people presenting with complex and challenging needs, requiring bespoke housing solutions.
 - The increase in costs of pay nightly accommodation due to cost-of-living challenges and increases in energy costs.

The Council is actively seeking ways to reduce reliance on pay nightly accommodation by investing in its own stock of temporary accommodation through opportunities such as LAHF, LAHF 2 and property acquisition whilst ensuring any stay is kept to a minimum.

In the Autumn Statement on 22 November 2023 the Chancellor of the Exchequer announced that the local housing allowance (LHA) rate will be increased for the first time in three years, and will cover the cheapest third (30th percentile) of local market rents from April 2024. The LHA rate is determined based on a survey of private market rents within a broad rental market area. This higher LHA rate will increase the amount of temporary accommodation expenditure that can be claimed back through DWP subsidy which will help to address the overall position for 2024/25 onwards.

- K. **Utility costs** – due to the rise in energy costs and inflationary pressures, additional costs of £40,000 are projected in 2023/24, mainly due to the increase in utility costs for the Council's employment estates.
- L. **Planning income** – a planning income shortfall of £150,000 is currently anticipated for 2023/24. This projection includes the recent legislative amendment to increase planning application fees with effect from 6 December 2023. Application fees have been increased by 35% for major schemes and 25% for all other applications. This is expected to generate around £60,000 to £70,000 of additional planning income in a full year. The legislative amendment also introduced an annual rise in application fees linked to inflation (and capped at 10%) every April from 2025 onwards.
- M. **Insurance** – insurance costs are currently anticipated to be around £30,000 higher than budgeted in 2023/24 due to inflationary pressures.

3. Other items to be considered in the 2023/24 Budget

- 3.1 This monitoring report includes an update on the position regarding the savings and additional income that were identified in the 2023/24 budget setting process, set out in Appendix B.

4. Review of Earmarked Reserves

- 4.1 The Council annually undertakes a review of the level of its Earmarked Reserves as part of the budget setting process. In addition a review of the Capital Programme and Earmarked Reserves was presented to the Hub Committee on 21 November 2023. The review of earmarked reserves has identified up to £871,000 of revenue reserves which is potentially available to support the delivery of the new emerging West Devon Vision and Strategy 2024-2028.
- 4.2 Earmarked Reserves are **£8.902m at 31 March 2023** as shown in Appendix A.

4.3 The Council's level of Unearmarked Reserves currently stands at £1.569 million. The surplus of £54,000 would go into Unearmarked Reserves at the year end, in accordance with normal accounting practice (the Accounting Code of Practice, which sets out that surpluses or deficits at the year end are added to Unearmarked Reserves). This gives a predicted year end balance at 31 March 2024 of £1.623 million for Unearmarked Reserves.

5. Prudential Indicators

5.1 The prudential code indicators were approved in the Capital, Investment and Treasury Management Strategy report to the Council on 4 April 2023. The indicators are monitored during the year through the normal revenue and capital monitoring processes. All Treasury Management limits have been adhered to.

6. Income

6.1 Income monitoring is an integral part of financial management. Below shows the current income (surpluses)/shortfalls already experienced for April 2023 to October 2023. The table also shows the latest 2023/24 projections for the major streams of income.

Service	Deficit/ (Surplus) April – October 2023 £'000	Projected Income 2023/24 £'000	Income Budget 2023/24 £'000	Deficit/ (Surplus) £'000	Deficit/ (Surplus) %
Car Parking	(40)	(1,037)	(997)	(40)	(4%)
Planning Applications & Advice	105	(323)	(473)	150	32%
Employment Estates	45	(352)	(427)	75	18%
Garden Waste	(35)	(340)	(305)	(35)	(11%)
Trade Waste	8	(45)	(45)	-	-
Business Rates Pooling Gain	-	(200)	(200)	-	-
Licensing	(3)	(114)	(114)	-	-
Interest & Investment Income	(262)	(1,100)	(400)	(700)	(175%)
Local Land Charges	1	(95)	(95)	-	-
Recycling Income	(6)	(515)	(515)	-	-
TOTAL	(187)	(4,121)	(3,571)	(550)	(15%)

7. Management Actions

7.1 The table below sets out the relevant management actions for the revenue expenditure and income variations shown above. It is best practice for the Council to state whether there are any corrective actions that need to be taken for the variances identified in 2023/24.

	Budget variations overspend/ (underspend) £000	Management Action
Reductions in expenditure/additional income		
Salary Savings	(250)	The projected underspend will be kept under review during the year.
Garden Waste Income	(35)	An additional income target of £35,000 has been built into the 2024/25 budget.
Car Parking Income (including payment to a third party)	(85)	There was a report to the Hub Committee on 21 st November 2023 regarding car parking income.
Investment Income	(700)	An additional income target of £400,000 has been built into the 2024/25 budget.
Increases in expenditure/reductions in income		
Waste Contract, inflation and increased contract costs	106	Contract inflation of £245,000 has been built into the 2024/25 budget.
Waste Contract, increase in number of households and collection	115	A budget pressure of £100,000 has been built into the 2024/25 budget.
Pay Award	130	This budget pressure for £147,000 has been built into the 2024/25 budget.
ICT Software & Support Contracts	120	A budget pressure of £110,000 has been built into the 2024/25 budget.
Employment Estates Income	75	Employment estates income levels will be kept under review in 2023/24.
Homelessness – temporary accommodation costs	250	Temporary accommodation costs will be kept under close review during 2023/24. The Council is actively seeking ways to reduce reliance on pay nightly accommodation by investing in its own stock of temporary accommodation through opportunities such as LAHF, LAHF 2 and property acquisition.

	Budget variations overspend/ (underspend) £000	Management Action
		In the Autumn Statement the Chancellor announced that the local housing allowance (LHA) rate will be increased for the first time in three years, and will cover the cheapest third (30th percentile) of local market rents from April 2024. This higher LHA rate will help to reduce temporary accommodation costs for 2024/25 onwards.
Utility costs	40	Inflation on goods and services of £150,000 has been built into the 2024/25 budget.
Planning Income	150	This will be kept under close review in 2023/24. This projection includes the recent legislative amendment to increase planning application fees with effect from 6 December 2023. Application fees have been increased by 35% for major schemes and 25% for all other applications. This is expected to generate around £60,000 to £70,000 of additional planning income in a full year. The legislative amendment also introduced an annual rise in application fees linked to inflation (and capped at 10%) every April from 2025 onwards.
Insurance	30	A budget pressure of £30,000 has been built into the 2024/25 budget.

8. Options available and consideration of risk

- 8.1 At this stage in the year it is important to note that these forecasts can change over the course of the year to 31 March 2024. For example, managers can seek out opportunities to reduce any budget shortfalls, whilst considering the risk of any adverse impact on the customer experience.

9. Proposed Way Forward

9.1 Revenue budget monitoring will continue on a regular basis and further reports will be brought to the Hub Committee each quarter.

10. Virement Limits and Approvals

10.1 Budget Virement is the process of transferring budgeted funds from one budget code (cost centre) to another, to better reflect where budget responsibility should be held, virements always net to zero. Other examples of virements will be where the budget responsibility for a service moves from one Director to another Director within the Senior Leadership Team.

10.2 Examples of where virements are required include re-allocation of budgets following a staffing restructure when a new cost centre is created, and allocation of the inflation provision. Virements are mainly made for presentational purposes and always net to zero. It's important that the detail of budgets are kept up to date and reflect current service delivery to allow for accurate budget monitoring.

10.3 It is proposed that all virements will be subject to the following approval limits:

Amount	Minimum approval required
Up to and including £0.25m	Director (<i>following consultation with the Budget Holder</i>), Section 151 Officer and Head of Finance
Up to and including £0.5m	Director (<i>following consultation with the Budget Holder</i>), Section 151 Officer and relevant Hub Committee Member(s)
Greater than £0.5m	Hub Committee (<i>following consultation with the relevant Hub Committee Member(s), Director and Section 151 Officer</i>)
Major Change in Policy and is worth £0.5m or more but less than £1m	Hub Committee (<i>following consultation with the relevant Hub Committee Member(s), Director and Section 151 Officer</i>). Section 151 Officer must consider if virements involve a major change in policy.
Any virement that involves a major change in policy and is over £1m	Council (Section 151 Officer must consider if virements involve a major change in policy)

Exceptions to the virement rules

- i. If the **Section 151 Officer** decides a decision by Council or Hub Committee is required.
- ii. Member approval is not required where a budget will continue to be used for the approved purpose but is being moved, for example, to reflect a change in budget holder responsibilities, or the re-allocation of the price inflation budget provision. Such transfers will however require the approval of the Head of Finance.
- iii. Ringfenced grant funding must be used for the specified purpose. Virements to update income and expenditure budgets to match the grant notification provided by the relevant body can be actioned without further approval.
- iv. Transfers between revenue and capital will be classed as a change in policy and will require Council approval regardless of the value.

11. Implications

Implications	Relevant to proposals Y/N	Details and proposed measures to address
Legal/Governance	Y	The Council is required to make arrangements for the proper administration of its financial affairs. As part of those arrangements, the Council is under a duty to monitor its budgets throughout the financial year and to take appropriate action to deal with any deterioration in the financial position revealed by the regular monitoring.
Financial implications to include reference to value for money	Y	<p><i>The report identifies a projected surplus of £54,000 which is 0.6% of the overall budget set for 2023/24 of £8.588 million. This is very close to a break-even position.</i></p> <p><i>The report recommends to Council to update the current virement limits as shown in Section 10 of the report.</i></p> <p>On 5 December 2023 the Audit and Governance Committee considered an interim Auditor's Annual Report from the Council's external auditors, Grant Thornton. This gave commentary on the Council's arrangements to secure economy, efficiency and effectiveness in its use of resources.</p>

		The report stated that 'The Council has demonstrated a good understanding of its role in securing economy, efficiency and effectiveness in its use of resources. Our work has not identified any significant weaknesses in arrangements.'
Risk	Y	1) Budget variances – continual monthly budget monitoring at all levels within the Council ensures early identification of variances. Reporting to the Hub Committee provides an opportunity for Members to identify and instigate remedial action where appropriate. 2) Resource Planning – the Hub Committee takes into account any significant issues when developing the Council's Medium Term Financial Strategy. These are identified in the Management Actions section of the report (Section 7).
Supporting Corporate Strategy		The budget monitoring process supports all of the Thematic Delivery Plans within the Council's strategic vision, 'A Plan for West Devon'.
Consultation and Engagement Strategy		External consultation and engagement has not been undertaken with regard to this report.
Climate Change – Carbon / Biodiversity Impact		A report was presented to Council on 8 th December 2020 'Climate Change and Biodiversity Strategy and Action Plan update'. In March 2021, Council approved to set up an Earmarked Reserve for £200,000 for the Recovery Plan and Corporate Strategy. Further detail is set out in the Council's 'A Plan for West Devon' strategic vision.
<i>Comprehensive Impact Assessment Implications</i>		
Equality and Diversity		None directly arising from this report.
Safeguarding		None directly arising from this report.
Community Safety, Crime and Disorder		None directly arising from this report.
Health, Safety and Wellbeing		None directly arising from this report.
Other implications		None directly arising from this report.

Supporting Information

Appendix A – Schedule of Reserves (Earmarked Reserves and Unearmarked Reserves)

Appendix B – Savings/Additional income schedule

Background Papers:

None

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ANALYSIS OF RESERVES (EARMARKED RESERVES AND UNEARMARKED RESERVES)

APPENDIX A

Extract of the Hub Committee report 21.11.23 on the review of Earmarked Reserves

EARMARKED RESERVES	Closing balance 31.03.2023	Future Commitments	Funding needed to hold a prudent provision	Unallocated spend	Annual reserve contribution	Comments
Specific Reserves - General Fund	£000s	£000s	£000s	£000s	£000s	
Earmarked Reserves which are essential for operational core service delivery (for example programmed renewal and replacement of plant and equipment)						
Business Rates Retention Reserve (remainder of the reserve needed to manage business rates volatility each year)	(971)	150	821	0		This relates to a timing issue on the accounting adjustments required for the localisation of business rates. This reserve deals with any volatility in Business Rate income. In 2023/24 £150,000 is budgeted to be used of this reserve to smooth the volatility in business rates income used to finance the revenue budget.
Car Park Maintenance Reserve	(534)	38	496	0		The majority of this reserve is uncommitted. Future commitments are for the provision of electric car charging points and resurfacing of car parks.
Elections	(61)	61	0	0	(20)	This reserve is held to fund the cost of Borough Council elections, an annual contribution of £20,000 is made into this reserve.
Environmental Health Initiatives	(104)	104	0	0		The additions to this reserve applied in 2022/23 relate to savings on Environmental Health salaries, and are committed to fund a post for the next two years (2023/24 & 2024/25).
Grounds Maintenance	(99)	99	0	0		A reserve set up in 2019/20 to hold the Grounds Maintenance in year surpluses to be reinvested back into the service.
Homelessness Prevention Reserve	(184)	141	43	0		This reserve has been created following underspends on Homelessness Prevention Costs. The future commitments of £74k are £50k towards the part funding of capital works at Springhill, and the future funding of service salary costs £31k.
ICT Development Reserve	(45)	45	0	0	(50)	An annual contribution of £50k is made into this reserve. Commitments in 23/24 are for the new website and planning system.
Leisure Services	(133)	86	47	0		A reserve set up in 2016/17 to support non recurring costs of the leisure service. The future commitments of £86k are contributions towards the cost of capital works at Parklands Leisure Centre and Tavistock Viaduct Walk.
Maintenance Funds	(436)	95	341	0		A reserve set up in 2016/17 to support potential non recurring maintenance costs of property assets held by the authority. The future commitments of £95k are contributions towards the cost of capital works at Heron Rd, Exeter and Hayedown Depot.
Maintenance, Management and Risk Management Reserve (MMRM) - 10% of annual income from investment properties is set aside into this reserve	(418)	0	418	0		This reserve was set up in 2018/19 to manage the ongoing maintenance costs of the Council's Investment Property. The contributions to this reserve equate to 10% of the rental income on an annual basis. This is being reviewed for the future.
New Homes Bonus (Revenue Base Budget funding)	(150)	150	0	0		Funding set aside to finance the 2023/24 revenue budget.
New Homes Bonus	(363)	363	0	0		Commitments for capital programme funding from allocations approved in previous years, such as Springhill, Tavistock and other capital projects.
Planning Policy & Major Developments	(123)	118	5	0	(25)	This reserve is for all planning matters and is also required to put funding aside to meet any future appeal costs. Commitments mainly relate to the Planning restructure. A contribution of £25,000 is made into the reserve annually.
Joint Local Plan	(25)	25	0	0	(25)	This reserve is to fund the salary costs of the JLP team. An annual contribution of £25k is made into this reserve.
Section 106 Monitoring and technical support	(3)	3	0	0		This reserve funds the costs of staff to oversee the administration of S106 deposits and how they are spent.
Organisational Development Strategy	(20)	20	0	0		This reserve was created from external work carried out in other Councils e.g. HR work with Councils also embarking on a Transformation Programme. This funding is now earmarked for implementing the Council's Organisational Development Strategy.
Vehicle Replacement	(376)	376	0	0	(50)	Earmarked for the Vehicle Fleet Replacement Programme. An annual contribution of £50k is made to this reserve.
Waste & Cleansing Options Review	(678)	450	228	0		This reserve was established in 2016/17 to support and promote changes in service provision and capital investment. Amounts have been committed to fund capital expenditure for an additional waste fleet vehicle and for the upgrade of Hayedown Depot.
Tree Maintenance	(14)	14	0	0		This reserve was set up in 2021/22 to hold underspends in the revenue budget and to support longer term ongoing costs of the tree maintenance programme.
Affordable Housing Reserve	(159)	98	0	(61)		This is a new reserve set up in 2022/23 to support the delivery of affordable housing initiatives. £98k has been committed to support the continuation of the tenants incentive scheme and capital works to modernise 3 Springhill, the balance of the reserve is currently uncommitted.
Tamar Trails	(55)	55	0	0		This is a new reserve set up in 2022/23 to support the delivery of capital improvement works to the trail. The reserve is fully committed as detailed in capital monitoring report to Hub Committee 07/03/23.
Sub - Total	(4,951)	2,491	2,399	(61)	(170)	
Earmarked Reserves which are being used to fund new corporate initiatives and corporate priorities						
Broadband Community Support Reserve	(50)	50	0	0		The set up of this reserve was approved by Hub on 01/12/20, min ref HC40, funded by a £50k contribution from the Business Rates Retention Reserve to support the council's economic and health & wellbeing objectives.
Business Rates Retention Reserve (Corporate Strategy)	(104)	104	0	0		£104k has been committed to fund initiatives included in the Corporate Strategy, including supporting enhancements to Tavistock & other towns.
Innovation Fund (Invest to Earn)	(376)	287	0	(89)		This reserve was set up in 2016/17, current commitments are for a contribution towards the upgrade of Hayedown Depot and Corporate Strategy projects £80k.
Recovery Plan & Corporate Strategy Reserve	(159)	159	0	0		This was a reserve established at the end of 2020/21 to support the costs of the Recovery Plan & Corporate Strategy (Hub 16/03/21), it is fully committed to fund the cost of various initiatives as detailed in the Corporate Strategy.
Strategic Change (T18)	(67)	33	0	(34)		£33k has been committed to finance the 2023/24 revenue base budget.
Sub - Total	(756)	633	0	(123)	0	
Earmarked Reserves which is Government Grant funding being used for the purposes of the grant determination letter						
Neighbourhood Planning	(45)	45	0	0		This is Neighbourhood Planning Grant funding received in previous years yet to be applied to finance relevant expenditure.
Revenue Grants	(1,303)	1,303	0	0		This reserve comprises of government grants received for specific initiatives or new burdens, and are held in the reserve for accounting purposes.
Ukraine Humanitarian Crisis (Government Grant funding)	(669)	669	0	0		This reserve was set up in 2022/23 to hold funding received to support the Ukraine Humanitarian Crisis which will be spent in 2023/24. An amount of £496,583 will be spent in 2023/24 on the purchase of five properties through the Local Authority Housing Fund (LAHF) as approved by Hub Committee (07/03/23).
Sub - Total	(2,017)	2,017	0	0	0	
Notional Earmarked Reserves which are held for a technical accounting purpose for the Collection Fund (this is not funding available to the Council to spend)						
S.31 Compensation Grant (Business Rates Section 31 Grants for business rates relief)	(307)	307	0	0		This is a new reserve set up to hold the business rates S31 grants received in 2020/21 and 2021/22 to offset the business rate reliefs given to businesses during lockdown. Under current Collection Fund accounting rules, the S31 grants received will not be discharged against the Collection Fund deficit until the following year in 2023/24. This reserve is not money which is available for the Council to spend and it is important that this is not misinterpreted in the Accounts, as this is a national issue.
Sub - Total	(307)	307	0	0	0	
Uncommitted Earmarked Reserves and available for Members to decide how to allocate these funds for future priorities (This potentially releases £871,000 for the West Devon Vision and Strategy 2024-2028 - see Section 3.30 of the covering report)						
COVID-19	(254)	0	0	(254)		This was a reserve set up at the end of 20/21 used to hold grant funding provided by central government to finance costs & income losses incurred as a direct result of dealing with the COVID-19 pandemic. The current balance in this reserve is uncommitted for these purposes.

Financial Stability	(617)	0	0	(617)		This was a new reserve set up in 2018/19, which is to be available for any future financial pressures arising from local government funding reforms and any other budget pressures. It is currently uncommitted funding.
Sub - Total	(871)	0	0	(871)	0	
TOTAL EARMARKED RESERVES	(8,902)	5,448	2,399	(1,055)	(170)	
TOTAL UNEARMARKED RESERVES (General Fund Balance)	(1,569)	0	1,569	0		This Unearmarked Reserve has a minimum balance of £0.9 million and an operating level of £1.25 million (set by Members as part of the budget process). The 2022/23 surplus of £79,000 from the 2022/23 Accounts has been transferred to Unearmarked Reserves, in accordance with normal accounting practice. The £1.569m includes the surplus of £79,000 for the 2022/23 financial year outturn.
TOTAL REVENUE RESERVES (EARMARKED AND UNEARMARKED RESERVES)	(10,471)	5,448	3,968	(1,055)	(170)	

Summary of Savings and Additional Income from the 2023/24 Budget Setting Process

APPENDIX B

The table below summarises the savings and additional income that were included in the 2023/24 Budget Setting process and indicates whether the saving/additional income is on track to be delivered.

	Savings and Additional Income for the 2023/24 Budget	Income/Savings Target for 2023/24 (£)	Latest Projection for 2023/24 (£)	Narrative
1	Income from Investment properties - periodic upwards rental reviews on investment properties	50,000	50,000	Currently on target to achieve this income.
2	Management fee income from external contracts such as leisure - Council 15 February 2022	45,500	45,500	Currently on target to achieve this income.
3	IT FIT Project - software savings	10,000	10,000	Currently on target to achieve these savings.
4	Establishment savings (salary savings) gained from IT and digital communications	50,000	50,000	Currently on target to achieve these savings.
5	Extra recycling income	190,000	190,000	Currently on target to achieve this income.
6	Extra trade waste income	30,000	30,000	Currently on target to achieve this income.
7	Extra treasury management income to reflect increases in the Bank Base rate	375,000	1,075,000	It is currently envisaged that additional treasury management income of £1.075m will be generated in 2023/24. This represents the extra income target of £375,000 plus the additional income of £700,000 projected in Table 1 of the report.
8	Extra garden waste income	60,000	95,000	It is currently envisaged that extra garden waste income of £95,000 will be received in 2023/24. This represents the extra income target of £60,000 plus the additional income of £35,000 projected in Table 1 of the report.
9	Savings on staff and Member travel and expenses	30,000	30,000	Currently on target to achieve these savings.
10	Housing Benefit overpayments	40,000	40,000	Currently on target to achieve this income.
11	Additional Employments estates income	50,000	0	There is a shortfall in employment estates income of £46,000 as at 31 October 2023. It is currently anticipated that this could increase to £75,000 by the end of the 2023/24 financial year.
12	Funding from Homelessness prevention government grant (this funds housing posts -funding to be reflected within the base budget)	180,000	180,000	The 2023/24 Homelessness prevention grant was received in August 2023.
	TOTAL	£1,110,500	£1,795,500	

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NOT FOR PUBLICATION

This report contains exempt information as defined in Paragraph 3 of Part 1 of Schedule 12A to the Local Government Act 1972
(applies to Appendix A only)

Report to: **Hub Committee**

Date: **30 January 2024**

Title: **Capital Programme Monitoring as at 31 October 2023**

Portfolio Area: **Resources – Cllr C Edmonds**

Wards Affected: **All**

Urgent Decision: **N** Approval and clearance obtained: **Y**

Author: **Clare Scotton** Role: **Principal Accountant**
Pauline Henstock **Head of Finance Practice**

Contact: **Tel. 01803 861559** E-mail: clare.scotton@swdevon.gov.uk
Tel. 01803 861377 E-mail: pauline.henstock@swdevon.gov.uk

RECOMMENDATION

That the Hub Committee RESOLVES to:

- 1. endorse the contents of the Report;**
- 2. note the addition of a budget for LAHF 2 as approved at Hub Committee on 19 September 23;**
- 3. note the addition of 20 Plymouth Road as detailed in section 2.8; and**

RECOMMEND to Council:

- 4. to use £180,000 of the Vehicle Replacement Reserve in 2023/24 to finance replacement vehicles currently on order, in accordance with the waste vehicle forward plan.**

1. Executive summary

- 1.1 The report advises Members of the financial position as at 31st October 2023 for the purposes of budget monitoring.

The monitoring of the Capital Programme at month 7 (end of October 2023) has shown that all projects are within their existing budget approved by Members. A capital budget of £7,511,308 has been profiled for 2023/24 with the remaining capital budgets rolled

forward into future years. **The capital expenditure for the first seven months of 2023/24 against the profiled capital budget is £1,876,187 (25.0% of the profiled budget) as at the end of October 2023 as shown in Appendix A.**

2. Background

- 2.1 The capital programme for 2023/24 was approved by Council on 21 February 2023 (Min CM66). This report provides an update on expenditure in the Capital Programme.
- 2.2 A new reporting process is in place and the narrative around capital schemes previously included in this budget monitoring report will now be part of the Integrated Performance Management Update reports. The capital budget monitoring report will purely focus on capital expenditure against budget.
- 2.3 The largest part of the expenditure for the first seven months of the 2023/24 financial year is £1.275m which has been spent on purchasing five properties in Okehampton. These properties were purchased using funding from the Local Authority Housing Fund (LAHF), Homes for Ukraine funding and funding from Devon County Council (DCC). One of these properties is now occupied with a Ukrainian family residing here as temporary accommodation. Three of the other properties have been allocated to families from Afghanistan who are expected to arrive in the country by the end of January 2024. The remaining property is currently vacant and confirmation is being sort from the Department for Levelling Up Housing and Communities (DLUHC) for a change of use so that it can be used for standard homelessness pressures.
- 2.5 On 7th June the Government announced a further LAHF scheme, LAHF 2 with a further allocation of funding for a maximum number of three properties for West Devon. Under LAHF 2, two of the properties in the allocation were specifically for households on Afghan resettlement schemes currently in bridging hotels and the third property to ease wider temporary housing pressures. Through negotiation with DLUHC the Council has been able to swap the allocation to one property for Afghan resettlement and two for wider housing pressures. The Council will utilise £412,000 of identified Section 106 planning contributions along with £46,241 underspend from LAHF 1 and £301,759 from LAHF 2.
- 2.6 As shown in Appendix A, the total approved capital budget is £21,171,817. A large amount of the capital budget (£13.650m) is predicted to be spent in 2024/25, with £12.365m of this being for the Okehampton Railway Transport Hub as detailed below.
- 2.7 The Council has been successful in securing a £13.4million bid to develop a new railway station and integrated transport hub on the Eastern edge of Okehampton. The plans will see the construction of a brand new, purpose built station and car park, which will be easily accessible from the nearby A30, built at the bottom of Devon County Council's business park off Exeter Road. The

aim to create an area with facilities for bus connections, cycle links and electric vehicle charging. The Borough Council will be the accountable body for the capital project and the estimated capital expenditure (profiled over the next three financial years) has been included within the Council's capital expenditure estimates within the strategy. The funding will be provided by DLUHC and the project will be delivered in partnership with Devon County Council and Network Rail. We have now received our first payment from the Department for Transport.

- 2.8 A scheme was agreed at Full Council on 19th December 2023 to repurpose 20 Plymouth Road in Tavistock from office accommodation to three residential units. This will support the Council's temporary Housing needs. The scheme will be financed using £500k from internal borrowing and £150k from Housing Revenue Grants.
- 2.9 It is recommended to Council that £180k from the Vehicles Replacement Reserve is used to finance replacement vehicles which are currently on order, in accordance with the waste vehicle forward plan.

S106 Deposits

- 2.10 The list of S106 Deposits are shown in Appendix B totalling **£1,505,294** as at 31 October 2023. **£44,595** has been spent on various revenue projects as at this date and **£412,000** has been committed as match funding for the second round of the Local Authority Housing Fund (LAHF2). A breakdown of these projects can be seen on Appendix B.
- 2.11 Some of these S106 Agreements have a clause within the S106 Agreement which states that the Council shall be entitled to use up to a five per cent (5%) part of the total payments and contributions payable pursuant to the provisions of the Agreement, towards the costs to be reasonably and properly incurred by the Council in monitoring compliance with the S106 Agreement and in assessing the details submitted to the Council for approval pursuant to the S106 Agreement.

3. Options available and consideration of risk

- 3.1 This is considered on a project by project basis as part of the project appraisal document and initial business case for each capital project.

4. Proposed Way Forward

- 4.1 This is considered on a project by project basis.

5. Implications

Implications	Relevant to proposals Y/N	Details and proposed measures to address
Legal/Governance		Statutory powers are provided by the S1

		<p>Localism Act 2011 general power of competence. The capital programme is implemented in line with the Council's legal requirements, which are examined on a project-by-project basis. To date there are no undue legal concerns.</p> <p>The public interest has been assessed and it is considered that the public interest will be better served by not disclosing the information in the Appendix A. Accordingly this report contains exempt Information as defined in paragraph 3 of Schedule 12A to the Local Government Act 1972.</p>
<p>Financial Implications to include reference to Value for Money</p>		<p>The monitoring of the capital programme at month 7 (end of October 23) has shown that all projects are within their existing budget approved by Members. A capital budget of £7,511,308 has been profiled for 2023/24 with the remaining capital budgets rolled forward into future years. The capital expenditure for the first seven months of 2023/24 against the profiled capital budget is £1,876,187 (25.0% of the profiled budget) as at the end of October 2023 as shown in Appendix A.</p> <p>It is recommended to Council that £180k from the Vehicles Replacement Reserve is used to finance replacement vehicles which are currently on order, in accordance with the waste vehicle forward plan.</p> <p>The largest part of the expenditure for the first seven months of the 2023/24 financial year is £1.275m which has been spent on purchasing five properties at Okement Park, Okehampton. These properties were purchased using funding from the Local Authority Housing Fund (LAHF), Homes for Ukraine funding and funding from DCC.</p> <p>The regular monitoring of the Capital Programme ensures the Council has arrangements in place to secure economy, efficiency and effectiveness in its use of resources.</p>
<p>Risk</p>		<p>The Council demonstrates that capital investment contributes to corporate priorities, provides value for money and takes account of the revenue implications of the investment. Regular monitoring of the capital programme and consideration of new pressures enables Members to control the programme and secure appropriate mitigation where problems arise.</p> <p>There is regular quarterly monitoring of the Capital Programme to Members where any cost overruns are identified at an early stage.</p>

Supporting Corporate Strategy		The Capital Programme supports all of the Thematic Delivery Plans within 'A Plan for West Devon'.
Consultation and Engagement Strategy		External consultation and engagement has not been undertaken with regard to this report.
Climate Change - Carbon / Biodiversity Impact		The Council declared a Climate Change and Biodiversity Emergency on 23 July 2019 and a Climate Change Action Plan was presented to Council in December 2019. Further detail is set out in the Council's 'A Plan for West Devon' strategy.
Comprehensive Impact Assessment Implications		
Equality and Diversity		This matter is assessed as part of each specific project.
Safeguarding		This matter is assessed as part of each specific project.
Community Safety, Crime and Disorder		This matter is assessed as part of each specific project.
Health, Safety and Wellbeing		This matter is assessed as part of each specific project.
Other implications		None

Supporting Information

Appendices:

EXEMPT Appendix A – Details of capital expenditure to 31st October 2023

(**Exempt**)

Appendix B – S106 Summary WDBC as at 31st October 2023

Background Papers:

None

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

Document is Restricted

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Class Code	Site	Date Received	Restriction/Committed End Date	Conditions	Opening S106 Balance 2023/24	Received in Year 2023/24	Monitoring Fee Deducted 2023/24	Balance available to be Spent	Total Spend to date	Commitments	Forecast Closing Balance	Comments
					£	£	£	£	£	£	£	

Homes and Built and Natural Environment Delivery Plan

Affordable Housing

2520	Land adjacent to Trescote, Bristow - 00465/2014	22/10/14	10 Years	Affordable Housing	(5,793)			(5,793)		5,793	0	Contribution towards Local Authority Housing Fund 2
	Land Adjoining Belle vue - 03222/2012	12/11/14	10 Years	Affordable Housing	(7,375)			(7,375)		7,375	0	Contribution towards Local Authority Housing Fund 2
2539	The Beeches, Yelverton - 0302/15	22/06/17	10 Years	DNP - Affordable Housing	(20,912)			(20,912)	3,159		(17,753)	
2546	Barns At Hurditch Hom Gulworthy 00358/2010	21/06/2019, 16/08/2022	10 Years	Affordable Housing	(31,950)			(31,950)		31,950	0	Contribution towards Local Authority Housing Fund 2
2535	The Old Post Office Highampton (00740/2014)	22/08/18	10 years	Affordable Housing	(6,122)			(6,122)		6,122	0	Contribution towards Local Authority Housing Fund 2
2514	Melcroft, Lifton - 00546/2013	29/04/2014, 09/02/2017	10 Years	Affordable Housing	(7,375)			(7,375)		7,375	0	Contribution towards Local Authority Housing Fund 2
2522	Land adj Shellsley North Tawton (02914/2012)	20/02/2015, 18/05/2018	10 Years	1st & 2nd 50% Affordable Housing	(47,137)			(47,137)		47,137	0	Contribution towards Local Authority Housing Fund 2
2512	Livaton Berns, S Tawton - 00707/2014	19/08/2015, 23/08/2018	10 Years	Affordable Housing 1st & 2nd 50%	(12,878)			(12,878)		12,878	0	Contribution towards Local Authority Housing Fund 2
2557	The Highwayman Inn, Sourton (3112/16/Ful)	26/03/2021, 15/6/2021, 24/12/2021	10 Years	Affordable Housing	(87,100)			(87,100)		87,100	0	Contribution towards Local Authority Housing Fund 2
2524	The Barton, Spreyton (01396/2014)	04/03/2015, 24/07/2015	10 years of first occupation	Affordable Housing	(71,530)			(71,530)		71,530	0	Contribution towards Local Authority Housing Fund 2
2508	Land adj Serendipity, Tavistock - 00556/2014	15/08/17	10 Years	Affordable Housing	(8,261)			(8,261)		8,261	0	Contribution towards Local Authority Housing Fund 2
2510	Land at 68 Plymouth Road, Tavistock - 03076/2012	21/11/17	10 Years	Affordable Housing	(12,197)			(12,197)		12,197	0	Contribution towards Local Authority Housing Fund 2
2503	Tanglewood, Tavistock - 01191/2013	12/11/2014, 24/04/2017	10 Years	Affordable Housing	(16,832)			(16,832)		16,832	0	Contribution towards Local Authority Housing Fund 2
2543	Land Lower Trendle, Tavistock - 2092/16/Ful	17/07/2020, 04/12/2020	10 Years	100% Affordable Housing Contributions	(44,221)			(44,221)		44,221	0	Contribution towards Local Authority Housing Fund 2
2513	RO 6 Westmoor Park - 00014/2014	20/06/19	10 Years	Affordable Housing	(7,801)			(7,801)		7,801	0	Contribution towards Local Authority Housing Fund 2
2528	Harewood House Tavistock -2232/17/FUL	09/02/21	10 Years	Affordable Housing	(164,285)			(164,285)			(164,285)	
2547	Land Rear of Rowan Cottage, Leddown, Okehampton - 0825/16/Ful	22/11/2019, 04/11/2022	10 Years	Affordable Housing	(55,499)			(55,499)		22,022	(33,477)	£22,022 Contribution towards Local Authority Housing Fund 2
2570	Dell Cote Crapstone (00364/2014)	27/09/2021, 16/05/2022	10 Years	Affordable Housing	(7,543)			(7,543)		7,543	0	Contribution towards Local Authority Housing Fund 2
2584	Broomhill Barn Sampford Courtenay (00841/2014)	02/11/22	NA	Affordable Housing	(15,865)			(15,865)		15,865	0	Contribution towards Local Authority Housing Fund 2
2609	Woodcroft Hse Bwkelly (01165/2013)	13/12/22	NA	Affordable Housing	(7,481)			(7,481)			(7,481)	
2616	Devonshire Gardens, North Tawton (1484/17/OPA)	27/04/23	10 years	Affordable Housing	0	(96,730)	4,836	(91,893)			(91,893)	
					(638,155)	(96,730)	4,836	(730,048)	3,159	412,000	(314,889)	

Protecting our Built Environment

2543	Land Lower Trendle, Tavistock - 2092/16/Ful	03/05/19	10 Years	Heritage Contribution survey work	(2,000)			(2,000)			(2,000)	
					(2,000)	0	0	(2,000)	0	0	(2,000)	

Improving our Natural Environment

2617	Coach House, Tavistock (1134/21/FUL)	06/06/23	NA	Plymouth EMS 2024	0	(622)	45	(577)			(577)	
2628	Candolim Tavistock (2269/22/FUL)	14/09/23	NA	Plymouth EMS 2024	0	(381)	45	(336)			(336)	
2629	1 West Street tavistock (0353/23/FUL)	22/09/23	NA	Plymouth EMS 2024	0	(468)	0	(468)			(468)	
					0	(1,471)	90	(1,381)	0	0	(1,381)	

TOTAL Homes and Built and Natural Environment Delivery Plan

					(640,155)	(98,201)	4,926	(733,429)	3,159	412,000	(318,270)	
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Strengthening Community Wellbeing Delivery Plan

Community Facilities

2527	11366/2008/TAV - Forma Tavistock Hockey Club	28/10/13	10 years	£23,250 - Community Facility & £112,000 off-site Sports Pitch	(41,888)			(41,888)	480		(41,408)	
	11462/2008/OKE (see 13 14 schedule 11/11/2008)	17/04/13	NA	Community Facilities	(97)			(97)			(97)	
2571	Glendale, Crediton Rd Okehampton (02728/2012)	30/11/21	10 years	Community Facility contribution	(15,538)			(15,538)			(15,538)	
					(57,523)	0	0	(57,523)	480	0	(57,043)	

Open Space, Sport and Recreation

2558	Land North of Crediton Road Okehampton - 01089/2013	08/06/21	10 Years	Play Field Contribution	(48,908)			(48,908)			(48,908)	
2537	Land Butcher park Hill - 00610/2015	21/09/2018, 14/07/2020, 28/06/2019, 09/09/2022	5 Years	Playing pitch and off-site play contribution	(78,006)			(78,006)	13,959		(64,048)	
2548	Land New Launceston Road - 2022/16/OPA	04/12/2019, 29/09/2021, 02/03/2022	10 years	Off Site Public open Space and play contribution	(250,793)			(250,793)	12,144		(238,648)	
2559	Land adjacent to Callington Road, Tavistock - 00554/2013	14/05/21	5 Years	Off-Site Play Contribution 1st phase	(34,060)	(63,077)		(97,137)			(97,137)	
2560	Land Adjacent to Cross Farm Leddown (2878/16/Ful)	11/05/21	5 Years	Open Space Contribution	(10,933)			(10,933)			(10,933)	
2571	Glendale, Crediton Rd Okehampton (02728/2012)	30/11/21	10 years	Open Space "Kick About" contribution	(3,005)			(3,005)			(3,005)	
2586	North Rd Lifton (2323/16/OPA)	14/06/2022, 11/11/2022	None	Child Play facilities	(12,761)			(12,761)			(12,761)	
2586	North Rd Lifton (2323/16/OPA)	14/06/2022, 11/11/2022	None	Pitch Facilities	(2,567)			(2,567)			(2,567)	
2588	Land opp Springfield Park Bristow - 00554/2013	08/04/22	7 years	OSSR contribution	(11,021)			(11,021)			(11,021)	
2589	Devonia House Yelverton (DNP 0018/20)	13/05/22	10 years	OSSR contribution	(25,521)			(25,521)	9,364		(16,156)	
2596	Land South of Exeter Rd Okehampton (0032/18/OPA)	29/07/22	None	OSSR contribution	(68,911)			(68,911)			(68,911)	
2616	Devonshire Gardens North Tawton (1484/17/OPA)	31/03/23	10 years	50% OSSR Play	(5,448)			(5,448)	5,488		40	
2616	Devonshire Gardens North Tawton (1484/17/OPA)	31/03/23	10 years	50% OSSR Sport	(9,400)			(9,400)			(9,400)	
2618	Abbey Meadows, Crapstone (0147/17/OPA)	22/06/23	None	Off Site Play Contribution	0	(57,714)		(57,714)			(57,714)	
2630	Land off Fore Street Lifton (2353/18/OPA)		10 years	OSSR contribution	0	(33,913)	1,696	(32,217)			(32,217)	
					(561,333)	(154,704)	1,696	(714,342)	40,956	0	(673,386)	

TOTAL Strengthening Community Wellbeing Delivery Plan

					(618,856)	(154,704)	1,696	(771,865)	41,436	0	(730,429)	
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Class Code	Site	Date Received	Restriction/Committed End Date	Conditions	Opening S106 Balance 2023/24 £	Received in Year 2023/24 £	Monitoring Fee Deducted 2023/24 £	Balance available to be Spent £	Total Spend to date £	Commitments £	Forecast Closing Balance £	Comments
TOTAL S106 DEPOSITS					(1,259,011)	(252,905)	6,622	(1,505,294)	44,595	412,000	(1,048,699)	

S106 Spend as at 31/10/23 - break down of projects

Revenue		
S106 Agreement	Project name	Expenditure
Devonshire Gardens North Tawton (1484/17/OPA)	S106 - NTTC trampoline repair Memorial Park	5,488

NOT FOR PUBLICATION

This report contains exempt information as defined in Paragraph 3 of Part of Schedule 12A to the Local Government Act 1972 (applies to Appendices A and B)

Report to: **Hub Committee**

Date: **30 January 2024**

Title: **Quarter 1 and Quarter 2 Write-Off Report 2023/24**

Portfolio Area: **Cllr Chris Edmonds – Lead Hub Member for Resources**

Wards Affected: **All**

Urgent Decision: **N** Approval and clearance obtained: **Y**

Date next steps can be taken: N/A

Author: **Geni Hotchkiss** Role: **Head of Revenues and Benefits**

Contact: **geni.hotchkiss@swdevon.gov.uk**

Recommendations:

That the Hub Committee:

- 1. Notes that, in accordance with Financial Regulations, the Section 151 Officer has authorised the write-off of individual debts totalling £76,408.49 as detailed in paragraph 3 of the report; and**
- 2. Approves the write-off of the individual debts totalling £54,049.72 as shown in Appendix A of the report.**
- 3. Approves the write off of a sundry debt set out in Appendix B of the report.**

1. Executive summary

- 1.1 The Council is responsible for the collection of Council Tax, Non-Domestic Rate, overpaid Housing Benefit and Sundry Debt.

- 1.2 This report informs members of debt written-off for these revenue streams. Debt up to the value of £5,000 can be approved for write-off by the Section 151 Officer under delegated authority. Permission needs to be sought from Hub Committee to write-off individual debts with a value of more than £5,000. Members agreed a write-off policy in March 2023 which sets out the circumstances in which a debt is deemed to be irrecoverable. This includes insolvency cases and where the debtor is deceased or cannot be traced.
- 1.3 The report covers the period 1 April 2023 to 30 September 2023. The total amount of debt to be written-off is £130,458.21. The amount written-off for the corresponding two quarters of 2022/23, for all revenue streams was £125,528.70. In addition there is a sundry debt in Appendix B which it is recommended to be written off.
- 1.4 One of the key outcomes of the Revenues and Benefits Service Review is the improvement of collection rates for Council Tax and Non-Domestic Rates and the report includes information about the amount of debt written-off by financial year as well as comparing collection performance against shire districts.
- 1.5 In 2022/23 the Council achieved a Council Tax collection rate of 98.3% which was significantly above the national average of 96% as well as the average for shire districts which was 97.2%. This performance placed West Devon Borough Council in the top quartile nationally.
- 1.6 For Non-Domestic Rates, our collection rate of 99% also placed the Council in the top quartile nationally, compared to a national average of 96.8% and an average collection rate of 97.5% for shire districts.

2. Background

- 2.1 The Council's sound financial management arrangements underpin the delivery of all the Council's priorities, including the commitment to provide value for money services. This report forms part of the formal debt write-off procedures included in these financial arrangements. The Hub Committee agreed at its meeting of 7 March 2023 to adopt a Council Tax, Non-Domestic Rate (Business Rates) and Housing Benefit Overpayments write-off policy to ensure transparency and consistency in decisions regarding the writing-off of uncollectable debt.
- 2.2 The writing-off of debt which is irrecoverable is recognised as good practice by the Department for Levelling Up, Housing and Communities, the Chartered Institute of Public Finance and Accountancy and the Department for Work and Pensions. Debts are only considered for write-off after we have taken all available steps to collect them.

- 2.3 Whilst it is recognised that most of the income owed to the Council will be successfully billed or invoiced for and collected, there are a variety of reasons why debt will become irrecoverable and needs to be written-off. Debts will only be recommended for write-off once all options to recover and enforce them, as allowed for by the relevant legislation, have been exhausted.
- 2.4 Following the Revenues and Benefits Service Review, a new structure is in place with more focus on maximising both in-year and prior year income collection for council tax and business rates. As the team works through historic debt, it may be necessary write-off debt due to the passage of time. This is only ever done as a last resort and, in doing so, it enables the team to concentrate on the arrears we can recover. Alongside this there are now measures in place to ensure that debt isn't left to become 'aged' and we take further action in an appropriate and timely manner to meet the best interests of both the debtor and the Council.

3. Outcomes/outputs

Council Tax Write-Offs

- 3.1 The table below shows Council Tax debts which have been approved for write-off in Quarters 1 and 2 of the 2023/24 financial year by the Section 151 Officer under delegated powers. It also compares the cases and amounts against the corresponding quarters of the 2022/23 financial year.

Reason for write-off	No. of cases	2022/23 – amount written off (£)	No. of cases	2023/24 – amount written off (£)
Debtors who cannot be traced	2	990.75	74	36,778.58
Deceased	1	971.10	1	4,484.64
Insolvency	42	65,726.51	7	14,783.56
Small balance	39	1,411.60	2	10.82
Miscellaneous	0	0.00	0	0.00
Uncollectable old debt	0	0.00	13	8,313.80
Total	84	69,099.95	97	64,371.40

- 3.2 Following the Revenues and Benefits Service Review, a new structure is in place with more focus on maximising both in-year and prior income collection. As the team works through historic debt, it may be necessary to write-off debt due to the passage of time or being unable to locate a current address for the debtor. This is only ever done as a last resort, and in doing so, it enables the team to concentrate on the arrears we can recover. Alongside this there are now measures in place to ensure that debt isn't left to become 'aged' and we take further action in an appropriate and

timely manner to meet the best interests of both the debtor and the Council.

Council Tax Write-Offs by financial year

- 3.3 The breakdown below details the write-offs by financial year. Our collection rate of 98.6% for 2022/23 was significantly above the Shire District Average of 97.2%.

Financial year	Amount written-off (£)	In-year Collection Rate	Shire District Average collection rate
Pre 2018/19	44,322.80	Various	Various
2018/19	6,583.80	97.7%	97.9%
2019/20	3,560.08	97.7%	97.7%
2020/21	1,747.91	97.3%	96.9%
2021/22	3,455.49	97.8%	97.2%
2022/23	3,468.48	98.3%	97.2%
2023/24	1,232.84		
Total	64,371.40		

Council Tax Write-Offs – over £5,000

- 3.4 Permission needs to be sought from Hub Committee to write-off individual debts with a value over £5,000. As this information is confidential, the full details are contained in the exempt appendix. The high-level detail is as follows:

Case 1

Amount – £8,373.76

Reason for write-off – Individual Voluntary Arrangement

Case 2

Amount – £5,468.73

Reason for write-off – debtor cannot be traced.

Case 3

Amount – £5,491.00

Reason for write-off – debtor cannot be traced.

Case 4

Amount – £5,293.87

Reason for write-off – Individual Voluntary Arrangement

The amounts requested for write off by financial year are as follows:

Financial year	Amount to be written-off (£)	In-year collection rate	Shire District Average collection rate
Pre 2018/19	13,250.21	Various	Various
2018/19	2,392.87	97.7%	97.9%
2019/20	1,738.01	97.7%	97.7%
2020/21	2,888.71	97.3%	96.9%
2021/22	2,207.06	97.8%	97.2%
2022/23	2,150.50	98.3%	97.2%
Total	24,627.36		

Non-Domestic Rates Write-Offs – under £5,000

- 3.5 The table below shows debts under £5,000 which have been approved for write-off in quarters 1 and 2 of the 2023/24 financial year by the Section 151 Officer under delegated powers. It also compares the number of cases and amounts against the corresponding quarters for the 2022/23 financial year.

Reason for write-off	No. of cases	2022/23 – Amount written-off (£)	No. of cases	2023/24 – Amount written-off (£)
Debtors who cannot be traced	0	0.00	0	0.00
Deceased	0	0.00	0	0.00
Insolvency	4	4,384.50	4	7,750.44
Small balance	0	0.00	0	0.00
Miscellaneous	0	0.00	0	0.00
Uncollectable old debt	0	0.00	0	0.00
Total	4	4,384.50	4	7,750.44

- 3.6 The primary reason for writing off Non-Domestic Rate debt remains insolvency, which may be a result of continuing difficult trading conditions post pandemic and through the cost of living crisis.

Non-Domestic Rate Write-Offs under £5,000 by financial year

- 3.7 The breakdown below details write-offs by financial year and compares our in-year collection rate against the average for shire districts.

Financial year	Amount written-off (£)	In-year collection rate	Shire District average
2020/21	437.51	91.5%	95.0%
2021/22	272.04	93.7%	97.0%
2022/23	6,065.38	99.0%	97.5%
2023/24	975.51		
Total	7,750.44		

Non-Domestic Rates Write-Offs over £5,000

3.8 Permission needs to be sought from Hub Committee to write-off individual debts with a combined value of over £5,000. Details of three cases are included in the exempt appendix:

Case 1

Amount – £9,326.50

Reason – company dissolved.

Case 2

Amount – £12,136.89

Reason – Corporate Voluntary Arrangement

Case 3

Amount - £7,958.97

Reason – Corporate Voluntary Arrangement

The amount requested for approval from Members to write-off by financial year are as follows:

Financial year	Amount written-off (£)	In-year collection rate	Shire District average
Pre 2018/19	9,326.50	Various	Various
2020/21	11,405.09	91.5%	95.0%
2021/22	725.00	93.7%	97.0%
2022/23	7,967.77	99.0%	97.5%
Total	29,422.36		

Housing Benefit Overpayments Write-Offs under £5,000

3.9 The table below shows debts under £5,000 which have been approved for write-off in quarters 1 and 2 of the 2023/24 financial year by the Section 151 Officer under delegated powers. It also compares the number of cases and amounts against the same quarters in 2022/23.

Reason for write-off	No. of cases	2022/23 – Amount written-off (£)	No. of cases	2023/24 – Amount written-off (£)
Insolvency	0	0.00	0	0.00
Deceased	3	413.53	2	490.76
Small balance	0	0.00	1	0.01
Uncollectable old debt	21	4,715.63	4	145.41
Non-recoverable	6	2,360.66	35	3,650.47
Total	30	7,489.82	39	4,286.65

3.10 There has been a reduction in the amount written-off in comparison to the same quarters for 2022/23.

Housing Benefit Overpayments Write-Offs over £5,000

3.11 There are no debts over £5,000 requiring approval to write-off by Members.

Sundry Debt Write-Offs under £5,000

3.12 No sundry debts have been approved for write-off in in quarters 1 and 2 of 2023/24 by the Section 151 Officer under delegated powers. It also provides details of the number of cases and amounts for the same quarters in 2022/23.

Reason for write-off	No. of cases	2022/23 – Amount written-off (£)	No. of cases	2023/24 – Amount written-off (£)
Debtors who cannot be traced	0	0.00	0	0.00
Other	0	0.00	0	0.00
Uneconomical to collect	5	670.27	0	0.00
Total	5	670.27	0	0.00

3.13 There is sundry debt in Appendix B which is over £5,000 which it is recommended is approved to be written off.

4. Options available and consideration of risk

4.1 The Hub Committee can either approve the debt being written-off or not. Should the write-off of an individual debt not be approved, it will remain on the relevant system as an outstanding balance. In cases of insolvency there is no other option available to the Council other than to write-off the debt.

4.2 If the debt remains on the system, it may result in additional time and cost spent pursuing the debt when there is no realistic prospect of collection. This is an inefficient use of the Council's staffing resources.

5. Proposed Way Forward

5.1 The Hub Committee approves the write-off of individual debts of more than £5,000 as detailed in Appendix A.

5.2 The Hub Committee notes the debts under £5,000 approved for write-off by the Section 151 Officer under delegated powers.

6. Implications

Implications	Relevant to proposals Y/N	Details and proposed measures to address
Legal/Governance		<p>The relevant billing, collection and recovery processes are governed by statutory provisions linked to the type of debt. Debts will be written off in accordance with the Council's Financial Procedure Rules, the Council Tax, Non-Domestic Rate (Business Rates) and Housing Benefit overpayments write-off policy and any legislation relevant to the type of debt. All relevant enforcement remedies will be pursued before a recommendation to write-off is made.</p> <p>The relevant powers for this report are contained within the following legislation.</p> <p>Section 151 Local Government Act 1972 Section 44 Local Government Finance Act 1988 Section 14 Local Government Finance Act 1992</p>
Financial implications to include reference to value for money		<p>A clear process for the writing-off of irrecoverable debt represents effective financial management practice. To continue to pursue debt when it is no longer cost effective to do so is an inefficient use of resources. Provision for bad debts is made in the Council's accounts.</p> <p>The Hub Committee notes that, in accordance with Financial Regulations, the Section 151 Officer has authorised the write-off of individual Council debts totalling £76,408.49 as detailed in paragraph 3.</p> <p>It is recommended that the Committee approves the write-off of the debt more than £5,000 for £54,049.72, as detailed in the exempt Appendix A.</p>

		In addition, it is also recommended that sundry debt in Appendix B is also written off.
Risk		<p>The Council Tax, Non-Domestic Rate (Business Rates) and Overpaid Housing Benefit write-off policy provides assurance regarding controls and the operational process in recovering debt. It should be recognised, however, that due to the volume, value and nature of annual debt due to the Council there will always be irrecoverable amounts which will be recommended for write-off once all enforcement remedies have been exhausted.</p> <p>A provision for bad debts is made in the Councils' accounts. The debt recovery policy and the write-off policy and supporting procedures are in place to minimise risk.</p>
Supporting Corporate Strategy		Delivering efficient and effective services.
Consultation & Engagement Strategy		There is no requirement to consult.
Climate Change - Carbon / Biodiversity Impact		No direct carbon/biodiversity impact arising from the recommendations.
Comprehensive Impact Assessment Implications		
Equality and Diversity		All enforcement action prior to writing-off debt is undertaken in accordance with the relevant legislation and accepted procedures. The Council's approach to dealing with debtors remains fundamentally unchanged, however through formalising policy and procedures we are better able to engage with debtors who have potentially tried to ignore their debts
Safeguarding		None directly arising from this report.
Community Safety, Crime and Disorder		None directly arising from this report.
Health, Safety and Wellbeing		None directly arising from this report.
Other implications		A bad debt provision is built into the financial management of the Council.

Supporting Information

Appendices:

EXEMPT Appendix A

EXEMPT Appendix B

Background Papers:

None

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

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