

Democratic Services

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Date: 8th July 2014
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To: All Members of the Cabinet

Councillor Paul Crossley	Leader of the Council
Councillor David Dixon	Deputy Leader and Cabinet Member for Neighbourhoods
Councillor Simon Allen	Cabinet Member for Wellbeing
Councillor Tim Ball	Cabinet Member for Homes and Planning
Councillor David Bellotti	Cabinet Member for Community Resources
Councillor Katie Hall	Cabinet Member for Community Integration
Councillor Caroline Roberts	Cabinet Member for Transport
Councillor Dine Romero	Cabinet Member for Early Years, Children and Youth
Councillor Ben Stevens	Cabinet Member for Sustainable Development

Chief Executive and other appropriate officers
Press and Public

Dear Member

Cabinet: Wednesday, 16th July, 2014

You are invited to attend a meeting of the **Cabinet**, to be held on **Wednesday, 16th July, 2014** at **6.30 pm** in the **Council Chamber - Guildhall, Bath**.

The agenda is set out overleaf.

Yours sincerely

Col Spring
for Chief Executive

The decisions taken at this meeting of the Cabinet are subject to the Council's call-in procedures. Within 5 clear working days of publication of decisions, at least 10 Councillors may signify in writing to the Chief Executive their wish for a decision to be called-in for review. If a decision is not called-in, it will be implemented after the expiry of the 5 clear working day period.

If you need to access this agenda or any of the supporting reports in an alternative accessible format please contact Democratic Services or the relevant report author whose details are listed at the end of each report.

This Agenda and all accompanying reports are printed on recycled paper

NOTES:

- 1. Inspection of Papers:** Any person wishing to inspect minutes, reports, or a list of the background papers relating to any item on this Agenda should contact Col Spring who is available by telephoning Bath 01225 394942 or by calling at the Riverside Offices Keynsham (during normal office hours).
- 2. Public Speaking at Meetings:** The Council has a scheme to encourage the public to make their views known at meetings. They may make a statement relevant to what the meeting has power to do. They may also present a petition or a deputation on behalf of a group. Advance notice is required not less than two full working days before the meeting (this means that for meetings held on Wednesdays, notice must normally be received in Democratic Services by 4.30pm the previous Friday but Bank Holidays will cause this to be brought forward).

The public may also ask a question to which a written answer will be given. Questions must be submitted in writing to Democratic Services at least two full working days in advance of the meeting (this means that for meetings held on Wednesdays, notice must normally be received in Democratic Services by 4.30pm the previous Friday but Bank Holidays will cause this to be brought forward). If an answer cannot be prepared in time for the meeting it will be sent out within five days afterwards. Further details of the scheme can be obtained by contacting Col Spring as above.

- 3. Details of Decisions taken at this meeting** can be found in the minutes which will be published as soon as possible after the meeting, and also circulated with the agenda for the next meeting. In the meantime details can be obtained by contacting Col Spring as above.

Appendices to reports are available for inspection as follows:-

Public Access points - Riverside - Keynsham, Guildhall - Bath, Hollies - Midsomer Norton, and Bath Central, Keynsham and Midsomer Norton public libraries.

For Councillors and Officers papers may be inspected via Political Group Research Assistants and Group Rooms/Members' Rooms.

- 4. Attendance Register:** Members should sign the Register which will be circulated at the meeting.
- 5. THE APPENDED SUPPORTING DOCUMENTS ARE IDENTIFIED BY AGENDA ITEM NUMBER.**
- 6. Emergency Evacuation Procedure**

When the continuous alarm sounds, you must evacuate the building by one of the designated exits and proceed to the named assembly point. The designated exits are sign-posted.

Arrangements are in place for the safe evacuation of disabled people.

- 7. Officer Support to the Cabinet**
Cabinet meetings will be supported by the Senior Management Team.
- 8. Recorded votes**
A recorded vote will be taken only when requested by a member of Cabinet.

Cabinet - Wednesday, 16th July, 2014

in the Council Chamber - Guildhall, Bath

A G E N D A

1. WELCOME AND INTRODUCTIONS

2. EMERGENCY EVACUATION PROCEDURE

The Chair will draw attention to the emergency evacuation procedure as set out under Note 6

3. APOLOGIES FOR ABSENCE

4. DECLARATIONS OF INTEREST

At this point in the meeting declarations of interest are received from Members in any of the agenda items under consideration at the meeting. Members are asked to indicate:

(a) The agenda item number in which they have an interest to declare.

(b) The nature of their interest.

*(c) Whether their interest is **a disclosable pecuniary interest** or an **other interest**, (as defined in Part 2, A and B of the Code of Conduct and Rules for Registration of Interests)*

Any Member who needs to clarify any matters relating to the declaration of interests is recommended to seek advice from the Council's Monitoring Officer or a member of his staff before the meeting to expedite dealing with the item during the meeting.

5. TO ANNOUNCE ANY URGENT BUSINESS AGREED BY THE CHAIR

6. QUESTIONS FROM PUBLIC AND COUNCILLORS

Questions submitted before the deadline will receive a reply from an appropriate Cabinet member or a promise to respond within 5 days of the meeting. Councillors may ask one supplementary question for each question they submitted, up to a maximum of two per Councillor.

7. STATEMENTS, DEPUTATIONS OR PETITIONS FROM PUBLIC OR COUNCILLORS

Councillors and members of the public may register their intention to make a statement if they notify the subject matter of their statement before the deadline. Statements are limited to 3 minutes each. The speaker may then be asked by Cabinet members to answer factual questions arising out of their statement.

8. MINUTES OF PREVIOUS CABINET MEETING 11TH JUNE 2014 (Pages 7 - 16)

To be confirmed as a correct record and signed by the Chair

9. CONSIDERATION OF SINGLE MEMBER ITEMS REQUISITIONED TO CABINET

This is a standard agenda item, to cover any reports originally placed on the Weekly list for single Member decision making, which have subsequently been the subject of a Cabinet Member requisition to the full Cabinet, under the Council's procedural rules

10. MATTERS REFERRED BY POLICY DEVELOPMENT AND SCRUTINY BODIES

This is a standing agenda item (Constitution rule 14, part 4D – Executive Procedure Rules) for matters referred by Policy Development and Scrutiny bodies. The Chair of the relevant PDS Panel will have the right to attend and to introduce the Panel's recommendations to Cabinet.

11. SINGLE MEMBER CABINET DECISIONS TAKEN SINCE PREVIOUS CABINET MEETING

There were none

12. SCHOOLS CAPITAL PROGRAMME 2014/15 IMPROVEMENT PROJECTS (pp.17-22)

To seek approval for inclusion in the 2014/15 schools capital programme improvement projects at two primary schools

13. YOUTH JUSTICE PLAN 2014 - 2015 (pp.23-66)

The Local Authority has a statutory responsibility to produce an annual Youth Justice Plan setting out work to be undertaken to prevent youth offending and re-offending across Bath and North East Somerset and was approved by the multi-agency Youth Offending Service Management Board on 24 June 2014

14. AMALGAMATION OF SOUTHDOWN INFANT AND JUNIOR SCHOOLS INTO A PRIMARY SCHOOL (pp.67-76)

This report seeks approval to publish a statutory notice proposing the amalgamation of Southdown Infant and Junior schools into a primary school

15. COMMUNITY INFRASTRUCTURE LEVY DRAFT CHARGING SCHED (pp.77-194)

The Community Infrastructure Levy Draft Charging Schedule, the Draft Regulation 123 List and the revised Draft Planning Obligations SPD have been prepared for public consultation

16. REVENUE & CAPITAL OUTTURN 2013/14 (pp.195-242)

The report presents the revenue and capital outturn for 2013/14, highlighting an underspend of £83,000. This represents a significant achievement in the context of the government's public sector deficit recovery plan which resulted in a revenue savings requirement of over £11 million for 2013/14.

17. CYCLE/PEDESTRIAN SCHEMES 2014/15 TRO (pp.243-248)

Cabinet approval is sought for the programme of cycle/pedestrian schemes

18. FIT FOR LIFE STRATEGY (pp.249-304)

The Council on 9th April 2014 approved the Draft Fit for Life strategy for formal consultation prior to adoption. This consultation has now been undertaken and final changes made. Cabinet is now asked to adopt the Policy.

The Committee Administrator for this meeting is Col Spring who can be contacted on 01225 394942.

Protocol for Decision-making

Guidance for Members when making decisions

When making decisions, the Cabinet/Committee must ensure it has regard only to relevant considerations and disregards those that are not material.

The Cabinet/Committee must ensure that it bears in mind the following legal duties when making its decisions:

- Equalities considerations
- Risk Management considerations
- Crime and Disorder considerations
- Sustainability considerations
- Natural Environment considerations
- Planning Act 2008 considerations
- Human Rights Act 1998 considerations
- Children Act 2004 considerations
- Public Health & Inequalities considerations

Whilst it is the responsibility of the report author and the Council's Monitoring Officer and Chief Financial Officer to assess the applicability of the legal requirements, decision makers should ensure they are satisfied that the information presented to them is consistent with and takes due regard of them.

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BATH AND NORTH EAST SOMERSET

CABINET

These minutes are draft until confirmed as a correct record at the next meeting.

Wednesday, 11th June, 2014

Present:

Councillor Paul Crossley	Leader of the Council
Councillor David Dixon	Deputy Leader and Cabinet Member for Neighbourhoods
Councillor Simon Allen	Cabinet Member for Wellbeing
Councillor Tim Ball	Cabinet Member for Homes and Planning
Councillor David Bellotti	Cabinet Member for Community Resources
Councillor Katie Hall	Cabinet Member for Community Integration
Councillor Caroline Roberts	Cabinet Member for Transport
Councillor Dine Romero	Cabinet Member for Early Years, Children and Youth
Councillor Ben Stevens	Cabinet Member for Sustainable Development

17 WELCOME AND INTRODUCTIONS

The Chair was taken by Councillor Paul Crossley, Leader of the Council.
The Chair welcomed everyone to the meeting.

18 EMERGENCY EVACUATION PROCEDURE

The Democratic Services Officer drew attention to the evacuation procedure as set out in the Agenda.

19 APOLOGIES FOR ABSENCE

There were no apologies for absence.

20 DECLARATIONS OF INTEREST

Councillor Paul Crossley declared an "other" interest under the Code of Conduct in item 14 on the agenda (Radstock Ecology Mitigation Programme) as a Board Member of the Norton Radstock Regeneration (NRR) company. Councillor Crossley would be taking part in the debate and voting.

21 TO ANNOUNCE ANY URGENT BUSINESS AGREED BY THE CHAIR

There was none.

22 QUESTIONS FROM PUBLIC AND COUNCILLORS

There were 16 questions from the following Councillors: Liz Hardman (3), Geoff Ward (4), Anthony Clarke (3), Liz Richardson (2), Vic Pritchard (2), Martin Veal (2).

There were no questions from members of the public.

[Copies of the questions and response, including supplementary questions and responses if any, have been placed on the Minute book as Appendix 1 and are available on the Council's website.]

23 STATEMENTS, DEPUTATIONS OR PETITIONS FROM PUBLIC OR COUNCILLORS

Robert and Anna Morgan raised their concerns in terms of their stall at the Guildhall Market. Councillor Paul Crossley advised that he would meet Robert and Anna Morgan with relevant officers to discuss this issue.

Rachel Mercer in a statement *[a copy of which is attached to these Minutes as Appendix 2 and on the Council's website]* expressed her concern about pedestrian safety within the village of Combe Down, in particular on the zebra crossing on North Road between the junctions of Stonehouse Lane and The Firs. Rachel Mercer presented a petition with 228 signatures that supported her call for a change to be made.

Councillor Patrick Anketell-Jones said that he made a statement at the last Cabinet meeting and that he was very encouraged by the response from Councillor Stevens. Councillor Anketell-Jones quoted Councillor Stevens, who said 'if the budget was to continue and the Gallery was left out in the cold, they would struggle'. Councillor Anketell-Jones commented that this was exactly what he had been saying for the last two years. Councillor Anketell-Jones also quoted Councillor Stevens, who said 'the plans he (Councillor Anketell-Jones) referred to are beginning to be thought about to change the gallery operating model to make the Gallery more sustainable'. Councillor Anketell-Jones added that everyone knew that the Gallery had been operating on unsustainable business model.

Councillor Anketell-Jones asked if he could get updates from Councillor Stevens on the progress towards sustainability.

24 MINUTES OF PREVIOUS CABINET MEETING

On a motion from Councillor Paul Crossley, seconded by Councillor David Dixon, it was

RESOLVED that the minutes of the meeting held on Wednesday 14th May 2014 be confirmed as a correct record and signed by the Chair.

25 CONSIDERATION OF SINGLE MEMBER ITEMS REQUISITIONED TO CABINET

There were none.

26 MATTERS REFERRED BY POLICY DEVELOPMENT AND SCRUTINY BODIES

There were none.

27 SINGLE MEMBER CABINET DECISIONS TAKEN SINCE PREVIOUS CABINET MEETING

The Cabinet agreed to note the report.

28 APPROACH TO SHARED SERVICES AND CO-OPERATION AGREEMENT WITH NORTH SOMERSET

Councillor David Bellotti introduced the item by saying that he would be quite happy to move the recommendations. Councillor Bellotti said that it was really important to have a purpose in looking at working with other people and the main purpose here was to improve the quality of services for B&NES residents. At the same time, it would be possible to make some savings. Those savings could either be used to avoid an increase Council Tax or to increase the level of services provided. The Council had been already working with a lot of local partners in the area, such as Sirona. The Council had been also working with neighbouring Councils in some areas , such as a jointly managed Audit service with North Somerset.

Councillor Bellotti said that Councillor Crossley had had a number of very useful meetings with the Leader of the North Somerset Council, and also some individual Cabinet Members had met with their equivalents from the North Somerset Cabinet, in order to discuss shared services.

Councillor Bellotti concluded his introduction by saying this was about delivering services to our residents in better way.

Councillor Bellotti moved the proposals.

Councillor Crossley seconded the proposal.

Councillor Crossley said that there was one change in the report. The following should be added at the paragraph 6.1 of the report: '...but only where this does not contradict or lessen the impact of the Think Local procurement strategy'.

Councillor Crossley also said that the B&NES Council had had a prior record of working with different organisations and partners across ex-Avon, Wiltshire and Somerset. This would be a growing model of the future. This proposal was not only about saving money, it was more about delivering better services with better value to residents.

Councillor Crossley added that there were quite a few meetings between senior officers from both Councils, which helped towards building the trust and interest between two Councils.

Councillor Katie Hall said that she was delighted to see this paper on the agenda. Councillor Hall appreciated the thoughtful way of talking with the North Somerset Council over the past 18-24 months, instead of rushing into this agreement. This was all about service improvement and doing this in more modern and efficient way.

Councillor Bellotti summed up by saying that even though B&NES Council had been in discussion with North Somerset Council, this Council would welcome an opportunity to work with other neighbouring Councils in future. Councillor Bellotti also said that, in terms of working with local partners, he was particularly pleased that the Police in Bath had expressed an interest in having a presence in our One Stop Shop. In the years to come there would be great developments with other Councils, local partners and voluntary organisations.

On a motion from Councillor David Bellotti, seconded by Councillor Paul Crossley, it was

RESOLVED (unanimously)

(1) To APPROVE:

- (a) further opportunities to join up services internally;
- (b) develop work with local partners in Bath & NE Somerset; and
- (c) work with other Councils where our services could benefit from joint working;

(2) To APPROVE the Co-operation agreement;

(3) To AUTHORISE the Leader to sign it on behalf of Bath & North East Council; and

(4) To ASK for a progress report in 12 months on the joint work that is developing.

29 COMMUNITY REGENERATION CAPITAL PROGRAMME 2014-15

Councillor Eleanor Jackson in an *ad hoc* statement drew Cabinet's attention to page 27 of the report, related to Digital B&NES. Councillor Jackson felt that this was an excellent initiative for investment of Council resources into and she also welcomed an investment into the River Corridor Fund. Councillor Jackson also said that the Midsomer Norton Business Centre was not accessible by public transport.

Councillor Dave Laming in an *ad hoc* statement said that this day represented a quite significant day in the history of river. The lease of the Boathouse had been finalised as headquarters for the River Corridor Group. This Council for the first time confirmed budgetary recognition of the river. Councillor Laming also said that he had received full support from a senior director of Wessex Water. Similar support had been received from an Environment Agency and the Canal and River Trust. All of this was possible with support from the leadership of the Leader of the Council and the Cabinet. Councillor Laming also thanked the Strategic Director for Place for her contribution towards the River Strategy.

Councillor John Bull in an *ad hoc* statement commented that broadband connectivity in Paulton had not been included in Digital B&NES programme. Councillor Bull felt that the scheme was not completely successful considering that residents in other parts of B&NES had provided their own cables in order to link to the BT system. Councillor Bull said that all parts of the authority would need to be connected.

Councillor Ben Stevens introduced the item by saying that this was really good news for all residents in B&NES. Councillor Stevens thanked Councillor Laming for his kind words and for his efforts for bringing the river into the forefront.

Councillor Stevens said that the Digital B&NES scheme had been trailed for the last few months and it would deliver wireless network in Bath, Midsomer Norton, Radstock and Keynsham. That would offer a significant boost in tourism and convenience for residents. It would also offer a superfast broadband in Enterprise Area, which would help businesses. Councillor Stevens highlighted an ongoing work with the BIDUK to deliver superfast broadband in rural areas. This would cover all but few thousand premises across B&NES.

Councillor Stevens said that comments from Councillor Jackson about public transport connections with the Midsomer Norton Business Centre would be picked up by the relevant Cabinet Member.

Councillor Stevens moved the proposals.

Councillor David Dixon seconded the proposal.

Councillor Dixon said that this report showed how Council would support businesses in the area.

Councillor Dixon said that he was pleased to see that the Minerva Rowing Club would receive some funding to provide basic facilities.

Councillor Dixon was also pleased that the Midsomer Norton Business Centre would receive some funding.

Councillor Paul Crossley said that this was really good news for B&NES. This was about provision of vibrant economy and vibrant place across the whole of B&NES. An expansion of Digital B&NES would address some current inadequacies. Councillor Crossley also praised commitment from Councillor Laming towards the River Corridor Group and highlighted Council's pledge of investment in the river. Councillor Crossley was also pleased for investment in the Minerva Rowing Club and the Midsomer Norton Business Centre.

Councillor Stevens summed up by saying that this would support local businesses and help them grow.

On a motion from Councillor Ben Stevens, seconded by Councillor David Dixon, it was

RESOLVED (unanimously)

(1) To APPROVE the following provisional items for inclusion within the 14/15 capital programme:

- River Corridor Fund - £340k to include support towards:
 - Minerva Rowing Club;
 - Edge Protection at Widcombe;
 - Riverside linkages through Pulteney Bridge to Cleveland Place;
- Digital B&NES - £350k;
- Midsomer Norton Business Centre - £125k; and

(2) To DELEGATE authority to the Strategic Director for Place in consultation with the Cabinet Member for Sustainable Development to draw down the funds.

30 RADSTOCK ECOLOGY MITIGATION PROGRAMME

Councillor Eleanor Jackson said she was speaking as Meadow View resident. The other residents in the road felt that this was a misuse of Council funds and it was the developer's responsibility to look after the ecological mitigation.

Councillor Jackson questioned whether £400k should be put in this programme. Councillor Jackson felt that this would set a worrying precedent because developers would now claim that their site was not viable.

Councillor Jackson also said that these proposals did not leave any way for a proper scrutiny for this measure, if executed by the B&NES Council.

Councillor Jackson requested that this report should be sent back for a further consideration.

Debra Porter said that the Council would need to commit to claims made by the developer. Debra Porter also said that it was important that the Council should not inflate the ecological value of a significantly diminished ecological resort. The ecologist would accept the package but only if it does what it said it would. Debra Porter suggested that the proposed money should go elsewhere instead of where it was proposed by the report and called this report a financially unviable plan.

Colin Currie addressed his concerns on the plan and also his concern that the developer would not look after the ecological mitigation.

Jason Shore in an *ad hoc* statement said that he was speaking in support of the regeneration project. Jason Shore also said that he did not understand why the regeneration had not happened yet and there was nothing in Radstock to keep people in the locality. The focus should be on building more shops in Radstock. In his view, the trade was declining in Radstock and soon it could become a ghost town.

Hayley Worth in an *ad hoc* statement said that she had lived in Radstock for long time and asked for how long Radstock would stay the same place. Hayley Worth said that more homes and shops would give more opportunities to people in the area. The regeneration should start and the town should be moving forward.

Councillor John Bull in an *ad hoc* statement said that the purpose of the paper was to agree the allocation of the funding to this particular project in Radstock. Councillor

Bull expressed his concern that money had been paid to developers for something which they were responsible for under the planning decision.

Nettie Williams in an *ad hoc* statement said that she worked with Radstock families for some time and that the regeneration of Radstock should continue to happen. This plan showed a great level of commitment for the future of Radstock. The Victoria Hall refurbishment had had a big impact on Radstock so further regeneration could only move Radstock forward.

Shane Kitchen in an *ad hoc* statement said that he grew up in Radstock and that had business in Radstock. Shane Kitchen would like to see the regeneration move forward. It would increase employment and contacts with Bristol and other cities.

Councillor Ben Stevens introduced the item by saying that he listened to the concerns on mitigation and ecological impact though he was satisfied that this plan could go forward. Councillor Stevens said that for far too long the Norton Radstock Regeneration project had been held up by a small group of people and that he was quite happy that there were people in Radstock who wanted to move forward.

Councillor Stevens moved the proposals.

Councillor Simon Allen seconded the proposal.

Councillor Allen said that 26 years ago the last train left Radstock train station. Councillor Allen said that there were still people who did not want Radstock to move forward. Councillor Allen also said that he was pleased that there were residents who wanted to move forward with the regeneration of Radstock. This would deliver affordable homes for people of Radstock. What had been happening in Radstock now, in terms of the regeneration, was a positive thing.

Councillor Tim Ball said that Radstock would need to move forward and supported the plan.

Councillor Paul Crossley said that there was no mishandling of money in Radstock. Radstock is an important part of B&NES. Councillor Crossley read out paragraph 5.5 of the report and said that this was good news for Radstock and it would allow regeneration to happen. Councillor Crossley also praised the Victoria Hall regeneration. Councillor Crossley said that the Cabinet would move Radstock forward and this plan was good news for Radstock.

Councillor David Dixon said it was great to see younger families in the Chamber tonight. The Victoria Hall had been a success. This plan had been created to enable regeneration happening. This would provide new homes and more amenities to local community. This paper was a big step forward in delivering the regeneration of Radstock.

Councillor Ben Stevens summed up that we would need to continue momentum. Councillor Stevens also said that this paper facilitates the regeneration

On a motion from Councillor Ben Stevens, seconded by Councillor Simon Allen, it was

RESOLVED (unanimously)

(1) To AGREE that the Council will work in partnership with Norton Radstock Regeneration Company and its development partner Linden Homes Ltd to undertake the responsibility to deliver the Ecological Mitigation, Compensation and Management Plan for the former Great Western Railway lands to support the delivery of new highway, homes and jobs in Radstock; and

(2) To ALLOCATE up to £400k of the existing capital budget for the capital costs of the Ecological Mitigation, Compensation and Management Plan with future revenue costs met from associated savings in corporate borrowing costs.

31 FUNDING APPROVAL FOR INDICATIVE AFFORDABLE HOUSING DEVELOPMENT PROGRAMME

Councillor Eleanor Jackson in a statement [*a copy of which is attached to these Minutes as Appendix 3 and on the Council's website*] said that this subject and a version of this paper came to the meeting of the PDS Panel for Housing and Major Developments on 27 May 2014, where it was generally welcomed by panel members.

This Panel was a good place to discuss the proposals because the measures recommended clearly needed to be seen in the wider context of housing delivery in Bath and North East Somerset, and the difficulties experienced in a number of the current major projects in getting adequate amounts of affordable housing built. Councillor Jackson suggested that the Resources PDS Panel should scrutinise this matter.

Amanda Leon (Radstock Action Group) in a statement [*a copy of which is attached to these Minutes as Appendix 4 and on the Council's website*] said that Linden Homes were clear that they were not going to pay the proposed S106 agreement due to their responsibility to their stakeholders and asked why the Council would have to pay for this out of taxpayers money.

Councillor Dave Laming in an *ad hoc* statement said that the title might be misleading. Not many people in the area could afford houses so the Council should be looking to invest into homes, like mobile homes.

Councillor Paul Crossley asked if all Cabinet Members had read a Public Interest Test circulated as an appendix to the report.

All Cabinet Members confirmed that they had read the Public Interest Test.

Councillor Paul Crossley asked if all Cabinet Members agreed that appendix 1 of the report be exempt from publication.

All Cabinet Members agreed.

Councillor Paul Crossley informed the meeting that if any of Cabinet Members would want to refer to information from exempt appendix, then he would exclude the public from the meeting and move into exempt session.

Councillor Tim Ball introduced the item by saying that paper had been about homes for people. Councillor Ball said that there had been partnership work across the

authority, with different housing associations, to ensure there were affordable homes and social housing. Councillor Ball also said that he was pleased that Councillor Jackson welcomed the report and assured that appropriate Scrutiny would be taking place.

Councillor Ball informed the meeting that we were the only authority in the country to hit its target on delivery of affordable homes. 610 affordable homes had been delivered within four year programme across the district. Councillor Ball congratulated officers and thanked them for the hard work they put in this report.

Councillor Ball highlighted that there were quite a lot of details in the papers on how the Council would deliver affordable housing, including S106 details.

Councillor Ball moved the proposals.

Councillor Paul Crossley seconded the proposal.

Councillor Crossley thanked Councillor Jackson for her comments on this report and commended her commitment towards housing for disadvantaged and excluded groups.

Councillor Crossley said that the Council would be committing a significant capital budget to provide homes. The most substantial problem was the cost of the land in B&NES, which makes building of the affordable homes extremely difficult.

Councillor Simon Allen said that building homes for people was one of the most important things that this Council had been doing. Councillor Allen also said that this was a vital document which would be interrelated with future S106 agreements.

On a motion from Councillor Tim Ball, seconded by Councillor Paul Crossley, it was

RESOLVED (unanimously)

(1) To APPROVE the allocation of £1.015m Affordable Housing Capital budget for 2015-18, as detailed within Appendix 1; and

(2) To DELEGATE the Director of Place, in consultation with the Cabinet Member for Homes & Planning, to approve allocations of Affordable Housing Grant and Commuted Sums for developments falling within the scope of the indicative 2014-15 programme.

Councillor Paul Crossley closed the meeting at this point and read out some of tweets that arrived during the duration of this meeting.

The meeting ended at 8.35 pm

Chair _____

Date Confirmed and Signed _____

Prepared by Democratic Services

Bath & North East Somerset Council		
MEETING/ DECISION MAKER:	Cabinet	
DECISION DATE:	16th July 2014	EXECUTIVE FORWARD PLAN REFERENCE:
		E 2669
TITLE:	Schools Capital Programme - Improvement Projects 2014	
WARD:	All	
AN OPEN PUBLIC ITEM		
<p>List of attachments to this report:</p> <p>Please list all the appendices here, clearly indicating any which are exempt and the reasons for exemption</p>		

1 THE ISSUE

- 1.1 To seek approval for inclusion in the 2014/15 schools capital programme improvement projects at two primary schools.

2 RECOMMENDATION

Cabinet is asked to:

- 2.1 Approve for inclusion in the 2014/15 Capital Programme Capital Maintenance funding of £150,000 for improvements at Southdown Junior and Southdown Infant schools
- 2.2 Capital Maintenance funding of £50,000 for improvements at Peasedown St John Primary School
- 2.3 Capital Maintenance funding of £170,000 to add to funding received from the Government for works required to enable the provision of free school meals for all infant pupils from September 2014.
- 2.4 Agree the change in use of the Basic Need funding for Saltford Primary school to provide temporary classrooms whilst a permanent solution is developed.

3 RESOURCE IMPLICATIONS (FINANCE, PROPERTY, PEOPLE)

- 3.1 DfE Capital Maintenance funding for 2014-15 is £1.987m. Due to carry forwards in previous years the 2014/15 Schools Planned Maintenance Programme (SCPM) to address worst condition issues in schools is already funded at £1m and is included in the approved 2014/15 capital programme. In April Cabinet allocated an additional £500,000 to the 2014/15 SCPM to enable additional projects to be undertaken bringing the total programme to £1.5m.
- 3.2 Members also approved an allocation of £500,000 from Capital Maintenance for improvement projects which were to be identified. In total Cabinet approved £1m from Capital Maintenance leaving a balance of £987,000.
- 3.3 DfE has also allocated specific funding of £353,269 in 2014/15 for capital costs associated with works to kitchens associated with the introduction of free school meals for all infant pupils from September 2014. This amount is based on pupil numbers rather than an evaluation of actual costs. There is a separate allocation (£53k) for Voluntary Aided church schools. Academies are funded centrally.
- 3.4 Following further evaluation by Catering Services of the implications of providing additional school meals the need for additional funding of £170,000 has been identified, chiefly because remodelling of existing facilities is required to provide the capacity to prepare the additional meals required. It is proposed that this is met from the balance of Capital Maintenance funding available.
- 3.5 Two of the projects recommended for approval in this report totalling £200,000 will be funded from the £500,000 previously approved for improvement projects.
- 3.6 The additional allocation required for kitchen works of £170,000 will be a call on the remaining balance in Capital Maintenance of £987,000 leaving £817,000 available. This provides a healthy contingency amount for unforeseen additional costs and emergency projects. Any unused balance could be earmarked against the 2015/16 SCPM which is in line with practice in previous years.
- 3.7 The proposed change to the Basic Need project at Salford Primary is within the funding previously approved for the project.
- 3.8 The DfE capital allocations are non - ring fenced grant funding to enable the Council to fulfil its statutory duties in ensuring sufficient school places and addressing worst condition buildings. There are no borrowing requirements or revenue implications for the Council.

4 STATUTORY CONSIDERATIONS AND BASIS FOR PROPOSAL

- 4.1 Relevant considerations: The Council's statutory duty to provide sufficient school places, Children and Young People, Planning, Social Inclusion, Property, Impact on Staff.

5 THE REPORT

- 5.1 As identified in Paragraph 3.2 funding of £500,000 from Capital Maintenance has been earmarked for improvement projects. It is planned to use this for a limited number of projects in schools where improvements to accommodation would have a positive impact on curriculum delivery or school management and organisation with priority projects to be identified and agreed with the Cabinet

Member before they are taken forward for full approval. Details of the first projects identified are shown below.

- 5.2 Southdown Infants and Southdown Junior School - The schools federated on 1st January 2014 and are led by a single Headteacher and governing body. A consultation exercise proposing the amalgamation of the schools has recently been completed and is the subject of a report elsewhere on this agenda. Following an Ofsted inspection the Junior school is under notice to improve and the Headteacher has identified the need for a small number of urgent improvements to the accommodation that would make an immediate difference to the environment for pupils, assist with behaviour, improve morale and ultimately contribute to improved standards. These include remodelling and relocation of toilets, provision of a central reception and administrative offices and an accessible link between the two schools and. It is planned to undertake these works during the summer holiday period ready for the new academic year. At the same time the opportunity is to be taken to create whole school IT and communications network. A feasibility study has identified that an allocation of £150,000 is required for all works.
- 5.3 Further investment in the accommodation at the Southdown schools will be required but proposals will be brought forward for approval as part of future reports to Members on the proposed amalgamation of the schools.
- 5.4 Peasedown St John Primary School – This is one of the largest schools in the authority with a net capacity of 525. The school's accommodation is in line with this number but suffers from some small classroom spaces and growth in pupil numbers in recent years has put pressure on the accommodation and the school site. This will be increased by the requirement to provide additional school meals in line with the introduction of free school meals for all infants. The school has indicated that this pressure could be eased by having access to the hall and hard court in the adjacent Peasedown St John Youth Centre. The Youth Service is agreeable to this proposal and pattern and terms of use will be agreed between the school and the youth centre. Management of the hall and hard court area will remain with the Youth Service. Extensive works are not required but it will be necessary to provide a secure access for pupils between the two sites and undertake some minor works to the hall and outdoor area. An allocation of £50,000 is proposed.
- 5.5 Kitchen Capital - As has previously been reported the allocation from the DfE is based on an assessment of the number of pupils eligible for a free school meal and not the actual costs of providing the equipment and facilities required to deliver them. The majority of schools use the Council's Catering Service so the lead responsibility rests with that service for ensuring that there is sufficient capacity to provide free school meals to all infant pupils by September 2014 as required by government. In authorities without a catering service both the funding and the responsibility has been delegated to individual schools.
- 5.6 Initial estimates by Catering Services suggested that the £353,269 allocated by the DfE may be sufficient to enable the additional meals to be provided. However further evaluation of the works required to ensure there is capacity to provide the additional meals has identified that additional funding of £170,000 will be needed. This is chiefly to fund the extension of the kitchen at St Michael's C of E Junior which will be a hub kitchen to provide additional meals for a number of schools in South Bath which do not have the capacity to do this e.g. Combe

Down C of E Primary. It will also be necessary to replace an SEN space at Chandag Infants that will be lost due to the need for a larger kitchen. The overall investment in school kitchens will also future proof the facilities to ensure that if a government decides to extend free school meals to KS2 pupils there is sufficient capacity to cope with this without having to undertake further adaptations to facilities.

- 5.7 Saltford C of E Primary School – In April Cabinet approved Basic Need funding of £400,000 for the provision of two additional classrooms to enable the permanent expansion of the school required due to increasing pupil numbers in both 2014 and 2015. Cabinet was informed that it was originally hoped that the expansion could be achieved within the school's current accommodation but at the conclusion of discussions with the school the governing body decided in Autumn 2013 that they felt this was not possible. At that stage it was too late to consider a permanent building for September 2014 and in agreement with governors it was decided to explore the provision of a modular building. Modular prefabricated buildings are manufactured off site and then assembled on site and can offer savings in cost and programme whilst providing quality similar to a permanent building. This was felt to be preferable in terms of efficient use of resources to providing a temporary classroom for September 2014 which would eventually have to be replaced to provide permanent accommodation.
- 5.8 Unfortunately further evaluation of the modular build proposal including discussion with contractors has identified that the perceived benefits in cost and programme will not be achieved and this together with another issue at the school, has led to a re-evaluation of the options. The additional factor is the presence of badgers on the school site. There is a long standing issue with badgers on the site and their sett has undermined the ground below two temporary classroom buildings housing four classes. This has required repairs over the years and the classrooms are monitored to ensure they are structurally safe. Nevertheless the situation is not ideal and the buildings have been identified as requiring replacement. The permanent expansion of the school provides the opportunity to incorporate the replacement of these buildings which would see the provision of the two Basic Need classrooms and four replacement classrooms in a six classroom block. This proposal is in line with the approach endorsed by Cabinet in April that where appropriate, the opportunity should be taken for Basic Need projects to address other issues such as the option of replacing poor condition temporary classrooms that would not only remove future maintenance liabilities but provide more cohesive accommodation for the school e.g. a well located classroom block rather than just the one or two classrooms required for additional capacity.
- 5.9 It will now be necessary to hire temporary classrooms for September 2014 and these will remain on site until the completion of the new classroom block in 2016. This together with design and development costs for the new block total £137,500 and this can be set against the £400,000 previously approved by Cabinet. The balance of £262,500 can be retained for future incorporation in the funding for the new classroom block which will be brought before Cabinet for approval in the future.
- 5.10 The projects proposed for approval have been considered and approved by the Capital Strategy Group.

6 RATIONALE

6.1 The projects proposed in this report are in line with intended purpose of DfE capital funding and are priorities within the Schools Capital Programme to ensure schools remain open and operational, statutory duties are met and longer term strategic planning is embedded.

7 OTHER OPTIONS CONSIDERED

7.1 It is considered the proposals reflect the most appropriate options given the needs identified and funding available.

8 CONSULTATION

8.1 Cabinet Member; Section 151 Officer; Strategic Director; Monitoring Officer.

9 RISK MANAGEMENT

9.1 A risk assessment related to the issue and recommendations has been undertaken, in compliance with the Council's decision making risk management guidance.

Contact person	<i>Chris Kavanagh 01225 395149</i> <i>Chris_ Kavanagh@bathnes.gov.uk</i>
Background papers	<i>List here any background papers not included with this report, and where/how they are available for inspection.</i>
Please contact the report author if you need to access this report in an alternative format	

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Bath & North East Somerset Council		
MEETING/ DECISION MAKER:	Cabinet	
MEETING/ DECISION DATE:	16 July 2014	EXECUTIVE FORWARD PLAN REFERENCE:
		E 2659
TITLE:	Youth Justice Plan 2014-15	
WARD:	All	
AN OPEN PUBLIC ITEM		
List of attachments to this report:		
Youth Justice Plan 2014-15		

1 THE ISSUE

1.1 The Local Authority has a statutory responsibility to produce an annual Youth Justice Plan. The Plan sets out work to be undertaken to prevent youth offending and re-offending across Bath and North East Somerset and was approved by the multi-agency Youth Offending Service Management Board on 24 June 2014

2 RECOMMENDATION

The Cabinet agrees that:

- 2.1 The Youth Justice Plan can be recommended to Council as fulfilling the requirements of the Crime and Disorder Act 1998 and can then be submitted to the Youth Justice Board.
- 2.2 The Youth Justice Plan can be recommended for adoption as part of the Council's Policy and Budget Framework and can be accommodated within the Council budget

3 RESOURCE IMPLICATIONS (FINANCE, PROPERTY, PEOPLE)

The Council is the lead partner in the multi-agency arrangements to prevent youth offending, working closely with Police, Probation and Health Services, in accordance with the Crime and Disorder Act 1998. All partners have a statutory responsibility to participate in the resourcing of the Youth Offending Service. Due to significant organisational changes, Probation has not yet confirmed their contribution to the budget for 2014-15, but has committed to retaining their level of staffing – one full-time Probation Officer. It is anticipated that confirmed

information will be available by the time the Youth Justice Plan is taken to Council in September. The Probation Service has not confirmed its representative on the Youth Offending Service Management Board either, but again, it is anticipated that this will be known by September.

The Council makes a significant contribution in terms of staff, cash and additional support, including provision of office accommodation and a range of financial and human resources services. In 2014-2015, the Council is contributing £455,858 or 49.2% of the total costed budget, mostly in the form of staff.

The Operational Manager has delegated responsibility from the Youth Offending Service Management Board for delivery of services set out within the Youth Justice Plan, within the agreed budget.

4 STATUTORY CONSIDERATIONS AND BASIS FOR PROPOSAL

Preparation of an annual Youth Justice Plan is required under the Crime and Disorder Act 1998. The national Youth Justice Board has requested that it is submitted by 30 September 2014.

5 THE REPORT

The principal, statutory aim of the youth justice system is to prevent youth offending. The Local Authority is the lead partner in the multi-agency arrangements for work undertaken with young people who have committed offences. The Youth Justice Plan reviews the positive progress made last year in work with young people at risk of offending and re-offending, and with parents/carers and victims and sets out how services are to be resourced and delivered in 2014-2015.

Actions within the work plan will contribute to making Bath and North East Somerset a safer place and to helping young people work towards more positive individual outcomes.

6 RATIONALE

The Council has a statutory obligation to publish a Youth Justice Plan.

7 OTHER OPTIONS CONSIDERED

None

8 CONSULTATION

This Plan draws on self assessment and consultation within the multi-agency Youth Offending Service and its Management Board, including the Lead Member for Early Years, Children, Young People, Health and Wellbeing. A copy has been sent to the Trade Unions.

This Plan has been drawn to the attention of the Council's Monitoring Officer (Divisional Director – Legal and Democratic Services) and Section 151 Officer (Divisional Director - Finance).

9 RISK MANAGEMENT

A risk assessment related to the issue and recommendations has been undertaken, in compliance with the Council's decision making risk management guidance.

Contact person	Sally Churchyard, 11-19 Prevention Service Manager 01225 39696
Background papers	
Please contact the report author if you need to access this report in an alternative format	

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Bath and North East Somerset

Youth Justice Plan 2014 – 2015

Working in partnership to prevent youth offending

**Bath & North East
Somerset Council**



NHS
*Bath and North East Somerset
Clinical Commissioning Group*

Working together for health & well-being

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1. Introduction

Multi-agency Youth Offending Teams were established in April 2000 under the Crime and Disorder Act 1998, to work with young people aged 10-17 years who have committed offences. They include staff from a wide range of backgrounds including Police, Health, Social Care, Education and Probation. Youth Offending Teams work in an integrated way alongside other specialists and have key statutory functions, including supervision of young people on Court Orders, giving victims a voice, enabling young people who have offended to re-pay the harm they have caused and strengthening parenting skills. In Bath and North East Somerset, the statutory work is supplemented by a prevention service, Compass, which works on a voluntary basis with children aged 8-17 years who are at high risk of offending and with their families. Additionally, it co-ordinates the Strengthening Families, Strengthening Communities parenting programme for parents and carers across the Authority. The Youth Offending Service is also responsible for safeguarding young people and supporting them to make more positive lifestyle choices, with a particular focus on education, training and employment. A summary of these functions and an organisational chart can be found in the appendices.

The Youth Offending Service has a statutory responsibility to prevent youth offending and, in addition to reviewing outcomes with individuals, it measures success in this using three key national outcomes; reduction in rate of first time entrants, reduction in rate of re-offending and a reduction in the rate of custody. Local performance against these indicators in 2013 - 2014 has continued to be excellent and reported crime and the number of young people within the youth justice system continues to fall, helping to make Bath and North East Somerset a safer area.

In addition to its principal work of preventing youth offending, as part of the wider children's workforce, the Youth Offending Service is committed to the three priority areas identified in the Children and Young People's Plan 2014 -17:

- Children and young people are safe
- Children and young people are healthy
- Children and young people have equal life chances

This annual Youth Justice Plan is written in accordance with the Crime and Disorder Act 1998. It summarises the excellent work undertaken by the Youth Offending Service and its partners in 2013-2014 and, based on self-assessment undertaken within the Service and with the oversight of the Management Board, sets out a work plan for 2014-2015. The work plan includes continuing developments and responses to changes in legislation and national changes in how youth justice services are to be delivered. It outlines actions the service will take locally to continually improve its high quality service to young people and their families and to victims of crime, thereby also contributing to public safety in this area. The plan also draws upon learning from the Protecting Children Thematic Inspection undertaken in B&NES by HMI Probation in October 2013.

2. Review of 2013-2014

Throughout 2013 and 2014, the Youth Offending Service has put great emphasis on supporting young people, parents and victims to participate in, and improve the services we offer. We have done this by involving young people in the recruitment and selection of new staff, asking young people and victims to provide feedback and to help to induct new Management Board Members to help them learn about the work of the service. The Compass project has achieved a Gold Charter Mark for listening to young people. The Youth Offending Service has also been involved with two of the Council's 10 in 100 projects, one helping young children to read and the other creating an online magazine for seldom heard young people.

In October 2013, B&NES Youth Offending Service participated in a HMI Probation Thematic Inspection on Protecting Children. Only a small sample of cases were reviewed, but it confirmed that the service was identifying safeguarding issues and making appropriate referrals to Social Care, although there was not always sufficient integration of planning for children with child protection plans who were also known to the Youth Offending Service. Following the Inspection, a Protecting Children Improvement Plan was created and signed off as completed by the Management Board in April 2014. The main achievements of the plan have been improved links with Children's Social Care and greater information gathering in relation to all children subject to Youth Offending Service supervision from other agencies such as Education, Social Care and the Police.

During this year, the service has also undertaken a significant piece of work in upgrading its database to ChildView.

2.1 Review of Work Plan 2013-2014

Page 30

Actions	End of Year Position
Priority Area 1: Strategic Development	
1. Develop a strategy for the active participation of the Service in the Connecting Families Service's work with troubled families.	<p>Completed</p> <p>An agreement is in place that the YOS will take the lead with some families, as set out in a written protocol. The YOS is contributing to the work with a number of families and B&NES has been able to claim payment by results in respect of reductions in offending.</p>
2. Promote the Service as a restorative service across the Council's People and Communities Department and with all partners represented on the Management Board.	<p>Continuing into next year</p> <p>The whole service has had initial training and more is planned, including in restorative conferencing, utilising the YJB grant. The Hull YOS Manager has agreed to speak to local partners about becoming a restorative service. This action now contributes to the wider priorities of the Police and Crime Commissioner</p>

Actions	End of Year Position
3. Ensure the Service utilises a framework for measuring and reporting outcomes in line with developments across the 11-19 service.	<p>Continuing into next year An Outcomes Based Accountability approach will be used linked to the national indicators. A framework is being developed in readiness for a new Service Level Agreement from September 2014+, with the Youth Justice Plan feeding directly into the new Specification</p>
4. Complete the youth justice component of the Joint Strategic Needs Assessment and use this, together with other thematic work and analysis, to understand where the youth justice partnership can achieve greatest impact.	<p>Continuing into next year Preliminary information has been collated but it has yet to be fully analysed</p>
5. Review the delivery model for youth justice work within the changing context for young people and the Service's statutory partners.	<p>Continuing into next year The Management Board used its development day to identify a number of models which are now being evaluated</p>
6. Position the Youth Offending Service, including its preventative work, within the wider arrangements for early help and integrated support for young people.	<p>Continuing into next year The YOS is a member of the 11-19 Prevention Service management group, working towards a joint Service Level Agreement. It will be involved in the development of B&NES' Early Help Strategy.</p>
Priority Area 2: Operational Development	
1. Ensure that the service has an action plan for the roll-out of the new assessment tool, Asset Plus, and a local change lead in place.	<p>Completed The change lead is the Operational Manager. Initial training requirements have been agreed and fed back to YJB. B&NES will be part of the second cohort, but implementation the dates for this have now changed to 2015</p>
2. Ensure that protocols with the Avon and Somerset Probation Trust demonstrate effective arrangements for the transfer of young people from youth-based to adult-based services, in community and custodial settings, and reflect the YJB Transitions Framework	<p>Discontinued The protocol has been discussed with Probation, revised and agreed by five Youth Offending Services. However, the Probation Trust did not sign it off before the new National Probation Service came into being.</p>
3. Appoint staff and consolidate the new management structure.	<p>Completed All appointments have been made and the new structure is in place</p>

Actions	End of Year Position
4. Establish a new users' group to participate in developing feedback systems on all areas of service delivery.	<p>Continuing to next year Various methods have been used in 2013/14 to gain feedback from young people, victims and parents. For example, a group of young people met with Panel Members to give feedback on their experiences at Panel Meetings and all victims are offered the opportunity to provide feedback on the services they receive. This work will continue to develop into the next year.</p>
5. Enable the service to continue to develop as a restorative service, including through the peer supervision and support groups and an audit of their efficacy.	<p>Progressing The peer supervision initiative is continuing, with no direct management input. It will be reviewed at the next YOS Continuing Professional Development morning</p>
6. Develop the new Speech and Language Therapy resource and staff capacity within the Youth Offending Service.	<p>Completed 0.2 fte continuing resource has been agreed until 2016 and a Therapist is now in post. Further training was provided at a Continuing Professional Development morning in April.</p>
Page 32 Develop a good practice guide for the Service, drawing on evidence-based practice for preventing offending and safeguarding young people	<p>Progressing Work is underway to create a document with hyperlinks to all national and local guidance. The new ChildView database also has links to all national guidance.</p>
8. Implement the upgraded data-base, ChildView, ensuring compliance with all Council guidelines.	<p>Completed ChildView was installed on 7th April 2014 and a programme of staff training has been completed.</p>
Priority Area 3: Safeguarding Young People	
1. Ensure that the service is working in accordance with the Working Together 2013 guidance for safeguarding young people, including the identification of a safeguarding lead.	<p>Completed Working Together and a subsequent summary have been shared within the YOS. They were addressed in the first YOS Continuing Professional Development morning on 4 September. The safeguarding lead is the Operational Manager. The Protecting Children Plan post the HMI Probation Thematic Inspection has also been implemented.</p>

Actions	End of Year Position
2. Work with partners to introduce a framework for supporting young people at high risk, including risk of sexual exploitation.	Completed The Risk Management Review Panel has been established and has discussed young people known to the YOS. The 11-19 Prevention Manager is one of the co-chairs. Staff have been briefed on the changes and have been involved in joint referrals to this panel with Children's Social Care.
3. Increase the number of fathers receiving parenting interventions, drawing on the learning from the Local Safeguarding Children Board's "Celebrating Fatherhood" campaign.	Completed Work has been completed with the YOS parenting worker to target interventions towards fathers. With all referrals to parenting worker, where the father's whereabouts are known, they have been contacted by her. As of March 2014, 50% of parenting interventions delivered by the YOS parenting worker include direct work to fathers.
4. With neighbouring Youth Offending Service and Police colleagues, plan arrangements for keeping young people safe, including the provision of an integrated Appropriate Adult Service, within the new merging custody facilities.	Completed Collaboration with Bristol and South Gloucestershire has been agreed and arrangements are on course for implementation from September 2014 when the new Custody Suite opens.
Complete work to achieve the Bronze Level Charter Mark for hearing young people's voice in the statutory work of the Youth Offending Service.	Discontinued Evidence has been collated, but it was not be possible to achieve the award within the available timescale. The YOS is continuing to actively involve young people in staff recruitment and feedback about the service.
6. Complete work to achieve the Gold Level Charter Mark for hearing young people's voice in the preventative work of the Youth Offending Service.	Completed Compass was the last team to achieve this award under the last participation commission. Compass children are now involved in staff development, contributing directly to staff PDRs and new staff induction programmes. We now have quarterly participation meetings to listen to children's views for service planning. We have also produced a leaflet designed by children for other children telling them about Compass. We actively encourage our children to attend wider Council meetings, such as the Young People's Equalities meeting so their voice is heard.

Actions	End of Year Position
Priority Area 4: Reducing the rate of First Time Entrants (National impact indicator)	
1. Ensure young people have information about the new Out of Courts disposals system, including by designing and sharing a web-based leaflet.	Completed Staff contributed to the development of an Avon and Somerset wide leaflet for young people
2. Work with Police involved with Impact to identify vulnerable young people and refer them into suitable crime prevention projects.	Progressing The first cohort of 10 young people identified – we are now working with Police to identify PCSOs to promote referral to crime prevention projects
3. Work with the Integrated Working Team to heighten the understanding and recognition of all staff in child-centred roles of the crime-related risk and protective factors.	Progressing The Integrated Working Team staff have provided training for the Youth Offending Service. The Operational Manager meets with Social Care Team Managers and the YOS participates in the Children’s Service staff induction programme. An on-going action is to explore YOS staff attending a CFAIT team meeting.
Page 34 Work with the Avon and Somerset Probation Trust to identify children of adults under Probation supervision who could be referred to Compass.	To be carried over Plans were in place to meet with Senior Probation Officer linked to YOS however, given transforming the rehabilitation agenda, we have been advised to approach the new service in July to achieve this objective.
5. Review the use of team-around-the-child meetings for children and young people at risk of offending to demonstrate integrated and joint outcome measures with partners, particularly health and education.	Completed The Senior Practitioner has reviewed use of integrated meetings and processes within Compass, which has led to their use on a consistent basis, and monitors their use with the team. Team Around Child processes are also used widely in the YOS’s statutory work.
6. Work with the seconded nurse to establish and evaluate a system for provision of targeted interventions for all 11-12 year olds who are of an unhealthy weight and make sure they are signposted to Change4Life.	Completed The Youth Offending Service nurse screens young people for health needs. This has led to referrals to and engagement with the Change4Life programme, including 11-12 year olds.
7. With the Preventions Commissioner, support commissioning of a new prevention project.	Completed The commissioning process is complete and Mentoring Plus has been selected.

Actions	End of Year Position
Priority Area 5: Reducing the rate of Re-offending (National Impact Indicator)	
1. Ensure that intervention plans are specific, sequenced and appropriately reviewed to enable all offending related needs to be met and offending to reduce.	Completed Initial audit and feedback to staff has established good practice and areas for development. Now a regular process.
2. Fully refresh the first appointment guidelines by establishing a working group to design “packs” which are consistently delivered, explained to and understood by all young people attending the Youth Offending Service.	Completed First appointment packs have been re-designed and are being used with all young people on new Court orders.
3. Deliver YJB training on facilitating restorative justice meetings to Community Panel Members and YOS practitioners, in line with the Restorative Justice Council’s National Occupational Standards and Best Practice Guidance for Restorative Practice.	Completed Training was led by Lena Higginson and Sally Burton. This has led to an increased awareness of Restorative Justice within the team and some direct Restorative Justice work undertaken with victims.
Page 35 With partners, primarily Schools/Colleges and the Youth Service, provide information sessions for young people on the impact and consequences for victims and young people of knife crime.	Completed YOS practitioners, including a YOS Police Officer, worked with staff at Southside Youth Hub to provide workshops for young people and parents
5. Ensure that all children and young people entering the preventions service or subject to Out of Court disposals who are living in a home where domestic violence takes place have an appropriate, targeted intervention which is reflected in their assessment and their intervention plan.	Completed Partnership and Interventions Manager met with Freedom Project and Off The Record in December 2013 - information regarding respective projects circulated to whole Youth Offending Service including Compass. On-going plans to invite speakers from these projects to YOS team meeting in 2014. Case by case discussions held in supervision and risk and vulnerability meetings at YOS, and appropriate interventions/referrals in place.
6. With young people and community panel members, establish a quarterly process for reviewing and evaluating interventions used to reduce offending behaviour and develop a young person-centred process for preparing feedback for Referral Order reviews and final panels.	Progressing Young people and volunteer panel members have met to record feedback about how Panel Meetings are working. Subsequent meetings are being arranged to continue this process.

Actions	End of Year Position
7. Ensure that whenever young people end their statutory contact, their final team-around-the-child meeting considers the need for appropriate exit plans or refers them to the Interface Panel, including young people at high risk of harm.	Completed All cases that come to an end have an exit strategy.
8. Develop the framework for the Youth Offending Service working in a preventative capacity with young people who have already been subject to a youth justice substantive outcome.	Progressing In all cases where statutory intervention is ending, a review is undertaken about whether there is an on-going role on a voluntary basis for the Youth Offending Service. In particular for Out of Court Disposal cases, case managers are ensuring that there is Team Around Child process in place before the intervention is ended.
Priority Area 6: Reducing the rate of Custody (National Transparency Indicator)	
1. Develop the use of the Custody Review Panel to identify which young people at risk of custody will benefit from additional support paid by the remands allocation to support interventions to prevent remands to custody. (Based on a Thematic Inspection recommendation).	Completed The principle has been established and work is underway. The Panel reviews use of the budget at its quarterly meetings.
2. Deliver a workshop with the Youth Offending Service, Children's Social Care and the Independent Reviewing Service to ensure knowledge is disseminated on the single remand framework.	Progressing A workshop was planned and booked for May 2014, but has been postponed until September 2014
3. Establish working relationships with key staff in the newly designated custodial facilities for young people from Bath and North East Somerset and provide information to affected young people and families, Social Care staff and Independent Reviewing Officers to facilitate contact and participate in plans for resettlement.	Progressing We successfully challenged the designation of HMP&YOI Feltham for local young people sentenced to custody and it has been changed to HMYOI Parc. Neither of the young people sentenced to custody or those securely remanded this year have gone to Youth Offender Institutions. Very positive relationships have been maintained with Vinney Green Secure Children's Home and the service is now developing its working relationship with HMYOI Parc

2.2 Performance against the three National Outcome Indicators

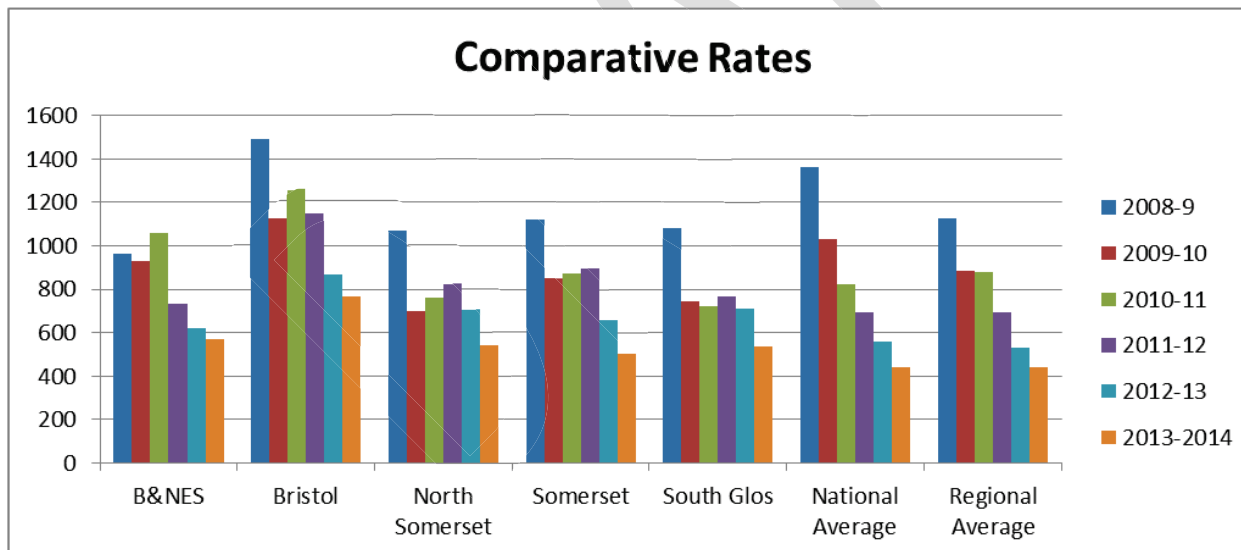
1. Reduce the rate of first time entrants to the youth justice system

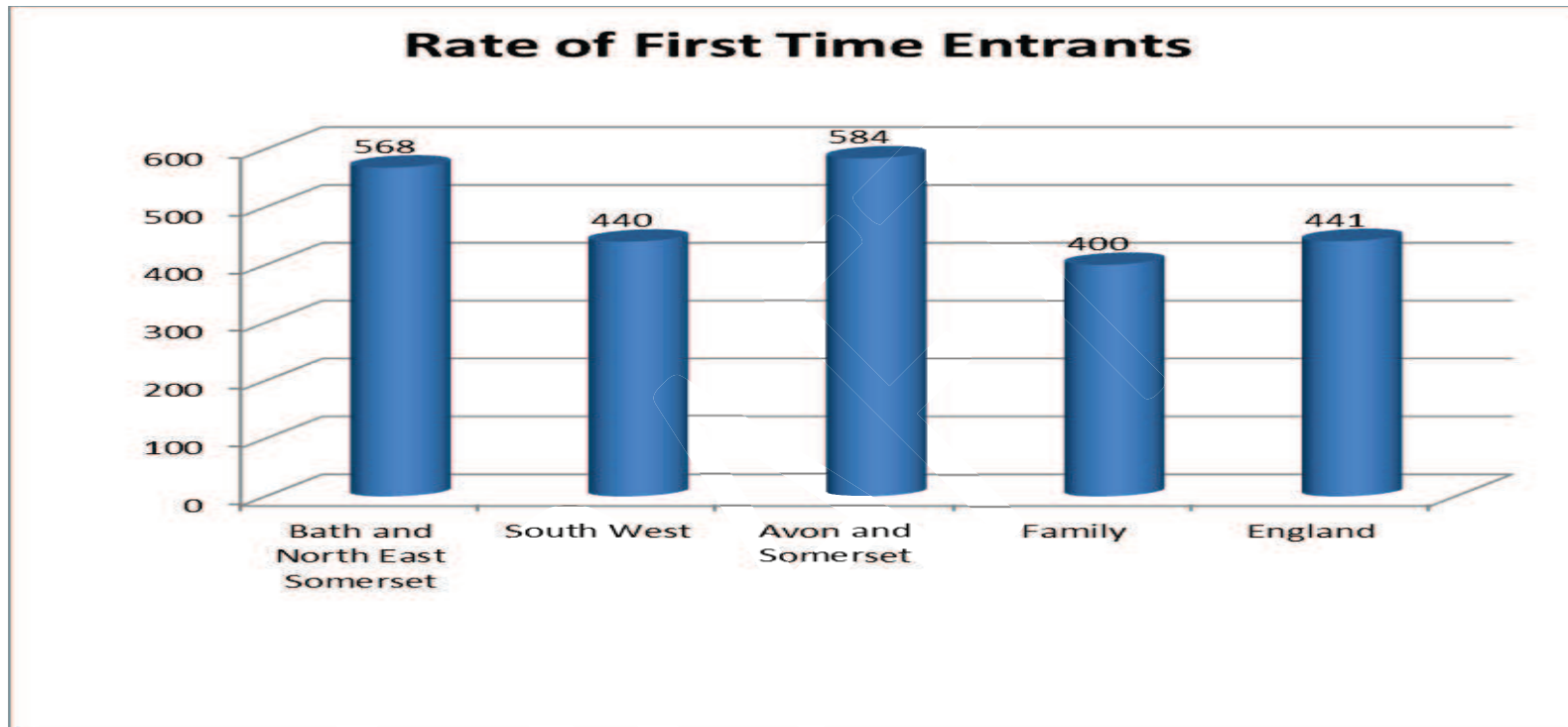
This performance measure helps understanding of how effective the local area has been in supporting young people not to offend and enter the youth justice system for the first time. It is shown as a rate of young people per 100,000 in the general population of 10-17 year olds who received their first substantive outcome (a Police Reprimand or Final Warning following admission of an offence, or a conviction in Court), to enable comparisons to be made. Police Reprimands and Final Warnings were abolished under the Legal Aid, Sentencing and Punishment of Offenders Act and so in future, this measure will address those receiving Youth Cautions and Youth Conditional Cautions.

Data is taken from the Police National Computer and is published in rolling full years for the twelve month periods ending March, July, September and December each year. Local performance is continuing to improve, but at a slower rate than comparators and the relative rate of first time entrants remains stubbornly higher than all comparators apart from Avon and Somerset. Nevertheless, the number of young people entering the youth justice system for the first time has reduced by more than half in the last five years. The local target is for a further 10% reduction.

	<i>Bath and North East Somerset</i>	<i>South West</i>	<i>'Family' comparator group</i>	<i>England</i>
<u>First time entrant rate per 100,000 of local population aged 10-17</u> (Source: Youth Justice Board)				
<i>January 2013 - December 2013 (latest period)</i>	568	440	400	411
<i>April 2012 – March 2013</i>	618	561	430	528
<i>Percentage change from selected baseline</i>	-8.1%	-21.6%	-7.0%	-16.5%

Date range for the last five years	Number of young people entering the youth justice system for the first time
April 2008 – March 2009	179
April 2009 – March 2010	150
April 2010 – March 2011	167
April 2011 – March 2012	114
April 2012 – March 2013	88
April 2013 – March 2014	80



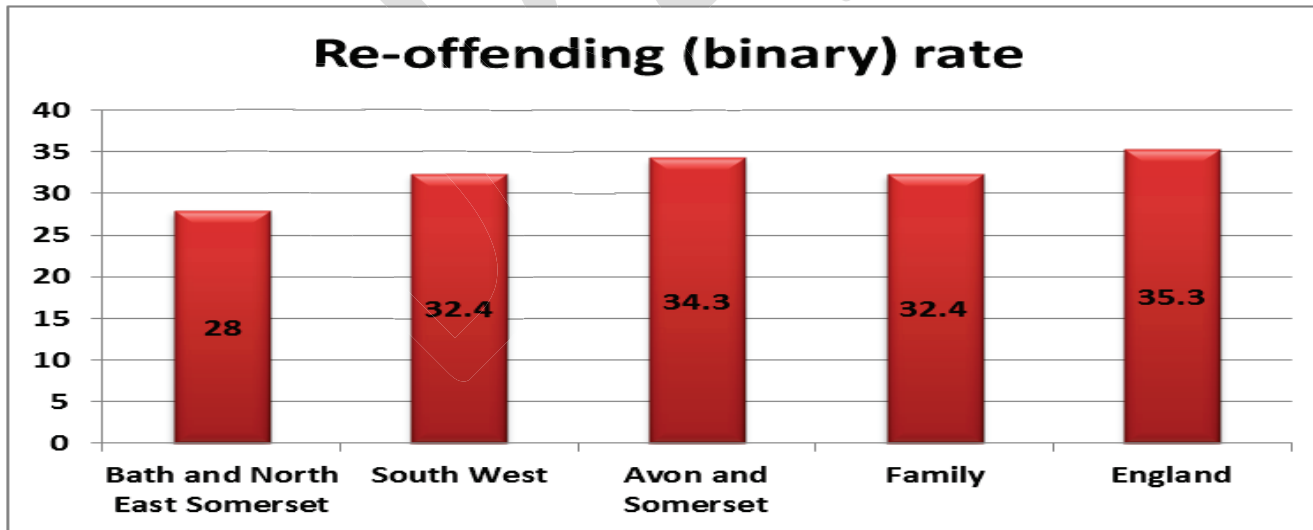
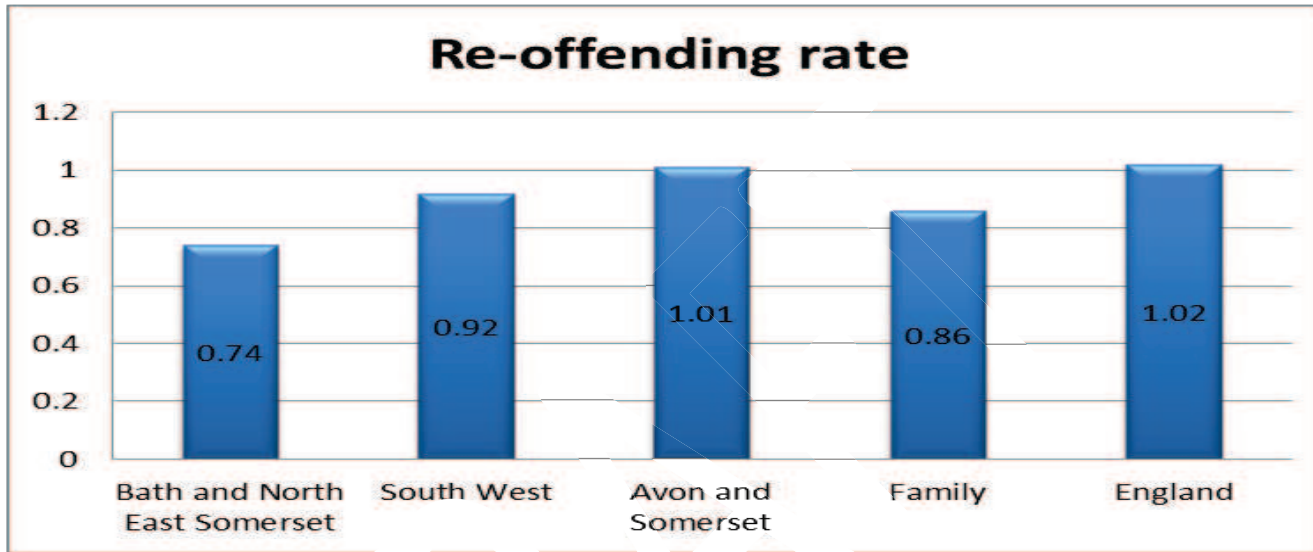


2. Reduce the rate of re-offending

This performance measure helps understanding of the effectiveness of the youth justice system in supporting young people who have previously offended to avoid re-offending. It is a quarterly rolling measure of the rate of re-offending after twelve months of a cohort of young people who received a Caution or Conditional Caution or a sentence in Court or were released from custody. The data is taken from the Police National Computer and published as a frequency rate (the average number of re-offences per 100 young people) and as binary information (a count of the number of young people who re-offended, expressed as a percentage of the cohort). The local rate continues to reduce and is much lower (better) than all comparators. The local target for re-offending for 2014-2015 is a reduction to 27%.

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	Bath and North East Somerset	South West	'Family' comparator group	England
<u>Re-offending rates after 12 months</u> (Source: Youth Justice Board)				
<i>Average frequency of re-offending per 100 young people in the cohort of young people dealt with in the youth justice system between July 2011 – June 2012</i>	0.74	0.92	0.86	1.02
<i>Average frequency of re-offending per 100 young people in the cohort of young people dealt with in the youth justice system between April 2011 – March 2012</i>	0.74	0.93	0.86	1.02
<i>Change from selected baseline</i>	0.00	-0.01	0.00	0.00
<i>Binary rate: percentage of young people dealt with in the youth justice system between July 2011 and June 2012 who re-offended</i>	28%	32.4%	32.4%	35.3%
<i>Binary rate: percentage of young people dealt with in the youth justice system between April 2011 and March 2012 who re-offended</i>	28.6%	33%	32.7%	35.4%
<i>Percentage point change from selected baseline</i>	-0.06%	-0.6%	-0.4%	-0.1%



Reduce the rate of custodial sentences

The third performance measure relates to the use made of custody as a sentencing option. Any Court's decision to sentence a child or young person to custody for a serious offence is not taken lightly and is avoided wherever they can be safely supported to remain within the community. The table below shows the marked Indicator is of the rate of custodial sentences per 1,000 young people aged 10-17 in the general population. The tables below shows that the local rate of custodial sentencing remains lower than all comparators and shows greater improvement in the last three years than local comparators. The local target for Custody for 2014/2015 is a reduction to 0.10.

Use of Custody rate per 1,000 young people in the population aged 10-17

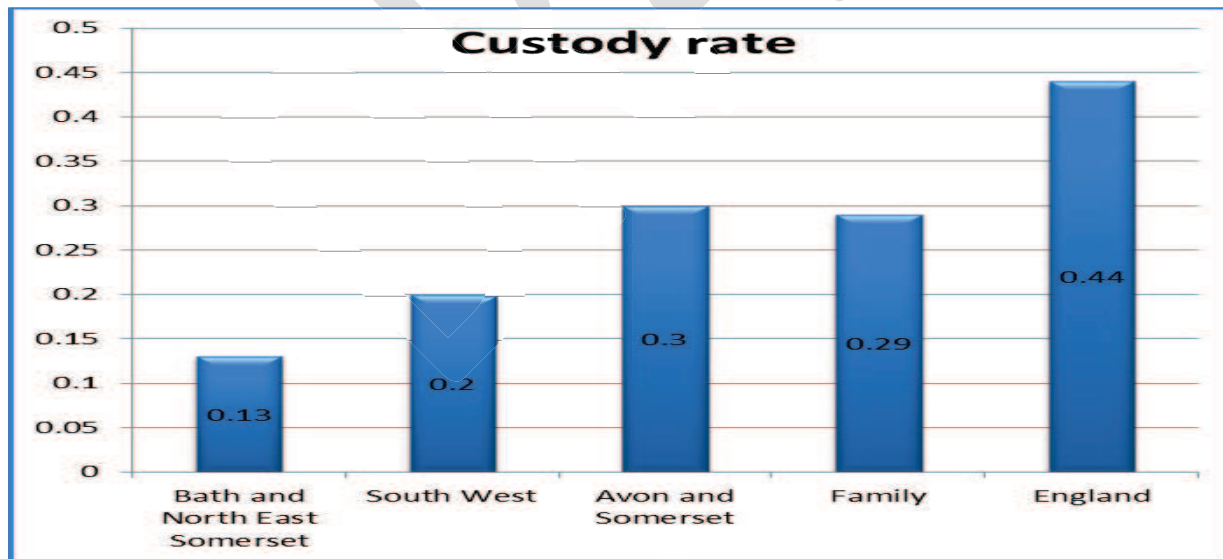
(Source: Youth Justice Board)

April 2012– March 2013

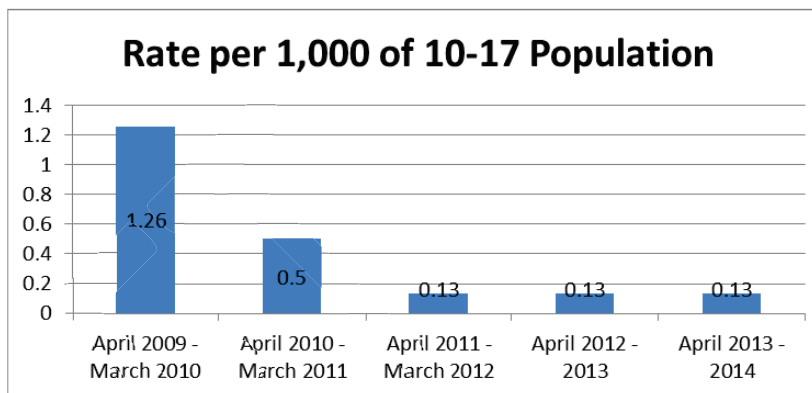
April 2011– March 2012

Change

	<i>Bath and North East Somerset</i>	<i>South West</i>	<i>YOT comparison group selected*</i>	<i>England</i>
April 2012– March 2013	0.13	0.27	0.86	0.55
April 2011– March 2012	0.13	0.36	1.06	0.82
Change	-0.00	-0.19	-0.20	-0.27



Date range for the last five years	Number of occasions on which a young person was sentenced to custody
April 2009 – March 2010	20
April 2010 – March 2011	8
April 2011 – March 2012	2
April 2012 – March 2013	2
April 2013 – March 2013	2



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3. The Context for Youth Justice

Wider changes in government policy impact upon the Youth Offending Service and the young people it works with and are incorporated into planning, policies and procedures. The following are the most significant changes impacting on the Service in the year ahead.

3.1 Avon and Somerset Constabulary Police and Crime Plan 2013 – 2017

The Police and Crime Plan for Bath and North East Somerset sets out the priorities of the service based on views of people living in the area. The four key priorities are:

- Reduce the impact that anti-social behaviour has in our communities
- Prevent and Reduce Burglary and fear of burglary in your area
- Tackle domestic and sexual violence, particularly towards women and children
- Ensure victims are at the heart of the criminal justice system

Other priorities include early intervention and prevention, better co-ordinating and integrating local services, building strong relationships and improving road safety and providing a visible and accessible service.

3.2 Avon and Somerset Constabulary Operating Model 2014

To meet budget cuts and make service improvements, Avon and Somerset Constabulary have reshaped their service with the introduction of the new Operating Model. The principles of the model are being 'Better for the Public', 'Simpler for Staff' and 'Value to the Organisation'. The document states that 'High-risk young offenders will be managed by IMPACT officers embedded in the Youth Offending Team and young people involved in street crime will be managed by IRiS.' Therefore, into 2014 -2015, the Youth Offending Service will need to negotiate the reviewed role of the seconded Police Officers, to ensure a continued high quality service for young people and victims.

3.3 Transforming Rehabilitation

Throughout 2014/15, the Government plans to change the way in which offenders are managed in the community in order to reduce reoffending rates. These changes are under the umbrella heading of 'Transforming Rehabilitation' and include the creation of a new public sector National Probation Service (NPS), working to protect the public and building upon the expertise and professionalism which are already in place. The Transforming Rehabilitation agenda will also open up the market to a diverse range of new Community Rehabilitation Companies to supervise low and medium risk offenders aged 18 and above. New payment incentives for market providers to focus on reforming offenders will be introduced, so they will only receive full payment for reductions in reoffending. The Youth Offending Service will therefore need to establish links with the new National Probation Service and Community Rehabilitation Companies in terms of transitions for 18 year olds and consider whether it is appropriate to bid as part of a wider consortium for a sub-contract to undertake some of this work. This is one of the possible future models for delivery.

3.4 Establishment of a Targeted Youth Support Service in Bath and North East Somerset

In 2014, The Connexions Service, previously provided by Learning Partnership West, has been brought into local authority management alongside the Youth Offending Service. The Connexions Service and the Youth Service are being integrated to create a single targeted youth support service. As a consequence, the Youth Offending Service will no longer have a dedicated Connexions Personal Adviser and will, instead, receive regular consultancy to support its work with young people.

3.5 The Children and Families Act 2014 including the Special Educational Need and Disability Reforms

The Children and Families Act includes clauses on special education needs (SEN) which aim to reform the SEN system. The clauses include the duty on local authorities to draw up Education, Health and Care plans and to set out a 'local offer' of services available to parents and young people. Young people will be able to receive SEN support until they are 25 years old.

3.6 Youth Justice Changes

Throughout 2014, there are anticipated changes to service delivery for Youth Offending Services in a number of key areas. Firstly, they will be required to supervise a young person on a licence or notice of supervision if they turn 18 while in custody. Secondly, the delivery of the Unpaid Work Requirement will be transferred to Youth Offending Teams from June 2014. This means that the Youth Offending Service will need to strengthen the placements where young people can complete unpaid work and ensure staff and partners are briefed of the changes. Thirdly, the responsibility of Junior Attendance Centres is moving from the Ministry of Justice to the Youth Justice Board in 2014 and then on to Local Authorities into 2015. The impact of this in B&NES may be slight due to the limited use of Attendance Centre Requirements, but this does present an opportunity to review provision and make it more accessible.

3.7 Appropriate Adult Service

Between July and September 2014, new custody suites will open in Patchway, South Gloucestershire and in Keynsham. All adults and young people needing to be processed through a custody suite in Bristol, South Gloucestershire and B&NES will be dealt with at the new police stations. To ensure a robust Appropriate Adult Service is maintained, Bristol, South Gloucestershire and B&NES Youth Offending Services are collaborating to provide a single Appropriate Adult Service. The scheme will be jointly funded but solely managed by Bristol Youth Offending Service. B&NES' Youth Offending Service will remain part of a steering group to oversee this service.

3.8 Introduction of Asset Plus

The introduction of a new Youth Justice Board approved assessment tool will now take place in the latter half of 2015. Asset Plus has been designed to provide a holistic end to end assessment and intervention plan, allowing one record to follow a young person throughout their time in the youth justice system. With a renewed focus on the professional judgement of practitioners, Asset Plus will enable better focussed intervention plans to provide improved outcomes for young people currently in the system and those at risk of entering.

3.9 The Secure Estate

The Court catchment for young people going to a Youth Offender Institution from Bath Youth Court has been changed from YOI Feltham to YOI Parc in Bridgend, Wales. This is a positive development and, if a young person is sentenced to go to custody and placed in a Young Offender Institution, it will enable families to visit more easily.

3.10 Troubled Families Initiative (TFI)

The government states that 'Troubled Families' are those that have problems and cause problems to the community around them, putting high costs on the public sector. The TFI is a programme which initially aimed to work with local authorities and their partners to help 120,000 troubled families in England turn their lives around by 2015, to ensure the children in these families have the chance of a better life, and at the same time bring down the cost to the taxpayer. The programme targets non-attendance at school, offending and anti-social behaviour and worklessness. The national programme has been extended for a further 3 years. In B&NES, the TFI is predominantly being delivered by a new Connecting Families Team. Other already established teams who work with children and families, such as the Youth Offending Service are part of a matrix team to also work with some of the identified families. For the Youth Offending Service and Compass, this means that with young people involved with the service who are identified as being part of a 'Troubled Family', we will widen our scope to work with the whole family, rather than one young person within it.

3.11 National Standards Monitoring

National Standards (NS) were first introduced to youth justice services in 2000, with the most recent edition of NS for Youth Offending Services being published in 2013. In 2014, the National Standards Audit is to be re-introduced by the YJB. The NS Audit will take place in two parts, firstly by a data extract from the YOS database ChildView and secondly by a qualitative self-audit of cases. The first year's data extraction will include monitoring Contact Frequency, Breach Compliance and Referral Order timeliness. The qualitative self-audit will not be prescribed by the YJB but will need to be submitted by 19th September 2014. It will also need to cover first tier, community orders and custody orders totalling 20% of live cases and consider equality in each of the yearly audits.

3.12 Education

A key role of the YOS in working with young people to prevent their offending and reoffending is to advocate and broker access to ETE both strategically and on behalf of individual young people. The importance of this intervention cannot be overestimated as participation in school and college and attainment of work-related skills are major protective factors in offending and reoffending. The YOS employs an Education Worker to monitor attendance and engagement with ETE and to work directly with young people and parents/ carers where there are issues affecting engagement, progress or quality of provision.

4. Plan for 2014-2015

4.1 Governance, Leadership and Partnership Arrangements

Bath and North East Somerset Council, as the relevant Local Authority, is the lead partner for youth justice. It has the primary responsibility to the Secretary of State for ensuring that the Youth Offending Service fulfils requirements and delivers services required under the Crime and Disorder Act 1998, and any subsequent criminal justice legislation and that it meets the requirements of all relevant legislation applicable to young people. The statutory partners (Social Care, Police, Probation, Education and Health) have a duty to ensure that, through the provision of resources and other support, statutory requirements are met.

Governance of the Youth Offending Service rests with the Community Safety Partnership's Responsible Authorities Group, and immediate oversight and accountability is provided by the Youth Offending Service Management Board, with representation from the key statutory partners. The Board, currently chaired by the Head of Service at Oxford Health NHS Trust has a Partnership Agreement in place, setting out its responsibilities for the strategic direction, resourcing and operational delivery of youth justice services. Membership of the Youth Offending Service Management Board has recently been reviewed and new members invited, including representatives from the Police and Crime Commissioner's Office, the Children and Young People's Commissioning Team, the Youth Justice Board and the local Councillor with responsibility for children and young people's services who also represents the Youth Offending Service's interests at the Children's Trust Board and at the Health and Wellbeing Board.

This Youth Justice Plan will be monitored by the Youth Offending Service Management Board, which meets quarterly and there will continue to be a level of support and oversight from the Youth Justice Board. The Youth Offending Service is managed within the People and Communities Department and is part of the Preventative Services Division. Strategic responsibility for the Youth Offending Service is allocated to the 11-19 Prevention Service Manager who is also responsible for the new targeted youth support service and the Hospital Education and Reintegration Service. The Operational Manager has oversight of all services delivered and is supported by the Partnership and Intervention Manager and a part-time Senior Practitioner. The wider staff structure can be found summarised in an organisational chart in the appendices.

The Youth Offending Service is very well established within the Authority and makes a substantial contribution to the work of a range of other partnerships and work streams. It regards these as opportunities to learn and share good practice and to influence other strategies to ensure they take account of the interests of young people at risk of offending and re-offending, their parents/carers and victims. Relationships with other key partner agencies within the Authority and across Avon and Somerset are set out in written protocols which are regularly reviewed and updated.

All plans delivered within the Local Authority sit beneath the Public Services Board. Key plans relating to the work of the Youth Offending Service are listed below:

Members of the Youth Offending Service Management Board

The work of the Board is supported by Claire Barnett (administration), Sarah Howell (accounts) and Carla Cooper (Operational Manager)

Member	Role and Agency Represented
Michelle Maguire – Chair	Head of Service, Oxford Health NHS Foundation Trust
Mike Bowden – Deputy Chair	Deputy Director, Children and Young People’s Strategy and Commissioning, Bath and North East Somerset Council
Philip Jones	Detective Chief Inspector – Avon and Somerset Constabulary
Richard Baldwin	Divisional Director, Children and Young People’s Specialist and Targeted Services, Bath and North East Somerset Council
To be confirmed	National Probation Service
Dine Romero	Cabinet Lead for Early Years, Children and Youth, Bath and North East Somerset Council
Deborah Forward	Senior Commissioning Manager, Bath and North East Somerset Council
Amy Hurst	Youth Champion and Health and Wellbeing Officer, Avon and Somerset Police and Crime Commissioner’s Office
Pauline Kinton	South West Local Performance Adviser, Youth Justice Board for England and Wales
Sally Churchyard	11-19 Prevention Service Manager, Bath and North East Somerset Council

The following local strategies and plans are directly relevant to work with young people at risk of offending and re-offending, setting the wider policy context.

(a) Children and Young People's Plan 2014 - 2017

This plan, as with previous Children and Young People's plans, sets out the vision and priorities that B&NES has for children and young people. The plan has retained the vision from the previous plan that "We want all children and young people to enjoy childhood and be well prepared for adult life" as this statement still underpins the commitment to the Children and Young People of Bath and North East Somerset. Following consultation with partner agencies, children, young people and parents/carers, the Plan includes three key outcomes that will be prioritised between 2014- 2017:

- Children and young people are safe
- Children and young people are healthy
- Children and young people have equal life chances

The Plan states that Bath and North East Somerset will continue to offer support to young people who offend or who at risk of offending.

(b) Reducing Re-Offending Strategy

The Community Safety Strategy incorporates the Reducing Offending Strategy which outlines the wider plan to reduce offending and cut crime in Bath and North East Somerset. The Youth Offending Service leads on the Children and Young People's pathway within this Strategy. It is also a partner with the multi-agency integrated offender management team known locally as Impact which manages a locally defined cohort of offenders involved in prolific, acquisitive crime and causing the most concern.

(c) Community Safety Strategy

The local Community Safety Partnership's priorities have been re-affirmed, as follows:

- Enhance the quality of life in our communities and increase public confidence by reducing anti-social behaviour
- Create a safe, strong and vibrant city economy
- Increase protection of the most vulnerable victims of crime
- Reduce crimes of local concern by working together with our communities
- Minimize the harm that substance misuse causes to society, communities, families and individuals
- Safeguard young people and prevent them from becoming victims or perpetrators of crime. This latter priority includes all the actions within this Youth Justice Plan

(d) Local Safeguarding Children Board Work Programme 2014-2015

The Youth Offending Service has a statutory duty under Section 11 of the Children's Act to safeguard and promote the welfare of children. The Youth Offending Service contributes to the Local Safeguarding Children Board and related sub-groups. The Youth Offending Service participates in the Operational Management Group set up to oversee work with children and young people about Harmful Sexual Behaviour. The Youth Offending Service is also involved in promoting the safeguarding needs of young people, including ensuring improved early identification of vulnerable 11-19 year olds and well-targeted services to reduce the need for statutory services.

(e) Youth Crime Prevention Strategy

The Youth Crime Prevention Board oversees the partnership working to reduce first time entrants to the youth justice system and reports to the Youth Offending Service Management Board. The local Youth Crime Prevention Strategy contains a comprehensive action plan for the partnership and highlights priorities for youth crime prevention work as well as outlining challenges for the future. Members of the Board will be actively involved in the development of an Early Help Strategy and its work will contribute to this

(f) Joint Health and Wellbeing Strategy

The Health and Wellbeing Board sets out the local strategic priorities to improve the health and well-being of people of Bath and North East Somerset, as assessed through the Joint Strategic Needs Assessment. This year sees the first Joint Health and Wellbeing strategy and the Youth Offending Service will have the opportunity to contribute to a consultation on the priorities outlined therein. Some of the proposed priority areas in this draft consultation overlap with the work of health staff attached to the Youth Offending Service and will be reflected in planning for the year ahead.

4.2 Work Plan 2014-2015

What will be done	Lead	Timescale
Priority Area 1: Strategic Development		
1. Review the delivery model for youth justice work within the changing context for young people and the Service's statutory partners and set.	Management Board and Service Manager	June 2105
2. In the light of new national guidance and findings from HMI Probation, consolidate the role of the Management Board in overseeing the effectiveness of youth justice services.	Management Board and Service Manager	June 2015
3. Participate in the development of a local Early Help Strategy, ensuring that it addresses principles and ambitions for working with young people at risk of offending.	Service Manager	December 2104
4. In line with the Police Operating Model, agree a new role and job description for the seconded YOS Police Officers.	Operational Manager	December 2014
5. Ensure the Youth Offending Service continues to involve the community in its work by recruiting a Community Involvement Worker to work with volunteers and reparation in the community.	Partnership and Intervention Manager	December 2014
6. Seek the establishment of a forum to bring together training providers and those services working with post 16 young people who are not in employment, education or training.	Management Board and Service Manager	June 2015
Priority Area 2: Assessment, Planning, Intervention and Supervision		
1. In preparation for Asset Plus and National Standards Audits, strengthen assessment skills of practitioners by reviewing the service's audit framework, and introducing joint assessments and live observations.	Operational Manager	December 2014
2. Support young people to participate in their supervision and own their assessment, by ensuring that, in every case, the young person's views are included in their assessment and that One Page Profiles are used as a tool with young people.	Operational Manager	December 2014
3. Ensure that young people participate in the development of the service by reviewing the processes used to seek feedback from young people and parents/ carers, including introduction of the HMI Probation tool, Viewpoint.	Operational Manager	December 2014
4. Promote young people participate in the development of the service by inviting young people to be part of staff interviews, inductions and reviews of the service. This will include creating young person friendly formats of feedback, collating the feedback and using it to improve the work of the YOS.	Operational Manager	June 2015

What will be done	Lead	Timescale
5. Ensure the interventions delivered by the YOS meet the learning and communication needs of young people, by reviewing and updating all interventions materials in consultation with the Speech and Language Therapist and monitor this through completion of communication screens and learning style assessments.	Partnership and Intervention Manager	June 2015
6. Increase the level of compliance with Court Orders by introducing Compliance Panels when a young person is at risk of going into breach to reduce the number of breaches from 21 in 2013/14.	Operational Manager	June 2015
Priority Area 3: Work with Victims		
1. Improve the Victim Liaison Service at the YOS, review the way feedback is sought from victims and create a user friendly / postcard feedback form. This feedback will then be collated and reviewed on a quarterly basis to inform how we offer support to victims.	Partnership and Intervention Manager	December 2014
2. Ensure victims and young people are able to reflect upon and feedback about a restorative justice meeting, create a template to be used to offer a de-brief to all young people and victims. This feedback will be reviewed on a quarterly basis to inform practice relating to restorative meetings.	Partnership and Intervention Manager	September 2014
3. Build upon the restorative justice skills within the team with team training in Family Mediation and use these skills where there is conflict in the young person's home environment.	Operational Manager	December 2014
Priority Area 4: Work with Families		
1. Develop and implement the use of Assessment and Screening Tools for Case Managers to use with Parents and Families.	Operational Manager	December 2014
2. Select suitable families throughout 2014/15 where the Youth Offending Service, including Compass, will work with the family as a whole as part of the Connecting Families Matrix Team.	Operational and Senior Practitioner	June 2015
3. Develop the role of the Youth Offending Service Parenting Worker to ensure that work with parents/carers is integrated into a Family Plan and that joint work with families is delivered where appropriate.	Partnership and Intervention Manager	June 2015
4. Review the referral process to the Youth Offending Service Parenting Worker to ensure that referrals are appropriate, timely, focussed and integrated into the wider plan with the family.	Partnership and Intervention Manager	September 2014
5. Ensure practitioners are able to undertake the family work as part of the matrix team, create resources that can be used to support the work such as Consent Forms, Written Agreements, and templates for a Whole Family Plan.	Operational Manager	December 2014

What will be done	Lead	Timescale
6. Ensure continued delivery of the Strengthening Families, Strengthening Communities parenting programme, by writing job description for SFSC sessional facilitators, consolidating the group of Local Authority employed facilitators and gaining approval for them to deliver the course, creating a rolling timetable for group work programmes and strengthening referral processes, participation and evaluation.	Partnership and Intervention Manager	December 2014
7. Ensure continued use of Team around the Child and Team Around the Family approaches and audit this in supervision.	Operational Manager	June 2015
Priority Area 5: Preventative Work		
1. Increase referrals to Compass from the Police by using the Guardian database to identify young people at risk of re-offending and supporting Police Community Support Officers to make referrals	Seconded Police Constable	September 2014
2. Target earlier support for children at risk of offending by screening all YRDs on those aged 10-14 years and sending a Keyworker appointment when considered a high concern and information about the Compass Project when a lower concern.	Senior Practitioner	September 2014
3. Compass Keyworkers will include a measurable intervention to strengthen relationships between children and parent in plans when the family and relationships section in the ONSET assessment indicates an issue (2+)	Senior Practitioner	December 2014
4. Improve parenting skills of all parents and carers of children working with Compass, by setting an expectation that parents complete the Strengthening families, Strengthening Communities programme as part of their support plan, engage in work with YOS parenting Worker or receive informal support and advice from Keyworker.	Senior Practitioner	December 2014
5. Work with Local Safeguarding Children Board partners to identify children of adult offenders who could be referred to Compass.	Senior Practitioner	September 2014
Priority Area 6: National Initiatives		
1. Use the YJB Learning Matrix as a pilot in PDRs for practitioners.	Operational Manager	December 2014
2. Introduce and manage the delivery of the Unpaid Work Requirement in court orders for 16 and 17 years olds.	Operational Manager	September 2014
3. As per the Offender Rehabilitation Act 2014, extend the supervision requirement for young people who will turn 18 during the custodial phase of their Detention and Training Order so that they all serve 12 months' supervision in the community.	Operational Manager	November 2014

4.3 Budget Summary 2014 - 2015

Source	Pooled budget	Staffing costs	Non-staffing costs	Comments	Total and %
Police	26,442	82,472	0	Seconded Police also have on-site access to the Police National Computer	108,914 (11.8%)
Probation	0	43,378	0	Based on 2013-14 costings	43,378 (4.7%)
Health	14,885	31,137	0	CAMHS consultation is delivered through a separate contract and not costed	46,022 (5.0%)
Local Authority	18,317	381,732	55,809	Office base, financial and personnel services are also provided but not costed	455,858 (49.2%)
Police and Crime Commissioner	n/a	11,790	9,468	A proportion of this contributes towards the commissioning of Project 28, a young people's substance misuse service	21,258 (2.3%)
Youth Justice Board	n/a	179,156	71,053	This funding is used to develop good practice and effectiveness, Unpaid Work and restorative practice	250,209 (27.0%)
Total	59,644	729,665	136,330		925,639

4.4 Partner Agency Commitment

Partner Organisation	Name of Chief Officer	Signature	Date
Local Authority	Jo Farrar, Chief Executive, Bath and North East Somerset Council		
Local Authority	Ashley Ayre, Strategic Director, People and Communities		
People and Communities Department	Richard Baldwin, Divisional Director Children and Young People's Services		
Health Service and Education	Mike Bowden, Deputy Director, Children and Young People's Strategy and Commissioning		
Avon and Somerset Police Service	Philip Jones, Detective Chief Inspector, Avon and Somerset Constabulary		
National Probation Service	Tbc Assistant Chief Officer		

5. Appendices

Appendix (a): Summary of the main areas of work undertaken by the local Youth Offending Service

1. Compass Project - voluntary support to young people aged 8-17 who are assessed as being at high risk of offending, and their parents/carers.
2. Strengthening Families, Strengthening Communities parenting programme – co-ordinated for parents/carers across the Authority, not just those with young people at risk of offending, and including a significant time commitment from a range of partner agencies.
3. Appropriate Adult services to safeguard a young person's interests when they are being interviewed by the Police in the Custody Suite of a Police station – during 2014-15, when the Custody Suite has moved to Keynsham, arrangements will change to collaboration with Bristol and South Gloucestershire Youth Offending Services.
4. Support to young people who are bailed by the Courts, which can attach conditions to maintain contact with the Youth Offending Service and help with arrangements for young people Remanded to the Care of the Local Authority.
5. Assessment and work with young people as part of the new Out of Court disposals framework, including those who are subject to Youth Conditional Cautions.
6. Preparation of Reports to help with key decision-making about young people who have offended (supporting contract requirements for Referral Order Panels, proposing sentencing options to the Courts and providing assessment information to the Parole Board).
7. Supervision of young people on community Court Orders – meeting regularly to help them to face up to the consequences of offending and address the factors that make it likely that they will re-offend, including lack of engagement in education, training and employment. These include Referral Orders, Reparation Orders and Youth Rehabilitation Orders. Those most likely to re-offend may have Intensive Supervision and Surveillance requirements attached to a Youth Rehabilitation Order.
8. Restorative Justice Services designed to provide victims with the information they want and to engage them and young people in meetings or activities to repair the harm caused by offending. Young people can also make reparation through community projects.
9. Support for young people sentenced to Custody and supervision of them when they return to the community. The most common youth custodial sentence is the Detention and Training Order, lasting up to two years. Longer sentences apply for more serious offences.
10. Individual work with parents/carers, access to parenting programmes and supervision of Parenting Orders.

Appendix (b): Values and Behaviours Framework

The following represents our shared view and approach to our service users and each other.

- Respect young people for who they are and take their needs and wishes seriously
- Listen to young people and take any action necessary to keep them safe
- Recognise the damaging impact of crime on individuals and communities and uphold the importance of preventing it
- View diversity positively
- Believe in the possibility and desirability of change
- Want the best for young people and their families
- Work restoratively
- Work in an integrated and multi-agency way
- Have a drive for results and courage when things don't go to plan

Locally, everyone who works with and on behalf of children and young people, and their parents/carers will collectively and individually:

- Expect the best of our children and young people across Bath and North East Somerset
- Shows respect for all
- Uses help/services that are evidenced based
- Ensures transparency in decision making
- Has energy and purpose
- Does not “assume” without thinking
- Is positively disposed to deliver the best outcomes for each individual child
- Recognises that young people’s participation in cultural, sports, play and leisure opportunities is valuable and is to be encouraged.

To support these values, there is an agreed set of behaviours that everyone is expected to embrace:

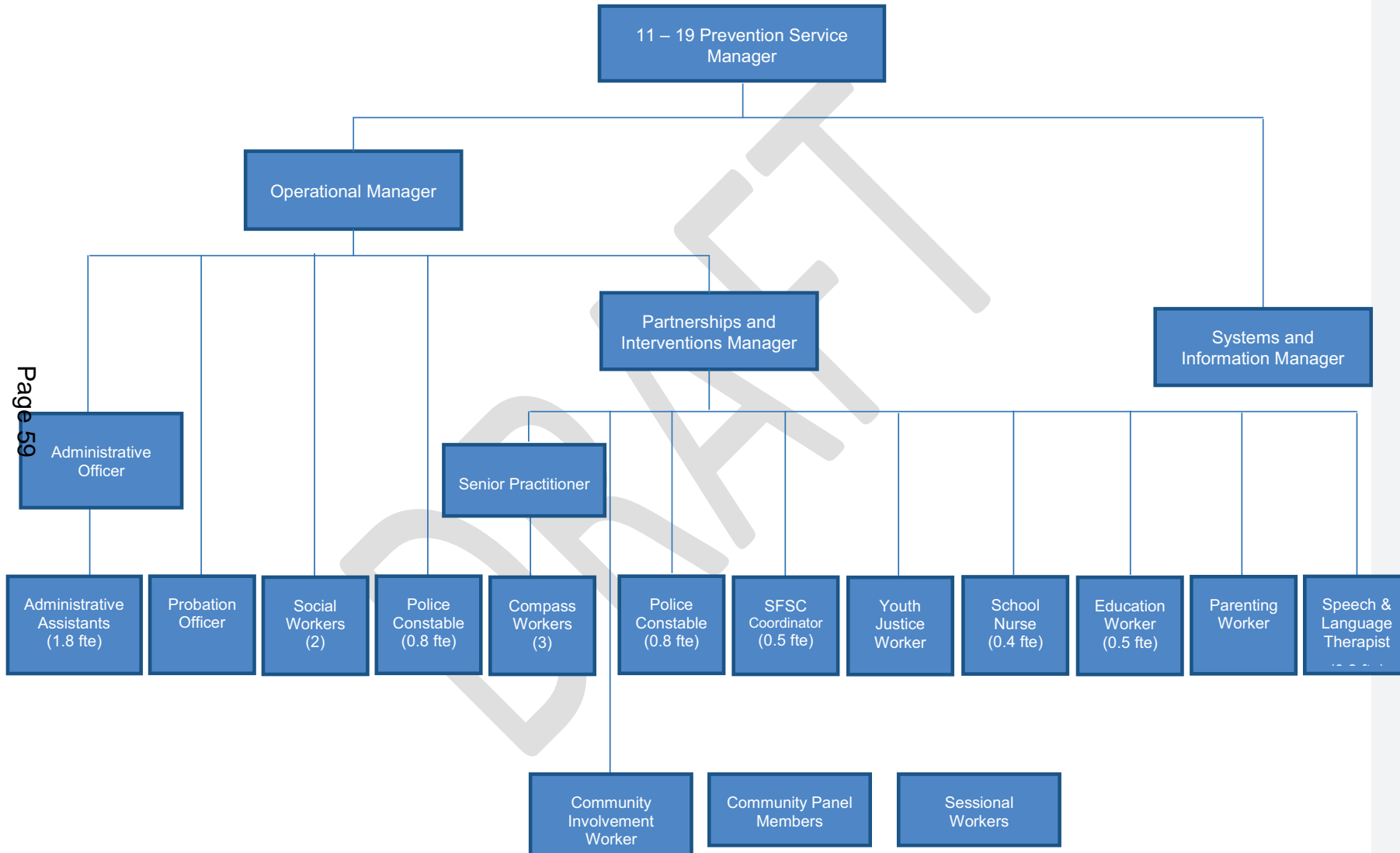
- Young people are central to any discussions of their needs
- Young people are involved in any meetings/discussions about their individual needs and plans
- All staff front –line staff /Head Teachers /managers/volunteers across the workforce will take responsibility for looking at the young people’s needs and assessments holistically- look at the big picture : will join up their work with that of other colleagues and or the family and develop one plan of support/intervention
- The young person will know who is the lead person for their plan and how to contact them
- Staff will be accountable to the young person in delivering the plan
- Line managers will make it happen

Young people across Bath and North East Somerset have identified the following as important behaviours and therefore we will provide workers who are:

- Honest
- Responsible
- Arrive on time
- Non-judgemental
- Show a caring attitude towards the young people
- Start at the point the young person wants them to
- Empower young people to take control of their lives
- Involve young people in all decisions/ panels/ meetings
- Do what they say they will do
- Communicate clearly and keeps young people up to date
- Committed to the principles of equity and diversity
- Safeguard the welfare of young people

Parents/carers want the same from the workforce, together with an active consideration with the young person of the right level of support from the parent/carer in planning for the young person. Taken together, these values and behaviours support the development of a person centred approach to supporting young people’s critical involvement in decisions about the design, delivery and effectiveness of services, and they are all adopted by the Youth Offending Service.

Youth Offending Service Organisational Chart



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The work of the Youth Offending Service would not be possible without its volunteers, who make up nearly a third of the staffing complement. We thank them again for their time, commitment and hard work as Appropriate Adults and Community Panel Members.

Staff in the Youth Offending Team by gender and ethnicity based on census 2001 categories																
	Strategic Manager		Team Manager		Practitioner		Administrator		Sessional		Student		Volunteer		Total	
	M	F	M	F	M	F	M	F	M	F	M	F	M	F	M	F
White British	0	1	0	2	4	8	0	4	1	5	0	0	3	8	8	28
White Irish	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
White Other	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Black Caribbean	0	0	0	0	0	0	0	0	0	0	0	0	1	0	1	0
White and Black African	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
British Black Caribbean	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
White and Asian	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Pakistani	0	0	0	0	1	0	0	0	0	0	0	0	0	0	1	0
Anglo Indian	0	0	0	0	1	0	0	0	0	0	0	0	0	0	1	0
Total	0	1	0	2	6	8	0	4	1	5	0	0	4	8	11	28

Appendix (e): Glossary of Terms

Appropriate Adults	Volunteers (and in more serious or complex matters, paid staff) who safeguard a young person's interests under the Police and Criminal Evidence Act 1984 when they are being questioned by the Police and a parent/carer is unable to attend.
ASSET	A structured assessment tool used to consider how a range of factors, such as engagement with education or mental health issues, may have contributed - and continue to contribute - to a young person's risk of offending.
B&NES	Bath and North East Somerset.
CFAIT	Children, Families, Assessment and Intervention Team.
Common Assessment Framework	A shared assessment tool for use across all children's services and local areas in England. It is used to support early identification of need and assist the co-ordination of services to address that need.
Children and Young People's Plan	The Children and Young People's Plan is the single plan that outlines what all agencies, schools, Local Authority and voluntary groups are going to do to help improve outcomes for Children and Young People across Bath & North East Somerset.
Children's Trust Board	Children's Trust Boards are the co-operation arrangements and partnerships between local organisations with a role in improving outcomes for children and young people. It is a partnership that has overall responsibility for planning and delivery of services for children and young people. The Trust in Bath and North East Somerset is responsible for publishing this Children and Young People's Plan and for making sure that services deliver the commitments outlined in that Plan.
ChildView	This is a standard database used by the Youth Offending Service for case management, monitoring and reporting.
Community Panel Members	Volunteer representatives of the local community, selected and trained to chair panels which meet with young people and their victims to agree how young people can make amends and address their offending behaviour.
Compass	The Compass Project, managed within the Youth Offending Service, provides intensive support to children and young people aged 8-17, who have been assessed as being at high risk of offending.

Connecting Families	A local initiative in response to the national Troubled Families agenda, to engage with and help improve outcomes for a small number of families with children who are involved in crime and/or anti-social behaviour, have children not engaged in education and have a history of adult worklessness. Typically, a large number of agencies may be working with these families and this initiative seeks to integrate the planning and support available in order that families can make better use of it.
Connexions	A universal service to provide a wide range of support for 13-19 year olds, particularly regarding education, training and employment. It gives priority to those considered most vulnerable.
Criminal Justice Board	A partnership of all the statutory criminal justice services, locally serving the Avon and Somerset area.
HMI Probation	Her Majesty's Inspectorate of Probation is an independent Inspectorate, funded by the Ministry of Justice, and reporting directly to the Secretary of State on the effectiveness of work with adults; children and young people who have offended aimed at reducing reoffending and protecting the public.
IMPACT / Integrated Offender Management	Known locally as IMPACT, this is a partnership between Police, Probation and other agencies, to tackle prolific, acquisitive crime and due to be extended to tackle violent and sexual offending.
Intensive Supervision and Surveillance	Intensive Supervision and Surveillance is a rigorous community sentence for eligible young people who have been convicted of an offence or a pattern of offences so serious that they would otherwise receive a custodial sentence. The Programme is also available as a condition of a Bail Supervision and Support programme or as a condition of the community element of a Detention and Training Order.
IRiS (Integrated Response, Integrated Service)	IRiS is a team of professionals based with Avon and Somerset Police. The team works with those people on a Community Order or License from prison as well as those who are not supervised or on probation. The team works to encourage and support offenders to make positive steps to positive change and to protect the public or those at risk from harm by sharing information.
Junior Attendance Centre	A Junior Attendance Centre is a community sentencing option. Ministry of Justice guidance states that Attendance Centres are primarily a punishment through the restriction of liberty in a controlled environment, the activities and instruction offered within the centres must be, at a minimum, safe and decent. The regime is also designed to strengthen desistance factors among those attending by offering structured physical activities and skills training such as life skills and offending behaviour work. The most local Junior Attendance Centre to B&NES is currently in central Bristol.

LASPO	The Legal Aid, Sentencing and Punishment of Offenders Act 2012.
Local Safeguarding Children's Board	The Local Safeguarding Children Board (LSCB) brings together local agencies working with children and families. LSCB is responsible for policy, procedures and services to support children and families in need to prevent significant harm.
Ministry of Justice	The Ministry of Justice is a ministerial department of the UK Government headed by the Secretary of State who is responsible for improvements to the justice system so that it better serves the public.
Multi-Agency Public Protection Arrangements	The Youth Offending Service has a legally duty to co-operate with arrangements, led by Police, Probation and Prisons, to safeguard the public from the threat posed by sexual and violent offenders, whilst also attending to the needs of the victim.
ONSET	A structured assessment tool to measure a young person's risk of offending, used with young people who have never been arrested and had a statutory response to their behaviour (Reprimand, Final Warning or conviction).
Out of Court Disposals	From April 2013, under the LASPO, a new framework for out of court disposals has been introduced. This includes the Youth Caution and the Youth Conditional Caution.
Participation	A term used to describe the process of actively involving children and young people in the planning, delivery and evaluation of services that benefit them individually and also, that benefit the wider community. The use of this term is extended to actively involving staff in planning and evaluation of the services they deliver.
Parenting Orders	Parents whose children offend or persistently truant from school can be made the subject of Court Orders, requiring them to attend parenting support, and sometimes, to exercise specific control over their child's behaviour.
Pre-Sentence Report	A formal, written report, prepared to assist the Court at sentencing stage, by providing an offence analysis, in the light of risk of continued offending and risk to the public, and outlining suitable sentencing options.
Protective Factors	Aspects of young people's lives that mitigate against offending, such as consistent parenting, engagement in education or involvement in constructive leisure.
Public Services Board	This is the strategic board overseeing all local authority service delivery which has replaced the Local Strategic Partnership.

Referral Order	Available since April 2002, these are mandatory sentences for all young people appearing in Court for a first offence and pleading guilty. They refer a young person to a Community Panel, led by trained members of the public and attended by their parents and the victim(s) of their offence(s). The Panel agrees a contract for how the young person is to make amends for their behaviour.
Reparation	Making amends to someone harmed. This can be doing something of direct benefit to the victim of an offence or could be undertaking work that benefits the wider community, ideally suggested by the victim.
Resettlement Consortium	A south west partnership between Youth Offending Services, the secure estate, voluntary sector partners and Probation to provide an enhanced offer of support to young people being released from custody, to assist their resettlement.
Restorative Justice	Restorative Justice describes a range of approaches to resolving a situation where harm, often an offence, has been caused. It focuses on victim satisfaction, offering a range of services by which the victim can gain an understanding of the offence, have a chance to be fully heard, and agree to and even participate in any suitable reparation. Where the victim does not wish to be involved in any way, then the Youth Offending Service will work with a young person to raise awareness of the likely impact of their offending on others and will plan for them to take on some indirect reparation.
Responsible Authorities Group	This Group oversees the delivery of the creating and maintaining safer communities. It is comprised of senior managers from the statutory agencies, an elected Council Member and other partners who together pool their combined knowledge to identify the key issues within the community and understand clearly how best to tackle them. This Partnership accepts that fighting crime is not just the job of the Police, but the responsibility of all organisations whether public, private or voluntary, and works towards the creation of safer and stronger communities.
Scaled Approach	A system whereby the level of intervention for a young person during the course of their Court order is determined by their assessed likelihood of re-offending.
Sustainable Community Strategy	The Sustainable Community Strategy sets out what type of place Bath and North East Somerset should become. It deals with a range of challenges and changes that impact on our daily lives. The strategy sets out how the challenges are going to be addressed. It is aspirational and high level, but these aspirations will be worked towards to make them a reality. The strategy is the outcome of listening to what is important for the community and responding with a vision for the area.
Team around the Child	A multi-agency planning meeting with the child and parent/carer present. The young person can help decide the agenda and should be enabled to fully participate in the meetings and the planning.

Unpaid Work	Unpaid Work is a requirement that is available to the court as part of a Youth Rehabilitation Order. The requirement involves young people carrying out work that will benefit the community in order to repay the harm caused by their offending.
Victim Liaison Officer	Member of the Youth Offending Service who makes contact with the victims of crimes we are notified about. They discuss the impact of the crime with the victim and enable them to consider a restorative approach.
Youth Rehabilitation Order	The Youth Rehabilitation Order is a generic community sentence for young offenders and can combine a number of requirements into one generic sentence. It is the standard community sentence used for the majority of children and young people who offend. It simplifies sentencing for young people, while improving the flexibility of interventions.
Youth Offending Service (YOS)	These multi-agency teams were established under the Crime and Disorder Act 1998, with a principal aim of preventing youth offending. They include representatives from Police, Probation, Health and the Local Authority, and their work is overseen by local Management Boards made up of key stakeholders. Locally, the term Youth Offending Service is used, because the remit includes preventative work as well as statutory supervision of young people.
Youth Justice Board	The Youth Justice Board for England and Wales is now linked to the Ministry of Justice and is responsible for overseeing the youth justice system, including performance monitoring, providing advice and disseminating good practice.

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Bath & North East Somerset Council		
MEETING/ DECISION MAKER:	Cabinet	
MEETING/ DECISION DATE:	16 July 2014	<small>EXECUTIVE FORWARD PLAN REFERENCE:</small>
		E 2670
TITLE:	Proposal to Amalgamate Southdown Infant and Junior Schools into a Primary School	
WARD:	All Bath Wards, Bathavon North, Bathavon South, Bathavon West Wards	
AN OPEN PUBLIC ITEM		
List of attachments to this report:		
Appendix 1 Consultation Responses Report		

1 THE ISSUE

- 1.1 This report seeks approval to publish a statutory notice proposing the amalgamation of Southdown Infant and Junior schools into a primary school.

2 RECOMMENDATION

- 2.1 The Cabinet is asked to approve the publication of a statutory notice proposing the closure of Southdown Junior school and the expansion and change in upper age range of Southdown Infant school in order to create an all through 420 place primary school.

3 RESOURCE IMPLICATIONS (FINANCE, PROPERTY, PEOPLE)

- 3.1 Any revenue implications relating to the amalgamation will be supported by the schools budget which is funded through the Dedicated Schools Grant (DSG) from the Department for Education (DfE). The only exception to this would be if a redundancy was to be required which is formally the responsibility of the Local Authority, in which case this would be funded through the People and Communities Department schools redundancy budget. It is anticipated that possible redundancies at either of the two existing schools would be minimal as one Headteacher is currently already supporting both schools.
- 3.2 Some additional accommodation will need to be added to enable the proposed primary school to have a Planned Admission Number (PAN) of 60 to admit more pupils. This will be funded from the Council's Basic Need capital allocation from the DfE and details will be provided as part of a further report in November when Cabinet will be asked to determine the statutory notice, should publication go ahead.

4 STATUTORY CONSIDERATIONS AND BASIS FOR PROPOSAL

- 4.1 Relevant considerations: Equalities, Children. No negative or adverse equalities issues have been identified. There is expected to be a beneficial impact on any junior age pupils who may be within the socio-economically disadvantaged equalities group, due to the OFSTED rating of Outstanding at the Infant school which will be expanded to also benefit junior age pupils, leading to enhanced attainment. The Council has a statutory duty to ensure the sufficiency of school places.

5 THE REPORT

- 5.1 Bath and North East Somerset Council is proposing to amalgamate Southdown Infant and Junior schools to create a larger all through primary school. Between 12 May and 22 June the Council carried out a statutory consultation with individuals and organisations that may be affected by this proposal. The results of this consultation are contained in the 'Consultation Responses Report' at Appendix 1.
- 5.2 It is proposed that the Junior school would close and the Infant school would increase its upper age range to age 11 and expand by taking on the junior school buildings, to provide places for junior pupils in Years 3 to 6 in addition to places for infant pupils in Reception to Year 2. The Infant school would then become an all through primary school with a single point of admission at Reception.
- 5.3 The existing Infant and Junior schools each currently have a Planned Admission Number (PAN) of 45 and offer a total of 315 places for children in Reception to Year 6. The primary school would be slightly larger with a PAN of 60 for admissions into Reception in 2015 onwards and ultimately offer a total of 420 places for children in Reception to Year 6. The primary school would also make provision for Early Years age children as at present, therefore the age range of the school would be 3 to 11.
- 5.4 The primary school would continue to operate from the existing buildings and sites currently occupied by the Infant and Junior schools. The current Infant and Junior schools are Community schools and the primary school would be a Community school. All children currently on roll at the Infant and Junior schools would become pupils on roll at the primary school.
- 5.5 The Local Authority is under a statutory duty to ensure that there are sufficient school places in their area. These places should where possible be provided in popular and successful schools serving the area of need to increase parental choice and contribute to raising standards and attainment.
- 5.6 Additional primary school places are projected to be required in this area of Bath for admissions in 2016 onwards. Southdown Community Infant school has an OFSTED rating of Outstanding and is a popular school, having 135 places and 130 pupils on roll.

6 RATIONALE

- 6.1 The two schools were federated on 1 January 2014. Federation is a formal arrangement whereby schools share a single governing body but retain their own

legal status, character, budget, performance tables and OFSTED inspections. As a result, they are already led and managed by a single Headteacher and Governing Body, in the same way as the primary school would be. The Headteacher and Governing Body have expressed a wish for the two schools to be fully amalgamated into an all through primary school. There would be several benefits in becoming a primary school:

- It would provide children with a seamless journey through school from age 4 – 11, removing the need for Infant school children to apply for a Year 3 junior school place as now.
- It would support and enhance the delivery of the new 2014 curriculum and would enable better continuity and progression of children's learning, particularly between Key Stage One and Key Stage Two.
- It would promote high educational standards and ensure high quality, good teaching.
- It would allow consistency of approach to learning policies, behaviour management, Special Education Needs (SEN) provision and better use of educational resources including teaching and non-teaching staff.
- It would provide opportunities to increase the range of expertise and experience of teaching staff and provide opportunities for improvements in the deployment and development of teachers.

6.2 The 11 consultation responses that were received from parents, parent governors, staff, unions and other interested parties were all in support of the proposal.

7 OTHER OPTIONS CONSIDERED

7.1 To continue to run the Infant and Junior schools as separate schools as at present. This option was rejected as this would not achieve any of the benefits as outlined in Section 6 above. Also the schools are already federated and the Governing Body and Headteacher wish to be fully amalgamated into an all through primary school.

8 CONSULTATION

8.1 Copies of the printed consultation document were given to the schools for distribution to every Governing Body member, the Headteacher and all staff at both schools and for all parents of all children at the schools including early years age children in the nursery.

8.2 A meeting for parents was held at the school on 17 June. A meeting for staff was held at the school on the same day and additional staff consultation has been carried out by Human Resources. The schools carried out consultation activities with pupils at the schools.

8.3 The consultation document was emailed to trade unions representing staff at the school, the local Church of England Diocese, the local Catholic Diocese, the MP for Bath, all Bath Ward Councillors and Councillors in Bathavon North, Bathavon South and Bathavon West wards, the Cabinet Member for Early Years, Children

and Youth, council officers including those in School Improvement, Admissions and Transport, Human Resources, Education Finance, Schools Capital and Early Years. It was also emailed to all other primary schools in Bath, all secondary schools in Bath and to the two special schools in Bath.

8.4 The consultation document was published on the Consultation section of the Bath and North East Somerset Council website for public access and on the Junior school website.

9 RISK MANAGEMENT

9.1 A risk assessment related to the issue and recommendations has been undertaken, in compliance with the Council's decision making risk management guidance. No significant risks have been identified.

9.2 With regard to possible redundancies at either of the two existing schools, it is anticipated that they will be minimal as the Headteacher is currently already supporting both schools.

Contact person	<i>Helen Hoynes 01225 395169</i>
Background papers	<p><i>Consultation Document</i></p> <p><i>Bath and North East Somerset website, Schools Colleges and Learning, School Strategies, Policies & Planning, School Statutory Notices</i></p> <p><i>Primary and Secondary School Organisation Plan 2013 – 2017</i></p> <p><i>Bath and North East Somerset website, Schools, Colleges and Learning, School Strategies, Policies & Planning</i></p>
Please contact the report author if you need to access this report in an alternative format	

APPENDIX 1

PROPOSAL TO AMALGAMATE SOUTHDOWN INFANT AND JUNIOR SCHOOLS INTO A PRIMARY SCHOOL

E2670

Consultation Responses Report

Total responses received:	12
Comments received from:	Parents: 1 Parent/Governors: 3 Staff: 5 Unions: 1 Other Interested Parties: 1 Pupils: 1

Parent:

I support this. It is the logical way forward both for the pupils and the staff.

Parent/Governor:

I support the proposal to amalgamate the schools and think it will be beneficial for children, families and staff. I support the proposal and think that amalgamation of these two schools is well overdue. We have already seen benefits from the hard federation and amalgamation will add the benefit of providing a 'through' educational experience for the children.

Parent/Governor:

I think this proposed amalgamation would be a positive move for both the children, teachers and the community. Streamlining teaching, admissions and transition from infant to junior. The historic attitude of this school and that school needs to be removed and provide a community school for all the children in the area.

Parent/Governor:

I believe that the proposed amalgamation will not only improve transition for children from KS1 and KS2, it will also improve the education for local children for many years to come.

Having just one school for the community to focus on AND give their full support to rather than having to decide which one to help each year, it should

enable more parental involvement and will enable staff and management to provide consistent high levels of education and care for all throughout the whole school.

It will benefit the children by creating an all over improved school, both schools are currently excellently led and managed with some superb times here and staff and an amalgamation of both will further enhance these assets. The transition at Year 2 will be better for children and families as it will be less traumatic/upheaval and our only wish was that it was done much sooner.

Amalgamation would consolidate and enhance the great environment already achieved by the federation, a primary school on one site is essential for the vision and development of the schools and provision within the local area.

Staff:

I feel that an amalgamation of the two schools is the way forward for the children, parents, staff and community of Southdown. Through being federated the children have become more secure knowing that Mrs Adams has their best interests at heart and strives to provide a stable and caring learning environment for them. We work hard to build relationships with our families and it will be rewarding to carry this through until Year 6. The children entering into Year 3 this year will be reassured by having familiar staff and more interaction between the two schools. Joining the two schools will maintain high standards and consistency in the expectations that we place upon the children. Also it will give staff a chance to take on different roles and share best practices.

The parents will benefit from having one central office to contact and a new uniform will ease costs. Many of our families require extra support and will feel confident that the support they have received in the Infant school will now be given up until Year 6.

Overall creating a new primary school will highlight the commitment and excellence of our teaching and nurturing of the children in this area.

Staff:

I am emailing to express my support for Southdown Junior school to close and the Southdown Infant's to increase their numbers to become a primary school. My reasons are the children would experience consistency throughout their journey within the school. The school would have a clear ethos with all the teaching and non-teaching staff following the school's visions and aims. I also feel this would help with Year 2 children's transitions from KS1 to KS2 as this can be a scary time for our children with lots of worries. I would also like to add our head teacher Mrs Sue Adams will make this transition for both schools as smooth as possible not only for the children, families - and the staff. She understands our children's needs, their families' and the community. Credit to her she still has past parents contacting her for advice and is a source of support for them. I can personally say as a staff member she has always made it known to me how she values not just myself but all her staff. This is an exciting time for Southdown and making this next step is in the best interests of our little people and our community.

Staff:

In response to the proposal of amalgamation

I believe this would be a positive move for the children and their parents within the community, as long as the process is seamless with little impact on the children's learning and development. Keeping staff up to date with information will help to deliver correct information to parents, who no doubt will have many concerns and worries which they are unlikely to mention at public meetings - they will more easily speak to the class teacher, key workers and LSA.

Staff:

I think this proposal is good for the children, families, community and staff of the two schools. It makes sense as the children's education will be more joined up and consistent from age 3 to 11. It will also be more efficient as we can share resources and staff across both schools. I just think it makes sense for everyone. On a personal note, it will be far easier to manage one budget rather than two and will save time. Thanks.

Staff:

I would like to offer the following comments in support of the planned amalgamation of Southdown Junior and Infants School.

The amalgamation will provide for seven continuous years potential education of a child. Currently there are examples of children completing their infant education at Southdown who then move to junior schools elsewhere. I have heard several parents say they would welcome the change and would ensure their children continue their education at Southdown.

The amalgamation will bring together all staff under a single Head Teacher with full administrative and budgetary control meaning consistency in teaching, standards, homework, marking and policies.

The amalgamation would bring consistency for the parents and extend the support they receive from the head and infant staff throughout their child's time in the school. I know of at least two parents whose children are not currently at Southdown that still seek advice and guidance from our current Head Teacher.

There would be a greater opportunity for staff to develop and grow their knowledge and experience with the wider range of education within the school and share with their colleagues.

There is an increased opportunity for the children to enjoy shared activities potentially easing the transition from Infants to Junior curriculums.

Union:

I am writing to formerly submit comments on the proposal to amalgamate Southdown Community Infant and Junior schools prior to the consultation end date of 22nd June 2014. Please confirm receipt of this email.

The comments are being submitted on behalf of UNISON members employed to work in Southdown Community Infant and Junior Schools.

The comments relating to the consultation are:

Has an Equality Impact Assessment been conducted and is the document available.

Will the all through primary school be adequately resourced in terms of staff resources and physical resources to support the increase in the Planned Admission Number of children.

The school currently generates an additional income stream by renting out some classroom space. Will this continue in the new primary school. If it is not likely to continue will the school be affected by the reduction of income. How will any budget reduction be managed.

Some specific questions have been raised about school support staff contractual arrangements. Clarity round these questions will be pursued separately.

Other Interested Party:

I often go into Southdown Infant and Junior schools in various capacities. I am delighted to hear how well the federation is going and think it would be really helpful if they could move forwards to amalgamation with all the associate benefits (smooth transition for children being a key one, also coherence of messages). As a visitor, I can say that the feel of the school, especially the juniors, seems much more positive in recent months since Sue Adams took over as head and the new governing body convened.

I hope the amalgamation can go forwards soon. I would be happy to give further comments if this would be helpful.

Pupils:

A summary of the children's comments on the proposed amalgamation of Southdown Community Infant School and Southdown Junior School.

Worries:

That there is going to be too many children. There's going to be so many accidents.

I am worried that the Year 6s and nursery might not get along very well. Also, the older children might be a little bit rough with the younger ones.

I might not be with my friends.

There might not be enough classrooms.

We might be bullied and people might be unkind.

Happy thoughts:

See all of your friends.

I can see my cousin.

I will see my brother and I will have to look after him.

I will be able to see my sister more often.

We will be able to cooperate with the young ones more.

I think it is going to be good because we'll make new friends.

I think it is good because I can make more friends.

Having a primary school and sharing things like sharing books.

Questions:

Is there going to be enough room?

Are Year 2 and 3 going to be a mixed class?

Will my brother be in my class?

Will we join the two buildings together?

Are the Year 3s and 4s going to be in the same class?

Will there be two canteens or one?

Will we change classes and class names?

Would we change uniform?

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Bath & North East Somerset Council		
MEETING/ DECISION MAKER:	Cabinet	
MEETING/ DECISION DATE:	16th July 2014	EXECUTIVE FORWARD PLAN REFERENCE:
		E 2638
TITLE:	Bath and North East Somerset Community Infrastructure Levy (CIL) and Planning Obligations Supplementary Planning Document (SPD)	
WARD:	All	
AN OPEN PUBLIC ITEM		
<p>List of attachments to this report:</p> <p>Attachment 1: B&NES CIL Consultation Paper (including the Draft Charging Schedule & Draft Regulation 123 List)</p> <p>Attachment 2: Draft Planning Obligations SPD</p> <p>Attachment 3: Bath Western Riverside SPD Appendix C update</p>		

1 THE ISSUE

1.1 The Community Infrastructure Levy (CIL) Draft Charging Schedule, the Draft Regulation 123 List and the revised Draft Planning Obligations SPD have been prepared for public consultation. The CIL is a new tariff system that allows local authorities to raise funds from developers to contribute to the costs of providing some of the infrastructure needed for new development. The Planning Obligations SPD is revised in response to the changes brought by the CIL regulations. The Regulation 123 List sets out the types of Infrastructure on which CIL income may be spent.

2 RECOMMENDATION

2.1 Cabinet approves:

- 1) the draft charging schedule and the draft Regulation 123 List (as set out in the B&NES CIL Consultation Paper in **Attachment 1**), for public consultation;

- 2) the revised draft Planning Obligations SPD in **Attachment 2** for public consultation;
- 3) the timeline for the public consultation period on the above documents from 24/7/14 to 18/9/14;
- 4) the update to Appendix C to the Bath Western Riverside SPD in **Attachment 3** for Development Management purposes; and
- 5) that responsibility is delegated to the Divisional Director for Development in consultation with the Cabinet Member for Homes & Planning to:
 - a) make minor textual amendments to the consultation documents prior to publication; and
 - b) make minor amendments to the CIL draft Charging Schedule, revised Planning Obligations SPD and the Regulation 123 list following public consultation and submit to the Secretary of State for examination.

3 RESOURCE IMPLICATIONS (FINANCE, PROPERTY, PEOPLE)

- 3.1 CIL has the potential to make an important contribution to the funding of infrastructure needed to support the District's long term growth aspirations as set out in the Core Strategy. CIL could secure between £12.5 and 17 million funding for infrastructure; this essentially replaces that part of s106 funding that the council could no longer secure after April 2015 when the S.106 approach is scaled back. CIL can only be levied if there is a funding gap in infrastructure provision.
- 3.2 The Infrastructure Delivery Programme (*IDP July 2014*) identifies the infrastructure required across a broad range of Service Providers and statutory undertakers to deliver the District's plans for growth in the Core Strategy. The IDP includes an estimate of the costs although this is regularly updated and refined. The costs and requirements in the longer term are unavoidably more difficult to identify. The IDP is therefore a 'live' document subject to on-going updating and refinement. It is not a formal investment programme and does not entail financial commitment by the Council or other statutory providers. Under CIL regulations the Council, as the charging authority, will need to prioritise and agree allocations of available CIL funding towards these infrastructure needs. These decisions will need to be taken as part of future budget decisions once the Council has completed the regulatory process to enable it to charge CIL.
- 3.3 The IDP confirms that there is a funding gap to which CIL will need to make a contribution. However CIL will not be the sole funding source. It will supplement other potential funding streams such as Business Rate Growth, New Homes Bonus, the Revolving Infrastructure Fund, HCA funding and site specific s.106 developer

contributions. Each of these will need to be considered by the Council as part of its medium term service and resource planning process. . The IDP lists all infrastructure requirements to support new growth, including provision to be provided by developers and other organisations such as utility companies and other public bodies.

- 3.4 The preparation of CIL has been funded by the Local Development Framework budget.
- 3.5 Alongside setting the CIL charging schedule, work is underway to establish the Local Authority as a CIL Charging Authority. This includes the appointment of a CIL Coordinator to arrange and oversee charging arrangements and s.106/CIL monitoring officer to implement CIL.
- 3.6 Charging Authorities will be able to use funds from the levy to recover the cost for setting up and administering the levy using up to 5% of their total receipts on administrative expenses.
- 3.7 The Council has secured nearly £20 million through s.106 agreements in the last 10 years. However, the current Planning Obligation SPD will need to be reviewed to align it with CIL.

4 STATUTORY CONSIDERATIONS AND BASIS FOR PROPOSAL

- 4.1 The CIL Charging Schedule must comply with relevant legislation, and the National Planning Policy Framework (2012). The Planning Act 2008 (Part 11) made provision for the introduction of the Community Infrastructure Levy (CIL). Regulations governing the preparation and operation of CIL Charging Schedule were first introduced in April 2010, and have subsequently been amended a number of times - the CIL (Amendment) Regulations 2011, the CIL (Amendment) Regulations 2012, the CIL (Amendment) Regulations 2013, and the CIL (Amendment) Regulations 2014. In addition, Part 6, Chapter 2 of the Localism Act 2011 has the effect of amending parts of the Planning Act 2008 as it relates to CIL.
- 4.2 CIL Regulations 2010 (Part 11) (as amended) also incorporate a corresponding scaling back of tariff based approaches to planning obligations under Section 106 of the Town and Country Planning Act 1990.

5 THE REPORT

Background

- 5.1 The introduction of the Community Infrastructure Levy (CIL) changes the role that new development plays in funding infrastructure. The current approach has been to require new development to make a

contribution, in kind or financially, to address the infrastructure needs caused by that development. This contribution is made under s.106 of the Town and Country Planning Act 1990. To ensure a systematic and transparent approach the Council adopted the Supplementary Planning Document on Developer Contributions in 2009.

5.2 If introduced, the levy is payable on development which creates net additional floor space, where the gross internal area of new build exceeds 100 m² and on a single house or flat of any size, unless it is self-build. A Council must have an up-to-date adopted Plan on which to base CIL. Key points to note are that;

- The rate is only charged on net increase in floorspace – therefore the yield is lower on brownfield sites/and nil for change of use
- Vacant buildings, development for a charitable use, self-build, affordable housing are exempt
- The test of soundness at examination is whether an appropriate balance has been struck between maximising income vs. undermining the viability of development

5.3 The Council can only charge a tariff on new development if a funding gap exists in the financing of necessary new development, taking account of all sources of development. The Core Strategy sets out the Council's growth plans for the district and the infrastructure needed to support this is identified in the Infrastructure Delivery Plan (IDP). See background paper.

5.4 The key decisions before Cabinet to make are whether to agree the;

- Draft Charging Schedule;
- Draft Regulation 123 List (the types of infrastructure that CIL may be spent on); and
- the revised draft Planning Obligations Supplementary Planning Document (SPD)

The Draft Charging Schedule (DCS)

Principles

5.5 CIL is effectively a tax on new development and therefore cannot be used as a policy tool. The key issue in setting the rate is that local authorities must strike "*an appropriate balance*" between revenue maximisation on one hand and the potentially adverse impact upon the viability of development on the other.

5.6 It must be informed by evidence of **viability** of development although there is some room for pragmatism. The Council has been advised by BNP Paribas who has undertaken the Viability Study. BNP Paribas has extensive experience of undertaking viability assessments and

successfully assisting LAs with developing DCS and defending them at examinations.

5.7 The results of the BNP Paribas analysis indicate a variation in viability of development between different types of uses and different locations within the District. In light of these variations, two broad approaches are available to the Council under the CIL regulations.

- The Council could set a single CIL rate across the District for all types of development, having regard to the least viable uses and the least viable locations. This option would suggest the adoption of the 'lowest common denominator', with sites that could have provided a greater contribution towards infrastructure requirements not doing so. In other words, the Council could be securing the benefit of simplicity at the expense of potential income foregone that could otherwise have funded infrastructure.
- Alternatively, the Council has the option of setting different rates for different use classes and different areas. The results of the BNP Paribas study point firmly towards the second option as the recommended route.

5.8 Given CIL's nature as a fixed tariff, it is important that the Council selects rates that are reasonable and not at the margins of viability. It is necessary to ensure that a 'buffer' or margin is included, so that the levy rate is able to support development when economic circumstances adjust and also to absorb some abnormal development costs. The Council must also be careful not to frustrate its other key objectives such as delivering affordable housing. Consequently, sensitive CIL rate setting for residential schemes is also vital.

Proposed rates

5.9 The key conclusions emerging from the viability evidence are set out below.

- For **residential** development, viability varies across the district with highest rates in the environs of Bath and lower viability in the south and west. However these differences are not significant because whilst house prices are higher in the Bath area, so are build costs and the Core Strategy sets a higher affordable housing requirement for the higher value area. Also, the rural environs of Bath fall almost entirely within the Green Belt where very limited housing is likely to come forward. In the interests of simplicity, a flat rate of £100/m² across the district is considered reasonable.
- The BNP Paribas' viability recognises the different viability consideration for '**Specialised, Extra Care and Retirement**

Accommodation' due to the lower gross to net ratio of developments (due to the need for communal facilities), and the additional time that it takes to sell the accommodation due to the restricted market for that type of unit. However, these developments typically command premium sales values that outperform local markets. Furthermore, the sites tend to be more efficiently used, due to lower car parking requirements and higher densities in comparison to standard residential developments. These factors help to offset the lower internal efficiency and longer sales period. Then the appraisal concludes that such developments are unlikely to generate significantly different results from those generated by other residential development. Therefore £100/m² is recommended.

- The only variation to the flat residential rate is in relation to the **urban extension** sites. The most effective approach to provision of site specific infrastructure, primarily for primary school provision should be via s.106 agreements. This means that a lower rate of around £50/m² should be charged for residential development in the urban extension sites identified in the Core Strategy.
- The viability of **Retail** development is higher in central Bath which would support a rate of £150/m². In other parts of the District, the viability evidence indicates that a £nil charge is appropriate. An exception to this is large supermarket, superstores and retail warehouses which would support a charge of £150 across the district.
- **Hotel** development in Bath could support a rate of around £100 which allows an adequate buffer for site-specific factors. Outside Bath, hotel values are lower, which adversely impacts on the viability of new hotel development. A nil rate on hotel development outside the city boundary of Bath is therefore recommended.
- For **Student housing** the degree to which developments can absorb CIL contributions is dependent on the rent levels set. There is a significant differential between rents in the private sector and the University Sector (with sub market rent). For student housing let at commercial rents (off campus) a rate of £200 m² is recommended. For the University sector at sub market rents (primarily on campus), a nil rate is recommended.
- Although there is a demand for **Office** space, this is not generating rents that would be high enough to support new development, particularly in Bath where build costs are significantly higher. The BNP Paribas viability assessment identifies that office development is unlikely to come forward in the short to medium term. BNP Paribas conclude that a £nil for

office is appropriate.

- BNP Paribas appraisal of **industrial and warehousing development** primarily in employment uses (not retail warehousing) indicate that these uses are unlikely to generate positive residual land values and therefore a zero rate is recommended.
- BNP Paribas has also tested **other uses**. Use classes D1 (community facilities eg schools, health centres, museums and places of worship) and D2 (leisure). These typically do not include revenue generating operations. Other uses that do generate an income stream (such as swimming pools) have operating costs that are far higher than the income and require public subsidy. Many D1 uses will be infrastructure themselves, which CIL will help to provide. It is therefore unlikely that D1 and D2 uses will be capable of generating any contribution towards CIL. These will sometimes include developments that are operated commercially (such as gyms) but with many new operations opening in existing floorspace, very little, if any CIL income could be secured. On this basis BNP Paribas has recommended a nil rate on such uses.

5.10 Reflecting the above considerations, the proposed DCS is set out in Attachment 1.

The Regulation 123 list

5.11 Charging Authorities must prepare a Reg 123 list which sets out those types of infrastructure on which CIL could be spent and the list must be included as part of the evidence at exam . The B&NES Reg 123 list is based on the Council's Infrastructure Delivery Plan (IDP) which underpins the Core Strategy. The IDP is regularly reviewed and updated through cross service working.

5.12 Preparation of the Reg 123 List must recognise the fact that Local Authorities cannot spend CIL on the same infrastructure that is being funded via s.106. Therefore the Reg 123 List must take account of the strategy for the provision of infrastructure, including taking account of which elements of infrastructure will be funded by CIL and which through on-site or pooled S.106 agreements. This will then inform, but not dictate, future spending arrangements, including the Council budget and the capital programme.

5.13 The draft Reg 123 is included in Attachment 1. The Reg 123 List can be reviewed responding to changes in infrastructure priority and requirements.

- 5.14 Delivery the Bath Enterprise Area are likely to benefit from allocation of CIL revenue although decisions on the priorities for CIL spend will be taken as part of future budget decisions.

Planning Obligations SPD

- 5.15 The current Planning Obligation SPD seeks to secure funding for infrastructure through developer contributions based on formulae. This will largely be curtailed by April 2015 and the CIL regulations will limit the use of planning obligations to affordable Housing and site-specific infrastructure. CIL Regulation 122 restricts the use of S.106 obligations to three tests which are;
- necessary to make the development acceptable in planning terms
 - directly related to the development; and
 - fairly and reasonably related in scale and kind to the development
- 5.16 However, contributions through s.106 may be pooled from up to only five separate planning obligations for a specific item of infrastructure. Therefore the Council's existing Planning Obligations SPD, which is based on a formulaic calculation of developer contributions towards paying for infrastructure, has been revised and is attached as Attachment 2.
- 5.17 Parts of the BWR SPD (Part 3 the Implementation Plan and Appendix C Developer Contributions) will also be superseded by the revised Planning Obligations and CIL in due course.

Other issues

- 5.18 **Local spend:** The regulations require that the proportion of CIL to be given to local communities is 15% (with a cap of up to £100 per existing council tax dwelling a year) of receipts from development in their area. This rises to 25% uncapped in areas with an adopted Neighbourhood Plan.
- 5.19 Many town and parish councils are working collaboratively with B&NES on the Placemaking Plan with very positive results. B&NES has the discretion to also award those communities involved in the Placemaking Plan 25% of CIL receipts from development in their area.
- 5.20 Where there is no Parish or Town Council, as in Bath, the charging authority (B&NES) will engage with the communities where development has taken place and agree with them how best to spend the neighbourhood funding. Charging authorities should set out clearly and transparently their approach to engaging with neighbourhoods using their regular communication tools e.g. website, newsletters. The Council AGM in May established a cross-party working group to consider options to strengthen community representation and civic

governance within Bath, and to report back on these options, including a preferred option. This will include the arrangements for spend of the local element of CIL in Bath

5.21 **Instalment policy:** A charging authority can set its own levy payment deadlines and/or offer the option of paying by instalments. If it does so, it must publish an instalments policy on its website and make it available for inspection at its principal offices. It requires at least 28 days' notice to adopt or change the policy. Where no instalment policy is in place, payment is due in full at the end of 60 days after development commenced.

5.22 Where the total CIL liability is greater than £35,000, the B&NES CIL document proposes the following instalment policy for consultation;

- 33% on 60 days after development commenced
- 33% 12months after deployment commenced
- 34% 18months after development commenced.

5.23 **Relief:** The Community Infrastructure Levy Regulations make a number of provisions for charging authorities to give relief from the levy. Some types of relief are mandatory; others are offered at the charging authority's discretion. 'Community Infrastructure Levy relief' means any exemption or reduction in liability to pay the levy.

5.24 Mandatory exemptions are defined by the regulations and include vacant buildings (subject to the vacancy test), affordable housing, self-build housing and buildings with charitable uses.

5.25 Discretionary exemptions include;

- discretionary charitable relief (for a charitable investment)
- discretionary social housing relief (for affordable housing types which do not meet the criteria required for mandatory social housing relief and are not regulated through the National Rent Regime)
- discretionary exceptional circumstances relief (Charging authorities may offer relief from the levy in exceptional circumstances where a specific scheme cannot afford to pay the levy.)

5.26 A local authority wishing to offer discretionary relief in its area must first give notice publicly of its intention to do so. This can be done following the adoption of the CIL.

5.27 **Monitoring and review arrangements:** To ensure that the levy is open and transparent, charging authorities must prepare short reports on the levy. Charging authorities must publish a report on their

website by 31 December each year, for the previous financial year. Where a charging authority holds and spends the neighbourhood portion on behalf of the local community, it should ensure that it reports this as a separate item. For CIL local funds, Parish, Town and Community Councils must also report on their levy income and spending.

Programme

- 5.28 In April 2015, the scope of S.106 contributions will be scaled back impacting on investment in those Districts that have not adopted a CIL. The Timetable for the preparation of CIL and associated documents is set out below. There is limited contingency if the CIL is to be agreed by the deadline of April 2015. Any delay beyond the April deadline risks loss of CIL income.
- 5.29 It is therefore recommended that CIL proceeds quickly to submission for examination after the consultation and this would be facilitated by delegating authority to the Strategic Director Place to make any amendments following the consultation in conjunction with the Cabinet member for Housing and Planning.

Consultation	July - Sept 2014
Amendments post consultation	Sept 2014
Submission	Oct 2014
Examination	Dec 2014/January 2015
Adoption	By April 2015

The Bath Western Riverside SPD

- 5.30 The current policy framework for BWR is set out in the B&NES Local Plan and the BWR Supplementary Planning Document (SPD). The latter provides a comprehensive Spatial Masterplan and an Implementation Framework including infrastructure requirements and developer contributions. The SPD was prepared on the basis that all infrastructure costs within the SPD area were funded proportionately from contributions from all development and Appendix C of the SPD sets out the basis for developer contributions.
- 5.31 However, Appendix C (prepared in 2008) is now out of date and needs to be updated in light of legislative changes, policy changes and cost increase. Appendix C will be superseded by CIL and revised Planning Obligations SPD in 2015, therefore this is an interim measure to be effective up to the adoption of CIL.

6 RATIONALE

- 6.1 Section 5 sets out the rationale for the decision but the key point is that if B&NES does not prepare a CIL by April 2015, its ability to align new development with the necessary infrastructure will be severely curtailed.

7 OTHER OPTIONS CONSIDERED

- 7.1 The adoption of a CIL Charging Schedule is discretionary for the Council, however, the scaling back of the use of pooled S106 obligations is not discretionary. As such, should the Council elect not to adopt a CIL Charging Schedule, it is likely to have significant implications with regard to funding infrastructure in the District
- 7.2 More detail options regarding CIL rates, scope of Reg 123 list, instalment policy are set out in section 5 above.

8 CONSULTATION

- 8.1 The parties consulted in the ongoing preparation of the draft Charging Schedule (and the preliminary Draft Charging Schedule) include;

- Internal Council Services
- External Infrastructure providers
- Commercial agents
- Local chambers of commerce and economic groups
- Adjoining Councils
- the local community
- Other bodies set out in the Statement of Community Involvement

- 8.2 If agreed, the DCS must be published for consultation for a period of at least 6 weeks. It is recommended that the consultation begins as soon as possible. However, because this would mean the consultation takes place over the August holiday period, it is recommended that the consultation period is extended to 8 weeks to run from 24/7/14 to 18/9/14.

- 8.3 Consultation arrangements for the DCS, Reg 123 List and the revised Planning Obligations SPD are to;

- use the current contact database (some from LDF database);
- notify individuals, organisations and statutory consultees in the CIL;
- advertise in the Local Press & website;
- target consultation within the business sector;
- engage with Parish & Town Councils; and

- engage with other bodies set out in the Statement of Community Involvement.

8.4 To assist the understanding of CIL and the particular context for the preparation of the B&NES CIL, a Q&A paper and leaflet will be published alongside the other documents.

8.5 Anyone who objects to the CIL and the associated documents will have the opportunity to pursue their objections via the examination.

9 RISK MANAGEMENT

9.1 A risk assessment related to the issue and recommendations has been undertaken, in compliance with the Council's decision making risk management guidance.

Contact person	Lisa Bartlett – 01225 477281, Simon de Beer - 01225 477616, Kaoru Jacques 01225 477288
Background papers	<ul style="list-style-type: none"> • <i>Background papers available from; www.bathnes.gov.uk/cil</i> • <i>Viability Test Update by BNP Paribas</i> • <i>B&NES CIL Evidence Paper</i> • <i>B&NES Core Strategy as proposed to be adopted July 2014</i> • <i>B&NES Core Strategy Inspector' Report June 2014</i> • <i>B&NES Infrastructure Delivery Plan IDP</i> • <i>B&NES EqIA Report</i> • <i>SEA/SA Screening Report</i> • <i>Regulation 15(7) Consultation Statement</i>
<p>Please contact the report author if you need to access this report in an alternative format</p>	

**Bath and North East Somerset Council
Community Infrastructure Levy**

Consultation Paper

in accordance with Regulation 16 Community Infrastructure
Levy Regulations 2010 (as amended)

Draft Charging Schedule

Draft Infrastructure (Regulation 123) List

July 2014

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1.0 INTRODUCTION

- 1.1. The Draft Community Infrastructure Levy (CIL) Charging Schedule is published under Regulation 16 of the CIL Regulations 2010 (as amended) so that representations can be made prior to its submission to the Secretary of State.
- 1.2. The consultation documents and evidence documents published are;
- B&NES Draft CIL Charging Schedule (see Section 5 of this document)
 - A Draft Infrastructure List in accordance with CIL Regulation 123 (See Section 6 of this document).
 - Economic Viability Study Update 2014 (Separate Document)
 - Revised Planning Obligations Supplementary Planning Document (Separate Document)
 - CIL Evidence Background Paper (2014) (Separate Document)
 - A Report on Consultation of the Preliminary Draft Charging Schedule (Separate Document)
- 1.3 This consultation runs from 24th July until 18th September 2014. Comments should be made via email to cil@bathnes.gov.uk or in writing to:

Community Infrastructure Levy
Planning Policy, Bath and North East Somerset Council
PO Box 5006 Bath BA1 1JG

- 1.4 A copy of the Draft Charging Schedule and Draft Infrastructure (Regulation 123) List Consultation Document and supporting documents are available for public inspection at:

Online at the Bath & North East Somerset Council website:
www.bathnes.gov.uk/CIL

Council One Stop Shops; between the hours of 8.30 am to 5.00 pm
Mondays-Thursdays and 8.30 am to 4.30 pm on Fridays, at:

- The Bath One Stop Shop, 3-4 Manvers Street, Bath BA1 1JQ
- The Hollies, Midsomer Norton, Bath, BA3 2DP;
- Riverside, Temple Street, Keynsham, Bristol, BS31 1LA

All Public Libraries within the District including the mobile libraries during library opening times.

- 1.5 All representations will be considered by the Inspector as written representations. In addition, any persons or organisations making representations have the right to be heard at examination, should they choose to appear. The examination will normally take the format of a hearing, using an informal 'round table' format under the direction of the Inspector.

- 1.6 Please be aware that your comments will be published on the Council’s website together with your name. A response form is available - If you do not have access to a computer, a paper form can be completed and sent to the Council. Copies of the response form are available from the Planning Policy team.
- 1.7 Should you have any questions please contact us on (01225) 477548 or email to cil@bathnes.gov.uk.

2.0 TIMETABLE

- 2.1 The B&NES Council has set a timetable to adopt a Community Infrastructure Charging Schedule by April 2015. Table 1 below outlines the key stages and timetable for adoption of CIL:

Table 1: Key stages relating to the adoption of the CIL Charging Schedule

Key Stage	Dates
Draft Charging Schedule Consultation	July - September 2014
Draft Charging Schedule submitted to Secretary of State	October / November 2014
Draft Charging Schedule examined in public by Independent Examiner	December 2014/January 2015
Final version of Draft Charging Schedule adopted by Council	By April 2015

3.0 GENERAL PRINCIPLES OF THE COMMUNITY INFRASTRUCTURE LEVY

What is the Community Infrastructure Levy (CIL)?

- 3.1 The CIL enables local planning authorities to raise funds from developers undertaking new building projects in their area to provide key infrastructure needed as a result of development. It is intended to supplement other funds to provide new infrastructure in the District – it is not intended to provide the full costs associated with all the infrastructure required.
- 3.2 The charge is an amount that must be paid in pounds sterling (£) per m² of qualifying development. CIL rates are set by the charging authority, in this case B&NES, in a charging schedule. The schedule sets out the CIL rates by type and size of development for all development liable for the charge.

Legislative Background

- 3.3 The CIL Charging Schedule must comply with relevant legislation, and the National Planning Policy Framework (2012). The Planning Act 2008 (Part 11) made provision for the introduction of the Community Infrastructure Levy (CIL). Regulations governing the preparation and operation of CIL Charging Schedule were first introduced in April 2010, and have subsequently been amended a number of times - the CIL (Amendment) Regulations 2011, the CIL (Amendment) Regulations 2012, the CIL (Amendment) Regulations 2013, and the CIL (Amendment) Regulations 2014. In addition, Part 6, Chapter 2 of the Localism Act 2011 has the effect of amending parts of the Planning Act 2008 as it relates to CIL.
- 3.4 The Department for Communities and Local Government has issued Community Infrastructure Levy Guidance (February 2014) which provides a detailed guide to the CIL Regulations and the Charging Schedule. The guidance can be found at the following link
- http://www.planningportal.gov.uk/uploads/cil/cil_guidance_main.pdf
- 3.5 CIL Regulations 2010 (Part 11) (as amended) also incorporate a corresponding scaling back of tariff based approaches to planning obligations under Section 106 of the Town and Country Planning Act 1990. Details of the changes can be found within the section below on the “Relationship between CIL and Section 106 agreements”.

What development will be liable for CIL?

- 3.6 The CIL Regulations 2010 (as amended) and the Government CIL Guidance February 2014 provide detailed guidance on what is liable for CIL, what is exempt, and what types of relief are available.
- 3.7 The following development types will be liable for CIL:
- Development comprising 100m² or more of additional new build floorspace
 - Development of less than 100m² of new build floorspace that results in the creation of one or more dwellings (note exemptions for self-builders below)
 - The conversion of a building that is no longer in lawful use.
- 3.8 Development exempt from CIL includes:
- Where there is no extension of floorspace as a result of the development.
 - Net additional new development of less than 100 square metres gross internal area (Minor Development Exemptions) – unless this is the creation of one or more dwellings, in which case the levy is payable.

- Houses, flats, residential annexes and residential extensions which are built by 'self-builders' that meet the self-build relief criteria
 - Development resulting from a change of use, where the building has been in continuous use for at least six months in the three years prior to the development being permitted, and no new floorspace is created.
 - "Social housing" that meets the relief criteria.
 - Charitable development by registered charities that meets the relief criteria including that the development is used for charitable purposes.
 - Any development where the total chargeable amount is less than £50 (this is deemed as zero rated).
 - Buildings and structures into which people do not normally go.
- 3.9 Where buildings are demolished or converted to make way for new buildings, the charge will be based on the floorspace of the new buildings less the floorspace of the demolished/converted buildings, i.e. the net increase in floorspace. The Regulations require that the buildings must have been in lawful use for a continuous period of at least six months in the last three years prior to when planning permission first permits the development.
- 3.10 Where an outline planning permission is granted prior to the implementation date of the Charging Schedule, the reserved matters approvals will not be subject to a CIL liability. Applications under Section 73 of the Town and Country Planning Act 1990 to remove or vary a condition, including those relating to the extension of timescale for implement an existing consent, which results in a fresh planning permission being issued, will not give rise to a CIL liability, unless there is an increase in floorspace as a result of those changes, in which case the additional floorspace may be liable. If permission is sought for a materially different scheme, from the existing permission, requiring a new planning permission, then that development may be liable for CIL.

Relief from CIL

- 3.11 The Community Infrastructure Levy Regulations make a number of exemptions and provisions for charging authorities to give relief from the levy. Some types of relief are compulsory; others are offered at the charging authority's discretion. 'Community Infrastructure Levy relief' means any exemption or reduction in liability to pay the levy.
- 3.12 A charging authority that decides to introduce a discretionary relief policy must publish a document setting out that policy. The document is not part of the charging schedule. The CIL Guidance states that the charging authority may publish the relief policy separately and at a different time to the publication of the charging schedule.

Discretionary charitable relief

- 3.13 Discretionary charitable relief - Local authorities can provide discretionary relief from CIL where the proposed development is owned by a charity but will be used for non-charitable purposes and the buildings will be retained by the charity as an investment to fund the work of the charity.

Discretionary social housing relief

- 3.14 A charging authority may offer further, discretionary, relief for affordable housing types which do not meet the criteria required for mandatory social housing relief and are not regulated through the National Rent Regime.
- 3.15 When applying for relief, a claimant must provide evidence that the chargeable development qualifies for social housing relief. The Regulations provide that dwellings no longer meeting these requirements must pay the levy.

Exceptional Circumstances Relief

- 3.16 The Regulations allow charging authorities to permit discretionary relief from CIL, where exceptional circumstances can be demonstrated. The key requirements are that the site must have a Section 106 agreement in place; the charging authority must consider that paying the full CIL liability would have an unacceptable impact on the development's viability; and the relief must not constitute notifiable state aid.

Instalment policy:

- 3.17 A charging authority can set its own levy payment deadlines and/or offer the option of paying by instalments. If it does so, it must publish an instalments policy on its website and make it available for inspection at its principal offices. It requires at least 28 days' notice to adopt or change the policy. Where no instalment policy is in place, payment is due in full at the end of 60 days after development commenced. The Council is considering the following instalment policy, however the final policy will be published at the time that the CIL Charging Schedule is adopted:

"Where the total CIL liability is greater than £35,000, CIL payments would be accepted in the following instalments;

- 33% on 60 days after development commenced
- 33% 12 months after development commenced
- 34% 18 months after development commenced."

What can CIL be spent on?

- 3.18 The money raised through CIL must be spent on infrastructure needed to support the development of the B&NES area. The Council must specify the

projects/types it intends to spend CIL receipts on, in what is known as an Infrastructure List or 'Regulation 123 List'. Please see below at **Section 6**.

- 3.19 The CIL (Amendment) Regulations 2013, requires that the Council pass a proportion of the CIL funds to the neighbourhoods in which the chargeable development takes place. The neighbourhood proportion of CIL can be spent on a wider range of items than the scope of the district wide infrastructure list under Regulation 123. In areas where there is a Neighbourhood Plan in place prior to planning permission being granted; or permission was granted by a Neighbourhood Development Order, the Council must pass 25% of Community Infrastructure Levy funds from developments within those areas to the relevant local council area (Town and Parish Councils). Where there is no Neighbourhood Plan this amount is 15%, subject to a cap of £100 per household in the local council area, per year.
- 3.20 Communities without a Parish or Town Council, such as Bath, will still benefit from the neighbourhood proportion of CIL funds (15% capped or 25% uncapped). In these areas the Council will include the arrangements for the spend of local CIL income in its options for strengthening community representation and civic governance within Bath.

The relationship between CIL and Section 106 agreements

- 3.21 Following the adoption of a Charging Schedule, CIL will replace Section 106 Agreements (S.106) (of the Town and Country Planning Act 1990) as the primary tool to pool contributions towards delivering the infrastructure necessary to support the sustainable development of the District. The provision of affordable housing lies outside of the remit of CIL and will continue to be secured through S.106 Agreements. S.106 Agreements will be significantly scaled back so that the Council will only be able to request S.106 planning obligations, alongside Planning Conditions, for on-site specific infrastructure (eg open space and facilities) and off-site infrastructure (eg highway access works) and facilities or services that are essential for the development to take place, or are needed to mitigate the impact of a specific development at site or neighbourhood level. The principle is that all CIL liable developments must pay CIL as well as contribute to any site specific requirements to be secured through S.106 Agreements.
- 3.22 As set out in the CIL regulations, the Council will only be able to pool up to five separate S.106 contributions towards the implementation of a specific item of infrastructure (which is not being funded by CIL receipts).
- 3.23 In order to explain the relationship between CIL and S.106 agreements, the **Planning Obligations Supplementary Planning Document (SPD) (2009)** has been revised to explain how CIL and S.106 agreements will operate together. A draft Revised Planning Obligations SPD accompanies this consultation.

4.0 EVIDENCE BASE

- 4.1 Appropriate available evidence must be used to inform the CIL rate setting process, based on an assessment of infrastructure necessary to support new development and the economic viability of development. The CIL Regulations 2010 (as amended) require that in setting rates, the charging authority

“must strike an appropriate balance between -

- (a) the desirability of funding from CIL (in whole or in part) the actual and expected estimated total cost of infrastructure required to support the development of its area, taking into account other actual and expected sources of funding; and*
- (b) the potential effects (taken as a whole) of the imposition of CIL on the economic viability of development across its area.”*

- 4.2 This section considers the background evidence used for setting the proposed CIL rates within B&NES Draft Charging Schedule. Please also see the separate Infrastructure funding gap evidence paper.

- 4.3 The following documents are required or recommended for preparing a sound Charging Schedule.
- An up to date development plan for the area
 - A broad assessment of the likely impact of CIL on the viability of development across the District
 - Details of infrastructure required to support the level of development set out in the development plan / Core Strategy, and evidence of the potential funding gap between the estimated total cost of infrastructure required, and the other actual and expected sources of funding.

- 4.4 The B&NES Draft Charging Schedule has been informed by the following:
- Informal Consultation and Stakeholder engagement.
 - CIL Preliminary Draft Charging Schedule; schedule of consultation responses and Report on Consultation (Separate documents).
 - B&NES Core Strategy (2014),
 - Infrastructure Delivery Programme (Updated 2014)
 - CIL Viability Assessment (2012 and May 2014 Update) (Separate Documents)

Informal Consultation and Stakeholder Engagement

- 4.5 The first formal round of consultation, the Preliminary Draft CIL Charging Schedule (PDCS), took place between 18th April and 8th June 2012. A total of 37 representations were received. A summary of comments received and the Council’s responses to those comments can be found in the PDCS Consultation Report, available with this consultation. These comments have

been taken into account in the preparation of the Council's Draft Charging Schedule, which is now the subject of this second formal round of consultation.

- 4.6 A wide range of stakeholders were consulted throughout the evidence gathering process for the Preliminary Draft Charging Schedule consultation. In particular, in order to ensure that the viability assessment is as fully reflective of conditions on the ground as possible, a workshop was held with representatives of local business and development sectors on 17th Oct 2011. This was to discuss and agree various assumptions used in the viability appraisals.
- 4.7 As part of the preparation of the viability testing to inform the Draft Charging Schedule, a letter was circulated to developers requesting evidence for consideration in the preparation of the economic viability study in March 2014. Evidence was sought on sales values, development costs and existing land values for residential development, and rents, yields and development costs for commercial development. No data has been offered on these issues.

B&NES Core Strategy

- 4.8 The B&NES Core Strategy (Local Plan Part 1 2014), is the principal planning document for guiding development in B&NES district to 2029. It sets out an up-to-date and robust strategic planning framework for the district, indicates the scale and broad locations for housing growth and other strategic development needs, and sets out environmental protection policies.

Infrastructure Delivery Programme

- 4.9 The B&NES Infrastructure Delivery Programme (IDP) covers the range of infrastructure requirements for all statutory providers and public services. The IDP is a "live" document that will be regularly updated to take account of updated information on costs and priorities, changing needs and circumstances over the plan period. The IDP sets out the body or department responsible for delivery and funding of the infrastructure, the estimated cost of the infrastructure, whether there are any sources of funding secured, timescale and priority. The IDP does not provide details of ongoing operation and maintenance costs.
- 4.10 The CIL Regulations require that each charging authority justifies the need to charge CIL by presenting appropriate available evidence on infrastructure requirements and the funding gap. A separate paper – "Community Infrastructure Levy Funding Gap Evidence Paper" - provides an assessment of the infrastructure requirements based on the IDP, and the funding gap.

CIL Economic Viability Assessment

- 4.13 A key part of the evidence underpinning the draft Charging Schedule is the viability evidence which examines the potential effects (taken as a whole) of the imposition of CIL on the economic viability of development across the area.
- 4.14 The Council commissioned BNP Paribas to undertake a CIL viability study to inform the Draft Charging Schedule. The study assessed the viability and financial capacity of a range of development scenarios to pay CIL using a standard residual land value, and yield capitalisation, development appraisal approach, and made recommendations to the Council on CIL rates. The appraisals assume a range of land values to reflect differences in location within the district and types of site. The consultants' approach to assessing the impact of CIL has been scrutinised through successful CIL examinations for other local authorities.
- 4.17 ***The BNP CIL Viability Assessment Update Report 2014*** accompanies this consultation document and the Draft Charging Schedule.

5. COMMUNITY INFRASTRUCTURE LEVY DRAFT CHARGING SCHEDULE

5.1 The Bath and North East Somerset District (B&NES) Council is proposing to charge the CIL in respect of the development at the following rates;

Development Type	Location	CIL charge £/m ²
RESIDENTIAL (Class C3) including Specialised, Extra Care and Retired Accommodation	District wide	£100
RESIDENTIAL	Strategic Sites /urban extension	£50
HOTEL (Class C1)	In Bath	£100
	Rest of District	£ Nil
RETAIL In-centre / High Street Retail	Bath city centre	£150
	Other centres	£ Nil
SUPERMARKETS, SUPERSTORES AND RETAIL WAREHOUSE (over 280m ²)	District wide	£150
OFFICES (Class B1)	District wide	£ Nil
INDUSTRIAL AND WAREHOUSING	District wide	£Nil
STUDENT ACCOMMODATION	On Campus with submarket rents to be set in section 106 agreement	£ Nil
	Off Campus	£200
ANY OTHER DEVELOPMENT	District wide	£ Nil

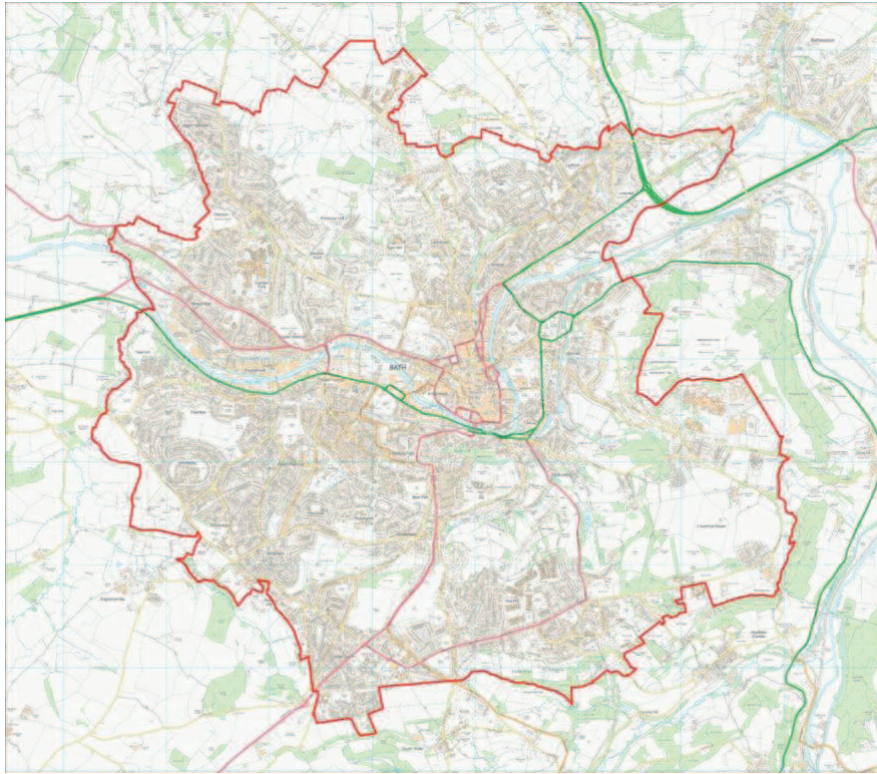
Definitions

- Strategic sites / urban extension
As defined within the Core Strategy (Policies B3A, B3C, KE3A, KE4 and RA5)
- Retail (Class A1/A2/A3/A4/A5)
- In-centre / High Street Retail as defined within the Core Strategy
- Supermarket - large format convenience-led stores. The area used for the sale of goods will be above that applied for the purposes of the Sunday Trading Act of 280 m² sales area.
- Student Accommodation (purpose built accommodation for students).
(Planning Use Classes under Town and Country Planning (Use Classes) Order 1987 (as amended))

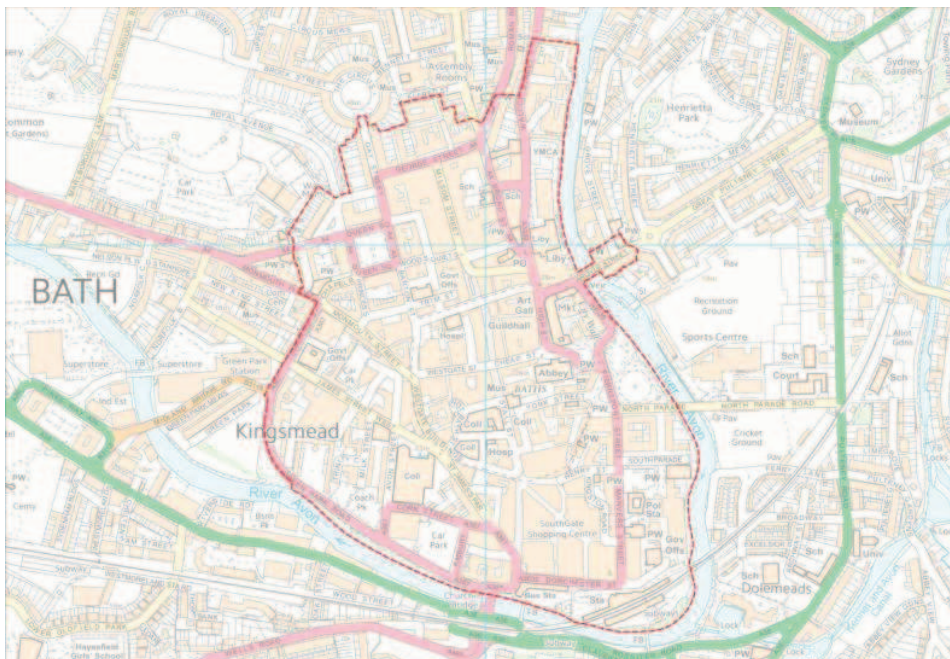
The Bath and North East Somerset District (B&NES) Council Draft Charging Schedule has been prepared in accordance with the Part 11 of the Town and Country Planning Act 2008 (as amended) and the Community Infrastructure Regulations 2010 (as amended).

The attached plans identify the locations and boundaries to which the residential and non-residential CIL charges apply.

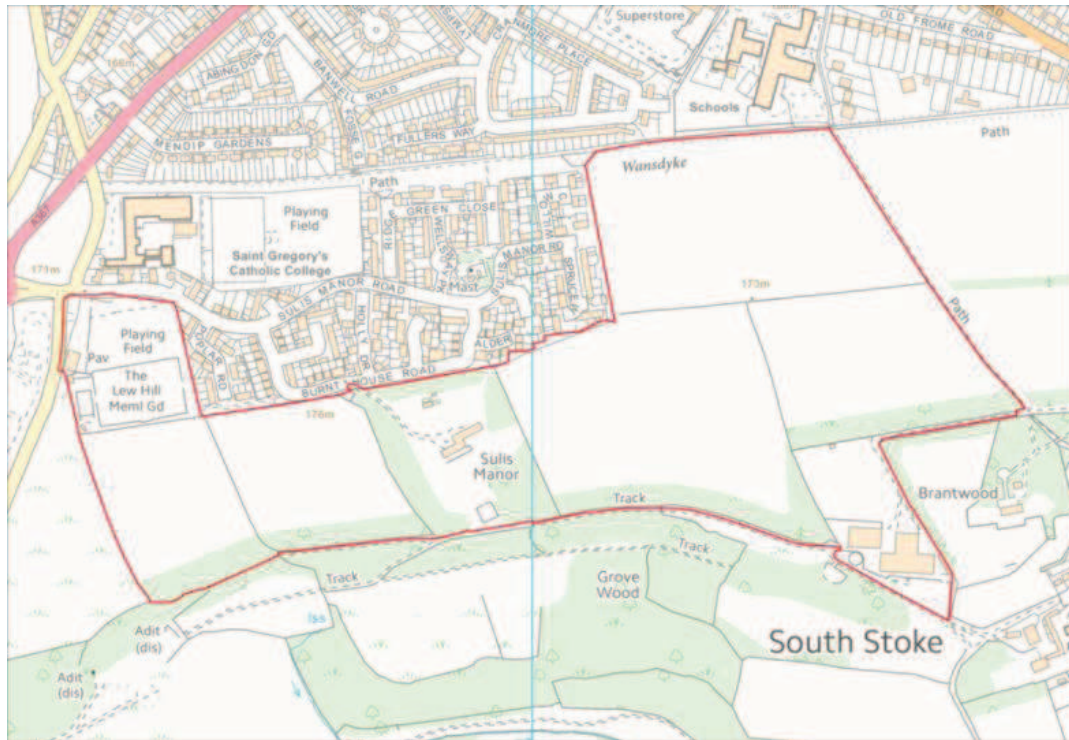
Plan 1- The CIL Charging Zone for hotel development in Bath



Plan 2 - The Charging Zone for Bath City Centre Retail development



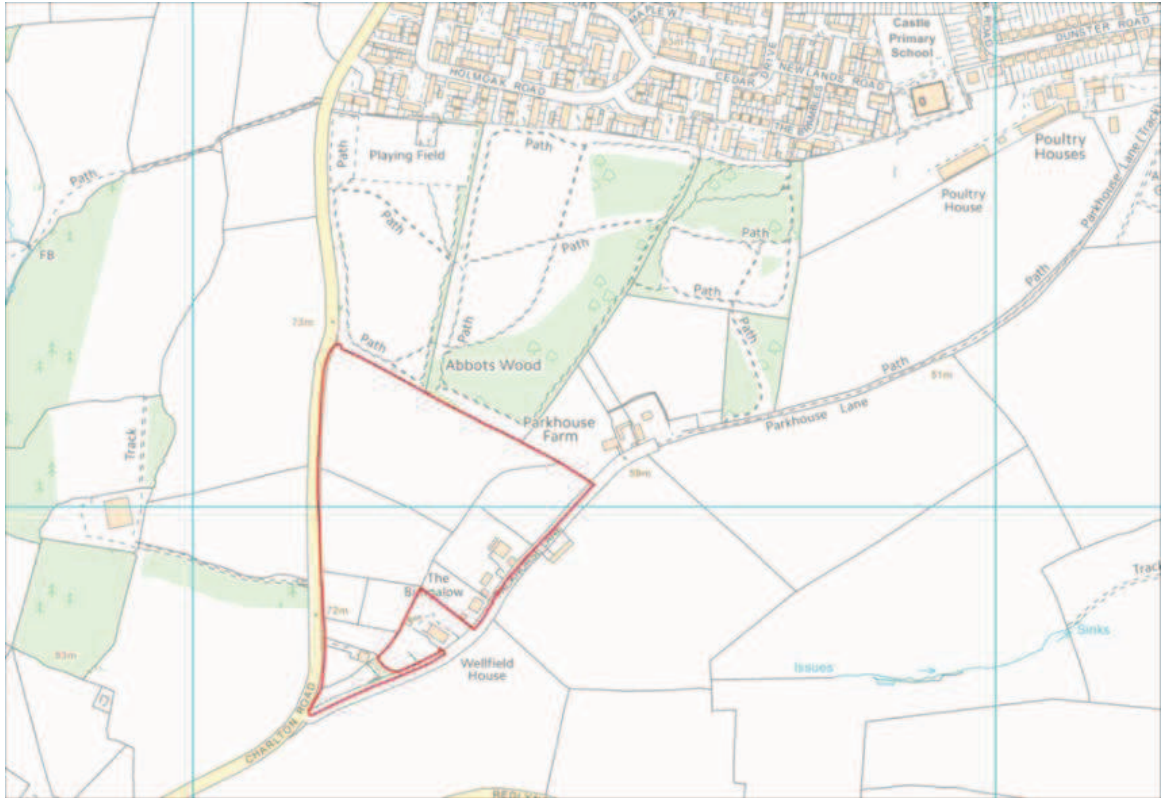
Plan 3 Strategic Site: Land adjoining Odd Down Charging Zone



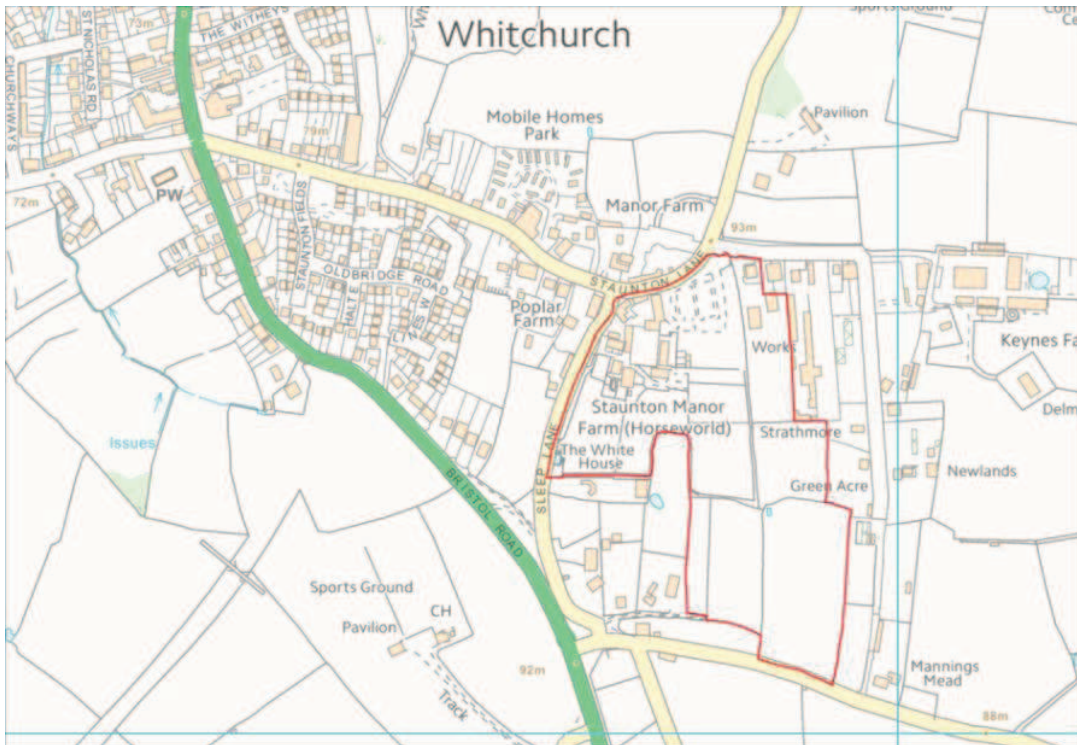
Plan 4 Strategic Site: Land adjoining East Keynsham Charging Zone



Plan 5 Strategic Site: Land adjoining South West Keynsham Charging Zone



Plan 6 Strategic Site: Land at Whitchurch Charging Zone



Calculation of CIL Charge

CIL charges will be calculated in accordance with CIL Regulation 40 (as amended) of the Community Infrastructure Levy Regulations 2010 (as amended). The chargeable amount will relate to the net additional Gross Internal Area and the CIL rate as set out in the Charging Schedule, index linked using the Royal Institution of Chartered Surveyors' All-in Tender Price Index figures for the year in which the planning permission is granted and the year in which this charging schedule took effect.

A summary of how the CIL charge will be calculated is as follows:

$$\frac{\text{CIL Rate (R) x Chargeable Gross Internal Area (A) x BCIS Tender Price Index (Ip)}{\text{BCIS Tender Price Index (Ic)}}$$

where

R= CIL Rate as set out in the Charging Schedule for relevant us/ area

A = net increase in gross internal floor area

Ip = The BCIS All-in Tender Price Index for the year in which planning permission was granted

Ic = The BCIS All-in Tender Price Index for the year in which the charging schedule containing rate R took effect (and the figure for a given year is the figure for 1st November of the preceding year)

6.0 DRAFT INFRASTRUCTURE LIST (Draft REGULATION 123 LIST)

6.1 Charging Authorities must prepare a Reg 123 list which sets out those types of infrastructure on which CIL could be spent and the list must be included as part of the evidence at CIL examination. The B&NES Reg 123 list is based on the Council's Infrastructure Delivery Plan (IDP) which underpins the Core Strategy.

6.2 The following table comprises Bath & North East Somerset Council's Regulation 123 list, which includes the infrastructure that the Council may apply CIL revenues to.

- Strategic Transport Infrastructure including cycling and walking infrastructure, and public transport (excluding development specific mitigation works on, or directly related to, a development site)
- Green infrastructure to deliver the requirements set out in the Green Infrastructure Strategy, including specific green space requirements identified in the Green Space strategy (excluding on site provisions)
- The Early Years provision sets out in the Childcare Sufficiency Assessment
- School Schemes set out in the Schools Organisation Plan (Except primary schools and places required by strategic site proposals)
- Social Infrastructure, including social and community facilities, sports, recreational, play infrastructure and Youth provision, and cultural facilities (excluding on site provisions)
- Strategic Energy Infrastructure (excluding on site provisions)
- Health and Well-being Infrastructure
- Strategic Waste Facilities

7.0 FURTHER INFORMATION

Further information about the Community Infrastructure Levy can be obtained from the following:

Useful Website Links

Bath and North East Somerset Council

www.bathnes.gov.uk/planningpolicy

www.bathnes.gov.uk/cil

Planning Portal

www.planningportal.gov.uk

Planning Advisory Service

www.pas.gov.uk

Relevant Legislation and Government Guidance

- Planning Act 2008 (November 2008)
- The Community Infrastructure Levy Regulations 2010 (March 2010)
- The Community Infrastructure Levy (Amendment) Regulations 2011 (March 2011)
- Localism Act 2011 (November 2011)
- The Community Infrastructure Levy (Amendment) Regulations 2012 (November 2012)
- The Community Infrastructure Levy (Amendment) Regulations 2013 (April 2013)
- The Community Infrastructure Levy (Amendment) Regulations 2014 (February 2014)

Department for Communities and Local Government (DCLG) Community Infrastructure Levy Guidance (February 2014)

ATTACHMENT 2

Bath & North East Somerset Council

Draft Planning Obligations Supplementary Planning Document

Final Draft

July 2014

Note: This Supplementary Planning Document (SPD) contains details of financial contributions calculated from formulae in prices current at the time of preparation of the document. All financial contributions will be updated at the time of the adoption of the SPD in line with the relevant price index.

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4. APPENDICES

Executive Summary

The aim of this Supplementary Planning Document (SPD) is to provide clear guidance in respect of Bath & North East Somerset Council's approach to Section 106 Planning Obligations. The planning policy basis for this SPD is set out within the National Planning Policy Framework (NPPF) (March 2012), National Planning Practice Guidance (NPPG) (March 2014) and Policy CP13 (Infrastructure Provision) of the Council's adopted Core Strategy. This SPD supersedes the Planning Obligations SPD published in 2009 and also Appendix C of the Bath Western Riverside SPD (March 2008).

The SPD provides guidance in relation to Planning Obligations in respect of 9 key policy areas:

- Affordable Housing including Extracare Housing
- Transport Infrastructure Works
- Public Transport
- Green Infrastructure
- Tree Replacement
- Adoption of On-Site Green Space, Allotments and Landscaping Schemes
- Targeted Recruitment and Training & Mitigation
- Fire Hydrants
- Education Facilities

The SPD sets out in detail the national and local planning policy context and demonstrates how the SPD is in conformity with this policy background. It also contains information in relation to the way that Development Management Planning Officers will prioritise planning obligations; the process that will be followed by the Council in seeking planning obligations; the drafting of legal agreements and the liability for costs associated with the preparation of such agreements.

The SPD also sets out the way that the Council will consider the impact of planning obligations on the viability of development proposals; how the Council will ensure that there is no duplication between Section 106 planning obligations and the Community Infrastructure Levy (CIL); and the Council's approach to the monitoring of the delivery of planning obligations, including the Monitoring Fee that will be required.

The SPD then addresses each of the 9 topic areas detailed above in turn, providing background information to each obligation type, the planning policy context for the obligation, the relevant trigger for an obligation to be sought, the level of contribution that will be required and contact details to obtain further information in respect of each obligation.

Lastly, the Appendices to the SPD set out additional relevant supporting information, working examples of the calculation of obligations and pro forma agreements for use by developers.

For more information on *the Planning Obligations Supplementary Planning Document* please contact the Planning Policy team at:
planning_policy@bathnes.gov.uk

This document can also be viewed on our website:
www.bathnes.gov.uk/planningpolicy

Telephone: 01225 477548
Fax: 01225 394199

1.0 INTRODUCTION

1.1 Purpose and Scope of the SPD

1.1.1 This SPD sets out Bath & North East Somerset Council's ('The Council') requirements in respect of planning obligations to be secured from development. The SPD replaces the previous version, which was adopted July 2009, and takes account of the introduction of the Council's CIL Charging Schedule.

1.1.2 The SPD provides further detail to the Council's Core Strategy, which provides the strategic planning policy framework for the development of the Bath and North East Somerset administrative area up to 2029, and will assist the Council in its aim of delivering sustainable development throughout the plan period.

1.1.3 The SPD provides the detail to Core Strategy Policy CP13, which is the Council's policy that establishes that new development must be supported by the timely delivery of the required infrastructure to provide balanced and more self-contained communities. The policy also confirms that the planning obligations sought by the Council will be based on this SPD and its successors.

1.1.4 It is anticipated that this SPD will provide useful guidance for developers, planning officers, elected Councillors and members of the public in respect of the type and level of obligations that developments of different type and size will be expected to deliver.

1.2 The Council's overall approach to Planning Obligations

1.2.1 Part 1 of the SPD focuses on the general matters relating to the Council's approach to planning obligations and demonstrates how the SPD complies with national and local planning policy, including the CIL Regulations as amended. Part 1 also sets out the Council's approach to viability and the relevant procedural matters.

1.3 The types of obligations that the Council may seek to secure

1.3.1 Part 2 of the SPD focuses on the type of planning obligations that the Council will seek to secure through the Section 106 mechanism. It sets out the policy context and, where appropriate, the trigger above which obligations will be sought in relation to each obligation type. The obligation types are as follows:

- Affordable Housing including Extracare Housing
- Transport Infrastructure Works

- Public Transport
- Green Infrastructure
- Adoption of On-Site Green Space, Allotments and Landscaping Schemes
- Tree Replacement
- Targeted Recruitment and Training & Supply-chain Protocol
- Fire Hydrants
- Education facilities
- Other Site Specific Measures

1.3.2 The Affordable Housing section of the SPD contains significantly more detail than other sections, by reason that Affordable Housing obligations will be secured solely through the Section 106 mechanism, without funding from CIL. This is in accordance with the CIL Regulations 2010 as amended.

PART 1

2.1 National Policy Context

- 2.1.1 Section 106 of the Town & Country Planning Act 1990, as amended by Section 12 of the 1991 Planning and Compensation Act, sets out the legislative background against which planning obligations may be sought. In addition, Regulations 122 and 123 of the Community Infrastructure Levy (CIL) Regulations 2010 and the CIL (Amendment) Regulations 2011, 2012, 2013 and 2014 are additional legislative regulations. Paragraphs 203 to 205 of the National Planning Policy Framework (NPPF) (March 2012) set out Government policy in relation to planning obligations.
- 2.1.2 From April 2015, or the date on which a CIL Charging Schedule is adopted if this is sooner, it will not be possible for local planning authorities to seek planning obligations for strategic infrastructure using the existing Section 106 mechanism. For this reason the tariff based approach set out in the Council's previous Planning Obligations SPD adopted July 2009 will no longer be fit for purpose.
- 2.1.3 In addition, the CIL Regulations require that Section 106 contributions cannot be pooled from more than five developments to provide new infrastructure, with the exception of Crossrail.
- 2.1.4 Regulation 122 and Paragraph 204 of the NPPF set out the tests that must be satisfied in order for obligations to be required in respect of development proposals. A planning obligation must be:
- necessary to make the development acceptable in planning terms;
 - directly related to the development; and
 - fairly and reasonably related in scale and kind to the development
- 2.1.5 Planning obligations satisfying the above tests will be limited to site specific obligations required to mitigate the impact of a particular development, however in relation to very large developments the use of Section 106 agreements could also extend to strategic infrastructure such as new schools; primary healthcare; and strategic highway and transportation improvements if they are needed as part of the development.

2.1.6 In addition to planning obligations that meet the above tests, the provision of affordable housing will remain within the remit of Section 106 obligations.

2.1.7 As discussed earlier, this SPD provides the detail to Policy CP13 of the Council's adopted Core Strategy. As such, given that the Core Strategy has been found to be sound by the Examination Inspector, and therefore in conformity with the NPPF, it is clear that this SPD is also in conformity with the NPPF.

2.2 Local Policy Context

2.2.1 The Bath and North East Somerset Public Service Board agreed the vision below.

'Bath and North East Somerset will be internationally renowned as a beautifully inventive and entrepreneurial 21st century place with a strong social purpose and a spirit of wellbeing, where everyone is invited to think big – a 'connected' area ready to create an extraordinary legacy for future generations.'

2.2.2 This vision is based on three work streams 'living', 'working' and 'getting around' and details are provided by the strategies below.

'Living' – Health and Wellbeing Strategy

'Working – Economic Strategy

'Getting around' – Transport Strategy

2.2.3 The Core Strategy is the spatial expression of those and is a key policy document for Bath & North East Somerset that puts in place a strategic planning framework to guide change and development in the District over the next 20 years and beyond.

2.2.4 Delivery of the growth set out in the Council's Core Strategy will need to be supported by the provision of necessary infrastructure. Policy CP13 of the Core Strategy sets out the Council's broad requirements in this regard. The key District wide infrastructure requirements are identified in the Council's Infrastructure Delivery Programme.

2.2.5 The Council's long-term economic and regeneration aspirations for the main urban centres within the District are set out in the Economic Strategy.

- 2.2.6 This SPD provides the detail to Policy CP13 of the Core Strategy and is therefore in conformity with the Council's statutory development plan.

POLICY CP13 Infrastructure provision

New developments must be supported by the timely delivery of the required infrastructure to provide balanced and more self-contained communities.

The Council will work in partnership with adjoining authorities, local communities and relevant agencies and providers to ensure that social, physical and green infrastructure is retained and improved for communities.

Developer contributions will be based on the Planning Obligations SPD and its successors.

Infrastructure proposals should not cause harm to the integrity of European wildlife sites which cannot be mitigated.

Planning obligations will be sought with regard to the national and local policy context set out above.

2.3 Priorities for planning obligations

- 2.3.1 It is essential that developers enter into early discussion with the Council's planning officers at an early stage about planning obligations that may be required for their development, by the Council. It is not possible to provide a priority list of planning obligations that may be sought, by reason that the relative importance of an obligation will be dependent on the development proposal being considered. This will be a judgment to be made by the Development Management Planning Officer who is considering the planning application.
- 2.3.2 In making this judgment, Planning Officers will have regard to the Development Plan; adopted Neighbourhood Plans; advice from statutory consultees, the financial viability of the proposals if necessary; and individual site characteristics.
- 2.3.3 The use of planning obligations has to be appropriate so knowing when to use them is important. The Planning Officer will have regard to the CIL Regulation 122 tests to determine if a particular obligation sought satisfies the legal tests

2.4 Planning Conditions process

- 2.4.1 The National Planning Policy Framework states that planning obligations should only be used where it is not possible to address unacceptable impacts of development proposals through a planning condition. Where a planning obligation is required it must be secured by legal agreement. Where the nature of the obligations required is relatively simple and it is not necessary for the Council to be a signatory to the legal agreement, applicants are encouraged to submit a Unilateral Undertaking for consideration by the Council. Where a Unilateral Undertaking is not appropriate a Section 106 agreement will be required, which will be drafted by the Council's Legal & Democratic Services Team. The applicant will be required to pay the legal costs reasonably incurred in respect of preparing a Section 106 agreement or reviewing a Unilateral Undertaking.
- 2.4.2 Applicants should agree with the Development Management Planning Officer the most appropriate mechanism to secure planning obligations at an early stage in the planning process.

2.5 Viability

- 2.5.1 If an applicant considers that the level of planning obligations required would render their proposal unviable, then the applicant will be expected to provide the full financial details of the proposal to the Council, in a financial appraisal submitted and signed by an appropriately qualified and independent financial professional. For the Council to consider a viability argument, it will be essential that the developer shares information substantiating this on an open book basis. The following information will be required:
- Site or building acquisition cost and existing use value
 - Construction costs and programme
 - Fees and other on costs
 - Projected sale prices of dwellings
 - Gross and net margin
 - Other costs and receipts
 - Other relevant information dependent on the nature of the obligation(s)
- 2.5.2 In assessing the viability of a development in terms of the delivery of subsidy free affordable housing, the Council will have regard to the average supportable deficit

figures in Appendix 1 to determine the likely income deriving from the transfer of the affordable housing units to a registered provider.

2.5.3 The Council will commission an independent chartered surveyor (or suitably qualified and independent financial professional) to interrogate any economic viability assessment provided by a developer. The costs of this work are to be met by the developer. The information will be kept confidential.

2.5.4 If there is any disagreement on the financial appraisal, the Council will expect the developer to agree to adjudication by an independent person, usually a Fellow or Member of the Royal Institution of Chartered Surveyors. The costs of the adjudication will be met by the developer.

2.6 Preventing duplication with the CIL

2.6.1 From April 2015 (or the date that the Council introduces CIL, if this is earlier) the CIL Regulations restrict the use of pooled contributions towards items that may be funded by CIL. At that point, no more may be agreed in respect of a specific infrastructure project or a type of infrastructure through a Section 106 agreement, if five or more obligations for that project or type of infrastructure have already been entered into since 6 April 2010, and it is a type of infrastructure that is capable of being funded by the levy.

2.6.2 In respect of planning obligations secured prior to 6 April 2010; these can continue to be used to fund Infrastructure items.

2.6.3 In respect of affordable housing, which cannot be funded by CIL, there is no restriction in terms of the numbers of obligations that may be pooled, but due regard must be given to the wider policies and guidance on planning obligations set out in the NPPF and NPPG.

2.6.4 To ensure developers do not pay twice for the same items, the Council will publish a Regulation 123 list of infrastructure that the Council intends will be, or may be, wholly or partly funded by CIL. These types of infrastructure cannot therefore be funded through new Section 106 planning obligations.

2.6.5 In order to increase transparency and certainty as to what infrastructure may be funded from CIL (and thus what may still be secured through planning obligations),

the Council's Regulation 123 list will be reviewed and amended going forward to ensure that it represents an up to date list of Infrastructure to be funded by CIL.

2.7 Planning Obligations Monitoring Fee

2.7.1 The monitoring of Section 106 planning obligations will be undertaken by the Council's Section 106 Monitoring Officer to ensure that the obligations of both the developer and Council are met. The costs incurred by the Council of monitoring planning obligations will be met by the developer and will be payable upon completion of the Section 106 agreement or Unilateral Undertaking. The fee will be equal to 15% of the application fee. However, a Monitoring Fee will not be required in cases where a CIL payment is due, in addition to the entering into of planning obligations.

2.8 Index Linking

2.8.1 All financial contributions calculated from formulae contained in this SPD are to be index linked from the date of adoption of the SPD. Most other financial contributions are to be index linked to the date that Committee or Delegated approval is given for the relevant planning application. The exception is where commuted maintenance payments are required and in these instances the payment will be index linked from the point at which the maintenance costs are agreed.

2.9 Late Payments

2.9.1 Where payment of a financial contribution is made after the date upon which it was due for payment, interest will be charged at a rate of 4% above the base lending rate. The interest due will be calculated after the indexed sum has been calculated.

PART 2

3.1 Affordable Housing including Extracare housing

Introduction

3.1.1 The delivery of affordable homes for those in housing need in Bath & North East Somerset is a key strategic priority, and the Council is committed to maximising delivery through planning obligations as well as encouraging our developer and housing association partners to deliver schemes for 100% affordable housing. The Core Strategy 'Strategic Objective 5' is all about meeting the housing needs of the District and states:

Strategic Objective 5: Meet housing needs

- enabling the delivery of new homes needed to respond to expected demographic and social changes and as far as possible to support the labour supply to meet our economic development objectives
- ensuring that the new homes provided are of high quality design and reflect and cater for a range of incomes and types of household, including those in need of affordable housing

3.1.2 The Council is committed to securing the delivery of homes for local people that are affordable, adaptable, safe and sustainable. These homes will be integrated into the wider development and shall be part of places where people want to live.

3.1.3 The need for affordable housing in the District is high and the Core Strategy makes provision for 3,290 new affordable homes over the plan period.

3.1.4 This housing chapter of the SPD should be read in conjunction with up to date supporting informing from the Council including the relevant Strategies and Delivery plans for housing sitting beneath the Corporate Health & Wellbeing Strategy and the Economic Strategy.

National Policy

3.1.5 Local Authorities have a statutory duty to provide housing for households in local housing need and to prevent homelessness.

3.1.6 The National Planning Policy Framework (NPPF) provides the overarching national requirements for planning policy and provides for a definition of affordable housing and associated products and tenures.

Bath & North East Somerset Core Strategy

3.1.7 The adopted Core Strategy contains two specific policy areas on affordable housing delivery, which have been independently tested in viability terms. There is a presumption of full compliance with Core Strategy and SPD requirements on all housing development sites that meet the criteria in CP9:

POLICY CP9 Affordable housing

Large sites

Affordable housing will be required as on-site provision in developments of 10 dwellings or 0.5 hectare (whichever is the lower threshold applies) and above. The following percentage targets will be sought:

40% in Prime Bath, Bath North and East, Bath Rural Hinterland;

30% in Bath North and West, Bath South, Keynsham and Saltford, Midsomer Norton, Westfield, Radstock, Peasedown St John, Paulton and Chew Valley.

This is on a grant free basis with the presumption that on site provision is expected.

Small sites

Residential developments on small sites from 5 to 9 dwellings or from 0.25 up to 0.49 hectare (whichever is the lower threshold applies) should provide either on site provision or an appropriate financial contribution towards the provision of affordable housing with commuted sum calculations. The target level of affordable housing for these small sites will be 20% for AH area 1 and 15% for AH area 2 %, half that of large sites, in order to encourage delivery.

In terms of the affordable housing on small sites, the Council will first consider if on site provision is appropriate. In some instances, the Council will accept a commuted sum in lieu of on-site provision. This should be agreed with housing and planning officers at an early stage.

Viability

For both large and small sites the viability of the proposed development should be taken into account, including:

- Whether grant or other public subsidy is available*
- Whether there are exceptional build or other development costs*
- The achievement of other planning objectives*
- The tenure and size mix of the affordable housing to be provided*

A higher proportion of affordable housing may be sought where supported by the assessment of viability of the proposed development.

Sub-division and phasing

Where it is proposed to phase development or sub-divide sites, or where only part of a site is subject to a planning application, the Council will take account of the whole of the site when determining whether it falls above or below the thresholds set out above.

Property Size and Mix

Residential developments delivering on-site affordable housing should provide a mix of affordable housing units and contribute to the creation of mixed, balanced and inclusive communities. The size and type of affordable units will be determined by the Council to reflect the identified housing needs and site suitability.

The type and size profile of the affordable housing will be guided by the Strategic Housing Market Assessment and other local housing requirements but the Council will aim for at least 60% of the affordable housing to be family houses including some large 4/5 bed dwellings.

Other

All affordable housing delivered through this policy should remain at an affordable price for future eligible households, in the event of any sales or staircasing affecting affordable housing unit(s) delivered through CP9 then an arrangement will be made to recycle the receipts/subsidy for the provision of new alternative affordable housing located elsewhere within Bath and North East Somerset. Affordable Housing should be integrated within a development and should not be distinguishable from market housing.

Affordable Housing	Sub-Market Areas	Postcode
Area 1: 40%	Prime Bath	BA1 2, BA1 1, BA2 4
	Bath North and East	BA1 5, BA1 6, BA2 6, BA11 7, SN14 8, and SN13 8
	Bath Rural	BA1 9, BA1 8, BA2 7, BA2 9 and BA2 0,
Area 2: 30%	Bath North and West	BA1 4 and BA1 3
	Bath South	BA2 1, BA2 2, BA2 3 and BA2 5
	Keynsham and Saltford	BS31 1, BS31 2, BS31 3,
	Midsomer Norton, Radstock, Westfield, Peasedown St John and Paulton	BS39 7, BA3 2, BA3 3 and BA2
	Chew Valley	BS40 6, BS40 8, BS39 4, BS39 5, BS39 6 and BS14 0

What will developers have to provide?

- 3.1.8 It is important that developers make early contact with the Housing Enabling & Development Team through Development Management in order to discuss the affordable housing requirements for any proposed development.
- 3.1.9 The Council will require the developer to provide the following information prior to agreeing the planning contribution in terms of affordable housing to ensure that the proposals comply with current Affordable Housing Policies, SPD requirements and supporting information / earlier guidance provided by the Council:
- Details of the mix of housing, number of units, type of units (e.g. social rented/intermediate), size of units
 - Details of design layout and construction standards (e.g location of affordable units, phasing of development, compliance with design standards).
 - Independently audited evidence of compliance with SPD requirements using HCA HQIs, Habinteg Lifetime Homes, Habinteg Wheelchair user standards and Secure by Design (or any successor equivalents).
 - For outline planning applications, the S.106 agreement will establish the broad requirements for affordable housing delivery and will make the detailed submissions a requirement of the Reserved Matters application/s.

- Details on affordability of the affordable housing units.
- How the affordable housing provision complies with Policy CP9.

Delivering Affordable Housing in Bath & North East Somerset

3.1.10 Affordable housing tenure types that are likely to be considered in the District are detailed in Table 3.1.A below:

Table 3.1.A

Tenure	Description
Social Rent	<p>Rented housing to be let at a figure no more than 100% of the rent level as determined by the National Rent Regime for target rents.</p> <p>THIS IS THE COUNCIL'S PREFERRED RENTED TENURE</p>
Affordable Rent Tenure	<p>Rented housing to be let at up to 80% of local market rents (including service charges). Affordable Rent Tenure rents are generally higher than social rents</p> <p>AFFORDABLE RENT TENURE CAN ONLY BE USED WHERE HOMES ARE BEING DELIVERED WITH Homes and Communities Agency (HCA) FUNDING OR AS PART OF AN RP'S CONTRACT WITH THE HCA</p>
Intermediate Rent	<p>Rented housing at a level above that of Social Rent but up to 80% of local market rent (including service charges).</p>
Shared Ownership	<p>The purchaser buys an initial share from a HARP who retains and charges rent on the remaining equity. The purchaser may acquire further equity shares until the whole home is owned (unless this is restricted, e.g. some rural schemes)</p>
Discounted Market	<p>Homes that are sold, usually on a freehold basis with a permanent % discount from open market value that is secured through land registry covenants. The level of discount will not be less than 25% and will be determined with regard to local incomes and house prices to ensure affordability.</p>

- 3.1.11 Homes that do not meet the NPPF definition of affordable housing, (e.g. some forms of “low cost market housing”) will not be considered as affordable housing for planning purposes. Low cost market housing is housing at the cheaper end of the market, which may help to meet the needs of first time buyers, single employed people or key workers. Low-cost market housing can play a useful role in meeting the District’s wider housing demand and achieving an appropriate housing mix. Developers are encouraged to supply a proportion of such homes to meet the wider needs of the housing market.
- 3.1.12 The Council’s definition of affordable housing encompasses both *general needs housing* provision and *supported housing* of different affordable tenures to meet the needs of the elderly and other vulnerable groups.
- 3.1.13 Extra Care housing is NOT specifically considered as an affordable housing tenure and is subject to Core Strategy Policy CP9.

Ensuring affordability of homes delivered in Bath & NE Somerset

- 3.1.14 In line with National Government limits, B&NES Homesearch policy has set the maximum ceiling on gross total income for households requiring an affordable home as £60,000.
- 3.1.15 This is a blunt tool, and the Council expects the cost of different affordable housing products to reflect different types of need in the District. All affordable housing products should be delivered within set affordability limits. The Council expects an overarching affordability test where no one living in an affordable home in the District has to pay more than **25%** of their total gross household income in meeting their total housing costs where:

Gross Income = all monies coming into the household from earned income before tax, return on investments & savings, Universal Credit / welfare benefits including housing benefit but excluding Constant Attendance Allowance and Exceptionally Severe Disablement Allowance (or any successor equivalent)

Total Housing Cost = all mortgage related, rent and service charge costs associated with the property but excluding utility bills and council tax.

A secondary test of affordability will be required to demonstrate equality in housing costs across the district.

- 3.1.16 Bath & North East Somerset exhibits a wide range of property values and housing costs. In higher value areas, delivering homes that are truly affordable is a challenge and a simple expression of housing costs as a proportion of the housing market is inappropriate if we are to deliver an equitable affordable housing supply across the District.
- 3.1.17 Both Social Rent and Affordable Rent Tenures have their basis in local property values and in high value areas even affordable housing costs can be excessive. For all affordable rented tenures, the total housing cost (including service charges) for the tenant should not exceed the appropriate Local Housing Allowance (LHA) set by the National Valuations Office (<http://www.voa.gov.uk/corporate/RentOfficers/LHADirect.html>)
- 3.1.18 Whilst LHA levels are considered the absolute ceiling for affordable housing costs, the LHA for larger properties are disproportionately higher than target rent levels than they are for smaller units. Affordable housing delivery for all rented units will be scrutinised to ensure that a pragmatic assessment of affordability is taken that ensures residents of affordable housing in higher value areas are not unduly disadvantaged through the location of their home. Developers are encouraged to seek guidance from a HARP and discuss provisional out turn rent levels on a development with the Housing Enabling & Development Team at an early stage.
- 3.1.19 Access to Low Cost Home Ownership should be equitable with the cost of accessing the local private rented market. For shared ownership products, the Council will not seek to impose strict parameters on % equity sales and % rent charged. Instead, proposals for the total housing cost for the shared ownership should reflect the total housing cost of accessing the lower quartile private rented market in the District taking into consideration the overarching 25% income test for affordability.
- 3.1.20 The total housing cost of other low cost home ownership products will be assessed in direct relation to the cost of accessing the private rental market and the agreed target audience for the development. Discounted Market homes will be sold at no more than 75% of the open market value.

3.1.21 The Service Charge payable by the occupants of any Affordable Housing Unit shall be limited to no more than £500 per annum from 1st April 2015 and Index Linked annually from the date of occupation thereafter.

3.1.22 In all instances, the affordability caps on these homes will be sought in perpetuity and appropriate clauses will be used in Planning Agreements to secure this.

Housing & Tenure mix

Bath & North East Somerset Core Strategy:

3.1.23 **The Core Strategy CP 10 sets out the policy for housing mix**

Policy CP10 New housing development, both market and affordable must provide for a variety of housing types and size to accommodate a range of different households, including families, single people and low income households as evidenced by local needs assessments (e.g. B&NES Residential Review, 2007) and the Strategic Housing Market Assessments or future evidence.

The mix of housing should contribute to providing choice in tenure and housing type, having regard to the existing mix of dwellings in the locality and the character and accessibility of the location.

Housing developments will also need to contribute to the provision of homes that are suitable for the needs of older people, disabled people and those with other special needs (including supported housing projects), in a way that integrates all households into the community.

The specific accommodation needs of older people will be addressed through the Placemaking Plan, including considering the allocation of appropriate sites.

3.1.24 The range of affordable housing units will reflect the pattern of open market homes proposed. The Council will expect to see proportions of open market and affordable homes provided for all unit types proposed on the development.

3.1.25 Unless specifically agreed otherwise:

- all 2 bed dwellings will be provided as 2 bedroom 4 person family houses

- On wholly or primarily flatted developments, 2 bed homes will be required to be for 4 people.
- 1 bed properties will be for 2 people
- 3 bed homes will be for 5 people

(See Table 3.1B below for expectations on minimum unit size and occupancy levels)

3.1.26 Where affordable flats are proposed on a development dominated by houses, the Council's preference is for house type flats to promote tenure blindness and reduce the communal elements of the scheme.

3.1.27 Policy CP9 aims for at least 60% of the affordable housing to be family Houses including some 4 and 5 bed dwellings. Where strategic evidence supports a higher proportion of family homes, this proportion will be increased.

3.1.28 Evidence from the 2013 Strategic Housing Market assessment continues to support an affordable housing requirement for 75% homes for social rent and 25% intermediate housing.

Delivering Specialist and Supported Housing

3.1.29 All affordable homes delivered through policy CP9 will be adaptable and will deliver a proportion of wheelchair user accommodation.

3.1.30 Where a strategic demand for other forms of specialist or supported housing is identified for the development area, the Council will seek to negotiate appropriate provision and will take into account the additional costs that may be associated in specialist delivery when determining the level of affordable homes delivered or the availability of subsidy.

3.1.31 The Council does not support artificial use of age restrictions on general needs affordable housing. If a developer wishes to deliver homes for older people as an alternative to mainstream affordable housing, there will be an expectation that design and layout will be appropriate to the proposed client group and that a clear justification for the proposal can be made in terms of meeting the Council's strategic visions for housing for older people.

3.1.32 Such developments will be assessed against the 10 HAPPI principles which are considered critical to achieving excellence in housing for older people. See Appendix 2.

3.1.33 Proposals for Extracare Housing will also be assessed with regard to the Housing LIN standards for Extracare development to ensure that adequate consideration has been given to designing and developing a scheme appropriate for a frail elderly client group. See Appendix 3.

Implementing Policy CP9

Thresholds

3.1.34 **The Council will have regard to the gross number of dwellings being proposed when considering whether Policy CP9 is applicable to an application, regardless of the replacement or conversion of any existing residential dwellings on the site**

3.1.35 The Council will be mindful of applications that deliberately seek to circumvent the relevant threshold for affordable housing and will not permit any benefit to be gained from this. Proposals for residential development just below the relevant thresholds must be based on the assessed housing potential of a site and not an attempt to avoid the provision of affordable housing. Sites presented just below threshold levels will be scrutinised in terms of site/ownership boundaries, density and unit mix to ensure that land is not used inefficiently or in a piecemeal fashion to produce a scheme that avoids affordable housing contributions.

Mixed Use Sites

3.1.36 Mixed-use planning applications, where the residential element meets the thresholds identified in CP9, will be expected to enter into a legal agreement to provide affordable housing in line with Policy. Mixed-use sites will be scrutinised to ensure the artificial reduction of residential land is not being used to avoid affordable housing contributions.

Phasing on Large Sites

3.1.37 On large sites where development will be phased, it is expected that the affordable housing will be developed at the same time as the market housing and a phasing plan submitted as part of the affordable housing master-plan. Generally, in respect of

each phase, no more than 25% of open market dwellings should be occupied until 25% of the affordable housing units have been constructed and transferred to the affordable housing provider ready for immediate occupation.

3.1.38 No more than 85% of open market dwellings on each phase should be occupied until 100% of the affordable homes have been transferred to affordable housing provider, ready for immediate occupation.

3.1.39 Each phase will be expected to deliver a proportional level of affordable housing to ensure even distribution across the development.

Conversions and Change of Use

3.1.40 Core Strategy Policy CP9 applies to the conversion of any building for residential purposes that requires planning permission, whether or not it is already in residential use.

Specialist Residential Development

3.1.41 The requirement for affordable housing extends to Extra Care, sheltered/ retirement dwellings and any other forms of housing with care and support that has a C3 Planning Use Class. For the avoidance of doubt this requirement does not apply to accommodation at residential institutions, with a C2 planning use class, for people in need of care such as care homes or nursing homes where such accommodation is confirmed in writing by the Council as being non self-contained accommodation. Please see **Appendix 3** for standards.

Design, Layout and Construction Standards

3.1.42 Affordable housing should not be distinguishable from market housing in terms of location, appearance, build quality and materials. Reductions in size, use of substandard materials, or poor finishing and detailing should not be perceived as an acceptable shortcut to achieving scheme viability. Delivering affordable housing as flats on a largely housing-focussed development will not be acceptable.

Clustering of affordable housing units

3.1.43 On sites larger than 30 units the Council wishes to see at most a cluster of 8 affordable houses or 8 affordable flats in a block. On smaller sites, housing layouts should consist of clusters of no more than 4 affordable units. Clusters of affordable

housing will not share boundaries, within or across separate phases of development. Any deviation from this will be determined in discussion with the Council's Housing Enabling and Planning Officers.

3.1.44 On primarily flatted developments a scheme by scheme consideration will be taken on clustering of units to address housing management and service charge concerns.

3.1.45 Planning layouts submitted as part of an application must clearly show the location of affordable housing units and identify their tenure and size and the location of wheelchair user units. For outline applications, this affordable housing layout plan will be part of reserved matters applications.

Design and Standards

3.1.46 There is a requirement for layout plans to be independently audited to demonstrate compliance with the standards below, and that this will be submitted as part of the Affordable Housing Statement either as part of the Planning or Reserved Matters Application.

3.1.47 An independent post completion audit will also be required to ensure construction has taken place to meet the details of the following standards. If non-compliance is identified, financial compensation will be sought to reflect the reasonable cost of rectifying the failure to comply.

3.1.48 The Council expects the affordable units secured through policy CP9 to meet the following standards:

Internal space standards:

3.1.49 All affordable homes will comply with the Council's minimum internal space standards, as follows:

Table 3.1.B

Dwelling Type	Minimum internal size m²
1 bed 2 person flat	46
2bed 4 person flat	67

	2 bed 4 person house	75	
	3bed 5 person house – 2 storey	85	
	3bed 5 person house – 3 storey	95	
	4bed 6 person house – 2 storey	100	
3.1.50	4 bed 6 person house – 3 storey	105	<u>Lifetime Homes</u> 90% of affordable units should meet the Lifetime
	Anything larger	105 = 10m ²	

Homes standard as defined by Habinteg (<http://www.lifetimehomes.org.uk>) This applies to all units including flats above ground floor, where it is expected that access arrangements take into account the mobility needs of current and future occupants.

3.1.51 Compliance with Lifetime Homes requirements will not be delivered at the detriment of living space in the dwelling and the Council expects the minimum HCA HQI standards to be met for all rooms in order to provide for a range of furniture layouts and to ensure appropriate storage space.

Wheelchair Homes

3.1.52 A minimum of 10% of affordable units should be built to full wheelchair user standards as defined by Habinteg (<http://www.habinteg.org.uk/main.cfm?type=WCHDG>). The Council will use up to date evidence from Its Homesearch Register and Sirona to determine the nature and tenure of the wheelchair units to be provided.

Secure by Design

3.1.53 Developers will demonstrate that scheme layout, design and specification will achieve SDB requirements (<http://www.securedbydesign.com>).

Gardens and outdoor space

3.1.54 There is an expectation that all affordable homes of 2 or more bedrooms will have access to a secure, private garden. In flatted developments, appropriate communal outdoor space will be provided.

Flexibility in design

3.1.55 The Council welcomes the development of homes that are flexible in design and can adapt to changing household patterns. This may include house-type flats which could

convert to a family home and double bedrooms with potential to be split to deliver HQI compliant single rooms.

3.1.56 NOTE: the Government is currently working on the development of a National Housing Standard. The Housing Standards Review consultation took place during autumn 2013 and included the development of 3 national housing accessibility standards in Part M of the Building Regulations:

- Level 1 – mandatory minimum (equivalent to existing part M with minor improvements)
- Level 2 – optional level for accessible and adaptable housing (equivalent to a streamlined Lifetime Home Standard)
- Level 3 – optional level for wheelchair housing (single national standard)

3.1.57 Consultation also took place on development of appropriate space standards to complement these 3 levels of accessibility requirements.

3.1.58 If a National Housing Standard is implemented this will take precedent over the local standards included in this SPD. It would be the Council's intention to seek 90% of all affordable homes to a Level 2 standard and 10% to Level 3 to mirror current requirements.

Occupation of Affordable Homes

3.1.59 Affordable housing delivered through Core Strategy policies may only be occupied by persons eligible for, and in need of affordable housing, who are unable to afford to buy or rent an appropriate property locally on the open market and who fulfil the criteria for affordable housing as laid out in the Council's Allocations Policy.

(<http://www.homesearchbathnes.org.uk/NovaWeb/Infrastructure/ViewLibraryDocument.aspx?ObjectID=497>)

Bath & North East Somerset 'Homesearch'

3.1.60 The Council operates a Choice Based Lettings (CBL) system called Homesearch for the allocation of rented affordable housing. Intermediate housing products for sale, such as shared ownership, are currently allocated through the Help to Buy agent

covering the West of England. 100% of initial lettings of rented affordable homes will be allocated through Homesearch and a minimum of 75% of all relets.

- 3.1.61 All initial and all resales of shared ownership or other low cost home ownership will be through the Help to Buy agent, Radian (www.helptobuysouth.co.uk) or any successor arrangements, to households who fulfil the occupancy criteria laid down in the Homesearch policy.

Sustainable Lettings Plans

- 3.1.62 Also known as Local Letting Plans, these are allocations plans specific to a development that address the complex lettings or sales issues that can affect a new development. Sitting under the broad requirements of the Homesearch Policy, these plans allow time limited restrictions or requirements on allocations that ensure the affordable homes on new developments are allocated to promote the creation of mixed communities. Developers will be required to work with the RP and the Council to consider if a sustainable lettings plan is an appropriate tool for allocating affordable homes on a new site.

Management Standards and Perpetuity Arrangements

- 3.1.63 The Council will require a mechanism to be in place to ensure that affordable housing remains affordable and available to those in housing need in perpetuity. The involvement of a Housing Association Registered Provider registered with the Homes and Communities Agency is the most effective way of developing a successful, well managed scheme that will ensure that the benefits of affordable housing are secured in perpetuity.

Working with a Registered Provider

B&NES Housing Partnership

- 3.1.64 The Council operates a partnership arrangement with RPs seeking to develop new affordable homes. This partnership is made up of approved Registered Providers who are committed to delivering good quality, well designed, sustainable, adaptable affordable homes in the District which meet strategic housing aims and fulfil excellent housing management standards. It is expected that Developers will engage with one of these partner RPs to deliver the affordable housing secured on a development.

Delivering Homes outside of the B&NES Housing Partnership

3.1.65 If the developer has specific reasons to work with a different affordable housing provider, the Council acknowledges it cannot seek to prevent this. However, the chosen provider must demonstrate that they can adhere to the Council's minimum housing management standards relating to; housing income management; estate management; tenancy management; housing or specialist support, void property management and lettings; resident involvement; and maintenance. These are available on request.

Delivering affordable homes without an RP partner

3.1.66 Where a developer proposes to develop and manage the affordable homes without the involvement of a RP, planning obligations and a legal agreement must be signed to ensure nomination rights, occupancy controls other arrangements are in place to guarantee initial and subsequent affordability and compliance with housing management standards. Alternative providers will be expected to sign up to a non-partner housing agreement that stipulates the expected delivery standards for housing development and management. Allocation of rented affordable homes will be through Homesearch and the developer will be expected to sign up to the adopted Homesearch Nomination agreement.[available on request]

3.1.67 There will be safeguarding clauses inserted into the S.106 and housing agreement which ensure alternative ownership / management arrangements will be secured in the event that the initial arrangements fail to meet expected standards or provider cannot continue to own or manage the affordable homes. Reversion to open market housing will not be considered as an acceptable alternative in the first instance and any agreement to allow this will be accompanied by payment of a commuted sum in accordance with the requirements of **Appendix 1**

3.1.68 The Council will reject *any* proposed alternative provider if it cannot be robustly demonstrated that they can meet the Council's required management and delivery standards.

Enabling Fees

3.1.69 An Enabling Fee (subject to annual review) will be incurred on each affordable housing unit delivered in Bath & North East Somerset and the wider West of England sub region. These fees are designed to help with the provision of an affordable housing enabling service, assisting with the financial, legal, social, economic and environmental objectives required to secure and maximise affordable housing

delivery and additional services. Where it is agreed in the legal planning agreement that a Partner RP will deliver the affordable homes, the enabling fee will not form part of the S.106 agreement as this is already secured through partnership arrangements.

3.1.70 Enabling fees will become part of the Planning Agreement if a non-partner RP or developer / third party will deliver the affordable homes. They will be payable under the following terms:

- The fee is paid to the council on entering a building contract or at start on site by the developer, re-chargeable directly or indirectly by the organisation retaining ownership of the affordable housing unit.
- The fee is a non-qualifying cost in respect of any bid for public subsidy.
- The fee applies to all affordable housing units (i.e. including both rented and intermediate units, re-provision/ remodelling, extra care housing, rural housing, 100% affordable housing sites, mixed tenure sites and those procured through S.106 negotiations and delivered either with or without public subsidy).
- The fees cannot be paid from HARP reserves which have been accumulated via Social Housing Grant (SHG) funded schemes such as Recycled Capital Grant Fund (RCGF).

3.1.71 The Council's Housing Enabling and Development Team will advise on the level of Enabling Fee payable at the time of development. Please also see the Council's Housing Services Charging Policy.

http://www.bathnes.gov.uk/sites/default/files/siteimages/Housing/Strategyandperformance/charging_policy_2014.docx

Securing affordable homes in perpetuity

3.1.72 The Council's intention is to provide affordable housing which is available for first and subsequent occupiers, in perpetuity, and will use appropriate clauses in the S.106 planning agreement to secure this.

Rented affordable housing

3.1.73 Rented affordable housing that is delivered without public subsidy is exempt from the requirements of the Right to Acquire. However, tenants in grant funded rented housing may exercise their legal Right to Acquire. In this case the Council will

require that any net capital receipt is recycled towards the provision of additional affordable housing in Bath and North East Somerset.

Social Rented housing

- 3.1.74 RPs are under pressure from the Homes and Communities Agency to convert existing social rented homes to the Affordable Rented Tenure in order to generate a higher rental return and improve borrowing capacity to fund new affordable homes. The Council wishes to maintain the affordability of rented stock in the district and will seek to prevent rent conversion of new homes delivered through the planning system.

Intermediate housing

- 3.1.75 Intermediate housing may be lost as affordable housing through stair casing to full ownership. In order to be able to replace it, the Council will require net capital receipts to be recycled for the provision of additional affordable housing in the district. There may be exceptional circumstances where the Council allows the stair casing receipts to be recycled into the existing scheme if it can be demonstrated that it will significantly improve affordability levels for purchasers in need of intermediate housing.

Mortgagee in possession

- 3.1.76 Whilst the council wishes to see the retention of affordable homes in the sector and will restrict opportunities for these homes to be lost to the market, it recognises that these restrictions make it difficult for the RP to bring private finance into the scheme through borrowing and prevent shared owners from mortgaging their property. An appropriately worded Mortgagee in possession clause will be allowed on all affordable housing schemes to ensure it will achieve the criteria required by banks and other lenders and is agreed by the Council.

Affordable Housing Led Development

- 3.1.77 Where a development is being brought forward for 100% affordable housing, or is affordable housing led with an element of open market housing proposed to cross-subsidise affordable housing delivery, it is acknowledged that strict adherence to the requirements of policy CP9 might be counter-productive to development.

3.1.78 This will be determined in discussion with the Housing Enabling & Development Team and Planning Officers and decisions to allow deviation from Policy CP9 will be made with regard to meeting strategic housing requirements.

3.1.79 Clauses in the S.106 agreement will be used to ensure that any waiver from CP9 requirements results in the delivery of the agreed housing outcomes. Fall-back clauses will be used to ensure developments will deliver, as a minimum, the requirements of this SPD should the proposed affordable housing scheme not proceed.

When On Site Provision cannot be achieved

3.1.80 There is a presumption towards the on-site provision of affordable housing. However, in exceptional situations where on-site provision is not proposed, the developer will need to provide the following:

- sound and detailed reasons why affordable housing cannot be provided on-site and/or
- sound and detailed reasons why affordable housing cannot be provided off-site in the vicinity of the proposal, and
- show how off-site provision or a commuted sum contribute to the creation of mixed communities in the local authority area

3.1.81 If the Council agrees that an off-site contribution is the appropriate delivery mechanisms to meet the affordable housing requirement, there are two options for consideration:

1) Development of affordable homes on an alternative site, delivery to be secured through planning conditions / s106 agreement. The formula provided in Appendix 1 will be used to determine the number of affordable homes to be delivered in lieu of on-site provision.

2) Payment of a commuted sum calculated in accordance with the formula found in Appendix 1. This sum will be paid to the Council at commencement of development, ring-fenced to support the delivery of affordable housing across the District and will not be time limited.

Delivering Affordable Homes in Rural Areas

3.1.82 The Core Strategy states:

Strategic Issues: Although rural Bath & North East Somerset is made up of a wide variety of settlements with locally distinctive character, there are a number of strategic issues (both challenges and opportunities) that are common across most of the rural area:

- Lack of affordable housing to meet local needs may impact on the social sustainability of the rural areas and exacerbate difficulties for an ageing population.

3.1.83 Supporting housing development that promotes both community and economic sustainability in rural areas is a key priority for the Council. Rural affordable homes can be delivered in Bath & North East Somerset through two routes:

- Rural Placemaking
- Exception site development

Rural Growth

3.1.84 The Core Strategy has established support for a limited amount of housing growth in the rural areas of Bath & North East Somerset which will be delivered through the Placemaking Plan.

3.1.85 Sites that come forward for development under the Placemaking Plan will be subject to all of the requirements of policy CP9.

3.1.86 It is highly unlikely that a commuted sum for the delivery of affordable housing will be considered an acceptable alternative to onsite provision UNLESS there is an agreed alternative site that has been secured for the delivery of a higher quantum of affordable housing to meet the needs of the parish.

3.1.87 Affordable Homes delivered under CP9 are NOT subject to the same, strict occupancy controls as homes delivered on rural exception sites, but the Council's Homesearch allocations policy does provide for a local connections approach to allocating the homes.

3.1.88 Particular scrutiny will be given to sites being brought forward under the Placemaking Plan to ensure that affordable housing thresholds are not being artificially avoided.

Delivery of rural affordable homes on Exception Sites

3.1.89 For villages that are not expecting growth through the Placemaking agenda, or where Placemaking does not deliver sufficient affordable homes to meet local need, the Council's exceptions policy can be used to deliver affordable homes. The rural exceptions policy allows the release of land that would not normally be used for housing for development of 100% affordable housing, on small sites and where there is a demonstrated local need:

POLICY RA4: Rural Exceptions Sites

As an exception to other policies of the Development Plan, residential development of 100% affordable housing will be permitted provided that:

- a: it meets a demonstrated local need for affordable housing
- b: the housing remains affordable in perpetuity
- c: occupancy of the affordable housing would remain, as a first priority, for those with demonstrated local connections
- d: the development is in scale and keeping with the form and character of its location
- e: the development is well related to community services and facilities

A small proportion of market housing will be appropriate only where it can be demonstrated that the market housing is essential to cross-subsidise the affordable housing and that the site would be unviable without this cross-subsidy.

Role of the local community in exception site delivery

3.1.90 The Parish Council should be a key stakeholder in developing homes under policy RA4. There is a presumption that they will work very closely with the Council and housing provider on all aspects of delivery. The parish council may use a Neighbourhood Planning forum or other community group to be the key liaison point on affordable housing delivery.

Affordable Housing Provider

3.1.91 The Council's partner Registered Providers are considered the most appropriate developers of rural affordable housing. Other business and organisations may be able to provide the Council's expected housing development, management and

allocations standards and will be considered for the development of rural affordable homes if this is supported by the Community.

- 3.1.92 The Council welcomes the creation of Community Land Trusts for the delivery of rural affordable homes (<http://www.communitylandtrusts.org.uk/home>)

Identifying Local Housing Need

- 3.1.93 Development of an exception site will only be supported where there is robust evidence of local housing need. The Council has developed its preferred approach to local housing surveys but other evidence may be considered to support exception site development including Neighbourhood Plans and information from the Council's Homesearch register. Tenure mix, unit sizes and scale of development will be dictated by the robust and timely evidence of local need.

Site identification

- 3.1.94 In accordance with national best practice, sites should be identified through a sequential approach which includes assessment of the economic, social and environmental impacts of development. The availability of land is a key consideration in prioritising potential exception sites. Where a sequential assessment of sites has been carried out as part of Placemaking, this will advise but not automatically replace site search process for affordable housing.

Cross subsidy

- 3.1.95 It is acknowledged that the levels of public subsidy available to deliver affordable housing are unlikely to allow the delivery of 100% affordable housing on exception sites. In order to ensure delivery, the council will support a small proportion of market housing where it can be *demonstrated* cross subsidy is required to fund the affordable housing units. There are no prescribed ratios for the number of cross-subsidy units but it is imperative that the majority of the scheme is affordable. Market units are *only* justifiable if they facilitate the delivery of the affordable units.
- 3.1.96 Developers are expected to consider the wider housing needs of the community when determining the nature of cross-subsidy units provided.

Scale of development

- 3.1.97 Exception site development should be appropriate in scale and character to its surroundings. The number of homes proposed will be determined in discussion with

Planning and Housing Enabling taking firstly into account the level of housing need identified and then the need for any open market units to cross-subsidise delivery. The nature of the site, the size and sustainability of the settlement, as well as the views of the community, will all help influence the scale of exception site development. Developers should note that the council is unlikely to support an approach where housing numbers are based on the entirety of identified local need.

Local Occupancy Criteria

3.1.98 Exception sites are developed to meet the affordable housing needs of people with local connections to the parish. This includes residents of the parish or group of parishes, individuals with strong local links such as those having family in the parish or parishes, or who have lived there for a significant period or are employed in the area. Prioritisation of local connections will be agreed within individual S.106 agreements. The Council's Homeseach Register will be used for the allocation of all rented homes.

3.1.99 Shared ownership homes may be sold through the Help to Buy Agent for the region or directly by the housing provider.

3.1.100 Cross-subsidy units WILL NOT be subject to local occupancy conditions and will be available for sale or rent on the open market without restriction.

Perpetuity arrangements

3.1.101 Exception site development will only be permitted where the homes are made available as affordable homes for local people in perpetuity. Perpetuity arrangements will be secured in the S.106 agreement. There will be a requirement for a maximum shared ownership sale of 80% and the use of restrictive clauses in the S.106 agreement that prevent any disposal of the affordable housing units on the open market.

3.1.102 An appropriately worded Mortgagee in Possession clause will be allowed in order for both the affordable housing provider and any subsequent shared owners to secure housing finance from lenders.

Meeting wider affordable housing expectations

3.1.103 The developer is expected to meet the requirements on housing standards that apply to the delivery of affordable homes through policy CP9, with the exception of

an automatic requirement for wheelchair units. This provision will be determined by local evidence of need.

3.1.104 Further detailed, guidance on the provision of affordable homes in rural areas is available from Bath & North East Somerset Council through:

- Neighbourhood Planning advice
- Placemaking Plan
- Housing Services Enabling & Development Team
- Other links / sign posting

3.2 Transport Infrastructure Works

Introduction and Policy Background

- 3.2.1 New transport infrastructure, or improvements to existing infrastructure, is often required to ensure that developments can be accessed in a safe and appropriate manner. In addition, appropriate transport infrastructure can play a vital role in delivering the Council's sustainability aims and reducing reliance on the private motor car.
- 3.2.2 The need for transport infrastructure works is recognised at paragraph 32 of the National Planning Policy Framework (NPPF) and throughout the Council's adopted Core Strategy. In addition, Manual for Streets 2 and the Design Manual for Road and Bridge works are relevant.

CIL vs S106

- 3.2.3 Where transport infrastructure works are of a strategic nature they will be included in the Council's Infrastructure Delivery Programme and Infrastructure /Regulation 123 list and will be delivered through other mechanisms including CIL. For works that are directly related to a particular development and are required on-site or close to the site, the developer will be required to enter into a Section 106 legal agreement to secure the works required.

Trigger for the Obligation

- 3.2.4 There is no trigger in relation to the need for transport infrastructure works, as it will be dependent on the development that is proposed. As such, requirements will be assessed on a case by case basis.

Level of Contribution

- 3.2.5 The level of the contribution will be dependent on the measures that are required to make the development acceptable in planning terms. As such, it is not possible to set a standard contribution. Developers are encouraged to engage with the Council's Highway Officers at an early stage in the development process to establish and agree any measures that are required. The Council will ordinarily require the developer to make a financial contribution in order that the required works can be delivered, however some works, such as new/revised junctions may be agreed to be carried out by the developer.

3.2.6 Two categories of required transport infrastructure have been identified;

- Access and local works
- On-site works, services or incentives

3.2.7 Each of these is considered in detail below.

Access and Local Works

3.2.8 All development, irrespective of size, must be capable of being accessed safely by vehicles, including public transport, pedestrians, cyclists and people with disabilities. To achieve this, the developer may need to carry out and/or fund on and off site works that are directly related to the development. The type of works secured under this heading may include:

- new junction/site access works for all modes;
- works for cycle, pedestrian and disabled facilities close to the site that provide a route for cyclists, pedestrians and the disabled into the site;
- traffic calming close to the site if there is a risk of the development generating unsuitable traffic on residential roads close by;
- parking controls in nearby streets where there is a risk of overspill parking from the development;
- individualised marketing projects to promote sustainable travel;
- commuted sums for maintenance of structures, drainage systems, traffic signals and enhanced paving materials;
- environmental improvements for the benefit of pedestrians

On-site works, services or incentives

3.2.9 On-site works, services and incentives required to encourage occupants of residential development to use more sustainable modes of travel to access local services may also be sought by planning condition and/or as part of a Section 106 Agreement. Measures to encourage visitors, employees and customers of non-residential development to travel by a means other than private car may also be sought as part of Section 106.

3.2.10 The type of works secured under this heading may include, on site cycle, pedestrian, disabled and public transport facilities travel plans (for employment/retail/educational developments, which may include matters such as car sharing, free bus passes,

interest free loans for cycle/bus pass purchase. Lockers, showers, provision of travel information, car park charging amongst other things) provision of travel information, cycles and free bus passes (in residential development).

Bond

3.2.11 Where the developer is required to carry out works on the public highway, the works will need to be supported by a Bond to cover the cost of the works.

Traffic Regulation Orders

3.2.12 A Traffic Regulation Order (TRO) will often be required where there is a requirement for highway infrastructure works as part of a development. The developer is expected to pay the cost of the TRO, which will be calculated on a case by case basis.

Further Information

3.2.13 For further information please contact the Council's Highways Department.

3.3 Public Transport

Introduction and Policy Background

- 3.3.1 Public transport is a key element of sustainable development and is recognised as such in the National Planning Policy Framework (NPPF); West of England Joint Local Transport Plan 3 2011–2026 (JLTP3); emerging Bath Transport Strategy; and throughout the Council’s Core Strategy. The Council is committed to delivering and improving a comprehensive, district wide public transport network to reduce dependency on private motor car based travel which is acknowledged as being a key component in reducing carbon emissions and delivering sustainable development.

CIL vs S106

- 3.3.2 It is anticipated that the majority of public transport measures will be delivered through other mechanisms including CIL as they are strategic infrastructure projects. These projects will be included in the Council’s Infrastructure Delivery Plan and Regulation 123 list. However, there will be instances where public transport facilities are required to make a development acceptable in planning terms and are directly related to a particular development. Examples of this include the provision of a new bus stop or bus lane to serve a development. In these cases the developer will be required to enter into a Section 106 agreement to secure the provision of the required measures.

Trigger for the Obligation

- 3.3.3 There is no trigger in relation to the need for public transport measures, as it will be dependent on the development that is proposed. Public transport requirements will be assessed on a case by case basis. Where there is a requirement for public transport measures, the developer will be required to enter into a Section 106 agreement to secure the provision of the required measures.

Level of Contribution

- 3.3.4 The level of the contribution sought will be dependent on the measures that are required to make the development acceptable in planning terms. As such, it is not possible to set a standard contribution. Developers are encouraged to engage with the Council’s Highway Officers at an early stage in the development process to establish and agree any measures that are required. The Council will ordinarily require the developer to make a financial contribution in order that the required works can be delivered.

Further Information

3.3.5 For further information please contact the Council's Highways Department.

3.4 Green Infrastructure

Introduction and Policy Background

3.4.1 The Council's Green Infrastructure Strategy adopted March 2013 sets out the vision and requirements in respect of Green Infrastructure within the District and provides the detail to Core Strategy Policy CP7. The importance of green infrastructure is firmly embedded in the NPPF which states "Local Planning authorities should: set out a strategic approach in their local plans, planning positively for the creation, protection, enhancement and management of networks of biodiversity and green infrastructure".

3.4.2 In addition, the NPPF states that the planning system should contribute to and enhance the natural and local environment by 'minimising impacts on biodiversity and providing net gains in biodiversity where possible, contributing to the Government's commitment to halt the overall decline in biodiversity, including by establishing coherent ecological networks that are more resilient to current and future pressures.' By 2026 the Council and its partners will have worked with the community to achieve a well-used, managed, connected and expanding network of green infrastructure which provides a wealth of benefits for people, place and nature. The Council recognises that Green Infrastructure is a key element in delivering the following benefits and sustainable development within Bath and North East Somerset:

- Supporting healthy lifestyles and thriving communities
- Providing active access to the outdoors
- Enhancing landscape character and built heritage
- Enhancing biodiversity
- Supporting healthy ecosystems
- Providing climate change solutions
- Invigorating the local economy and natural tourism
- Enhancing sense of place

Triggers for the Obligation

- 3.4.3 Strategic green infrastructure will be delivered through a number of mechanisms including CIL. Developers are also required to have due regard to the Strategy, or any amended or replacement Strategy, when formulating development proposals to ensure that the aims of the Strategy are delivered at the local level. Green infrastructure should be central to the design of new developments. Proposals should respect and enhance green infrastructure within the site and demonstrate strong links to the wider network. Development proposals that do not address green infrastructure adequately are likely to be considered unacceptable. The impact of new development on green infrastructure will be assessed through the Development Management process and specific development management policies will be included in the Placemaking Plan.
- 3.4.4 Given that green infrastructure needs to be an integral part of development proposals, there is no specific threshold above which Green Infrastructure must be considered. Developers should engage with the Council at an early stage in the planning process to establish requirements in respect of their specific proposals.

Further Information

- 3.4.5 For further information please contact the Council's Environment Team.

3.5 Tree Replacement

Introduction

- 3.5.1 The Council requires trees of value to be retained and protected through the planning process and to be given due consideration on all developments. This should encourage developers to plant suitable numbers of replacement trees on site and in appropriate locations, but where this is not possible this policy provides a mechanism where replacement trees can be planted in a near-by location. Developers will be expected to demonstrate why on-site replacement is not possible or appropriate before off-site replacement is accepted. In this way the green infrastructure of the district can be maintained and enhanced hand in hand with development.
- 3.5.2 The advantages of this fixed number replacement system include the following:
1. It encourages trees to be protected on development sites.
 2. It ensures that trees lost as a result of development are adequately replaced on site or near the development site in all situations.
 3. Every development that impacts trees is likely to produce the information required to reach a value for compensation as a matter of routine (a measurement of the trunk diameter for the trees affected).
 4. It is quick and doesn't require the costs of employing experts.
 5. No specific training is necessary to use this system beyond the ability to identify if a tree has less than 10 years useful life expectancy.
 6. It is a system that is understood by most arboriculturists, developers, and planning officers which is a great strength in the context of planning application negotiations.
 7. It conforms to the Community Infrastructure Levy Regulations (2010) and developers can clearly understand how many trees will be planted for the money that they pay.
- 3.5.3 It is expected that developers will adopt a reasonable approach to the issue of tree replacement; however in the event that trees are felled prior to the submission of a planning application it will be possible for stumps to be measured and these measurements used to work out how many new trees need to be planted.

Policy Background

3.5.4 The justification for requiring obligations in respect of new or compensatory tree planting is set out in Policies CP6, CP7 and CP13 of the Council's Core Strategy. In addition, paragraphs 109 and 114 of the National Planning Policy Framework (NPPF); and the Council's Green Infrastructure Strategy and Green Space Strategy are relevant.

Trigger for Obligation

3.5.5 Obligations in respect of trees will be required:

- Where trees covered by categories A, B and C of BS 5837 (Trees in relation to construction) are removed as part of a development, and replacement planting is required on public land

3.5.6 Tree planting will either take place on open ground or in areas of hard standing such as pavements. Where planting can take place directly into open ground the contribution will be lower than where the planting is in areas of hard standing. This is due to the need to plant trees located in areas of hard standing in an engineered tree pit.

3.5.7 All tree planting on public land is to be undertaken by the Council to ensure a consistent approach and level of quality, and to reduce the likelihood of new tree stock failing to survive.

Level of Contribution

3.5.8 The contribution covers the cost of providing the tree pit (where appropriate), purchasing, planting, protecting, establishing and initially maintaining the new tree. The level of contribution is as follows:

Tree in open ground (no tree pit required) **£735.28**

Tree in hard standing (tree pit required) **£1,913.08**

3.5.9 The "open ground" figure will apply in the following circumstances:

- Where development results in the loss of Council owned trees in open ground
- Where development results in the loss of trees on the development site, and is unable to provide replacement tree planting on site.

3.5.10 In both these cases the Council will provide replacement tree planting in the nearest appropriate area of open space.

3.5.11 The “hard standing” figure will apply in the following circumstances:

- Where development results in the loss of Council owned trees in areas of hard standing.
- Where new tree planting in hard standing is required to mitigate the impact of development (for example street trees required as part of highway improvements).

3.5.12 In the first of these cases the Council will locate replacement tree planting in areas of hard standing as close as reasonably practical to the development site; and in the second of these cases the Council will implement tree planting in specific locations identified through the planning approval process.

The fixed number replacement

3.5.13 This fixed number replacement system is a non-expert system designed specifically for reaching an acceptable degree of compensation for the loss of trees as a result of new development. The number of replacement trees that it requires developers to plant is generated from a table based on the principle of more value being given to larger trees. When setting the criteria the aim was to develop a system that would replace canopy cover of the tree that is lost within 5-10 years whilst generating a level of compensation that is a fair and realistic outcome for tree replacements in a planning context. The system requires a maximum of eight trees to replace any tree lost as a result of development, which is considered to be the level of replacement provision to make development acceptable in planning terms.

3.5.14 The number of trees required to compensate for loss of existing trees depends upon the size of the trees to be lost. This is set out in the following table:

Table 3.5.A

Trunk Diameter of Tree lost to development (cm measured at 1.5 metres above ground level)	Number of Replacement Trees
Less than 15	0 - 1
15 - 19.9	1
20 - 29.9	2
30 - 39.9	3
40 - 49.9	4
50 - 59.9	5
60 - 69.9	6
70 - 79.9	7
80 +	8

3.5.15 The developer has the option to undertake on-site replacement planting themselves, in accordance with the Council's specification (this would involve opening up a tree pit and planting the tree to the specification). In these instances the developer would be required to pay a maintenance contribution to the Council to cover 15 years maintenance.

Further Information

3.5.16 Developers are expected to engage with the Council at an early stage of the planning process in relation to tree replacement and are therefore encouraged to contact the Council's Environment Team.

3.6 Adoption of On-Site Green Space, Allotments and Landscaping Schemes

Introduction and Policy Background

- 3.6.1 Whilst the Council expects that the majority of green space and allotment facilities will be delivered by CIL, there will be instances where on-site provision comes forward as part of a development. In addition, landscaping schemes that are secured by a Section 106 agreement will form part of a development in many cases.
- 3.6.2 Such facilities may be offered to the Council or its nominee (usually a Town or Parish Council) by a developer for adoption as Council owned and maintained provision. In principle the Council will adopt these facilities subject to a number of conditions, which are set out below.
- 3.6.3 The adoption of green space provision, allotment facilities and landscaping schemes is supported by Policy CP7 and Policy CP13 of the Council's adopted Core Strategy, the Council's Green Infrastructure Strategy adopted March 2013 and the Council's adopted Green Space Strategy.

Trigger for the Obligation

- 3.6.4 There is no trigger in relation to the adoption of the aforementioned facilities, as it will be dependent on the developer offering the particular facility to the Council for adoption.

Conditions to be met for adoption to be considered acceptable

1. The provision offered to the Council for adoption must, in the case of formal green space; natural green space; and allotment provision, be useable, and, in the case of landscaping schemes, be of high quality. There are no specific standards against which the Council will undertake this assessment, as it will be dependent on the individual site characteristics. As such, an assessment will be made on a case by case basis.
2. The provision offered to the Council for adoption must be maintained by the developer to the satisfaction of the Council for a period of not less than 12 months after being provided on site. In some cases this period may be extended

(e.g. if remedial works required prior to transfer are not completed within an agreed timescale).

3. The developer must pay to the Council a commuted sum to cover the cost of maintaining the provision for a 20 year period. The commuted sum payable will be dependent on the type of provision to be adopted and will be calculated in accordance with the following formulas:

- **Formal green space and landscaping schemes** = Amount of provision to be adopted in m² x £84.58
- **Natural green space** = Amount of provision to be adopted in m² x £23.90
- **Allotments** = Amount of provision to be adopted in m² x £19.96

The above rates will be increased annually in line with inflation.

3.6.5 The commuted sums set out above will be secured by a Section 106 legal agreement, which will include provision for the commuted sums to be indexed from the date that the Section 106 is signed to the date of payment.

Further Information

3.6.6 For further information please contact the Council's Parks and Estates Team or Environment Team.

3.7 Targeted Recruitment and Training & Mitigation

Introduction

- 3.7.1 The B&NES labour market is relatively strong compared to the rest of the West of England, however there are issues with over 4% of 16 – 24 year olds Not in Education, Employment & Training (NEET), over 6,000 residents claiming out of work benefits and both average work place and resident wages below local, regional and national averages. There is also a reported shortage of skilled construction workers locally, which puts pressure on the local labour market and could if not adequately addressed affect future developments.
- 3.7.2 Construction can provide a stable and sustainable source of employment for B&NES residents and the potential to secure Targeted, Recruitment & Training opportunities through construction is essential to enable the labour market to remain buoyant and deliver a suitably trained work force to meet the sector's labour demand.

Policy Justification

- 3.7.3 The National Planning Policy Framework 2012 reaffirms the objective of the Planning process as `achieving sustainable development` and refers to the 2005 UK Sustainable Development Strategy where the definition of sustainable development includes:

Ensuring a Strong, Healthy and Just Society: Meeting the diverse needs of all people in existing and future communities, promoting personal wellbeing, social cohesion and inclusion, and creating equal opportunity for all.¹

- 3.7.4 This element has been addressed in the Council's Core Strategy which recognises the need to address socio-economic differences in the Council area and increase local employment. The latter will also help reduce commuting, and therefore the number of transport trips. Core Strategy Objective 6 includes *promoting and delivering employment, training and regeneration opportunities that can contribute to a reduction in the health and social inequalities across the District*, and Core Strategy Objective 6e states that:

¹ DEFRA. *Securing the Future: delivering UK sustainable development strategy. March 2005*

'Delivery of economic development will also be facilitated by the B&NES Economic Strategy, the Regeneration Delivery Plans and the Development Management process. Working alongside local communities and partners will be essential to deliver the ambitions of the Economic Strategy and developers may be asked to support the objectives of the Strategy through a Targeted Recruitment, Training and Supply-chain Protocol.'

3.7.5 These commitments are reflected in the Councils Planning Obligations SPD

3.7.6 Further to this the Council's Economic and Health & Wellbeing Strategies are also committed to tackling issues of worklessness, inequality and the effects that this can have on the health & wellbeing of residents, whilst also providing a sustainable supply of employment that is responsive to the areas needs.

Trigger for Contribution

3.7.7 The Council will require developers to agree a Targeted Recruitment and Training (TR&T) target and contribution where the proposed development is above the following thresholds:

- Residential : 10 units of housing and above
 - Non Residential /Commercial Premises over 1000sq ft

3.7.8 Mixed use developments will also be included if either the residential or non-residential/ commercial elements exceed the thresholds above.

3.7.9 Developers will also be required to provide a contribution if employment space is lost. The threshold for this is as follows:

- Where development results in the loss of 1,000m² or more of Gross Internal Area of employment floor space.

Targeted Recruitment & Training - Targets & Contributions

3.7.10 The TR&T outcomes and contribution are calculated using estimated costs of development with an aim of providing opportunities for at least 5% of the construction work force being a New Entrant Trainee (NET). The definition of a NET is a B&NES resident who is:

- a person leaving full-time education or training or the Council's Care Service, or a person who has left fulltime education / training / care and who the Council accepts as not having obtained permanent full-time employment in a job that is appropriate to their education and training; or
- a person who has been registered unemployed, or who is otherwise accepted by the Council as being non-employed, who is seeking a job with training and mentoring in order to re-access employment;
- a person that was a `new entrant trainee` prior to achieving their current or recent employment and who is accepted by the Council as requiring a further period of work and training in order to achieve accreditation and /or be able to operate in the labour market.
- a person undertaking a training or education course.

3.7.11 There are three distinct TR&T outcomes defined for NETs as follows

- Work Experience placements on site of no less than 16 hours per opportunity
- Apprenticeship starts on site
- New jobs created on site advertised through the Department of Work & Pensions (DWP) and filled by DWP clients.

3.7.12 The contribution is intended to support NETs entering into TR&T activity providing training, travel and equipment costs. These figures have been estimated in consultation with the B&NES Learning Partnership. The breakdown of costs are as follows:

- Work Experience - £150 per opportunity. This is provide any necessary training (CSCS card), work safety ware or travel expenses.
- Apprenticeship starts - £2000 per opportunity. This is to provide funds to support training and necessary work safety ware.
- New Jobs Advertised and filled with DWP - £150 per opportunity. This is to provide any necessary training (CSCS card), work safety ware or travel expenses, for those entering into employment.
- There are also set up and management costs, which are an additional 10% of the total contribution.

3.7.13 An estimated NET outcome and financial contribution framework has been provided in Table 3.7.A & B for both residential and non-residential/ commercial

developments. It must be noted that these are estimates within the dwelling and floor space ranges and developers are encouraged to contact B&NES Community Regeneration team as early as possible in the planning process to establish an exact level of NET outcome and contribution relevant to individual developments.

Table 3.7.A.

Residential	Band 1	Band 2	Band 3	Band 4	Band 5	Band 6	Band 7	
Dwellings Range	10 - 19	20 - 29	30 - 39	40 - 59	60 - 79	80 - 99	100 - 149	
Work Placements	3	5	6	8	10	14	20	
Apprenticeship Starts	0	0	0	1	2	2	3	
New Jobs Advertised through DWP	0	0	0	1	2	2	2	
Contribution (£)	£ 450	£ 750	£ 900	£ 3350	£ 5800	£ 6250	£ 9300	
Residential	Band 8	Band 9	Band 10	Band 11	Band 12	Band 13	Band 14	Band 15
Dwellings Range	150 - 199	200 -249	250 - 299	300 -349	350- 399	400 - 449	450-499	500 - 700
Work Placements	28	36	45	54	63	72	81	100
Apprenticeship Starts	4	5	6	6	7	7	8	10
New Jobs Advertised through DWP	3	4	4	5	5	6	6	10
Contribution (£)	£ 12650	£ 16000	£ 19350	£ 20850	£ 24200	£ 25700	£ 29050	£ 50000

Table 3.7.B.

Non-Residential/ Commercial – Sq ft Range	1000 - 5000	5000 - 10000	10000 - 15000
Work Placements	8	11	20
Apprenticeship Starts	0	2	4
New Jobs Advertised through DWP	0	2	4
Contribution (£)	£ 1200	£ 4100	£ 11600

Mitigation for the loss of employment space

3.7.14 The loss of employment space and the effect on residents also needs to be mitigated. Where employment space is lost, the purpose of the obligation is to compensate for this loss by contributing to the provision of training and support to enable displaced employees and people who may have sought employment at the site, to gain employment elsewhere.

3.7.15 Contributions that mitigate the loss of employment space are calculated by estimating the total employment level of a premises that is being lost to a non-employment use. It is accepted that not all those who are or could potentially be employed on the site will need retraining, so an estimate of a third of the potential employee volume is used. The cost for an individual to retrain can vary widely with costs ranging from £500 to in excess of £4000. It is not appropriate to expect developers to provide the full level of expense, therefore the Council regards a contribution of £2000 per employment as reasonable contribution. This is also in line with the apprenticeship contribution.

3.7.16 The number of square metres of floor space required per employee is as set out in Appendix 4.

Example

- (a) Loss of 2,000m² of B2 Industrial space to residential development
- | | |
|------------------------------|---|
| Potential number of employee | $2,000 \text{ m}^2 / 36 = 55.5$ |
| Employee requiring retaining | $55.5 / 3 = 18.5$ |
| Contributions required | $18.5 \times \text{£}2000 = \text{£}37,000$ mitigation contribution |

Contractors, sub-contractors and occupiers.

3.7.17 It is the developer's responsibility to take the steps to ensure that they obtain the cooperation of contractors and sub-contractors and the occupiers of buildings so as to enable the TR&T outcomes can be met.

TR&T Method Statement & Management Board

3.7.18 It is a requirement of the developer to provide a method statement produced in partnership with the B&NES Learning Partnership that will outline the delivery of the TR&T outcomes. The developer will also be required to participate and contribute to a TR&T Management Board supported by the B&NES Learning Partnership that will have the overall responsibility of delivering the outcomes.

Further Information

3.7.19 Developers are expected to engage with the Council at an early stage of the planning process in relation to Targeted Recruitment and Training & Mitigation and are therefore encouraged to contact the Council's Community Regeneration team.

3.8 Fire Hydrants

Background

- 3.8.1 Building regulations require major new development to be within 100m of a fire hydrant. The vast majority of development in Bath and North East Somerset is already within 100m of a fire hydrant, and therefore this obligation will only be occasionally required. However, there are areas, primarily around the fringes of the city and on undeveloped land, that are not within 100m of a fire hydrant. In these circumstances, Avon Fire and Rescue Service require the provision of a new fire hydrant in an accessible location within 100m of the development.
- 3.8.2 Avon Fire and Rescue Service are consulted on all major planning applications and they will notify the Council when a fire hydrant obligation is required.

Policy Background

- 3.8.3 The relevant section of the Building Regulations that require the provision of fire hydrants is Approved Document B – Fire Safety Volume 2 Part B5 (Access and facilities for the fire service), Section 15 (Fire mains and hydrants). The justification for requiring obligations in respect of the provision of fire hydrants is set out in Policy CP13 of the Council's Core Strategy.

Trigger for Obligation

- 3.8.4 Obligations in respect of Fire Hydrants will be required where both the following criteria apply:
- Where the development is for 10 or more dwellings or in excess of 1,000 m² of commercial floor space; and
 - Where the development will be erected more than 100m from the nearest existing fire hydrant.

Level of Contribution

- 3.8.5 The Avon Fire and Rescue Service have calculated the cost of installation and five years maintenance of a fire hydrant to be £1,500 per hydrant.

Trigger for Payment

- 3.8.6 The provision of a fire hydrant is essential for safety reasons, and therefore where a new hydrant is required it must be operational prior to the occupation of the relevant development. In order to enable Avon Fire and Rescue Service to arrange installation of the new hydrant prior to occupation, the contribution will be required upon commencement of the development.

3.9 **Education Facilities**

Policy Background

- 3.9.1 The policy justification for requesting planning contributions for Children’s Services flows down from ‘The Schools White Paper: Higher Standards, Better Schools For All’, the ‘14-19 Education and Skills White Paper’ at national/regional level and the Bath & North East Somerset Core Strategy Policy CP13, and the National Planning Policy Framework.

Trigger for Obligation

- 3.9.2 The Core Strategy facilitates five urban extension sites as follows:

Policy B3A	Land adjoining Odd Down	300 homes
Policy B3C	Extension to MoD Ensleigh	120 homes
Policy KE3A	Keynsham East	220 – 250 homes
Policy KE3B	Keynsham South West	180 – 200 homes
Policy RA5	Whitchurch	200 homes

- 3.9.3 The urban extension developments result in the capacity of local primary schools being exceeded, therefore contributions are required to make either on-site provision or financial contributions towards primary school places.

- 3.9.4 The type of provision required:

- Primary School Provision

Where additional school capacity is required in the area of the development. The determination of whether or not there is sufficient school capacity available in the school or schools that serve the area of the development will be made with reference to the current school capacity figures and Planned Admission Numbers, and to a projection of future pupil numbers based on current numbers on roll, births and resident population data as outlined in the published School Organisation Plan. Projections will also be adjusted to include pupils calculated to be generated from previously approved developments.

What Developers Will Have to Provide

- 3.9.5 Where an existing off-site primary school is to be extended or upgraded, the cost per place multiplier including Location Factor will be used to calculate a contribution.

Where the development creates a requirement for a new on-site school, the developer will be expected to pay the full cost of construction, including design fees and charges, furniture and equipment and provide the site free of charge, as the cost per place multiplier is based only on the average of new build costs and extension costs and not the full cost of building new whole schools. The space and accommodation requirements will be calculated by reference to the maximum areas as outlined in the latest DfE school area guidelines. The specification will also need to comply with current Council design, build and space requirements, meet best practice for the type of school and Government advice on design and environmental issues. This would also apply if it was agreed that the developer could provide the additional accommodation in kind rather than make a financial contribution.

3.9.6 A formula is set out for the calculation and the following paragraphs and tables provide a breakdown of the expected planning obligations costs the developer will in most cases have to meet. The elements in the formulae below will be subject to annual review in line with government guidance and where new or updated information becomes available from relevant government or Council departments that update current use values or cost indicators, the Council will make amendments to levels of contribution on this basis.

3.9.7 The cost per place multiplier is based on the assessment made by the Government of the cost of building a primary school place in 2008-09, updated by applying the latest Royal Institute of Chartered Surveyors (RICS) Building Cost Information Service (BCIS) All-in Tender Price Index. Also the DfE issue a Location Factor for each Local Authority which is derived from the Building Cost Information Service (BCIS) run by the Royal Institute of Chartered Surveyors (RICS). This Location Factor is applied to the cost per place multiplier to arrive at the cost of providing a place in Bath and North East Somerset. This multiplier will be reviewed annually and may be updated every financial year.

3.9.8 The current cost per place multiplier that will be used when calculating contributions is as follows:

Table 3.9.A

Primary School per place	£11,810.00
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3.9.9 The current DfE Location Factor for Bath and North East Somerset is as follows:

Table 3.9.B

Location Factor	1.08
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3.9.10 Therefore the current cost per place multiplier (including Location Factor) that will be used when calculating contributions is as follows:

Table 3.9.C

Primary School per place	£ 12,754.80
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3.9.11 The Council will be notified of the proposed mix of dwellings in the development and the following pupil yield figures based on type of dwelling and number of bedrooms will be used to calculate the contribution:

Table 3.9.D

	No. of bedrooms					
	Flats		Houses			
	2	3+	2	3	4	5+
Primary pupils per 100 dwellings	4	30	9	30	46	65

3.9.13 Where the precise housing mix is not known the following will apply:

31 primary school pupils per 100 dwellings

3.9.14 Bed sits, temporary housing and any dwellings designated for restricted use such as student accommodation, sheltered housing for the elderly or adults with learning difficulties etc. would not normally be expected to contribute as the number of children generated would be marginal or nil. All other new dwellings of 2 bedrooms or more will be included in the calculations.

3.9.15 The following table shows the contribution per dwelling:

Table 3.9.E

	No. of bedrooms
--	------------------------

	Flats		Houses			
	2	3+	2	3	4	5+
Primary per dwellings	£510.19	£3,826.44	£1,147.93	£3,826.44	£5,867.20	£8,290.62

3.9.16 All capital sums will be indexed from signature of the Section 106 agreement or Unilateral Undertaking up to the payment date using the RICS BCIS All-In Tender Price Index.

3.9.17 Developer contributions are required to be made in full prior to or on commencement of development.

Substantial Residential Development (generally in excess of 300 units)

3.9.18 Apart from primary school provision required for urban extensions, improvements and expansions to schools will be funded through CIL rather than planning obligations. However development proposals of in the region of 300 or more residential units may come forward that may generate a need for a new education facility due to the increase in the resident population resulting from the development.

3.9.19 In such cases, the provision of a new education facility will be required through planning obligations, as the infrastructure is required to specifically mitigate the impact of the development. The assessment of whether these facilities are required will be based on the following:

- A new education facility will be required if the development will generate sufficient children to necessitate its provision and if the Council can demonstrate that the children generated by the development cannot be provided for within existing educational accommodation in the local area.

Further Information

3.9.20 For further information please contact the Council's Schools Capital and Organisation Team.

3.10 Other Site Specific Measures

3.10.1 Other site specific measures may be necessary and planning obligations including the following areas may also be sought. Requirements will be assessed on a case by case basis. It is recommended that applicants and developers engage with the Council at an early stage to determine if their specific proposal will result in a requirement for obligations such as;

- Sustainability
- Waste and Recycling
- Public Realm including funding of Legible Signage
- Drainage
- Ecological measures where a development has an adverse impact on local habitats and ecology, or the provision of alternative habitats to compensate for any loss.

Policy Background

3.10.2 The justification for requiring obligations in respect of site-specific measures is set out in Policy CP 13 of the Council's Core Strategy.

Trigger for Obligation

3.10.3 Site Specific obligations could be required from any development type, irrespective of size, and consequently there is no threshold below which an obligation will not be required. The determining factor is whether the development creates an impact that requires mitigation.

APPENDICES

Appendix 1 (Affordable Housing): Options in lieu of on-site delivery of affordable homes

Delivering affordable homes Off-Site

Where the Council accepts that off-site provision is appropriate, the example below shows how the quantum of units delivered as alternative provision will be calculated.

This calculation is based on an approach which combines the initial total housing numbers proposed *plus* the additional homes to be provided elsewhere.

Example 1: For schemes where 40% affordable housing is expected the following formula will be used to calculate the number of off-site affordable units required.

$$B = (A \times 40) / 60$$

Where

B = No of affordable homes required off site

A = No of market homes provided on applicants site

For example,

Site for 100 units, *all* of which will be market housing as off-site provision has been agreed.

$$B = (100 \times 40) / 60 = 66.6$$

In this example, the number of off-site dwellings required are **67** (after rounding to nearest whole number) i.e. 40% of the combined total of 167 units

Example 2: For schemes where 30% affordable housing is expected the following formula will be used to calculate the number of off-site affordable units required.

$$B = (A \times 30) / 70$$

Where

B = No of affordable homes required off site

A = No of market homes provided on applicants site

For example,

Site for 100 units, *all* of which will be market housing as off-site provision has been agreed.

$$B = (100 \times 30) / 70 = 42.8$$

In this example, the number of off-site dwellings required are **43** (after rounding to nearest whole number) i.e. 30% of the combined total of 143 units

Commuted Sum Formula

In very exceptional cases where the Council accepts neither on-site or off-site can be provided, the following formula should be used:

Step 1

Calculate the number of off-site affordable housing units in line with example 1.

Step 2

Take the supportable deficit, the amount payable by the Affordable Housing Provider (AHP), away from the full market value of the market houses as if provided on site.

For example:

Step 1: 100 unit residential application in the 40% AH zone, all of which to be market housing – calculations from example 1 above show that 67 affordable homes are required as of- site contribution.

Step 2: Total Notional Market value of the 67 'affordable' properties = £13,400,000

(assuming MV of £200,000 per unit)

Less notional price payable by AHP* = £ 4,714,814

Therefore the commuted sum = £ 8,685,186

Using Example 1 above, the table below summarises the comparison of developer contributions between an off-site or commuted sum (CS) approach and on site provision (OS):

Table 1A

	Off-site / Commuted sum	On site
No market units constructed on site	100	60
MV of private units	£20m	£13m
No of affordable units @ 40%	67	40
MV affordable	£13.4m	£8m
Price paid for AH	£4.7m	£2.8m
Developer contribution	£8.7m	£5.2m

(assuming MV of £200,000 per unit)

The formula for Step 2 is as follows:

$$CS = MV - SD$$

Where:

CS = Commuted Sum

MV = Market Value of affordable housing with vacant possession/no restrictions

SD = Supportable Deficit (amount payable without the need for grant by a (RSL or AHP)

* notional price payable by an AHP based on agreed likely mix of affordable housing units that would otherwise be delivered and the supportable deficit figures for the unit & tenure types and Planning zone.

Guide to Supportable Deficit Figures

The Council does not prescribe what amount RSLs or AHPs should pay developers for affordable housing contributions, provided it is delivered on a grant free basis with all the outputs of Policy CP9 and this SPD fully met. However to calculate commuted sum contributions the Council has given below supportable deficit figures that are to be used for the sole purpose of calculating these sums. They are:

Table 1B

	High value area 1 40% AH	Lower value area 2 30% AH
social rent		
1bed flat	£72,278	£62,460
2bed flat	£93,163	£73,972
2bed house	£101,471	£83,291
3bed house	£121,742	£106,200
4bed house	£143,198	£117,831
shared ownership		
1bed flat	£73,120	£55,538
2bed flat	£102,888	£65,400
2bed house	£113,820	£81,348
3bed house	£143,959	£97,485
4bed house	£179,228	£128,262

High value area - Prime Bath, Bath North and East, Bath rural hinterland

Low value area - Bath North and West, Bath South, Norton/Radstock, Keynsham

[Link to map showing 30% / 40% zones]

These figures are an average of Supportable deficit figures gathered from the Council's key RP partners where the RP's were instructed to:

- Use reasonable Jan 99 values
- Use reasonable market rent levels
- SO to be in line with AH policy and affordability
- All other normal viability assumptions

(note supportable deficit figures will be updated periodically to reflect market conditions)

Appendix 2 (Affordable Housing) Housing our Ageing Population

Housing our Ageing Population: Plan for Implementation

'Housing for older people should become an exemplar for mainstream housing, and meet higher design standards for space and quality. Local Planning Authorities should play a key role to ensure delivery of desirable housing in great places, tuned to local need and demand.' (HAPPI12)

The All Party Parliamentary Group on Housing and Care for Older People published *Housing our Ageing Population: Plan for Implementation* (also known as HAPPI2) in November 2012. In addition to some of the elements highlighted above, the HAPPI2 guide also identified ten elements that were critical to achieving “age-inclusive” housing. These were:

- Generous internal space standards:
- Plenty of natural light in the home and circulation spaces:
- Balconies and outdoor space, avoiding internal corridors and single-aspect flats:
- Adaptability and “care aware” design which is ready for emerging assistive technologies:
- Circulation spaces that encourage interaction and avoid an “institutional feel”:
- Shared facilities and community hubs where these are lacking in the neighbourhood:
- Plants, trees and the natural environment:
- High levels of energy efficiency, with good ventilation to avoid overheating:
- Extra storage for belongings and bicycles:
- Shared external areas such as “home zones” that give priority to pedestrians.

The full HAPPI report can be found here:

http://www.homesandcommunities.co.uk/sites/default/files/happi_final_report_-_031209.pdf

Appendix 3 Necessary Elements for future Extra Care developments

The Council wishes to see Extracare development that reflects national best practice, ensuring that the housing provision will also be appropriate to meet the social, mobility and care needs of the growing number of vulnerable older people in the District.

Table 3A - Extracare Standards

1. Dwellings	Essential	Desirable	Commentary
Minimum size of dwellings:			The desirable dwelling size standard is based on <i>Design principles for extra care</i> (Housing LIN factsheet 6). The minimums reflect current standards in some private sector retirement schemes.
One bed for 2 persons	50m ²	54+m ²	
Two bed for 3 persons	60m ²	68+m ²	
Mix of one and two bed properties	x		
Some three bed properties		x	
Minimum scale 45-50 dwellings		x	
Must be self-contained	x		
Including an adaptable kitchen appropriate for the client group	x		
2. Standards	Essential	Desirable	Commentary
Registered Provider follows HCA standards	x		Care Standards Act 2000 does not apply to extra care despite the care element of extra care schemes having to register with the CQC.
Lifetime home standards	x		
Design Principles for extra care (Housing LIN factsheet 6)		x	
Compliance with the 10 HAPPI principals			See below*
3. Facilities			
Communal lounges	x		The range of facilities will be more extensive the larger the development and should also complement what else is available in the near community. This is not an exhaustive list but reflects what has been developed/provided in other schemes
Restaurant/dining room	x		
Tea/coffee making area	x		
Activity/hobby rooms		x	
Communal WCs	x		
Assisted bathroom	x		
Hairdressing/beauty therapy	x		
Informal seating space		x	
Scooter store	x		
Car Parking	x		
Manager's office	x		
Care staff office	x		
Staff rest room including changing/lockers		x	
Guest room with en-suite		x	
Laundry (if no washing machines in flats)	x		
Catering kitchen		x	
Cleaners storage	x		
General storage		x	

Lift/motor room	x	x	A lift is essential if housing complex is spread over more than one floor.
Refuse store/bin room	x		
Shop, gym, library, IT room, cinema		x	
Treatment/therapy room		x	
4. Care and Support	Essential	Desirable	Commentary
24 hour on site care	x		Due to the unpredictable nature of need in extra care settings, it is more viable for one care provider to operate within a “scheme” although this may not be practicable if a resident is insistent on retaining an established care arrangement.
Emergency alarm	x		
Door opening and CCTV	x		
Assistive Technology personalised		x	
Environmental sensor	x		
Meals provision	x		
Catering standard kitchen		x	
Culture that promotes independent living but discourages social isolation	x		Although meals need to be provided, it is not essential that these are produced on site.

*The All Party Parliamentary Group on Housing and Care for Older People published *Housing our Ageing Population: Plan for Implementation* (also known as HAPPI2) in November 2012. In addition to some of the elements highlighted above, the HAPPI2 guide also identified ten elements that were critical to achieving “age-inclusive” housing. These were:

- Generous internal space standards:
- Plenty of natural light in the home and circulation spaces:
- Balconies and outdoor space, avoiding internal corridors and single-aspect flats:
- Adaptability and “care aware” design which is ready for emerging assistive technologies:
- Circulation spaces that encourage interaction and avoid an “institutional feel”:
- Shared facilities and community hubs where these are lacking in the neighbourhood:
- Plants, trees and the natural environment:
- High levels of energy efficiency, with good ventilation to avoid overheating:
- Extra storage for belongings and bicycles:
- Shared external areas such as “home zones” that give priority to pedestrians.

A proportion of units within extra care schemes must be suitable for wheelchair use. The *Wheelchair Housing Design Guide – 2nd Edition* (2006) written by Stephen Thorpe and the Habinteg Housing Association highlighted the following standards in relation to the design of lifetime properties for wheelchair users. These standards include:

Table 3B

	Minimum standard
Landing/Entering property	
Gradient inside buildings	No more than 1:20
Landings outside front door	1500mm by 1500mm
Door widths	At least 800mm*
Door handle height	Between 900 and 1000mm from the floor
Door lock	Between 800 and 900mm from the floor
Inside flat - hallway	
Entry phone	1000mm from the floor
Front door "swing"	1200mm*
Postbox	Letter cage fitted as standard
Passageway width	At least 900mm*
Kitchen	
Storage units - height	Between 300 and 1500mm
Storage units - depth	No more than 300mm
Worktops and sinks - height	Between 750 and 910mm
Worktops and sinks - depth	No more than 650mm
Turning spaces	1100mm throughout the flat Therefore, this space needs to be allowed within all areas to enable turning capacity for wheelchairs

*Consistent throughout housing unit

Appendix 4 (Economic Development)

Table 4A: Employment Densities

Use Class	Use Type	Area per FTE (m2)
Industrial		
B2	General	36
B1 (c)	Light Industrial	47
Warehouse		
B8	General	70
Office		
B1 (a)	General Office	12
Retail		
A1	High Street	19
A1	Food Store	17
A2	Financial & Professional Services	16
A3	Restaurants & Cafes	18
Leisure & Visitor Attractions		
C1	General Hotels	1 employee per 2 bedrooms
D2	Amusement & Entertainment Centres	70

ATTACHMENT 3

Bath Western Riverside Supplementary Planning Document (BWR SPD)

Appendix C: Developer Contributions

Update April 2014

[This appendix to the Bath Western Riverside Supplementary Document (SPD) was originally adopted in March 2008. It has been updated to take into account legislative changes and latest price information as derived from the National Statistics RPI index, to the financial contributions requirements only. All prices within the original document are assumed to be as at March 2008, Updated prices as stated are at May 2014]

The Appendix sets out the planning authority's requirements for developer contributions. It should be read in conjunction with Section 3.3 of the SPD which sets out the national and local policy context, and information on negotiating and monitoring contributions.

Affordable Housing

The justification for affordable housing contribution is as set out in Policy CP9 of the Bath & North East Somerset Core Strategy. The dominant form of affordable housing provided should be rented accommodation managed by a Registered Social Landlord, with the Council expecting 75% of the affordable housing at BWR to be social rented. An element of intermediate home ownership accommodation will also be acceptable, however, a range of intermediate home ownership products (if possible ranging from 25% to 75% ownership) should be provided. The low cost home ownership products must be affordable for those households in need of intermediate housing who are unable to buy on the open market and who fulfil the application criteria of the Council's Homesearch (allocations) policy.

Infrastructure related to BWR

Proposals for the individual Development Zones (see Plan 3.1 of the SPD) will be expected to include (either physically, financially or both) the following specific infrastructure requirements:

Zone 1: (East)

- Public realm enhancements to James St West / Green Park Rd / Charles St junction.
- New bridge crossing of river for vehicles & pedestrians.
- Provision of fully operational Sustainable Transport route and link to James St West.
- Strengthened and enhanced Victoria Bridge and potential new pedestrian and cycle bridge to Norfolk Crescent.

- Enhanced traffic junction on Lower Bristol Road providing vehicular access to Victoria Bridge Road and public realm enhancements
- Enhanced pedestrian crossing of Upper Bristol Road.
- New pedestrian route to Victoria Park obelisk.
- Improved junction of Marlborough Lane and Upper Bristol Road, including public realm enhancements.
- Improved junction of Locksbrook Road and Upper Bristol Road, including public realm enhancements.
- Provision of a site for a cultural facility
- Flood alleviation measures.

Zone 2: (West)

- Re-location of Midland Road Depot.
- Provision of fully operational Sustainable Transport route.
- Strengthened and enhanced Victoria Bridge
- New signalised traffic junction on Lower Bristol Road providing vehicular access to Victoria Bridge Road and public realm enhancements
- Enhanced pedestrian crossing of Upper Bristol Road.
- Replacement for destructor bridge (Midland Road) to allow two-way vehicular river crossing.
- Enhanced junction of Upper Bristol Road and Midland Road, incorporating public realm improvements and better pedestrian access to Royal Victoria Park.
- New junction of Lower Bristol Road and Midland Road.
- New pedestrian bridge in the vicinity of existing service crossing of river.
- Enhanced junctions of Windsor Bridge Road with Upper and Lower Bristol Road, including public realm improvements.
- Improved junction of Marlborough Lane and Upper Bristol Road, including public realm enhancements.
- Improved junction of Locksbrook Road and Upper Bristol Road, including public realm enhancements.
- Provision of site for Primary School and community facilities.
- Flood alleviation measures.

Other on-site requirements, or requirements in relation to onsite items:

- Public Open Space (see para. 1.6.51)
 - Public Toilets (and commuted sum for maintenance -£212K)
 - Street Furniture – Benches and Bins – (and commuted sums for maintenance £67.5k and £13.5k respectively)
- Commuted sum for street cleaning £111.71 per linear metre
- Mini Recycling Centre, and facilities for refuse and recycling collection (individual Green Boxes and Wheelie Bins) or communal facilities depending on nature of the design.
- CCTV provision in the retail area.

Occupancy Assumptions

The s106 requirements are based on an estimate of likely occupancy arising from the development, both to calculate the requirements arising from the development and to allocate costs between different uses.

The 1999 Housing Needs survey has been used as the source for the following residential occupancy assumptions used in this SPD.

Property Type	Assumed Occupancy
1 Bed	1.31
2 Bed	1.81
3 Bed	2.39
BWR Total	5,396

Standard Occupancy assumptions for other types of development have been used as follows:

Use per m2	Assumed Occupancy
Non Food Retail	20
Food Retail	19
Office	19
Hotel	30
Leisure	65
Culture	36
Bars / Cafes	13
Av Commercial	26
Av Employment	19

Student Accommodation	Assumed Occupancy
1 bed	1

The remaining part of this Appendix sets out the requirements for pooled contributions calculated on a formulaic basis in relation to each service element.

Per 'occupancy' contribution

Total infrastructure costed for Zone 1 and Zone 2	Total estimated occupancy	@ occupancy contribution
£21,975,269	8,556	£2,568

Educational Facilities Policy Background

The justification for requiring obligations in respect of Educational Facilities is as set out in CIL Regulations (as amended) and Policy CP.13 of the Bath & North East Somerset Core Strategy, Policies IMP.1, CF.3 and GDS.1 of the Bath & North East Somerset Local Plan.

Trigger for Obligation

Education Obligations apply to residential development only, if implementation of the development will result in the generation of additional pupil numbers in excess of that which local schools can accommodate.

The education authority's assessment of existing capacity in local schools concludes that provision of additional secondary places is not required, however if secondary school or sixth form provision is required, the B&NES Planning Obligations SPD will be used to calculate contributions

The provision of a site for a Primary School and community facilities within zone 2 has already been identified as a requirement elsewhere in this SPD (1.6.53-1.6.56).

The following types of residential accommodation will not be subject to Education Obligations: sheltered housing, rest homes, nursing homes, hostels, student accommodation, one bedroom dwellings and studio flats.

Basis of Calculation

The standards used to assess education provision requirements are as follows: Nursery 3.4 places per 100 eligible residential units Primary 24 places per 100 eligible residential units The cost per school place (as advised by DfES for 2006/07) is as follows: Nursery Primary £ 5,290 £ 10,579 These figures are specific to B&NES as they include a local factor provided by DfES and are updated annually.

Conclusion

This equates to a requirement for financial contributions as follows:

March 2008 prices	Nursery	Primary	Total
1 Bedroom units	NIL	NIL	NIL
2 Bedroom units	£181	£2,539	£2,720
3 Bedroom units	£181	£2,539	£2,720
May 2014 prices	Nursery	Primary	Total
1 Bedroom units	NIL	NIL	NIL
2 Bedroom units	£218	£3,063	£3,282
3 Bedroom units	£218	£3,063	£3,282

Youth Facilities

Policy Background

The justification for requiring obligations in respect of Youth Facilities is as set out in CIL Regulations (as amended), Policy CP.13 of the Bath & North East Somerset Core Strategy, and Policies IMP.1, CF.3 and GDS.1 of the Bath & North East Somerset Local Plan.

Trigger for Obligation

Youth Obligations apply to residential development only. The following types of residential accommodation will not be subject to Education Obligations: sheltered housing, rest homes, nursing homes, hostels, student accommodation, one bedroom dwellings and studio flats.

Basis of Calculation

Pooled contributions are required towards youth facilities which will form part of a mixed use community facility, probably associated with the Primary School. The estimated total cost of the youth facilities element is £115,000. Other uses on this site will include Library, sports, and primary health care facilities. The cost is spread equally across the expected residential development (excluding 1 bedroom properties).

The provision of a site for a Primary School and community facilities, which will include Youth facilities, within zone 2 has already been identified as a requirement elsewhere in this SPD (1.6.53-1.6.56).

The calculation assumes standalone premises. If it is proposed to make sports provision on a joint use basis (e.g. in conjunction with a school / other community facilities) it might be possible to consider reducing the required contributions to the extent that costs are lower.

Conclusion

The requirement for financial contributions is as follows:

	March/2008 prices	May/2014 prices
1 Bedroom units	NIL	NIL
2 Bedroom units	£57	£68.77
3 Bedroom units	£57	£68.77

Community Meeting Places

Policy Background

The justification for requiring obligations in respect of Community Meeting Places is as set out in CIL Regulations (as amended), Policy CP.13 of the Bath & North East Somerset Core Strategy, and Policies IMP.1, CF.3 and GDS.1 of the Bath & North East Somerset Local Plan.

Trigger for Obligation

Community Meeting Places Obligations apply to residential development only.

Basis of Calculation

The provision standard for community meeting places is 0.3m² per resident. The current unit cost is £1,520 per m², which converts to £456 per person.

The provision of a site for a Primary School and community facilities within zone 2 has already been identified as a requirement elsewhere in this SPD (1.6.53-1.6.56).

The calculation converts the above costs and standards in to amounts per unit of development based on assumed occupancy levels as set out in the introduction to this Appendix.

The calculation assumes standalone premises. If it is proposed to make sports provision on a joint use basis (e.g. in conjunction with a school / other community facilities) it might be possible to consider reducing the required contributions to the extent that costs are lower.

Conclusion

The requirement for financial contributions is as follows:

	March/2008 prices	May/2014 prices
1 Bedroom units	£595	£717.87
2 Bedroom units	£825	£995.37
3 Bedroom units	£1,088	£1,312.68

Cultural Facilities

Policy Background

The justification for requiring obligations in respect of Cultural Facilities is as set out in CIL Regulations (as amended), Policy CP.13 of the Bath & North East Somerset Core Strategy, and Policies IMP.1,CF.3 and GDS.1 of the Bath & North East Somerset Local Plan. Paragraph B3.41 makes specific reference to the need for a middle scale (350-650) seat venue.

Trigger for Obligation

Cultural Facilities Obligations apply to all types of development within BWR.

Basis of Calculation

The building cost of a cultural facility which meets the requirements of the local plan (B3.41) and would provide a facility for conferences and exhibitions as well as being a music venue, has been estimated.

The proposed facility will be a facility for the whole city and funding will need to come from a variety of sources. A feasibility study analysing the options has been commissioned.

An element of the funding is included here as a s106 requirement in relation to BWR, based on the share of the total city that will be formed by BWR on completion in 2021, taking into account the quantum of existing development in the city, and other development expected in that time period.

The calculation weights different types of uses based on assumed occupancy levels as set out in the introduction to this Appendix, and a scaling factor of 0.1 in relation to non-residential uses.

The provision of a site for a Cultural Facility within zone 1 has already been identified as a requirement elsewhere in this SPD (1.6.52).

Conclusion

The requirement for financial contributions is therefore as follows:

	March/2008 prices	May/2014 prices
Residential:		
1 Bedroom units	£343	£413.83
2 Bedroom units	£476	£574.30
3 Bedroom units	£627	£756.48
Commercial / m2	£1.00	£1.21
Employment / m2	£1.38	£1.66

Transport Infrastructure Policy Background

The justification for requiring obligations in respect of Transport is as set out in CIL Regulations (as amended), Policy CP.13 of the Bath & North East Somerset Core Strategy, and Policies IMP.1 and GDS.1 of the Bath & North East Somerset Local Plan.

Trigger for Obligation

Transport Obligations apply to all types of development within BWR.

Basis of Calculation

Key transport infrastructure items are listed in pages 1 and 2 under Zones 1 and 2 and contributions will be sought based on ***the per 'occupancy' figure***. There may be some site specific contributions which are not listed in pages 1 and 2.

Sports Facilities

Policy Background

The justification for requiring obligations in respect of Sports Facilities is as set out in CIL Regulations (as amended), Policy CP.13 of the Bath & North East Somerset Core Strategy, and Policies IMP.1 and GDS.1 of the Bath & North East Somerset Local Plan.

Trigger for Obligation

Sports Facilities Obligations apply to residential development only.

The following types of residential accommodation will not be subject to Sports Facilities Obligations: sheltered housing, rest homes, and nursing homes.

Basis of Calculation

The standards and costs of provision required are taken from the Sport England Sports Facilities calculator. Underlying this calculator are national standards of provision for pools, sports halls and indoor bowls. The calculator also includes construction cost assumptions which are locally weighted. This equates to £288 per person.

The provision of a site for a Primary School and community facilities, which might include sports facilities, within zone 2 has already been identified as a requirement elsewhere in this SPD.

The calculation converts the above costs and standards in to amounts per unit of development based on assumed occupancy levels as set out in the introduction to this Appendix.

The calculation assumes standalone premises. If it is proposed to make sports provision on a joint use basis (e.g. in conjunction with a school / other community facilities) it might be possible to consider reducing the required contributions to the extent that costs are lower.

Conclusion

The requirement for financial contributions is therefore as follows:

	March/2008 prices	May/2014 prices
1 Bedroom units	£376	£453.65
2 Bedroom units	£522	£629.80
3 Bedroom units	£688	£830.08

Green Space

Policy Background

The justification for requiring obligations in respect of Green Space is as set out in CIL Regulations (as amended), Policy CP.13 of the Bath & North East Somerset Core Strategy, and Policies IMP.1, CF.3, SR.3, and GDS.1 of the Bath & North East Somerset Local Plan.

Trigger for Obligation

In line with Local Plan Policies CF.3, SR.3 and GDS.1, Planning Obligations will be applied to all approved development that creates a demand for additional green space and/or places additional pressure on existing facilities. The Obligations are a mechanism to implement the local green space standards and aim to ensure that the needs of those occupiers of new development have access to a range of high quality green spaces that meet their needs and that the demands for green space created by new development does not deny existing occupiers these same opportunities.

The obligations will most often relate to residential development but will also apply to some other proposals such as tourism enterprises that bring additional visitors to an area or office and retail developments that generate open space needs for employees.

What types of Green Space should be provided?

The Bath & North East Somerset Local Plan requires the provision of areas for outdoor recreation and sport, allotments and children's play facilities as part of new housing development sites proposed under Policy GDS.1 and in the case of other sites where need is generated by new development .

National guidance in PPG17 with its Companion Guide sets out an open space typology which the government considers appropriate when Councils are assessing open space provision. Drawing on information gained from the recent green space assessment and audit, the Council has produced its own bespoke, PPG 17 compliant typology in recognition of the multi-functional nature of the majority of green spaces, and the diverse range of provision, management and need across Bath & North East Somerset. This guide includes standards for the following land types:

- 1 Formal Green Space – including parks and public gardens along with recreation grounds and spaces for informal activities.
- 2 Natural Green Space – including woodland, natural and semi-natural spaces and green corridors.
- 3 Allotments – including community gardens and community orchards

Standards for most outdoor sports facilities available to the public and the provision of facilities for children and young people are included in the formal green space standard as it is within these spaces that these facilities are generally provided.

Financial contributions secured for the provision of green space may be spent on one or more of the above infrastructure types depending on needs identified in the Green Space Strategy.

Basis of Calculation

The calculation is based on local standards of provision as follows:

Quantity Standards for the Provision of Green Space	
Type	Quantity
Formal Green Space	a minimum of 15 sq. m per person
Natural Green Space	a minimum of 20 sq. m per person
Allotments*	a minimum of 2.8 sq. m per person with a minimum site size of 1,500 sq. m / 10 plots

Generally, on site provision will be required where the size, topography and other characteristics of the application site makes this feasible. On site green space should be an integral part of the development's design concept and should fully take account of, for example, considerations relating to access, orientation, topography, biodiversity and the character of the locality.

Where green space is provided by the developer, it must be maintained to the satisfaction of the Council for a period of no less than 12 months. In some cases this period may be extended (e.g. if remedial works required prior to transfer are not completed within an agreed timescale). Developers will then be required to dedicate the green space and any associated facilities (e.g. changing facilities, play equipment, landscaping) to either the District or Parish Council and to make a capital commuted contribution to cover their maintenance over a 10 year period.

The commuted sums used by the Council represent the cost of maintaining the different types of open space per annum and will be revised annually. The current rates (2006/07) are as shown below.

Green Space -Annual Maintenance costs (on site and off-site)		
Type	Cost of Maintenance per annum (£/sq.m)	
	March/2008 prices	May/2014 prices
Formal Green Space	48.49	£58.50
Natural Green Space	11.48	£13.85
Allotments	6.63	£8.00

In cases where a proportion of the required green space is to be provided on site with the rest off-site, there will be a need for a similar level of financial contribution towards annual maintenance, but also a contribution to pay for the capital costs of construction. The current rates for the construction costs (2006/07) are as shown below.

Off-site Green Space – Construction costs		
Type	Cost of Provision (£/sq.m)	
	March/2008 prices	May/2014 prices
Formal Green Space	46.08	£58.60
Natural Green Space	8.61	£10.39
Allotments	45.15	£54.47

NB -these rates do not include land purchase which would be an additional cost to be added. These rates include a 6% supervision fee.

Alternatively it may be that offsite provision can be made (at least in part) through enhancement of existing faculties rather than new construction. The current rates (2006/07) for off-site enhancement are as shown below.

Off-site Green Space – cost of enhancement of existing faculties		
Type	Cost (£/sq.m)	
	March/2008 prices	May/2014 prices
Formal Green Space	47.89	£57.78
Natural Green Space	10.04	£12.11
Allotments	25.89	£31.24

This is a combined cost which includes both capital and commuted revenue elements. The capital element includes a 6% supervision fee.

If the quantity of land dedicated by the developer to the Council is greater than the minimum local standards, then the commuted sums to cover maintenance will relate to the total land area not just that required by the standards.

The calculation converts the above costs and standards in to amounts per unit of development based on assumed occupancy levels as set out in the introduction to this Appendix.

Conclusion

The calculation of required contributions in relation to a particular application depends on a specific assessment of the quantities of on-site provision being made as part of the development, and whether any off-site provision is made through enhancement of existing provision or new provision.

Social Services Policy Background

The justification for requiring obligations in respect of Social Services is as set out in CIL Regulations (as amended), Policy CP.13 of the Bath & North East Somerset Core Strategy, and Policies IMP.1 and CF.3 of the Bath & North East Somerset Local Plan.

Social Services obligations are required to cover the anticipated costs of disability adaptations in relation to new residents of the BWR site.

Trigger for Obligation

Social Services Obligations apply to residential development only.

Basis of Calculation

Analysis of likely requirements for and current costs of disability adaptations gives rise to an estimated requirement of £18.53 per person.

The calculation converts the above unit costs into amounts per unit of development based on assumed occupancy levels as set out in the introduction to this Appendix.

Conclusion

The requirement for financial contributions is therefore as follows:

	March/2008 prices	May/2014 prices
1 Bedroom units	£24	£28.96
2 Bedroom units	£34	£41.02
3 Bedroom units	£44	£53.09

Economic Development

Policy Background

The justification for requiring obligations in respect of Economic Development is as set out in CIL Regulations (as amended), Policy CP.13 of the Bath & North East Somerset Core Strategy and Policy IMP.1 of the Bath & North East Somerset Local Plan.

The 'Linking to Employers' section of the Bath & NE Somerset Learning Plan encourages local training provision which meets employer needs and addressing basic skills.

The contribution will be used to ensure local companies and residents are able to capitalise on the opportunities for procurement and employment offered by the development activity. It will be utilised to fund support staff able to promote procurement opportunities to the local supply chain and an intermediary service to assist in matching employment vacancies to the local construction skills base, along with an allocation to develop on-site training facilities and support the tutelage.

Trigger for Obligation

Economic Development Obligations apply to all types of development within BWR.

Basis of Calculation

The calculation is based on the cost of providing the above services during the construction period. It will also ensure that capacity is available to contribute toward the training infrastructure required to capitalise on the opportunities presented by this development.

Conclusion

The requirement for financial contributions is therefore as follows:

Type	Cost	
	March/2008 prices	May/2014 prices
Residential (£/unit)	£120	£144.78
Commercial (£/m ²)	£5	£6.03
Employment (£/m ²)	£5	£6.03

Libraries

Policy Background

The justification for requiring obligations in respect of Libraries is as set out in CIL Regulations (as amended) and Policy CP.13 of the Bath & North East Somerset Core Strategy and Policies IMP.1 and CF.3 of the Bath & North East Somerset Local Plan. B&NES Council has a statutory duty to provide a comprehensive, efficient and modern library service to those who live work or study within its boundaries.

Trigger for Obligation

Libraries Obligations apply to all types of development within BWR, but the assumed occupancy of non-residential properties is taken into account to include only the proportion who are non B&NES residents so as to avoid double counting.

Basis of Calculation

The calculation applies the International Federation of Libraries Associations (IFLA) standard for Library provision which is 42 m² per 1,000 population. The building cost of library provision is estimated at £3,000 per m², with an allowance for books / IT stock of £9.38 per head.

The calculation converts the above unit costs into amounts per unit of development based on assumed occupancy levels as set out in the introduction to this Appendix. A scaling factor of 0.37 is applied to the assumed occupancy of commercial and employment space so that it is based on the likely proportion of occupants who are not B&NES residents only.

The provision of a site for a Primary School and community facilities, which might include Library facilities, within zone 2 has already been identified as a requirement elsewhere in this SPD (1.6.53-1.6.56). The calculation assumes standalone premises. If it is proposed to make sports provision on a joint use basis (e.g. in conjunction with a school / other community facilities) it might be possible to consider reducing the required contributions to the extent that costs are lower.

Conclusion

The requirement for financial contributions is therefore as follows:

Type	Cost	
	March/2008 prices	May/2014 prices
Residential (£/unit)		
1 Bedroom units	£177	£213.55
2 Bedroom units	£245	£295.59
3 Bedroom units	£323	£389.70
Commercial (£/m ²)	£1.91	£2.30
Employment (£/m ²)	£2.64	£3.19

Police

Policy Background

The justification for requiring obligations in respect of Police is as set out in CIL Regulations (as amended) and Policy CP13 of the Bath & North East Somerset Core Strategy.

Trigger for Obligation

Police Obligations apply to all types of development within BWR.

Basis of Calculation

The Avon & Somerset Constabulary has assessed the policing requirements that are likely to arise from the BWR development and estimated the additional building / parking space necessary to accommodate the officers and other staff required.

The calculation provides for office type accommodation for 7 people and parking spaces for 2 cars. This is not an on-site requirement, but a financial contribution to off-site provision.

The calculation converts the above costs into amounts per unit of development based on assumed occupancy levels as set out in the introduction to this Appendix.

Conclusion

The requirement for financial contributions is therefore as follows:

Residential (£/unit)	March/2008 prices	May/2014 prices
1 Bedroom units	£33.00	£39.81
2 Bedroom units	£55.50	£55.50
3 Bedroom units	£73.60	£73.60
Commercial (£/ m2)	£1.17	£1.17
Employment (£/ m2)	£1.62	£1.62

Primary Health Care

Policy Background

The justification for requiring obligations in respect of Primary Health Care is as set out in CIL Regulations (as amended) and Policy CP.13 of the Bath & North East Somerset Core Strategy and Policies IMP.1 and CF.3 of the Bath & North East Somerset Local Plan.

Trigger for Obligation

Primary Health Care Obligations apply to all types of development within BWR.

Basis of Calculation

The Bath & NE Somerset PCT has assessed the primary health care requirements that are likely to arise from the BWR development and estimated the building / parking space necessary to accommodate the staff and facilities required.

The calculation provides for the construction costs of a health care facility with a floor area of 800m² and 40 parking spaces, within the BWR development.

The provision of a site for a Primary School and community facilities, which might include health facilities, within zone 2 has already been identified as a requirement elsewhere in this SPD (1.6.53-1.6.56).

The calculation converts the above costs into amounts per unit of development based on assumed occupancy levels as set out in the introduction to this Appendix. A scaling factor of 0.5 is applied to the assumed occupancy of commercial and employment space.

The calculation assumes standalone premises. If it is proposed to make sports provision on a joint use basis (e.g. in conjunction with a school / other community facilities) it might be possible to consider reducing the required contributions to the extent that costs are lower.

Conclusion

The requirement for financial contributions is therefore as follows:

	March/2008 prices	May/2014 prices
Residential:		
1 Bedroom units	£340	£410.21
2 Bedroom units	£472	£569.47
3 Bedroom units	£622	£750.45
Commercial (£/m ²)	£4.96	£5.98
Employment (£/m ²)	£6.86	£8.28

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Bath & North East Somerset Council		
MEETING:	Cabinet	
MEETING DATE:	16 July 2014	EXECUTIVE FORWARD PLAN REFERENCE:
		E 2658
TITLE:	Revenue & Capital Outturn 2013/14	
WARD:	All	
AN OPEN PUBLIC ITEM		
<p>List of attachments to this report:</p> <p>Appendix 1: Revenue & Capital Outturn 2013/14 information Appendix 2: Revenue Outturn by Directorate & Portfolio 2013/14 Appendix 3: Reasons for Revenue Budget Variances 2013/14 Appendix 4: Revenue Budget Items to be considered for carry forward/write-off Appendix 5: Corporate Earmarked Reserves Appendix 6: Revenue Virements 2013/14 Appendix 7: Capital Outturn Summary 2013/14 Appendix 8: Detailed Capital Variance & Rephasing Requests 2013/14 Appendix 9: Capital Programme by Portfolio 2013/14 & 2014/15 Appendix 10: Capital Virements 2013/14 & 2014/15</p>		

1 THE ISSUE

- 1.1 The report presents the revenue and capital outturn for 2013/14, highlighting an underspend of £83,000. This represents a significant achievement in the context of the government's public sector deficit recovery plan which resulted in a revenue savings requirement of over £11 million for 2013/14.
- 1.2 The report refers to requests to carry forward specific revenue budget items to 2014/15 and to write-off revenue overspends where recovery in future years would have an adverse impact on continuing service delivery.
- 1.3 The report also refers to requests to re-phase specific capital budget items to 2014/15 and to write off net capital underspends.

2 RECOMMENDATION

The Cabinet agrees that:

- 2.1 The revenue budget outturn underspend of £83,000 for 2013/14 as set out in Appendix 2 is noted.
- 2.2 The revenue carry forward proposals and write-off requests listed in the tables in Appendix 4 are approved.

- 2.3 Transfers to Earmarked Reserves are agreed as set out in Appendix 1 paragraph 1.13.
- 2.4 The revenue virements for 2013/14 as listed in Appendix 6(i) are approved.
- 2.5 The resulting reserves position shown in Appendix 1 paragraph 1.14 is noted and that unearmarked reserves remain at the target level of £10.5m.
- 2.6 The provisional outturn of the 2013/14 capital programme in Appendix 7, and the funding as laid out in the table in Appendix 1 Paragraph 1.23, is noted.
- 2.7 The capital rephasing and write-off of net underspends as listed in Appendix 8 are approved.
- 2.8 The adjustments to the 2013/14 to 2018/19 capital programme as detailed in Appendix 10, and the final capital programme for 2013/14 in Appendix 9 are noted.

3 RESOURCE IMPLICATIONS (FINANCE, PROPERTY, PEOPLE)

- 3.1 These are contained throughout the report and appendices.

4 STATUTORY CONSIDERATIONS AND BASIS FOR PROPOSAL

- 4.1 The Medium Term Finance & Planning process allocates scarce resources across services with alignment of these resources towards our priorities as set out in the Medium Term Service & Resource Plans. This report monitors how the Council has performed against the financial targets set in February 2013 through the budget setting report.

5 THE REPORT

- 5.1 This report provides information about the Council's financial performance against its revenue and capital budgets in 2013/14.
- 5.2 This report enables Cabinet to review:
- Requests for write-off of overspends
 - Requests for carry forward of underspends
 - Suggested transfers to earmarked reserves
- 5.3 The report identifies that after carry forwards and transfers to reserves, the Council underspent by £83,000. This represents a significant achievement in the context of the government's public sector deficit recovery plan which resulted in a revenue savings requirement of over £11 million for 2013/14. The position reflects that the funding of one-off costs relating to the delivery of the savings required as part of the 2013/14 budget have been offset against underspends achieved during the year rather than using earmarked reserves.
- 5.4 The capital spend in 2013/14 was £44.57m against a budget of £62.92m giving a variance of £18.35m, primarily reflecting the delivery time to complete projects moving into future financial periods. Of this variance, £18.03m is requested for carry forward to 2014/15 to cover re-phased costs of capital projects.

- 5.5 Details of the outturn position for the revenue and capital budgets are provided in Appendices 1-10.
- 5.6 The Corporate Audit Committee will approve the audited statutory final accounts of the Council in September 2014. This report presents the 2013/14 outturn in the form that is routinely reported throughout the year as part of budget monitoring.
- 5.7 The Cabinet received financial reports throughout the year highlighting the known pressure areas, and identifying those actions that could be taken to reduce these to manageable proportions.

6 RATIONALE

- 6.1 The recommendations made are based upon the Budget Management Scheme and a consideration of the Council's latest financial position and reserves strategy.

7 OTHER OPTIONS CONSIDERED

- 7.1 Appendix 4 lists all options that can be considered in making a decision on carry forwards and write offs relating to the revenue outturn position.

8 CONSULTATION

- 8.1 Consultation has been carried out with the Cabinet Member for Community Resources, Strategic Directors, Section 151 Finance Officer, Chief Executive and Monitoring Officer.
- 8.2 The provisional outturn position has been discussed at Senior Management Team and Divisional Directors' Group during May.

9 RISK MANAGEMENT

- 9.1 A risk assessment related to the issue and recommendations has been undertaken, in compliance with the Council's decision making risk management guidance.
- 9.2 The substance of this report is part of the Council's risk management process. The key risks in the Council's budget are assessed annually by each Strategic Director, with these risks re-assessed on a monthly basis as part of the budget monitoring process.

Contact person	Tim Richens – 01225 477468; Gary Adams – 01225 477107 ; Tim_Richens@bathnes.gov.uk ; Gary_Adams@bathnes.gov.uk
Sponsoring Cabinet Member	<i>Councillor David Bellotti</i>
Background papers	<i>2013/14 Budget Monitoring reports to the Cabinet; Budget Management Scheme</i>
Please contact the report author if you need to access this report in an alternative format	

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REVENUE OUTURN 2013/14

- 1.1 Appendix 2 outlines the Council's budget outturn for the 2013/14 financial year at both Directorate and Portfolio level. The outturn shows the budget has been managed in total with a very small under spend. After carry forwards, the Council underspent by £83,000.
- 1.2 The position reflects that the funding of one-off costs relating to the delivery of the £11.63m savings required as part of the 2013/14 budget have been offset against underspends achieved during the year rather than using earmarked reserves. This approach does result in some service areas showing an overspend position due to the non draw down of reserves that were previously anticipated.
- 1.3 Underlying the Council's "bottom line" figure, prior to carry forwards and after funding one-off costs related to savings delivery, are a number of variations (at a Directorate level):
- Service overspends of £2.034m
 - Service underspends / over achievement of income of £1.249m
 - A £1.195m underspend on Corporate and Agency budgets.
- 1.4 The explanations for the 2013/14 outturn variations are given in Appendix 3, and some are highlighted below.
- 1.5 The main areas contributing to the underspend and over achievement of income position occurred in the following areas:

Heritage Services

Underspend of £1,124,000. There has been an exceptional return generated this year by the Heritage estate, in particular the Roman Baths. This has been based on the exceptional increase in visitors following on from the Olympics last year.

Planning Services

Underspend of £325,000. This is due to increased volumes of planning applications and the resulting additional income achieved by the service.

Waste Services

Underspend of £268,000. The service has achieved one off underspends from inflation savings on the waste contract, lower disposal tonnages and staff turnover savings.

Park & Ride

Underspend of £263,000. There has been increased income reimbursed for concessionary fares, unbudgeted income from bus penalties and savings from a renegotiated bus contract.

Corporate Budgets: Capital Financing & Interest

Underspend of £557,000. Position due to the net savings achieved in debt costs and interest following the repayment of Council borrowing during the year.

Corporate Budgets – Other

Underspend of £435,000. The underspend mainly relates to savings of £147,000 in the costs of external auditors following the government's rationalisation of the external audit regime, a £153,000 favourable adjustment to prior years' Housing Benefit subsidies, and the final Council Tax Freeze Grant being £50,000 higher than originally forecast.

- 1.6 The main areas of overspending not relating to the non draw down of reserves have occurred in the following areas:

Children Social Care

Overspend due to costs resulting from an individual remand case, estimated to cost £580 a day resulting in unbudgeted costs of £106,000. The Placements budget also came under pressure in particular from Court directed parent and baby residential assessments as a result of the family justice review. Each assessment costs at least £20,000 and the overall overspend has amounted to £107,000.

Commercial Estate

Overspend of £276,000. The overspend relates to increased costs for insurance, rates, consultancy and an increase in the service bad debt provision.

Neighbourhoods

Overspends relating to public conveniences, cemeteries and crematorium budgets.

- 1.7 The Council's net budget outturn position has accommodated non draw down of reserves that were planned totalling £3.7m, consisting £2.8m earmarked from the severance reserve and £0.9m from the financial planning reserve which included the delayed implementation of the corporate travel plan savings.

DECISIONS REQUIRED RELATING TO OVER AND UNDERSPENDS

- 1.8 Decisions are needed on some of the items in Appendix 4 relating to under and overspending in 2013/14. Each section of Appendix 4 is clearly marked for information or for decision. In particular, decisions are required in Tables 2 and 3 of Appendix 4. If all these items are approved this would give a final underspend of £83,000.
- 1.9 Table 3 of Appendix 4 contains requests to write off overspends as an exception to the Budget Management Scheme rules. The write off is requested as it is not considered practical to recover the overspend against the continuing financial pressures in 2014/15 and future years.

OTHER 2013/14 MOVEMENTS AFFECTING RESERVES

- 1.10 The net underspend position of £83,000 reported above does not include technical transactions, such as the change to the Council's corporate bad debt provision, which are one-off in nature, or relate to previous years so are reported separately from the regular monitoring figures.
- 1.11 The net effect of these transactions is an increase in unearmarked reserves of £149,000.
- 1.12 Appendix 5 provides details of corporately earmarked reserves reflecting the outturn revenue budget position.

USE OF UNDERSPEND

- 1.13 It is proposed that the overall underspend is transferred to the Revenue Budget Contingency Reserve.

The proposed transfer to the Revenue Budget Contingency would increase the amount available in the reserve to £1.332m

REVENUE RESERVES

- 1.14 If the requests shown in recommendations 2.2 and 2.3 are approved by the Cabinet, the overall situation would be as follows:

Description of the Revenue Reserves Movements	£'000
Estimated General Un-earmarked Reserves following February Budget Report 2013*	10,480
2013/14 Outturn position, including additional use in carry forward of underspends and write off of overspends	+83
Net transfers into reserve (see paragraph 1.10)	+149
Increase in earmarked Revenue Budget Contingency Reserve	-232
Remaining available reserves would then be	10,480
<i>Recommended optimal level based on corporate risk assessment</i>	10,480

*Excluding Invest to Save drawdowns which are repayable in future years.

- 1.15 As a result, the Council is meeting the reserves strategy outlined in the budget report to Council on 18th February 2014.

SCHOOLS

1.16 The bottom line out-turn position in relation to schools is an overspend of £101k, while the centrally held elements of the DSG have underspent by £674k. The DSG overspend results in a DSG balance to be carried forward of £4.459m up from £3.758m in 2012-13. The main reason for the increase in the DSG balance is an underspend on early years funding reflecting the new requirements for 2 year olds which have yet to be fully implemented. These items are automatically carried forward under the DSG accounting arrangements, and budget adjustments have been made to reflect this.

1.17 The balances held by schools have decreased by £101k from £3.3m to £3.2m. This reduction reflects the conversion of 2 schools to academies which reduces the balances held by the Local Authority. The schools balances are closely monitored by Schools Forum which has an excessive balances policy in line with DFE guidance. All schools with balances deemed to be excessive are challenged to explain their position. Most excessive balances are planned in preparation for capital projects in schools.

COLLECTION FUND OUTTURN POSITION

1.18 As part of the 2014/15 Budget, an estimate was made on the position of the Collection Fund as at the 31st March 2014. The estimate is split into two elements, one relating to Council Tax and the other relating to Business Rates. The estimated and actual position for each is shown in the following table. The figures relate to the Council's share of the surplus / deficit, excluding preceptor and central government shares.

	Estimated surplus / (deficit) £m	Actual surplus / (deficit) £m	Difference £m
Council Tax	1.600	2.231	0.631
Business Rates	(0.589)	(0.546)	0.043
Total	1.011	1.685	0.674

1.19 The difference will be taken into consideration when estimating the closing 2014/15 Collection Fund position as part of the 2015/16 Budget process.

CAPITAL OUTTURN 2013/14

1.20 The outturn capital spend of £44.57m was £18.35m less than the 2013/14 revised budget of £62.92m.

1.21 Services are requesting re-phasing of funding (project re-phasing) to 2014/15 of £18.03m, which includes:-

- £2.0m Bath Transport Package
- £579k Highways Structural Maintenance Programme

- £629k Victoria Bridge
- £354k Temple Precinct (Roman Baths)
- £314k Public Realm
- £385k London Road Regeneration
- £1.0m BWR – Relocation of Gas Holders
- £1.6m BWR – Replacement of Destructor Bridge
- £1.3m Spend at School Level (devolved school budgets)
- £1.5m Other Children Services Projects
- £388k Adult Social Services & Housing Projects
- £2.5m Keynsham Regeneration & New Build
- £0.7m Property Schemes
- £852k Resources IT & System Projects
- £2.4m Corporate Capital Contingency

Details of the overall capital outturn position are given in Appendix 7, with further detail on the rephasing requests and over/underspends adjustments provided in Appendix 8.

CAPITAL RESOURCES

1.22 The 2013/14 outturn expenditure of £44.572m was financed mainly through the use of capital grants, third party contributions and borrowing.

1.23 The 2013/14 outturn expenditure was financed as follows:

	£'000
Total Capital Spending:	44,572
Funded by:	
Capital Receipts	10,221
Capital Grants	16,277
3 rd Party Receipts (inc S106)	1,171
Revenue	817
Prudential Borrowing (Implied Need)	16,086
Total	44,572

1.24 The £817k of revenue funding is predominantly in respect Disabled Facilities Grants and IT investment projects.

1.25 The Council's provisional Capital Financing Requirement (CFR) as at 31st March 2014 is £153 million. This represents the Council's requirement to borrow to finance capital expenditure, and demonstrates that total borrowing

of £70 million remains well below this requirement as at 31st March 2014. This illustrates the extent to which the Council is currently cash-flowing capital projects in line with the Treasury Management Strategy.

Financial Monitoring Statement (Revenue): All Directorates

APPENDIX 2 (i)

REVENUE SPENDING	YEAR END FINAL FIGURES				Carry forwards overspends under the BMS Rules (App 4 table 3) Col 4 £'000	Requested by Strategic Directors		Net Col 7 £'000
	Actual Spend or (Income) Col 1 £'000	Budgeted Spend or (Income) Col 2 £'000	Outturn over or (under) spend Col 3 £'000	ADV/FAV		Requested carry forward Underspend (App 4 table 2) Col 5 £'000	Write off overspend (App 4 table 3) Col 6 £'000	
All Directorates For period to 31st March 2014								
Place	25,270	26,397	(1,127)	FAV	112		(1,015)	
Children Services	24,162	23,427	734	ADV		734	734	
Adult Social Services & Housing	58,036	58,158	(122)	FAV			(122)	
Resources	17,075	16,970	104	ADV	(104)	104	319	
TOTAL	124,542	124,953	(410)	FAV	(838)	327	838	

Note: "ADV" indicates an adverse variance, "FAV" a favourable variance, and a "(" in the over and under spend columns indicates an underspend or overachievement of income

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APPENDIX 2 (ii)

Portfolio Summary Monitor REVENUE SPENDING For the Period APRIL 2013 to MARCH 2014	2013/14 YEAR END POSITION			ADVERSE / FAVOURABLE
	Net	Actual	Annual Budget	
	£'000	£'000	£'000	
Leader	10,166	9,494	672	ADV
Community Resources	4,366	4,993	(627)	FAV
Wellbeing	56,101	56,118	(17)	FAV
Early Years, Children & Youth	24,162	23,427	734	ADV
Homes & Planning	3,832	4,532	(700)	FAV
Sustainable Development	(2,151)	(996)	(1,155)	FAV
Neighbourhoods	21,007	20,323	685	ADV
Transport	7,060	7,062	(2)	FAV
TOTAL COUNCIL	124,542	124,953	(410)	FAV

Less: Carry Forward Requests

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REVISED OUTTURN POSITION

(83)

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APPENDIX 3 - Financial Monitoring Statement (Revenue): All Portfolios at Cashlimit level

REVENUE SPENDING For the Period APRIL 2013 to MARCH 2014	YEAR END ACTUAL			ADV/ FAV	Notes on main areas of over / under spending
	Net Actual A £'000	Annual Current Budget B £'000	Forecast Over or (under) spend C £'000		
Leader					
Policy & Partnerships	1,623	1,598	24	ADV	
Councils Retained ICT Budgets	4,793	4,793			
People Services	546	589	-43	FAV	Increased income from schools and reduction in system and other service costs
Corporate Items - (Corporate Travel Plan)		-500	500	ADV	Savings related to the revised Corporate Travel plan delayed until 2014/15. Reserves not drawdown to cover impact.
Council Solicitor & Democratic Services	1,676	1,607	69	ADV	Review of detailed savings proposals
Improvement & Performance	1,529	1,407	122	ADV	Severance costs charged to service rather than drawing down from earmarked reserves
Sub Total	10,166	9,494	672	ADV	
Community Resources					
Finance	1,666	1,519	147	ADV	Severance costs charged to service rather than drawing down from earmarked reserves
Support Services Change Programme		-4	4	ADV	
Customer Services	2,401	2,531	-131	FAV	Additional court cost liability order income, salary savings and DWP universal credit recovery
Risk & Assurance Services	976	974	1	ADV	
Property Services	3,276	2,830	447	ADV	Severance costs charged to service rather than drawing down from earmarked reserves
Corporate Estate Including R&M	4,485	4,756	-271	FAV	Underspend on Repairs & Maintenance and Rates
Commercial Estate	-13,455	-13,731	276	ADV	Increased cost of insurance, rates, consultancy and increased bad debt provision
Traded Services	47	-80	127	ADV	Higher costs of provisions, salaries and shortfall in schools subsidy
Strategic Director - Resources	176	208	-32	FAV	
Hsg / Council Tax Benefits Subsidy	152	305	-153	FAV	Favourable adjustment to prior years' Housing Benefit subsidies
Capital Financing / Interest	3,521	4,078	-557	FAV	Net interest savings from debt repayment
Unfunded Pensions	1,678	1,709	-31	FAV	
Corporate Budgets including Capital, Audit and Bank Charges	-1,063	-628	-435	FAV	Savings in external audit, carbon trading and gas contract inflation costs, increased Council Tax Freeze grant, and rates refund.
Magistrates	14	17	-3	FAV	
Coroners	289	305	-16	FAV	
Environment Agency	203	205	-1	FAV	
Sub Total	4,366	4,993	-627	FAV	
Wellbeing					
Adult Services	55,555	55,572	-17	FAV	Demand pressures in social care commissioning budget offset by use of Section 256 funding
Adult Substance Misuse (DAT)	546	546			
Sub Total	56,101	56,118	-17	FAV	
Early Years, Children & Youth					
Children Young People & Families	12,087	11,283	804	ADV	Overspend in Childrens Social Care costs due to individual remand case and court directed parent and baby residential assessments. The net overspend position reflects that severance costs and transformation costs have been charged to service rather than drawing down from earmarked reserves
Learning & Inclusion	6,024	6,093	-68	FAV	
Health, Commissioning & Planning	-87,966	-87,964	-2	FAV	
Schools Budget	94,016	94,016			
Sub Total	24,162	23,427	734	ADV	

REVENUE SPENDING For the Period APRIL 2013 to MARCH 2014	YEAR END ACTUAL			ADV/ FAV	Notes on main areas of over / under spending
	Net Actual A £'000	Annual Current Budget B £'000	Forecast Over or (under) spend C £'000		
Homes & Planning					
Planning Services	1,826	2,152	-325	FAV	Additional Income from increased volumes of planning applications Increased land charges income, underspend on fracking provision and other smaller underspends Reduced requirement for revenue funding of Disabled Facilities Grants and reduced take up in loans for remedial repairs
Building Control & Land Charges	70	340	-270	FAV	
Housing	1,935	2,040	-105	FAV	
Sub Total	3,832	4,532	-700	FAV	
Sustainable Development					
Arts	552	553	-2	FAV	Mainly due to increase in income from the Spa profit share model and water monitoring costs.
Tourism & Destination Management	432	656	-224	FAV	
Heritage including Archives	-5,176	-4,052	-1,124	FAV	Additional income generated by the Heritage estate, in particular the Roman Baths. There has been an exceptional increase in visitors following on from the Olympics last year.
Project Delivery	336	387	-51	FAV	Restructuring costs and severance costs charged to service rather than drawing down from earmarked reserves
Regeneration, Skills & Employment	1,705	1,459	246	ADV	
Sub Total	-2,151	-996	-1,155	FAV	
Neighbourhoods					
Service Delivery - Overheads	1,129	1,148	-19	FAV	Underspends from inflation savings on the waste contract, lower disposal tonnages and staff turnover savings The overspend position reflects that severance costs and MTSRP transformation costs have been charged to service rather than drawing down from earmarked reserves Shortfall on Public Conveniences budget and pressures relating to the Cemeteries and Crematorium. The overspend also reflect costs charged to the service rather than drawing down from earmarked reserves Severance costs charged to service rather than drawing down from earmarked reserves Staffing pressures and legal fees related to River Moorings
Waste	10,113	10,380	-268	FAV	
Public Protection	874	574	300	ADV	
Neighbourhood Services	5,619	5,150	469	ADV	
Libraries & Information	2,052	1,977	75	ADV	
Sports & Active Leisure	1,066	974	92	ADV	
Community Safety	155	120	35	ADV	
Sub Total	21,007	20,323	685	ADV	
Transport					
Transport Design & Projects	1,102	882	221	ADV	Severance costs charged to service rather than drawing down from earmarked reserves
Transportation Planning (including Public Transport)	5,680	5,854	-174	FAV	Mainly due to underspend on concessionary fares
Park & Ride	-944	-682	-263	FAV	Increased park & ride income, savings from renegotiated bus contract and income from bus penalties
Highways - Network Maintenance	7,699	7,479	220	ADV	Severance costs charged to service rather than drawing down from earmarked reserves
Highways - Transport & Fleet Management	34	-184	218	ADV	
Car Parking (excluding Park & Ride)	-6,512	-6,287	-225	FAV	Increase in parking income
Sub Total	7,060	7,062	-2	FAV	
TOTAL	124,542	124,953	-410	FAV	
Less: Carry Forward Requests			327		
Revised Outturn Position			-83		

**Budget Items to be considered for carry forward to
2014/15**

TABLE 1: Over and under spends already approved under Budget Management scheme (BMS) and Statutory Requirements (SR)

This table is for **information** - no decision is required

Under spend Carry Forward Requests - approved under rules of BMS – 2013/14 to 2014/15 or already agreed by the Cabinet	Requested approval £	Already Approved under BMS/ SR £	Director
<u>Children's Service Portfolio</u> The Dedicated Schools' Grant is ring-fenced, the under spend will be automatically carried forward into 2014/15.	4,459,397	4,459,397	AA
Total (Net position)	4,459,397	4,459,397	

Appendix 4 (cont)

TABLE 2:
For Decision - Under spend carry forward requests not automatically approved

Under spend Carry Forward Requests - those <u>not</u> approved under rules of BMS – 2013/14 to 2014/15	Requested approval £	Already Approved under BMS £	Dir	Reported by BMS Deadline (Jan'14)
Homes & Planning Portfolio				
(H1) – Planning – CIL IT System - To fund costs relating to set up and training following installation of system	29,000		LF	Yes
(H2) – Planning – CIL Implementation- To fund costs relating to CIL viability study and other implementation costs following delays in Core Strategy agreement.	60,000		LF	Yes
(H3) – Planning – Placemaking Plan - To fund costs relating to parking standards and retail / town centre policy review study.	20,000		LF	Yes
(H4) – Planning – Freshford / Limpley Stoke Neighbourhood Plan – Carry Forward of residual amount of funding (administered by the Council) in respect of neighbourhood plans.	3,000		LF	Yes
Resources Portfolio				
(R1) – Finance - Re-phasing of expenditure relating to the retender for the Council's banking contract which has been moved into 2014/15	20,000		AP	Yes
(R2) – Property – Saltford Brassmill - To enable works on "Saltford Brassmill" for which implementation has been delayed due to unsuitable weather conditions	140,000		AP	No
(R3) – Property – Connexions Day Centre - To fund costs relating to the refurbishment of facilities at the Connexions Day Centre.	55,000		AP	No
TABLE 2 TOTAL	327,000			

Appendix 4 (continued)

TABLE 3:
For Decision - Requests for overspend write off from services in 2013/14

Requests to write off overspends	Request £	Already approved under BMS £	Director
<u>Resources</u> Net position on Resources	104,000		AP
<u>Children's Services</u> Net position on Children's Services	734,000		AA
Total	838,000	0	

This column lists the figures requested

This column indicates where figures are approved within the rules of BMS. If no figure it will need decision to approve it

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Appendix 5

Corporate Earmarked Reserves	Current Position * £'000
Insurance Fund	1,125
Capital Financing / Service Supported Borrowing Reserve	3,406
Revenue Budget Contingency	1,332
Transformation Investment Reserve	3,817
D&MP regional & sub regional issues	77
PCT Pooled Budget upfront payment	2,125
Pensions Liability Reserve	331
Business Rates Reserve	61
Carbon Management Programme Reserve	42
Procurement Programme Reserve	60
Exceptional Risk Reserve	39
Affordable Housing & Capital Development Reserve	3,000
Restructuring Reserve	5,418
Financial Planning Reserve	5,695
Dedicated Schools Grant Carry Forward Reserve	4,459
Community Empowerment Fund	512
Development Fund Reserve	185
Regional Delivery Plan Reserve	50
Revenue Grants Unapplied	2,276
Tax Liabilities Reserve	711
Review of Leisure Provision Reserve	45
Revenue Funding of Capital Reserve	906
Transport Strategy Reserve	73
Other	33
Sub Total	35,778
* Balances exclude any allocations made in 2014/15 i.e Revenue Budget Contingency	

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2013/2014 Revenue Virements for Information

REF NO	REASON/ EXPLANATION	CASHLIM	TRANSFER FROM	Income (£'s)	Expenditure (£'s)	CASHLIM	TRANSFER TO	Income (£'s)	Expenditure (£'s)	DESCRIPTION	ONGOING EFFECTS
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The following virements have either been previously approved, are technical in nature or are below limits within BMS that require approval, and therefore are reported for information only.

INFO 13#38	Gas Inflation	Community Resources	Corporate Budgets incl. Capital, Audit & Bank Charges		21,026	Community Resources Early Years, Children & Youth Neighbourhoods	Corporate Estate Including R&M Learning & Inclusion Waste Services Neighbourhoods Services		9,113 3,657 1,035 7,221	Allocation of gas contract inflation provision.	Budget virement is ongoing.
INFO 13#39	Bath Spa Remedial Works Drawdown	Community Resources	Balances (Exceptional Risk Reserve)		20,826	Sustainable Development	Project Delivery		20,826	Allocation from Exceptional Risk Reserve	Budget virement is one off.
INFO 13#40	Changes in PCT Contribution to LD Pooled Budget	Wellbeing	Adult Services	2,125,000		Community Resources	Balances	2,125,000		To reflect adjustment in the PCT's contribution to the pooled budget in 2014/15.	Budget virement is one off.
INFO 13#41	PCT Section 256 Contribution	Wellbeing	Adult Services	3,034,050		Community Resources	Balances	3,034,050		Transfer to reserves of s.256 re-ablement contribution received from the PCT in 2013/14 for use in 2014/15.	Budget virement is one off.
INFO 13#42	Revenue Grants Unapplied Accounting Adjustment	Neighbourhoods	Sports & Active Leisure	22,968		Community Resources	Balances (Revenue Grants Unapplied)	1,166,379		Technical accounting adjustment to fully recognise unconditional revenue grants fully in year of receipt.	Budget virement is one off.
			Waste	643,416							
		Community Resources	Corporate Budgets incl. Capital, Audit & Bank Charges	375,195							
		Wellbeing	Adult Services	124,800							
INFO 13#43	Change Programme Drawdowns	Community Resources	Council Balances (Transformation Investment Reserve)		415,744	Leader Community Resources	Policy & Partnerships Improvement & Performance Customer Services		44,954 205,000 165,790	Budget transfers to reflect allocations from the Transformation Investment Reserve	Budget virement is one off.
INFO 13#44	VAT Reserve Drawdown	Community Resources	Council Balances		32,232	Community Resources	Finance		32,232	Drawdown of funding from service earmarked reserve	Budget virement is one off.
INFO 13#45	Green Deal Reserve Drawdown	Community Resources	Council Balances		81,207	Leader	Policy & Partnerships		81,207	Drawdown of funding from service earmarked reserve	Budget virement is one off.

2013/2014 Revenue Virements for Information

REF NO	REASON/ EXPLANATION	CASHLIM		CASHLIM	CASHLIM		CABINET MEMBER	TRANSFER TO	Income (£'s)	Expenditure (£'s)	DESCRIPTION	ONGOING EFFECTS
		TRANSFER FROM	Income (£'s)		Expenditure (£'s)	TRANSFER TO						
INFO 13#46	Workplaces Reserve Drawdown	Community Resources	Council Balances	Community Resources	Corporate Estate including R&M	Community Resources			298,109	298,109	Transfer reflecting Invest to Save movement on Workplaces Project off.	Budget virement is one off.
INFO 13#47	Combe Down Stone Mines Reserve Drawdown	Community Resources	Council Balances	Sustainable Development	Project Delivery	Sustainable Development			185,444	185,444	Drawdown from Combe Down Stone Mines unapplied revenue grant reserve	Budget virement is one off.
INFO 13#48	Essential Car User Allowance	Community Resources	Council Balances	245,870	Transport	Various	Various	Various	14,490	14,490	Drawdown from the Financial Planning Reserve to cover Essential Car User Compensation payments	Budget virement is one off.
					Early Years, Children & Youth	Various	Various	Various	106,640	106,640		
					Wellbeing	Various	Various	Various	23,940	23,940		
					Leader	Various	Various	Various	8,820	8,820		
					Neighbourhoods	Various	Various	Various	28,350	28,350		
					Sustainable Development	Various	Various	Various	3,780	3,780		
Community Resources	Various	Various	Various	18,900	18,900							
					Various	Homes & Planning	Various	40,950	40,950			
INFO 13#49	Financial Planning Reserve Drawdowns	Community Resources	Council Balances (Financial Planning Reserve)	159,667	Health, Commissioning & Planning	Early Years, Children & Youth	Health, Commissioning & Planning		13,000	13,000	Drawdown from Financial Planning Reserve	Budget virement is one off.
					Corporate Budgets incl. Capital, Audit & Bank Charges	Community Resources	Corporate Budgets incl. Capital, Audit & Bank Charges	Community Resources		146,667		
INFO 13#50	Youth Community Empowerment Drawdown	Community Resources	Council Balances	20,575	Learning & Inclusion	Early Years, Children & Youth			20,575	20,575	Drawdown from Community Enablement Fund	Budget virement is one off.
INFO 13#51	Tax Liability Reserve Drawdown	Community Resources	Council Balances	4,880	Corporate Budgets incl. Capital, Audit & Bank Charges	Community Resources			4,880	4,880	Drawdown of funding from service earmarked reserve	Budget virement is one off.
INFO 13#52	Transport Strategy Reserve Drawdown	Community Resources	Council Balances	66,987	Transportation Planning (incl. Public Transport)	Transport			66,987	66,987	Drawdown of funding from service earmarked reserve	Budget virement is one off.
INFO 13#53	Development & Major Projects Regional Issues Reserve Drawdowns	Community Resources	Council Balances	120,846	Regeneration, Skills & Employment	Sustainable Development			120,846	120,846	Drawdown of funding from service earmarked reserve	Budget virement is one off.

2013/2014 Revenue Virements for Information

REF NO	REASON/ EXPLANATION	CASHLIM		CASHLIM		TRANSFER TO CASHLIM	Income (£'s)	Expenditure (£'s)	CABINET MEMBER	DESCRIPTION	ONGOING EFFECTS
		TRANSFER FROM	Income (£'s)	TRANSFER TO	Expenditure (£'s)						
INFO 13#54	Revenue Budget Contingency Drawdowns	Community Resources	Council Balances (Revenue Budget Contingency)	195,070	Sustainable Development	Regeneration, Skills & Employment		117,220		Drawdown from Revenue Budget Contingency Reserve	Budget virement is one off.
					Neighbourhoods	Arts		41,250			
						Tourism & Destination Management		16,600			
						Sports & Active Leisure		20,000			
INFO 13#55	NEET Community Enablement Fund Reserve Drawdown	Community Resources	Council Balances	34,950	Sustainable Development	Regeneration, Skills & Employment		34,950		Drawdown from Community Enablement Fund	Budget virement is one off.
INFO 13#56	Bath Masterplan Development Reserve Drawdown	Community Resources	Council Balances	163,768	Sustainable Development	Regeneration, Skills & Employment		163,768		Drawdown from Development Reserve	Budget virement is one off.
INFO 13#57	Leisure Strategy Reserve Drawdown	Community Resources	Council Balances	84,477	Neighbourhoods	Sport & Active Leisure		84,477		Drawdown of funding from service earmarked reserve	Budget virement is one off.
INFO 13#58	Council Tax Freeze Grant Adjustment	Community Resources	Council Tax Freeze Grant	50,219	Community Resources	Corporate Budgets incl. Capital, Audit & Bank Charges	50,219			Budget Adjustment to reflect actual Council Tax Freeze Grant Allocation	Budget virement is one off.
INFO 13#59	Early Intervention Grant Cash Limit Correction	Early Years, Children & Youth	Children, Young People & Families	5,584,000	Early Years, Children & Youth	Health, Commissioning & Planning		5,584,000		Transfer to reflect correct cash limit allocation of grant income	Budget virement is on-going.
INFO 13#60	DSG & Schools Reserves Transfers	Early Years, Children & Youth	Schools Budget	4,358,251	Community Resources	Balances & Reserves		4,358,251		Net transfer to reserves to reflect automatic carry forward of year end DSG underspend and transfers from school balances	Budget virement is one off.
INFO 13#61	Small Business Rates Relief Grant	Community Resources	Corporate Budgets incl. Capital, Audit & Bank Charges	60,613	Community Resources	Council Balances		60,613		Transfer to Business Rates Reserve	Budget virement is one off.
INFO 13#62	Place Director Budget Realignment	Homes & Planning	Planning Services	53,494	Place Overheads	Place Overheads		53,494		Centralisation of overhead & management costs following Strategic Director's restructure of management within Place directorate.	Budget virement is on-going.
		Sustainable Development	Tourism & Destination Management	143,952	Place Overheads	Place Overheads		143,952			
		Transport	Transport Services	45,260	Place Overheads	Place Overheads		45,260			

2013/2014 Revenue Virements for Information

REF NO	REASON/ EXPLANATION	CASHLIM		CASHLIM		CABINET MEMBER	TRANSFER TO		TRANSFER TO		DESCRIPTION	ONGOING EFFECTS
		TRANSFER FROM	TRANSFER TO	Income (£'s)	Expenditure (£'s)		Income (£'s)	Expenditure (£'s)				
INFO 13#63	Centralisation of IT Budgets	Community Resources	Customer Services	129,000	129,000	Leader	Council's Retained ICT Budget		129,000		Additional consolidation of the Council's IT budgets as part of the MTSRP savings delivery.	Budget virement is on-going.
INFO 13#64	Finance Support Recharges	Community Resources	Finance	165,807	89,573	Community Resources	Property Services		89,573		To eliminate the Finance Support recharge SLA to services, following the recent Finance restructure.	Budget virement is on-going.
INFO 13#65	High Needs Commissioned Places	Early Years, Children & Youth	Children, Young People & Families	30,000	30,000	Early Years, Children & Youth	Health, Commissioning & Planning		30,000		Allocation of budget to match where high needs places have been commissioned.	Budget virement is one off.
INFO 13#66	Connecting Families Team	Early Years, Children & Youth	Children, Young People & Families	101,624	101,624	Early Years, Children & Youth	Health, Commissioning & Planning		101,624		To merge the responsibility of the old Think Family team to the new Connecting Families Team.	Budget virement is on-going.
INFO 13#67	Property Budget Realignment	Community Resources	Corporate Estate Including R&M Commercial Estate	1,218,627 1,109,521	2,328,148	Community Resources	Property Services		2,328,148		The removal of internal recharging to streamline accounting and improve transparency. Data regarding activities against the corporate and revenue estates are now captured and reported at source, rather than via additional accounting transactions	Budget virement is on-going.
INFO 13#68	Workplaces Budget Adjustment	Community Resources	Property Services Commercial Estate	57,537 178,000	235,537	Community Resources	Corporate Estate Including R&M		235,537		Year end adjustments to Property budgets to reflect Workplaces Programme adjustments.	Budget virement is one off.

OVERALL TOTALS

6,386,042 16,247,004
22,633,046

6,375,648 16,257,398
22,633,046

Portfolio Cash Limits 2013/14 - Revenue Budgets
Appendix 6(ii)

CABINET PORTFOLIO	Service	Feb'14 Revised Cash Limits	Technical Adjustments, below BMS limits or already agreed - shown for information	Total Virements for Approval	Outturn Cash Limits
		£'000	£'000	£'000	£'000
Leader	Policy & Partnerships	1,472	126		1,598
	Council's Retained ICT Budgets	4,663	130		4,793
	People Services	589			589
	Council Solicitor & Democratic Services	1,606	1		1,607
	Improvement & Performance	1,195	211		1,407
	PORTFOLIO SUB TOTAL	9,525	469		9,994
Community Resources	Finance	1,648	(130)		1,519
	Support Services Change Programme	(4)			(4)
	Customer Services	2,491	41		2,531
	Risk & Assurance Services	974			974
	Property Services	462	2,368		2,830
	Corporate Estate Including R&M	5,431	(676)		4,756
	Commercial Estate	(12,443)	(1,288)		(13,731)
	Traded Services	(84)	4		(80)
	Strategic Director - Resources	208			208
	Corporate items (Tourism Levy, Trading Opps, Community Use of Assets & Corporate Travel Plan)	(500)			(500)
	Hsg / Council Tax Benefits Subsidy	305			305
	Capital Financing / Interest	4,078			4,078
	Unfunded Pensions	1,709			1,709
	Corporate Budgets incl. Capital, Audit & Bank Charges	1,604	(255)		1,349
	New Homes Bonus Grant	(1,977)			(1,977)
	Magistrates	17			17
	Coroners	305			305
Environment Agency	205			205	
	PORTFOLIO SUB TOTAL	4,429	64		4,493
Wellbeing	Adult Services	60,832	(5,260)		55,572
	Adult Substance Misuse (Drug Action Team)	546			546
	PORTFOLIO SUB TOTAL	61,378	(5,260)		56,118
Early Years, Children & Youth	Children, Young People & Families	16,940	(5,657)		11,283
	Learning & Inclusion	17,257	53		17,310
	Health, Commissioning & Planning	(113,838)	5,748		(108,090)
	Schools Budget	107,283	(4,358)		102,924
	PORTFOLIO SUB TOTAL	27,642	(4,214)		23,427
Homes & Planning	Planning Services	2,187	(35)		2,152
	Building Control & Land Charges	334	6		340
	Housing	2,024	16		2,040
	PORTFOLIO SUB TOTAL	4,545	(13)		4,532
Sustainable Development	Arts	512	41		553
	Tourism & Destination Management	707	(51)		656
	Heritage including Archives	(4,054)	3		(4,052)
	Project Delivery	181	206		387
	Regeneration, Skills & Employment	1,021	438		1,459
	PORTFOLIO SUB TOTAL	(1,632)	637		(996)

Portfolio Cash Limits 2013/14 - Revenue Budgets
Appendix 6(ii)

CABINET PORTFOLIO	Service	Feb'14 Revised Cash Limits	Technical Adjustments, below BMS limits or already agreed - shown for information	Total Virements for Approval	Outturn Cash Limits
		£'000	£'000	£'000	£'000
Neighbourhoods	Service Delivery - Overheads	904	243		1,148
	Waste Services	11,021	(640)		10,380
	Public Protection	562	12		574
	Neighbourhood Services	5,133	17		5,150
	Libraries & Information	1,977			1,977
	Sports & Active Leisure	888	86		974
	Community Safety	120			120
	PORTFOLIO SUB TOTAL	20,605	(283)		20,323
Transport	Transport Design & Projects	881	1		882
	Transportation Planning (incl. Public Transport)	5,783	70		5,854
	Park & Ride	(682)			(682)
	Highways - Network Maintenance	7,471	8		7,479
	Transport Services	(140)	(43)		(184)
	Parking Services	(6,288)	1		(6,287)
	PORTFOLIO SUB TOTAL	7,025	36		7,062
	NET BUDGET	133,516	(8,563)		124,953

Sources of Funding

Council Tax	71,342			71,342
Revenue Support Grant*	31,106			31,106
Retained Business Rates	20,262			20,262
Collection Fund Deficit (-) or Surplus (+)	168			168
Council Tax Freeze Grant	740	50		790
Balances	9,898	(8,614)		1,285
Total	133,516	(8,563)		124,953

FINANCIAL YEAR 2013-2014	Actuals £'000's	Budget £'000's	Variance £'000's	Requested Re-Phasing			Overspend / (Underspend) Adjustment to Programme		
				+ Over £'000's	- Under £'000's	Total £'000's	+ Over £'000's	- Under £'000's	Total £'000's
Total Place	19,209	27,775	(8,566)	543	(8,882)	(8,339)	6	(234)	(228)
Total Children's Services	5,846	8,694	(2,848)	4	(2,831)	(2,827)	0	(21)	(21)
Total Adult Social Services & Housing	1,487	1,899	(412)	88	(476)	(388)	0	(24)	(24)
Total Resources & Support Services	18,030	22,127	(4,097)	203	(4,244)	(4,041)	0	(56)	(56)
Total	44,572	60,495	(15,923)	838	(16,433)	(15,595)	6	(335)	(329)
Capital Contingency	0	2,430	(2,430)	0	(2,430)	(2,430)	0	0	0
Grand Total	44,572	62,925	(18,353)	838	(18,863)	(18,025)	6	(335)	(329)

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FINANCIAL YEAR 2013-2014	Variance £'000's	Requested Re-Phasing			Overspend / (Underspend) Adjustment to Programme	Commentary
		+ Over £'000's	- Under £'000's	Total £'000's	Total £'000's	
Place						
Bath Transport Package	(1,968)		(1,968)	(1,968)	0	This is an ongoing scheme over several years with the 13/14 underspend being due to timing differences on several project elements; the budget requires rephasing.
Rossiter Road	139	139		139	0	Budget was largely rephased to 14/15 in February budget report however spend has happened earlier than anticipated. This requires reversal of the earlier rephasing
Transport Smart Card E-Purse	(1)		(1)	(1)	0	Request that current year underspend be carried forward as it is utilising external funding.
Local Sustainable Transport Fund	(231)		(231)	(231)	0	Grant funding slipped as agreed by DfT. The underspend is largely through delays caused by A431 landslip and road closure; request that the budget be rephased to 2014/15; this has been agreed by DfT, the grant providers
Greater Bristol Metro	(73)		(73)	(73)	0	Request that this underspend be rephased; this is a grant funded project.
Highway Structural Maintenance	(579)		(579)	(579)	0	Variance relates to 13 schemes that did not complete in 13/14. Main ones are Durlay Lane Overbridge £213k which was further delayed by the recent wet weather, and Sally In The Woods £127k due to continuing design delays and resource allocation. Request that this budget be rephased
Transport Improvement Programme	(1)		(1)	(1)	0	Rephase minor amount (grant funded)
Batheaston Footbridge	(52)		(52)	(52)	0	Final parts of construction and paths were delayed through severe weather during early 2014 (flooding at site). This is now due to be completed in early 2014/15. Request budget be rephased.
Cycle Schemes	(133)		(133)	(133)	0	Re-phasing of this budget requested due to delays in delivery of the schemes
2 Tunnels Northern Link	115	115		115	0	Funding to be reclaimed from Sustrans - rephase the overspend to be financed in 14/15
5 Arches	(23)		(23)	(23)	0	Request to rephase to cover any remediations; this is grant funded and if not used will be returned or reallocated
Greater Bristol Bus Network	3	3		3	0	Rephase this small overspend; this will be funded in 2014/15 from approved grant funded block budgets
2 Tunnels	60	60		60	0	Funding to be reclaimed from Sustrans - rephase the overspend to be financed in 14/15
7 Dials / CAF	12	12		12	0	The whole budget was slipped into 14/15 in the February 2014 budget report but initial costs charged within 2013/14. This is funded primarily by grant; rephase the overspend.
Total Planning & Transportation	(2,732)	329	(3,061)	(2,732)	0	
20mph Schemes	(156)		(156)	(156)	0	Re-phasing relates to delays in implementing schemes. These are in progress and due to be completed during 14/15.
Victoria Bridge	(629)		(629)	(629)	0	This is an ongoing scheme over several years with the 13/14 underspend being due to timing differences on several project elements; the budget requires rephasing. Scheme due to be completed in 14/15.
Better Bus Fund	(18)		(18)	(18)	0	RTI couldn't be completed due to A431 road closure (landslip). Will be completed in 14/15. Request that this budget be rephased
Waste Vehicle Replacement	(211)		(211)	(211)	0	Of the £211k, £136k is contractually committed at the year end, the remaining £75k is also requested to be rephased into 14/15 as this is a rolling programme.
Neighbourhood Services - Vehicles incl Tracking / Cleansing Equipment	(164)		(117)	(117)	(47)	This project has three strands. The full budgets for Tracking & Cleansing (£33k & £19k) are all required to be rephased into 14/15 as is £65k of the replacement vehicle strand due to timing of procurement. The remaining £47k is underspend.
Allotments	(11)		(11)	(11)	0	£11k to rephase into 14/15 - works still to be undertaken.
Pay & Display Machines / Parking Systems Permit Processing / Advertising	(44)		(25)	(25)	(19)	P&D machines - programme completed in full against £150k budget. The additional £25k budget relates to advertising in car parks which is to be rephased into 2014/15.
Haycombe Crematorium Chapel Refurbishment	(11)		(3)	(3)	(8)	This project is now complete other than £3k of remedial costs; this is to be rephased
River Safety	(37)		(37)	(37)	0	Project not completed; this will be finalised in 14/15 request rephasing of budget
Beechen Cliff Woodland & Other Open Spaces Improvements	(76)		(76)	(76)	0	Of the £76k, £54k is already committed at the year end, the remainder is to be rephased to 14/15 as this is a multi-year project.
Haycombe Cemetery	(1)			0	(1)	Project is now complete.
Neighbourhood Services - Play Equipment	(26)		(26)	(26)	0	Rephasing of £26k into 14/15 required as there are still minor works required to complete the project.
Contaminated Land	(6)			0	(6)	Scheme complete. Note - it was funded by an Environment Agency grant, conditions of which mean we are required to return any unspent grant.
Total Environmental Services	(1,390)	0	(1,309)	(1,309)	(81)	
Odd Down 3G Pitch and Changing Facilities	(89)		(90)	(90)	0	This is an ongoing scheme over multiple years largely grant funded, with the 13/14 underspend being due to timing differences on several project elements; the budget requires rephasing. Scheme due to be completed in 14/15.
Odd Down Cycle Track	(12)		(12)	(12)	0	This is an ongoing scheme over multiple years largely grant funded, with the 13/14 underspend being due to timing differences on several project elements; the budget requires rephasing. Scheme due to be completed in 14/15.
Beau Street Coin Hoard	(1)		(1)	(1)	0	Expenditure on fees was less than budgeted; request rephase the £1k to 14/15 to fund next phase of project
Visitor & Till Management System	(65)		(65)	(65)	0	Expenditure in 2013/14 was below budget due to delays in the implementation of the system, caused by back office staffing shortages and integration issues; this project will be completed in 14/15 - request rephasing

FINANCIAL YEAR 2013-2014	Variance	Requested Re-Phasing			Overspend / (Underspend) Adjustment to Programme	Commentary
		+ Over	- Under	Total	Total	
		£'000's	£'000's	£'000's	£'000's	
Roman Baths Stone Cleaning	(143)		(143)	(143)	0	Pump Room façade consolidation: the budget was underspent by £143k as a result of constraints placed upon the works that could be carried out. Request that the remaining budget be rephased into 2014/15 to finance façade consolidation to the remaining elevations as well as part of the cost of the remaining roof repairs
Assembly Rooms Dilapidations	(24)		(24)	(24)	0	The £24k underspend is requested to be rephased to allow further dilapidation works, as agreed with the National Trust, to be carried out.
Temple Precinct	(354)		(354)	(354)	0	This is a multi- year project, completed in April/May 2014. The underspend is required to fund the completion of the project in early 2014/15.
Roman Baths Infrastructure:Roof repairs	(47)		(47)	(47)	0	The budget was underspent by £47k. During the course of the roof works it became apparent that works were urgently required to repair windows within the roof area of the Pump Room dome that had not been included in the original specification. The cost of these repairs is likely to total c. £60k. Request for the budget to be rephased to part finance these repairs in 2014/15, with the balance of the cost financed by rephasing and reallocation of the budget for stone cleaning.
Bath Spring Water Strategy (Hetling Spring Borehole)	(63)			0	(63)	The Hetling Spring works were carried out in 12/13 with headpipe work in 13/14; this work is now complete and the variance is underspend.
Total Tourism Leisure & Culture	(798)	0	(736)	(736)	(63)	
BWR	214	214		214	0	This is a multi-year project; the overspend mainly represents acceleration of spend on infrastructure works - timing issue only; rephase the overspend
Public Realm	(314)		(314)	(314)	0	These projects are nearing completion; the 13/14 underspend relates to timing of payments for final accounts and defects which fall into 14/15; request that the budget be rephased and any remaining underspend be used on the emerging Sawclose public realm project
NRR Infrastructure	(60)		(60)	(60)	0	There was a delay to this multi-year project due to planning; the underspend is due to timing and is requested to be rephased into 14/15
London Road Regeneration	(385)		(385)	(385)	0	2 separate project elements: on one element properties require listed planning or planning consent therefore delaying spend; on the other objections from cycling groups has resulted in the redesign of the original plans and has delayed capital spend on the project. The £385k therefore requires re phasing into 14/15.
Radstock Regeneration	(173)		(173)	(173)	0	Grant still requiring distribution due to delay in individual project elements. Budget requested to be rephased to 14/15
Strategic Flooding Solution / BEA Flood Mitigation	(72)		(72)	(72)	0	This is a multi year project with the in-year spend being £72k less than budgeted due to timing of spend. This requires rephasing into 14/15.
BWR - Relocation of Gas Holders	(1,040)		(1,040)	(1,040)	0	This relates to grant payments to Crest; the underspend is due to timing and is requested to be rephased.
BWR - Replacement of Destructor Bridge	(1,632)		(1,632)	(1,632)	0	This project was held up due to canals and rivers trust objections which have now been resolved; due to go ahead in 2014/15 and the budget requested to be rephased.
River Corridor Fund	(100)		(100)	(100)	0	£73k of this is to be spent on refurbishment of the Old Boathouse at Pultney Weir; there has been a delay to establishing the lease to the River Regeneration Trust, which will be resolved in early 2014/15. The remainder is to match fund the Environment Agency for works on the Radial Gate and links with the 2014/15 River Corridor Fund programme. It is requested that this whole budget be rephased into 2014/15.
Southgate	(90)			0	(90)	This project is now completed. The remaining variance is underspend.
Guildhall Co-Working Hub	6			0	6	Project completed with minor overspend
BWR & Regeneration	(3,646)	214	(3,776)	(3,562)	(84)	
Total Place	(8,566)	543	(8,882)	(8,339)	(228)	

FINANCIAL YEAR 2013-2014	Variance £'000's	Requested Re-Phasing			Overspend / (Underspend) Adjustment to Programme	Commentary
		+ Over £'000's	- Under £'000's	Total £'000's	Total £'000's	
People & Communities						
Spend at School Level:						
Devolved Capital	(1,255)		(1,255)	(1,255)	0	Devolved budgets are held by schools. Rephasing required to 2014-15.
Seed Challenge	3	3		3	0	
School Travel Plans	(6)		(6)	(6)	0	
Private Capital	(59)		(59)	(59)	0	
Specialist Schools	0			0	0	
Local Authority Contribution	(3)		(3)	(3)	0	
Early Years Projects :						
Early Years Section 106 Twerton	(1)		(1)	(1)	0	Works at Twerton Infant School to be completed in 2014-15
Early Years - 2 Year Olds Funding	(1)		(1)	(1)	0	
School Projects :						
Ralph Allen ALC	(14)		(14)	(14)	0	Project to be finalised
St Gregory's Post 16 Block	(53)		(53)	(53)	0	Project to be finalised
Writhlington BSF	(31)		(31)	(31)	0	Project complete, underspend to be rephased and reallocated
Writhlington ALC	(21)		(21)	(21)	0	Project complete, underspend to be rephased and reallocated
Weston All Saints 2012/2013 Basic Need	(167)		(167)	(167)	0	Project rephased following redesign, further rephasing is now required
Castle Primary 2012/2013 Basic Need	(55)		(55)	(55)	0	Rephasing required as expenditure profile has changed
Paulton Infant 2012/2013 Basic Need	(235)		(235)	(235)	0	There have been planning delays but the contract for this scheme has now been awarded and completion is scheduled for Sept 14
Farrington Gurney 2012/2013 Basic Need	(7)		(7)	(7)	0	Project complete, underspend to be rephased for minor items
Paulton Junior 2012/2013 Basic Need	(13)		(13)	(13)	0	Rephasing required as expenditure profile has changed
Chew Magna Primary	(181)		(181)	(181)	0	Budget of £208k approved by Cabinet in April 2013. Further budget will be required in 2014-15 and will be funded from rephased underspends on other schemes
Bathampton Primary	1	1		1	0	Minor overspend to be rephased and funded from underspends on other projects
St Michael's Primary - BESD	(67)		(67)	(67)	0	Project to be finalised
St Saviour's Junior - Basic Need	(270)		(270)	(270)	0	Project rephased following redesign, further rephasing is now required
Moorlands Junior	(59)		(59)	(59)	0	Awaiting a decision from the school on IT procurement, budget to be rephased
Margaret Coates Centre	(2)		(2)	(2)	0	Project complete, underspend to be rephased and reallocated
Wellsway Sports Hall	(77)		(77)	(77)	0	Project to be finalised
Oldfield Co-Ed Improvements	(26)		(26)	(26)	0	Project to be finalised
Other School Schemes / Projects:						
Schools Capital Maintenance Programme	(88)		(88)	(88)	0	Changes to the Repairs & Maintenance Programme have resulted in a revised expenditure profile.
Children's Services Capital Schemes	(3)		(3)	(3)	0	To be rephased
Children's Services Capital Schemes Managed by Property Services	(127)		(127)	(127)	0	Various Schemes including, Oldfield Park Junior CPO Playing Field £114k - to be rephased and reallocated as required
Aiming High for Disabled Children	(7)		(7)	(7)	0	Building works have been completed and the equipment is currently being procured.
Youth Projects	(24)		(3)	(3)	(21)	Underspend re Biomass boiler transferred to Saltford Primary
Total Children's Services	(2,848)	4	(2,831)	(2,827)	(21)	
Adult Social Services & Housing						
Supported Housing Development	(4)		(4)	(4)	0	Now complete. Underspend on scheme to be rephased to 14-15
Disabled Facilities Grant	(23)			0	(23)	Minor underspend due to larger than anticipated contributions from Curo
Carefirst Module for Personal Budgets	(1)			0	(1)	Minor project underspend
Gypsy & Traveller Sites	(15)		(15)	(15)	0	Adjustment required as too much budget rephased to 13-14 as in-year rephasing
Housing Association Grant	(19)		(19)	(19)	0	A project to re-house a large family is now complete, with a cost saving of £19k. The balance of the budget is to be rephased to 14-15 pending the development of a project plan.
Occupational Therapy Equipment	88	88		88	0	Additional OT equipment charged to capital in 2013-14, overspend to be rephased and funded from PSS Grant in 2014-15
Empty Property CPO - Affordable Housing	(438)		(438)	(438)	0	CPOs on two empty properties currently being progressed. Budget requires rephasing to 2014-15
Adult Social Services & Housing	(412)	88	(476)	(388)	(24)	
Total People & Communities	(3,260)	92	(3,307)	(3,215)	(45)	

FINANCIAL YEAR 2013-2014	Variance	Requested Re-Phasing			Overspend / (Underspend) Adjustment to Programme	Commentary
		+ Over	- Under	Total	Total	
		£'000's	£'000's	£'000's	£'000's	
Resources & Support Services						
Workplaces Programme Delivery	199	199		199	0	Workplaces Programme: Works to the Keynsham new build is progressing one week behind the target completion programme due to some initial delays with the timber frame. The overall completion date of the development remains on programme.
Keynsham Regeneration & New Build	(2,516)		(2,516)	(2,516)	0	
Lewis House (Inc Comms Hub & OSS)	(14)		(14)	(14)	0	
The Hollies	(6)		(6)	(6)	0	Slippage of the window installation to the spring/summer.
Corporate Estate Planned Maintenance	(330)		(330)	(330)	0	Budget to be re-phased into 2014/15, approved detailed project plan for this is in place.
Disposals Programme (Minor)	(45)		(45)	(45)	0	Rephasing needed for works not yet undertaken.
Key Disposal Programme	(42)		(42)	(42)	0	Rephasing needed for works not yet undertaken. In 2014/15 this budget will need to be assigned to the individual key schemes.
Commercial Estate Investment Fund	(50)			0	(50)	Budget not required as no 'invest to improve income generation' schemes were identified in 2013/14. Schemes are approved on an individual business case basis.
Victoria Hall	(64)		(64)	(64)	0	Phases 1 and 2 are now complete. An application has been made to the Arts Council for a grant for some specific items that allow the community to use the building to a greater extent. Residual budget to be re-phased into 2014/15 to cover any further additional works and match funding.
Saw Close Development	(16)		(16)	(16)	0	The Heads of Terms are almost ready to be signed as the legal negotiations are well progressed. The developers are expected to apply for planning soon and have made good progress on their pre lets. The compensation due will fall into 2014/15 hence the request for rephasing.
South Road Car Park MSN	(34)		(34)	(34)	0	£34k to slip into 14/15 - works still to be undertaken.
Grand Parade & Undercroft	(199)		(199)	(199)	0	Rephasing relates to on-going project work to market the developments and sign pre-lets. Overall Programme is on time and on budget.
Bluecoat House	(6)			0	(6)	This project has come to its outturn and all residual budget no longer required.
DDA Works	(94)		(94)	(94)	0	All works that slipped from 2012/13 except for works in Royal Victoria Park, have now been fully completed and final accounts have been received. This will slip into 2014/15 and the designing and scoping of works has already commenced.
Paulton Library Relocation	(5)		(5)	(5)	0	The defects walk around has confirmed that there are still minor issues to be resolved before the retention can be released, hence budget is to be rephased into 2014/15.
Total Property Services	(3,222)	199	(3,365)	(3,166)	(56)	
Desktop As a Service - VDI Technology	(570)		(570)	(570)	0	This rephasing is due to the deployment starting later than scheduled, caused by technical build and testing work taking longer than expected and due to the very complex nature of this new IT technology platform. The deployment is however now underway, starting in Riverside and all remaining spend will take place in 14/15.
Windows 7 Upgrade	(180)		(180)	(180)	0	This rephasing is due to this project being dependent upon the larger Virtual Desktop (VDI) project that started later than planned. The upgrade of the Windows 7 operating system across the Council (this project) relies, technically, on the delivery of VDI as a platform. VDI is now into full deployment, for completion in 14/15.
Customer Services System	(106)		(106)	(106)	0	There were delays to the Go Live date of Phase 1, which meant that Phase 2 of the project was also subject to slippage. Rephasing is required for planned development work not yet done.
LAA Performance Reward Grant	(23)		(23)	(23)	0	Further rephasing needed for Batheaston Village Hall work will start April 2014. Somer Skate Park delayed caused by planning issues, work expected to start early 2014 and The Hub Odd Down Playing Fields.
IT Public Service Network	2	2		2	0	Demand has been greater than planned and a further order may be required. This may push the project over budget which is proposed would be funded from I.T. reserve. This will be reviewed in the first quarter of 2014/15.
IT Asset Refresh	2	2		2	0	Procurement has now progressed with tenders due back in April. This will be funded from 2014/15 budget.
Total Support Services	(875)	4	(879)	(875)	0	
Total Resources & Support Services	(4,097)	203	(4,244)	(4,041)	(56)	
Total Excluding Contingency	(15,923)	838	(16,433)	(15,595)	(329)	
Capital Contingency	(2,430)		(2,430)	(2,430)	0	Unallocated contingency to be re-phased to allow an adequate resource for unforeseen capital commitments in future years.
Grand Total	(18,353)	838	(18,863)	(18,025)	(329)	

Capital Programme by Portfolio - 2013/2014
Revised Capital Cash Limits by Portfolio

CAPITAL SCHEME	2013/2014		
	Revised Budget After 12 February 2014 Cabinet	Approvals to Outturn	Final Budget at Outturn
	£000	£000	£000
Transport			
Local Sustainable Transport Fund	666		666
BTP - Pre Construction Costs	77		77
BTP Property	116		116
BTP Main Scheme	5,150	(10)	5,140
Highways Structural Maintenance	4,772	120	4,891
Local Transport Improvement Schemes	1,165		1,165
Pay & Display Machines / Parking Systems / Permit Processing / Advertising	150	25	175
Smart Card E Purse for WofE	6		6
Victoria Bridge	930		930
5 Arches	26		26
Rossiter Road	140		140
20mph Schemes	349		349
Better Bus Fund	216		216
Greater Bristol Metro	67	57	124
Batheaston Footbridge	654		654
Cycle Routes	301		301
Two Tunnels	240		240
	15,024	192	15,216
Neighbourhoods			
Vehicle Replacements - Waste	485		485
Vehicle Replacement - Neighbourhoods	258		258
Haycombe Crematorium Chapel Refurbishment	54		54
Haycombe Cemetery	19		19
Allotments	17		17
Paulton Library Relocation	29		29
Odd Down Playing Field - Cycle Track	22		22
Odd Down Playing Field - Pitch and Changing Rooms	218		218
River Avon Safety Fencing	109		109
Beechen Cliff Woodlands	4	136	140
Wansdyke Sports Centre Refurbishment	80		80
Play Equipment Programme	225		225
Contaminated Land	0	39	39
	1,521	175	1,696
Sustainable Development			
Roman Baths Site Development - Catering / Infrastructure / Stone Cleaning	199		199

Capital Programme by Portfolio - 2013/2014
Revised Capital Cash Limits by Portfolio

CAPITAL SCHEME	2013/2014		
	Revised Budget After 12 February 2014 Cabinet	Approvals to Outturn	Final Budget at Outturn
	£000	£000	£000
Beau Street Coin Hoard	0	70	70
Visitor Management System	100		100
Assembly Rooms Dilapidations	120		120
Temple Precinct	886		886
Pump Room Gas Supply (Roof)	230		230
Hetling Spring Borehole	139		139
Combe Down Stone Mines (HCA)*	72		72
BWR - Council Project Team	444		444
BWR - Affordable Housing	1,343		1,343
BWR - Infrastructure	950		950
BWR - Windsor Gas Tanks	1,690		1,690
BWR - Destructor Bridge	1,646		1,646
NRR Infrastructure	277	65	342
Creative Hub	245		245
BDUK Broadband	0		0
London Road Regeneration - Public Realm Implementation	424		424
London Road Regeneration - Public Realm Grant Scheme	110		110
Radstock Capital Schemes	340		340
Bath Enterprise Area - Flood Mitigation	350		350
River Corridor Fund	100		100
	9,665	135	9,800
Early Years, Children & Youth			
Schools Capital Maintenance Programme	1,205		1,205
Schools Capital Maintenance Programme	0		0
Carbon Reduction Project			
Ralph Allen Applied Learning Centre	1,092		1,092
Wellsway Sports Hall (inc 6 court)	79		79
Devolved Capital 2013/2014	1,741		1,741
Seed Challenge	1		1
School Travel Plans	6		6
Private Capital	180		180
Specialist Schools	80		80
Early Years / Extended Services / Twerton S106	93		93
Writhlington BSF	196		196
Writhlington ALC	47		47
Children's Services Capital Schemes	5		5
Children's Services Capital Schemes Managed by Property	261		261
Aiming High for Disabled Children	53		53
BN - Oldfield Park Infants Expansion	4		4
Oldfield Co Ed Capital Improvements	26		26
Peasedown St John - ALC	35		35
St Gregory's / St Mark's 6th Form	1,304		1,304
Culverhay (Bath Community College) Co-Ed Capital Improvements	14		14

Capital Programme by Portfolio - 2013/2014

Revised Capital Cash Limits by Portfolio

CAPITAL SCHEME	2013/2014		
	Revised Budget After 12 February 2014 Cabinet	Approvals to Outturn	Final Budget at Outturn
	£000	£000	£000
Radstock Nursery Provision / Trinity Primary	171		171
Schools Carbon Reduction Scheme - Lighting	2		2
Margaret Coates Centre Expansion	30		30
Youth Projects	9		9
BN 2012/2013 Schemes			
Weston All Saints Primary / Castle Primary / Paulton Infant / Farrington Gurney Primary / St Saviour's Junior / Paulton Junior	1,614		1,614
Chew Magna Primary	181		181
Bathford Primary Land Purchase	30		30
St Michael's Primary BESD Unit	131		131
Moorlands Junior	70		70
Two Year Old provision	34		34
	8,693	0	8,693
Community Resources			
Corporate Estate Planned Maintenance	704		704
Disposals Programme - Minor	285		285
Key Disposal Programme	122		122
DDA Works	153		153
Commercial Estate Investment Fund	50		50
Saw Close Development	48		48
Bluecoat House	7		7
South Road Car Park MSN	135		135
Victoria Hall	660		660
Grand Parade & Undercroft	439		439
Lewis House (inc Comms Hub & OSS)	9	21	30
The Hollies	10	0	10
Workplaces Programme Delivery	448	(20)	428
Keynsham Regeneration & New Build	16,855	0	16,855
Public Realm - Wayfinding	169		169
Public Realm - High Street	507	10	517
Public Realm - Northumberland Place	130		130
Public Realm - Pattern Book	160		160
Public Realm - Street Furniture	37		37
Public Realm - Team Costs	38		38
Southgate - Council	115		115
Contingency	2,805	(375)	2,430
	23,884	(364)	23,520
Leader			
Policy & Partnerships	89		89
Customer Services System	499		499

Capital Programme by Portfolio - 2013/2014
Revised Capital Cash Limits by Portfolio

	2013/2014		
	Revised Budget After 12 February 2014 Cabinet	Approvals to Outturn	Final Budget at Outturn
CAPITAL SCHEME	£000	£000	£000
Agresso System	6		6
Desk Top Service - VDI Technology	936		936
Windows 7 Upgrade	400		400
IT Public Service Network	138		138
IT Asset Refresh	33		33
	2,100	0	2,100
Homes and Planning			
Housing Association Grant	144		144
Supported Housing Development	77		77
Gypsy and Traveller's Site	80		80
Empty Properties CPO - Affordable Housing	440		440
	741	0	741
Wellbeing			
Disabled Facilities Grant	1,042		1,042
Adult PSS Capital Grant	0		0
Occupational Therapy Equipment	100		100
Carefirst Module for Personal Budgets	16		16
	1,158	0	1,158
GRAND TOTAL	62,787	138	62,925
Sources of Funding (£'000)			
Government Supported Borrowing	0	0	0
EU/Government Grant	13,143	193	13,336
Capital Receipts (inc RTB)	9,732	0	9,732
Revenue	692	50	742
Service Supported Borrowing / Unsupported Borrowing / Corporate Supported Borrowing (Headroom) (inc Inter Yr Adjustments)	37,299	(238)	37,061
s106 Contribution	885	130	1,015
Other 3rd Party	1,036	2	1,038
Total	62,787	138	62,925

Capital Programme by Portfolio - 2014/2015
Revised Capital Cash Limits by Portfolio

CAPITAL SCHEME	2014/2015		
	February 2014 Council Approved Budgets	Additions to Programme to July 2014 Cabinet	Budget at July 2014 Cabinet
	£000	£000	£000
Transport			
Local Sustainable Transport Fund	567		567
BTP Property	87		87
BTP Main Scheme	10,542		10,542
Highways Structural Maintenance		3,941	3,941
Local Transport Improvement Schemes	1,534	5	1,539
City Cycle Ambition	1,216		1,216
Smart Card E Purse for WofE	255		255
Victoria Bridge	1,398		1,398
Rossiter Road	1,417		1,417
20mph Schemes	104		104
Batheaston Footbridge	40		40
Cycle Routes		85	85
Highways Maintenance - Vehicles	325		325
Highway Surfacing		1,000	1,000
Highway Structures		1,000	1,000
Footway Improvements in Highways		200	200
Flood Protection in Chew Magna		200	200
	17,485	6,431	23,916
Neighbourhoods			
Vehicle Replacement - Neighbourhoods	578		578
Allotments	93		93
Odd Down Playing Field - Pitch and Changing Rooms	1,472	880	2,352
Beechen Cliff Woodlands	174		174
Play Equipment Programme		100	100
Neighbourhoods - Bin and Bench Replacement		250	250
Royal Victoria Park Skate Park		50	50
Royal Victoria Park Open Space Improvement		100	100
Queen Square Improvements		100	100
East of Bath Skate Park		40	40
Improvements at the Sandpits		20	20
Litter Bins		325	325
Play Equipment		25	25
Great Dell Walkway		100	100
	2,317	1,990	4,307

Capital Programme by Portfolio - 2014/2015
Revised Capital Cash Limits by Portfolio

CAPITAL SCHEME	2014/2015		
	February 2014 Council Approved Budgets	Additions to Programme to July 2014 Cabinet	Budget at July 2014 Cabinet
	£000	£000	£000
Sustainable Development			
Roman Baths Site Development - Catering / Infrastructure / Stone Cleaning	100		100
Beau Street Coin Hoard	90	113	203
Visitor Management System	100		100
Temple Precinct	100		100
BWR - Council Project Team	342		342
BWR - Affordable Housing	1,037		1,037
BWR - Infrastructure	3,184		3,184
BWR - Windsor Gas Tanks	2,410		2,410
BWR - Destructor Bridge	154		154
NRR Infrastructure	2,103		2,103
London Road Regeneration - Public Realm Implementation	449		449
Bath Enterprise Area - Flood Mitigation	4,750		4,750
River Corridor Fund		340	340
	14,819	453	15,272
Early Years, Children & Youth			
Schools Capital Maintenance Programme	1,000	500	1,500
Devolved Capital 2014/2015	355		355
Aiming High for Disabled Children	72		72
St Gregory's / St Mark's 6th Form	72		72
BN 2012/2013 Schemes			
Weston All Saints Primary / Castle Primary / Paulton Infant / Farrington Gurney Primary / St Saviour's Junior / Paulton Junior	3,893	123	4,016
Two Year Old Provision	203		203
School Energy Invest to Save Fund	375		375
Universal Infant Free School Meals		353	353
Basic Needs Feasibility / Option Appraisal		150	150
Salford Primary - Basic Need		400	400
	5,970	1,527	7,497
Community Resources			
Corporate Estate Planned Maintenance	1,036		1,036
Disposals Programme - Minor	53		53
Disposals - Englishcombe Lane / Cattlemarket & Cornmarket / Roseberry Place / 1-3 James Street West / 7-9 Lower Borough Walls	270		270
Key Disposal Programme	128		128
Equality Act Works	552		552
Commercial Estate Investment Fund	350		350
Saw Close Development	210		210
South Road Car Park MSN	20		20
Grand Parade & Undercroft	4,826		4,826
Lewis House (inc Comms Hub & OSS)	237		237
The Hollies	45		45
Workplaces Programme Delivery	3,220		3,220

Capital Programme by Portfolio - 2014/2015
Revised Capital Cash Limits by Portfolio

CAPITAL SCHEME	2014/2015		
	February 2014 Council Approved Budgets	Additions to Programme to July 2014 Cabinet	Budget at July 2014 Cabinet
	£000	£000	£000
Keynsham Regeneration & New Build	12,616	80	12,696
Public Realm - High Street	80		80
Contingency (*see Note below)		(650)	(650)
Digital B&NES		350	350
Midsomer Norton Business Centre		125	125
	23,643	(95)	23,548
Leader			
Policy & Partnerships	149		149
Customer Services System	462		462
Desk Top Service - VDI Technology	222		222
IT Asset Refresh	422		422
	1,255	0	1,255
Homes and Planning			
Affordable Housing		1,015	1,015
	0	1,015	1,015
Wellbeing			
Disabled Facilities Grant	1,200		1,200
Adult PSS Capital Grant	385		385
	1,585	0	1,585
GRAND TOTAL	67,074	11,321	78,395
* Capital Contingency shown prior to re-phasing of £2.430m from 2013/14			
Sources of Funding (£'000)			
Government Supported Borrowing			0
EU/Government Grant	15,487	4,958	20,445
Capital Receipts (inc RTB)	14,454	0	14,454
Revenue	2,799	5	2,804
Service Supported Borrowing / Unsupported Borrowing / Corporate Supported Borrowing (Headroom) (inc Inter Yr Adjustments)	31,526	5,540	37,066
s106 Contribution	2,270	288	2,558
Other 3rd Party	538	530	1,068
Total	67,074	11,321	78,395

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Capital Virements - Additions & Reductions 2013/2014

Appendix 10 (i)

REF NO	REASON / EXPLANATION	TRANSFER / FUNDING FROM	Income (£'s)	Expenditure (£'s)	TRANSFER TO	Income (£'s)	Expenditure (£'s)	Notes
CAP13#51 - 2013	Two Tunnels	3rd Party Contribution	159,580		Place - Transport		159,580	Approved by Technical Adjustment November 2013
CAP13#52 - 2013	IT Public Service Network	3rd Party Contribution	138,000		Resources - Support Services		138,000	Approved by Technical Adjustment November 2013
CAP13#53 - 2013	IT Asset Refresh	Service Supported Borrowing	172,000		Resources - Support Services		172,000	Approved by Technical Adjustment November 2013
CAP13#54 - 2013	Two Tunnels Element 3	Government Grant	80,000		Place - Transport		80,000	Approved by Cabinet July 2013
CAP13#55 - 2013	Two Year Old Provision	Government Grant / 3rd Party Contribution - S106	34,316		People & Communities - Children's Services		34,316	Approved by Cabinet November 2013
CAP13#56 - 2013	Empty Properties CPO	Capital receipt / Corporate Supported Borrowing	440,350		People & Communities - Adult's Services		440,350	Approved by Cabinet November 2013
CAP13#57 - 2013	Play Equipment Programme	Service Supported Borrowing	225,000		Place - Neighbourhoods		225,000	Approved by Leader and Cabinet Member for Neighbourhoods
CAP13#58 - 2013	Gypsy & Travellers Site	Corporate Supported Borrowing (Headroom)	30,000		People & Communities - Adult Services		30,000	Approved by Technical Adjustment January 2014
N/A - 2013	Place	2013/2014 In Year Rephasing to 2014/2015 - Various Funding Sources		13,228,000	Place (excluding Tourism, Leisure and Culture)	13,228,000		Approved at February 2014 Cabinet (as part of 2014/2015 Budget Report)
	People & Communities			2,280,000	People & Communities - Children's Services	2,280,000		
	Resources & Support Services			9,669,000	Resources & Support Services	9,669,000		
CAP13#59 - 2013	Capital Contingency - Realignment	Capital Contingency		375,000	Capital Contingency	375,000		Approved by Technical Adjustment February 2014
CAP13#60 - 2013	Manvers Street / North Parade	3rd Party Contribution - S106	130,000		Place - Highways		130,000	Approved by Technical Adjustment February 2014
CAP13#62 - 2013	Metro West (Greater Bristol Metro)	Government Grant	57,000		Place - Transport		57,000	Approved by Technical Adjustment March 2014

Capital Virements - Additions & Reductions 2013/2014

Appendix 10 (i)

REF NO	REASON / EXPLANATION	TRANSFER / FUNDING FROM	Income (£'s)	Expenditure (£'s)	TRANSFER TO	Income (£'s)	Expenditure (£'s)	Notes
CAP13#63 - 2013	Beechen Cliff Woodland	Corporate Supported Borrowing (Headroom)	136,000		Place - Neighbourhoods		136,000	Approved by Technical Adjustment March 2014
CAP13#64 - 2013	Beau Street Coin Hoard	Revenue / Grant	70,000		Place - Heritage		70,000	Approved by Technical Adjustment March 2014
CAP13#65 - 2013	Advertising in Car Parks	Revenue	25,000		Place - Parking Services		25,000	Approved by Technical Adjustment Outturn 2014
CAP13#66 - 2013	Contaminated Land - Newbridge Hill	Grant	38,617		Place - Neighbourhoods		38,617	Approved by Technical Adjustment Outturn 2014
CAP13#67 - 2013	Landslip - Kelston Road	Grant	52,467		Place - Highways		52,467	Approved by Technical Adjustment Outturn 2014
CAP13#68 - 2013	Landslip - Midford Road	3rd Party Contribution	2,367		Place - Highways		2,367	Approved by Technical Adjustment Outturn 2014
OVERALL TOTALS			29,683,630	26,331,006		26,331,006	29,683,630	
				3,352,624			-3,352,624	

Capital Virements - Additions & Reductions 2014/2015

Appendix 10 (ii)

REF NO	REASON / EXPLANATION	TRANSFER / FUNDING FROM	Income (£'s)	Expenditure (£'s)	TRANSFER TO	Income (£'s)	Expenditure (£'s)	Notes
CAP14#01 - 2014	Keynsham Regeneration	3rd Party Contribution - S106	80,000		Resources		80,000	Approved by Technical Adjustment April 2014
CAP14#02 - 2014	School Kitchen Programme	Government Grant	353,269		People & Communities - Children's Services		353,269	Approved by Cabinet April 2014
CAP14#03 - 2014	Basic Needs Feasibility / Option Appraisal	Government Grant	150,000		People & Communities - Children's Services		150,000	Approved by Cabinet April 2014
CAP14#04 - 2014	Saltford Primary Accommodation Expansion	Government Grant	400,000		People & Communities - Children's Services		400,000	Approved by Cabinet April 2014
CAP14#05 - 2014	Schools Capital Planned Maintenance	Government Grant	500,000		People & Communities - Children's Services		500,000	Approved by Cabinet April 2014
CAP14#06 - 2014	Highways Maintenance Programme	Government Grant	3,435,000		Place - Highways		3,435,000	Approved by Cabinet May 2014
CAP14#06 - 2014	Highways Maintenance Programme - Additional	Government Grant	353,000		Place - Highways		353,000	Approved by Cabinet May 2014
CAP14#06 - 2014	Highway Surfacing	Corporate Supported Borrowing	1,000,000		Place - Highways		1,000,000	Approved by Cabinet May 2014
CAP14#06 - 2014	Highway Structures	Corporate Supported Borrowing	1,000,000		Place - Highways		1,000,000	Approved by Cabinet May 2014
CAP14#06 - 2014	Footway Improvements in Highways	Corporate Supported Borrowing	200,000		Place - Highways		200,000	Approved by Cabinet May 2014
CAP14#06 - 2014	Flood Protection in Chew Magna	Corporate Supported Borrowing	200,000		Place - Highways		200,000	Approved by Cabinet May 2014
CAP14#07 - 2014	Resurfacing Programme - Emergency & Severe Weather Grant	Government Grant	153,369		Place - Highways		153,369	Approved by Technical Adjustment May 2014
CAP14#08 - 2014	Weston All Saints Primary	3rd Party Contribution - S106	123,369		People & Communities - Children's Services		123,369	Approved by Technical Adjustment May 2014
CAP14#09 - 2014	Bin and Bench Replacement	Service Supported Borrowing	100,000		Place - Neighbourhoods		100,000	Approved by Cabinet May 2014

Capital Virements - Additions & Reductions 2014/2015

Appendix 10 (ii)

REF NO	REASON / EXPLANATION	TRANSFER / FUNDING FROM	Income (£'s)	Expenditure (£'s)	TRANSFER TO	Income (£'s)	Expenditure (£'s)	Notes
CAP14#10 - 2014	Royal Victoria Park Skate Park	Corporate Supported Borrowing	250,000		Place - Neighbourhoods		250,000	Approved by Cabinet May 2014
CAP14#11 - 2014	Royal Victoria Park Open Space Improvement	Corporate Supported Borrowing	50,000		Place - Neighbourhoods		50,000	Approved by Cabinet May 2014
CAP14#12 - 2014	Queen Square Improvements	Corporate Supported Borrowing	100,000		Place - Neighbourhoods		100,000	Approved by Cabinet May 2014
CAP14#13 - 2014	East of Bath Skate Park	Corporate Supported Borrowing	100,000		Place - Neighbourhoods		100,000	Approved by Cabinet May 2014
CAP14#14 - 2014	Improvements at the Sandpits	Corporate Supported Borrowing	40,000		Place - Neighbourhoods		40,000	Approved by Cabinet May 2014
CAP14#15 - 2014	Litter Bins	Corporate Supported Borrowing	20,000		Place - Neighbourhoods		20,000	Approved by Cabinet May 2014
CAP14#16 - 2014	Play Equipment	Service Supported Borrowing / Corporate Supported Borrowing	325,000		Place - Neighbourhoods		325,000	Approved by Cabinet May 2014
CAP14#17 - 2014	Great Dell Walkway	Corporate Supported Borrowing	25,000		Place - Neighbourhoods		25,000	Approved by Cabinet May 2014
CAP14#18 - 2014	Public WC Conversions	Corporate Supported Borrowing	100,000		Place - Neighbourhoods		100,000	Approved by Cabinet May 2014
CAP14#19 - 2014	Beau Street Coin Hoard	Grant	203,000		Place - Heritage		203,000	Approved by Cabinet May 2014
CAP14#20 - 2014	Traffic Island Alterations - Midsomer Norton	Revenue	5,000		Place - Highways		5,000	Approved by Technical Adjustment June 2014
CAP14#21 - 2014	Cycling Schemes - Silver Street	3rd Party Contribution - S106	75,000		Place - Highways		75,000	Approved by Technical Adjustment June 2014
CAP14#22 - 2014	Cycling Schemes - Lime Grove	3rd Party Contribution - S106	10,000		Place - Highways		10,000	Approved by Technical Adjustment June 2014
CAP14#23 - 2014	Odd Down Playing Fields - 3G Pitch	3rd Party Contribution	80,000		Place - Leisure		80,000	Approved by Technical Adjustment June 2014
CAP14#24 - 2014	Odd Down Playing Fields - Changing Rooms	3rd Party Contribution	450,000		Place - Leisure		450,000	Approved by Technical Adjustment June 2014

Capital Virements - Additions & Reductions 2014/2015

Appendix 10 (ii)

REF NO	REASON / EXPLANATION	TRANSFER / FUNDING FROM	Income (£'s)	Expenditure (£'s)	TRANSFER TO	Income (£'s)	Expenditure (£'s)	Notes
CAP14#25 - 2014	Odd Down Playing Fields - Changing Rooms	Capital Contingency	350,000		Place - Leisure		350,000	Approved by Technical Adjustment June 2014
CAP14#26 - 2014	Beau Street Coin Hoard	Grant		90,000	Place - Heritage	90,000		Approved by Technical Adjustment June 2014
CAP14#27 - 2014	River Corridor Fund	Corporate Supported Borrowing	340,000		Place - Regeneration		340,000	Approved by Cabinet June 2014
CAP14#28 - 2014	Digital B&NES	Capital Contingency / Corporate Supported Borrowing	350,000		Place - Regeneration		350,000	Approved by Cabinet June 2014
CAP14#29 - 2014	Midsomer Norton Business Centre	Corporate Supported Borrowing	125,000		Place - Regeneration		125,000	Approved by Cabinet June 2014
CAP14#29 - 2014	Affordable Housing Programme	Corporate Supported Borrowing	1,015,000		Place - Housing		1,015,000	Approved by Cabinet June 2014
OVERALL TOTALS			12,061,007	90,000		90,000	12,061,007	
				11,971,007			-11,971,007	

Capital Virements - Additions & Reductions Future Years

Appendix 5 (i)

REF NO	REASON / EXPLANATION	TRANSFER / FUNDING FROM	Income (£'s)	Expenditure (£'s)	TRANSFER TO	Income (£'s)	Expenditure (£'s)	Notes
CAP14#19 - 2014	Beau Street Coin Hoard	Grant	17,000		Place - Heritage		17,000	Approved by Cabinet May 2014
OVERALL TOTALS			17,000	0		0	17,000	
				17,000			-17,000	

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Bath & North East Somerset Council		
MEETING	Cabinet	
MEETING/ DECISION DATE:	16th July 2014	EXECUTIVE FORWARD PLAN REFERENCE:
		E 2673
TITLE:	Cycle/pedestrian schemes	
WARD:	All	
AN OPEN PUBLIC ITEM		
List of attachments to this report:		
Appendix 1 List of Cycle/Pedestrian Scheme Proposals		

1 THE ISSUE

- 1.1 Cabinet approval is sought for the programme of cycle/pedestrian schemes listed at Appendix 1

2 RECOMMENDATION

The Cabinet agrees:

- 2.1 The Funding Allocation breakdown across cycling and walking for 2014/15 set out in Appendix 1.
- 2.2 The £250k budget for cycling and walking schemes for 2014/15 for which provisional funding approval was included within the Council's February 2014 budget report be approved for spend.
- 2.3 The Divisional Director Environmental Services and the Service Manager Highways are delegated authority to alter the programme, in consultation with the Cabinet Member for Transport, as may prove necessary during 2014/15. Any alterations will be within the overall budget allocation and take into account any additional funding streams that become available.

3 RESOURCE IMPLICATIONS (FINANCE, PROPERTY, PEOPLE)

- 3.1 £250k capital spend was provisionally approved by Council in the February 2014 Budget aimed at encouraging and promoting cycling as part of the healthy living and sustainable transport initiatives. This is funded by Corporately Supported Borrowing.
- 3.2 Maintenance costs of the infrastructure for all the projects listed are estimated at approximately £3k per annum. This includes for example, verge cutting and replacement of signs and lines. This has been discussed with the Highway Maintenance team and it has been agreed that these costs will be met from within the existing highway maintenance budget. At some point in the future there will be a need to replace a more significant amount of the infrastructure, for example, when the resurfacing of a path is necessary. This will need to be considered in the allocation of funding as part of the Council's Budget process in future years.

4 STATUTORY CONSIDERATIONS AND BASIS FOR PROPOSAL

- 4.1 The implementation of the programme of cycle/pedestrian schemes promotes low carbon travel and healthy lifestyles which reinforces the Council's Values of:
- Promoting independence and positive lives for everyone
 - Creating neighbourhoods where people are proud to live
 - Building a stronger economy

4.2 An Equalities Impact Assessment has been completed. No adverse or other significant issues were found.

5 THE REPORT

- 5.1 In 2013 officers drafted a list of aspirations for the cycling network based on their own knowledge and requests from the cycling community. This list was then prioritised mainly on the basis of achievability (prioritising schemes which were generally free from risks associated with land acquisition, legal issues and difficult design issues). In 2013/14 the top priorities were implemented and the next priorities on the list were to be implemented this financial year.
- 5.2 The prioritised list was approved by the Leader of the Council, the Cabinet Member for Transport and the Council's Cycling Champion in 2013.
- 5.3 A number of pedestrian improvement schemes have also been included on the list. These were also prioritised on the basis of achievability and available budget.
- 5.4 The list approved by CSG is shown at Appendix 1. A further list (not appended) has been compiled of other cycling schemes and aspirations which have not been included in the list for 2014/15. These schemes will be considered for prioritisation when future funding permits.

6 RATIONALE

6.1 The list of schemes has been approved by relevant Members (see 5.2 above)

7 OTHER OPTIONS CONSIDERED

No other options considered. The process for scheme selection is described in paragraph 6, above.

8 CONSULTATION

8.1 Cabinet Members; Staff; Other B&NES Services; Service Users; Stakeholders/Partners; Section 151 Finance Officer; Monitoring Officer

8.2 Bath & North East Somerset staff and stakeholders have attended meetings to discuss and suggest schemes to be included in the Cycle Schemes programme. Cabinet Members, Section 151 Officer and Monitoring Officer and all Members have been circulated with the draft report and Appendix 1.

9 RISK MANAGEMENT

9.1 A risk assessment related to the issue and recommendations has been undertaken, in compliance with the Council's decision making risk management guidance.

Contact person	<i>Alison Sherwin 01225 394406</i>
Background papers	
Please contact the report author if you need to access this report in an alternative format	

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Cycle Schemes 2014/15

07/05/14

Cost (£000s)

ITEM	Originator	Area	Project manager	Scheme	Scheme details (provide enough detail for the scheme to be assessed for feasibility and cost)	Land issues?	Legal issues?	Construction	Staff	Mtce (per annum)	Total	Comments	Type
21	AS	SE Bath	AS	Claverton Down Uni link - construction				94	15	1.5	109		Link
22	PB	SE Bath	AS	North Road zebra crossing - link to Claverton Down Uni link	Design complete	No	Yes - TRO process required	23	7		33		Crossing link
28	AS	Chew Valley	AS	Chew Valley Lake - Dam to Walleycourt Road - construction	Design only		Land agreement required with BW	72	7	1.5	5		Link
30	Jl	Authority wide	AS	Small signing schemes including -series of signs and information boards along circular route from Two Tunnels back to Bath along towpath, and signs linking to BBRP	Information would enable tourists and families to cycle this 13 mile leisure route informed of distances, history and info like cafes, toilets etc. Series of small unlit cycle direction signs mounted on new posts and existing street furniture	No	No	4	1		5	Requires negotiation with CRT - could be staff resource intensive	Signing
34	JFT	Keynsham	AS	Shared use footway extension from Broadmead R/A to Wellsway school entrance, Keynsham	Extend width of current footway using existing carriageway	No	Yes	26.5	6.5	0.3	33	Possible parking TRO required	Link
35	AS	Keynsham	AS	Shared use footway extension at Ellsbridge Close, A4 Keynsham	Linked to above scheme	No	Yes	14	4	0.2	18		Link
	PB	Bath	AS	Prior Park Road footway buildout	Footway buildout and tactiles	No	No	4	1		5		Ped crossing
	PB	Bath	AS	Roman Road pedestrian refuge	central island to existing zebra	No	No	5	1		6		Ped crossing
	SC	Farrington Gurney	AS	Relocation of pedestrian refuge	Relocation of pedestrian refuge o/s Methodist Church on A37	No	No	16	2		18		Ped crossing
	SC	Peasedown St John	AS	Pedestrian refuge	Pedestrian refuge between Russet Way and Underleaf Way	No	No	16	2		18		Ped crossing

Total 250

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Bath & North East Somerset Council		
MEETING/ DECISION MAKER:	Cabinet	
MEETING/ DECISION DATE:	16 July 2014	EXECUTIVE FORWARD PLAN REFERENCE:
		E 2676
TITLE:	'Fit for Life'	
WARD:	All	
AN OPEN PUBLIC ITEM		
List of attachments to this report: 'Fit for Life' Strategy 2014-2019		

1 THE ISSUE

- 1.1 The Council on 9th April 2014 approved the Draft Fit for Life strategy for formal consultation prior to adoption. This consultation has now been undertaken and final changes made.. The strategy shows the Council's commitment to improving opportunities to get more people active and healthy and enable greater involvement from all sectors to develop services which promote and facilitate an active lifestyle for all our residents.
- 1.2 A key function of the strategy is to form the basis for a procurement process for a new leisure contract, which is outlined in the built facility section of the strategy.

2 RECOMMENDATION

- 2.1 The Council adopts the 'Fit for Life' strategy

3 RESOURCE IMPLICATIONS (FINANCE, PROPERTY, PEOPLE)

- 3.1 The strategy is designed to improve people's health and wellbeing delivering a reduction in long term costs to the health sector, making a contribution to supporting the local economy through creating a healthier workforce and contributing to improving social cohesion by engaging communities in positive activities. This is a key part of delivering the Public Health agenda that the Council is now responsible for.
- 3.2 The Council will contribute financially to the delivery of the Fit for Life Strategy from existing resources (both across various Council departments and from the ring-fenced Public Health budgets).. The Council will consider the appropriate

use of any new funding it secures to support delivery of the recommendations in the strategy.

3.3 Due to the cross cutting nature of this strategy its successful delivery will rely upon the funding and resources identified within supporting strategies (listed below) and a commitment to pool budgets or align resources.

- (1) Healthy Weight Strategy
- (2) 'Getting Around Bath' Transport plan
- (3) Green Infrastructure Strategy
- (4) Children and Young People's Plan
- (5) Play Strategy
- (6) Built Facilities and Playing Pitches Strategy
- (7) CCG strategic plan

3.4 The strategy seeks to influence the work and use of resources of other partners and coordinate work within the sector in order to secure additional budget to deliver the outcomes.

3.5 In relation to the built facilities strategy, feasibility studies have been completed for Leisure Centres which have identified potential invest to save projects by demonstrating proof of concept of these proposals. Detailed final solutions for these projects will be refined and developed through the current procurement process for the new contract. The procurement is a separate exercise to the strategy and as such a formal decision process will be followed for any budget requests that arise from it.

4 STATUTORY CONSIDERATIONS AND BASIS FOR PROPOSAL

4.1 Public Health and Inequalities

5 THE REPORT

5.1 Physical activity should be an important part of everyone's lives. We want more people to get active, to fully achieve this the Council needs to provide efficient and effective services in partnership with a range of partners and stakeholders.

5.2 This strategy presents to Councillors, staff, partners and stakeholders the priorities for Physical Activity up to 2019. It links directly to the Joint Health and Wellbeing Strategy, providing more detail on how the Council is working to deliver on the active living aspects of the 3 identified themes.

5.3 The need for this strategy is increasingly important at this time when finances are very limited; whilst the needs, expectations and aspirations of our customers and partners are increasing.

5.4 The strategy makes the case for physical activity by making reference to a number of national and local statistics, by referring to the extensive evidence

base for the benefits of activity and by making use of the joint strategic needs assessment to understand the key local issues.

5.5 The strategy will help to:

- (1) **Boost the economy** through reducing sickness absence and worklessness
- (2) **Meet the Objectives of the Public Health, NHS and Social Care Outcomes Framework** – for example reducing falls in over 65s, tackling obesity, reducing mortality from cardiovascular disease and increasing the use of outdoor space
- (3) **Reduce demand on health and social care services** – through creating opportunities for people to live full and independent lives
- (4) **Increase the use of existing facilities and maximising use of outdoor space** – for example increasing use of existing community facilities (e.g schools), parks and open spaces to encourage people to be more active
- (5) **Empowering communities** - connecting with communities to improve health and wellbeing
- (6) **Reduce health inequalities** - Getting people of all ages and backgrounds to participate in leisure and sports activities can improve social cohesion and help reduce antisocial behavior.

Why Leisure?

5.6 The Cost of Inactivity

This cost currently stands at an estimated £2.8 million per year in Bath and North East Somerset – We know from the ‘Active People’ survey that only 27% of adults are doing enough physical activity to benefit their health which compares well with national level of 22%. 43.7% of adults are doing little or no activity.

5.7 The Health Benefits

Exercise has been described as a ‘wonder drug’ or ‘magic pill’ which, if used in the right measures can:-

- reduce the risk of heart disease by 40 per cent;
- lower the risk of stroke by 27 per cent;
- reduce the incidence of diabetes by almost half;
- reduce the risk of recurrent breast cancer by almost half;
- lower the risk of colon cancer by over 60 per cent; and
- decrease depression as effectively as some drugs

‘The scientific evidence is compelling. Physical activity not only contributes to wellbeing, but is also essential for good health. People who are physically active reduce their risk of developing major chronic diseases by up to 50%, and the risk

of premature death by about 20% - 30%. Chief Medical Officer, Department of Health, 2004

Evidence shows that the health impact of inactivity in terms of coronary heart disease, for example, is comparable to that of smoking, and almost as great as that of high cholesterol levels.

On average, an inactive person spends 38% more days in hospital than an active person, and has 5.5% more family physician visits, 13% more specialist services and 12% more nurse visits than an active individual.

5.8 Halting the rise in Obesity

In Bath and North East Somerset it is estimated that £45.8 million was spent by the NHS in 2010 on disease related to overweight and obesity, set to rise to £49 million in 2015. We know that in B&NES 21.5% of adults are obese, *30.6% of children in year 6 and 25.9% of children in reception (compared to 22.6% nationally) are an unhealthy weight.*

5.9 Health Inequality

There is a life expectancy gap of 6.3 years for men and 3.5 years for women between the wards at either ends of the spectrum.

The Strategy

5.10 The strategy sets out the priorities for Bath and North East Somerset which are determined using existing provision, consultation, research, other strategies and plans and emerging trends and issues.

5.11 It recognises the significant health and wellbeing benefits that physical activity can deliver and seeks to find ways to make physical activity more central to people's lives making explicit links to the Health and Wellbeing Strategy.

5.12 The strategy also considers the contribution sport and physical activity can make to the economy of the area, how it can help to enhance place and communities through bringing people together and reducing social isolation and how it can contribute to improving the environment and deliver against the sustainability agenda.

5.13 It shows the Council's commitment to improving opportunities to get more people active and healthy and enable greater involvement from all sectors to develop services which promote and facilitate an active lifestyle for all our residents.

5.14 The draft strategy has emerged following extensive research and consultation with partners and stakeholders including a 1000 count street survey and a number of focus groups run with those groups within the population that have lower levels of physical activity.

5.15 The vision for the strategy is:

More people, more active, more often

- 5.16 The strategy has 4 key themes
- (1) Active Lifestyles
 - (2) Active Travel
 - (3) Active Design
 - (4) Active Environments (Facilities and outdoor space)
- 5.17 Active Lifestyles is about increasing opportunities for everyday activity, sport, recreation and treating ill health for all ages and abilities across the locality. To develop and support activities that start where people are, are fun and sociable and help to build and strengthen communities.
- 5.18 Active Travel is about encouraging walking and cycling as a means of getting to school, work and getting around as part of everyday life.
- 5.19 Active Design is about developing planning policy and practice which supports an increase in physical activity and facilitates positive wellbeing for all residents.
- 5.20 Active Environments is about maintaining and improving the standard and safety of our parks, play and leisure facilities, green spaces and access to the natural environment in order to encourage their use by local residents and visitors.

6 RATIONALE

- 6.1 The strategy has emerged following extensive research. The authority now wishes to adopt this strategy.

7 OTHER OPTIONS CONSIDERED

- 7.1 The strategy has emerged following extensive research and consultation which considered a wide range of options.

8 CONSULTATION

- 8.1 A wide range of both internal and external consultees were approached to gain views on the strategy (these can be found in the appendix) This also included a number of focus groups involving those who are less physically active, a wide range of partners and stakeholders for physical activity.
- 8.2 The strategy has completed a period of public consultation. There was a lot of positive feedback about the strategy as part of this process and a number of suggested changes made.
- 8.3 Some sections have been shortened as a result of feedback with some more specific actions turned into higher level objectives.
- 8.4 There was comment around ensuring walking and cycling are recognised as both a leisure/recreational activity and a form of travel for commuting and this is reflected in the document.
- 8.5 More emphasis has been placed on the links between physical activity and mental wellbeing.

8.6 A number of responses were received in relation to improving access to warm water swimming in the area and a recommendation has been made that a teaching pool form part of the new build leisure centre in Keynsham to reflect this.

8.7 A full list of the comments and changes can be found in the consultation responses attachment.

9 RISK MANAGEMENT

9.1 A risk assessment related to the issue and recommendations has been undertaken, in compliance with the Council's decision making risk management guidance.

Contact person	<i>Marc Higgins 01225 39 6423</i>
Background papers	
Please contact the report author if you need to access this report in an alternative format	

**'Fit for Life' - A strategy to get more people, more
active, more often**

June 2014-2019

Bath and North East Somerset Council

“Lack of activity destroys the good condition of every human being while movement and methodical physical exercise save it and preserve it”

Plato

Foreword

Introducing the Fit for Life strategy

Welcome to Fit for Life, the strategy for physical activity in Bath and North East Somerset Council.

I believe that physical activity should be an important part of everyone's lives. To achieve this the Council along with a range of partners and stakeholders will need to work together to provide a range of efficient and effective services and opportunities for people to engage with.

In 2008, the Council's first physical activity strategy 'Get Active' was produced. Its purpose was to create a framework to increase physical activity levels in Bath and North East Somerset. Since 2008, there has been much progress resulting in increased levels of participation from 22.5% for 2008 period (Active People Survey 2/3 NI8 data) to 27.2% for the 2013 period (Active People 6/7 NI8 data).

Fit for Life has been produced to build on the good work that is already being done with partner organisations. The strategy sets out strategic aims and key actions to support the continued development of Physical Activity within Bath and North East Somerset up to 2019. It also seeks to reinvigorate and build on the 'Get Active Partnership' that was created as part of the previous strategy and played an important role in bringing partners together.

Having a strategy is increasingly important at this time when finances are very limited; whilst the needs, expectations and aspirations of our customers and partners are increasing. Our Health and Wellbeing Strategy recognises the significant benefits that physical activity can deliver and this strategy builds on that work to looking to provide preventative measures to improve the future health of our population.

The strategy also demonstrates the contribution sport and physical activity can make to the economy of Bath and North East Somerset, how they contribute to a sense of place and community through bringing people together and reducing social isolation in addition to contributing creating a sustainable environment.

Particular attention will be given to encouraging those who are inactive to take up regular participation in physical activity, helping to reduce the significant health inequalities that exist within the district.

David Dixon
Cabinet Member for Neighbourhoods

Executive Summary

Vision

The overarching vision for 'Fit for Life', agreed by all partners and delivery organisations is:

More people, more active, more often

This strategy is also driven by the Public Service Board Vision which is:

Bath and North East Somerset will be internationally renowned as a beautifully inventive and entrepreneurial 21st century place with a strong social purpose and a spirit of wellbeing, where everyone is invited to think big – a 'connected' area ready to create an extraordinary legacy for future generations

The Strategy

The strategy sets out the priorities for Bath and North East Somerset which are determined using existing provision, consultation, research, other strategies and plans and emerging trends and issues.

It recognises the significant health and wellbeing benefits that physical activity can deliver and seeks to find ways to make physical activity more central to people's lives making explicit links to the Health and Wellbeing Strategy.

The strategy also considers the contribution physical activity can make to the economy of the area, how they can help to enhance place and communities through bringing people together and reducing social isolation and how they can contribute to improving the environment and support the sustainability agenda

It shows the Council's commitment to improving opportunities to get more people active and healthy and enable greater involvement from all sectors to develop services which promote and facilitate an active lifestyle for all our residents.

The strategy has emerged following extensive research and consultation with partners and stakeholders including a 1000 count street survey and a number of focus groups run with those groups within the population that have lower levels of physical activity.

The strategy makes the case for physical activity by making reference to a number of national and local statistics, by referring to the extensive evidence base for the benefits of activity and by making use of the joint strategic needs assessment to understand the key local issues.

The strategy seeks to support delivery against a number of key opportunities:

- Ageing well
- Healthy weight
- Reducing inequalities
- Positive mental health
- Employability
- Supporting complex families
- Stronger communities
- Supporting the local economy
- Creating healthy and sustainable places
- Self Help

The strategy sets out a framework for partnership action under 4 key themes:

- Active Lifestyles
- Active Travel

- Active Design
- Active Environments

Active Lifestyles: More people are participating in physical activities which are fun and sociable and help to build and strengthen communities.

Active Travel: More people are walking or cycling as a means of getting around as part of everyday life

Active Design: Our neighbourhoods are designed to offer easy access to a choice of opportunities for physical activity enabling communities to be more active and healthy.

Active Environments: Our leisure facilities and green infrastructure are well used and enjoyed by local residents and visitors.

Vision

The overarching vision for 'Fit for Life', agreed by all partners and delivery organisations is to get:

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What is Physical Activity?

Physical activity is a broad term to describe movement of the body that uses energy. It includes everyday activity such as walking and cycling to get from A to B, work-related activity, housework, DIY and gardening. It also includes recreational activities such as working out in a gym, dancing, or active play, as well as organised and competitive sport. Some people think about getting active as getting fit and assume that it means vigorous physical activity. It doesn't.

We do get fitter as we get more active. But, the goal for good health is to increase the amount of physical activity that we do. In doing more physical activity, we will develop the health-related areas of our fitness. These are cardiovascular fitness (our heart, lungs and circulatory systems), muscle strength and stamina, flexibility and body composition (percentage of body fat). There are also skill-related areas of fitness – power, speed, agility, co-ordination, balance and reaction time. These are vital for good health and are also important for sports performance.

How much Physical Activity is enough?

The four UK Chief Medical Officers recommend at least:
150 minutes per week of moderate physical activity
in bouts of 10 minutes or more.

All children and young people should engage in moderate to vigorous intensity physical activity for at least 60 minutes and up to several hours every day.

More detailed government recommendations on physical activity levels can be found in appendix 5.

Principles underpinning the strategy

- 1 Leadership – Has strong local leadership supporting people to embrace change
- 2 Partnerships – effective partnership working to optimise the use of resources
- 3 Intelligent Interventions - developments are needs led, making best use of available market insight
- 4 Advocacy – ensuring local people & key stakeholders understand the benefits of physical activity
- 5 Value for Money – ensuring we deliver our priorities in the most effective way
- 6 Innovative – uses technology to better engage and connect with people

- 7 High quality and Best Practice – Development that meets local need, learning from & improving on the best
- 8 Holistic – a cross sector commitment contributing to improved health and wellbeing of local people as well as providing a better built and natural environment for people to enjoy
- 9 Targeted – focuses on the inactive, addressing inequalities for underrepresented groups, creating opportunities which are fun, tailored and inclusive.
- 10 Sustainability - ensuring exit routes are in place for participants to ensure impacts and measures are sustained and long lasting

What are the benefits? - National and Regional Context

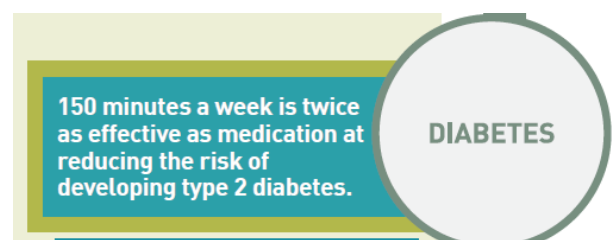
‘The scientific evidence is compelling. Physical activity is good for both physical and mental health and contributes to overall positive wellbeing. People who are physically active reduce their risk of developing major chronic diseases by up to 50%, and the risk of premature death by about 20% - 30%. (Chief Medical Officer, Department of Health, 2004)

Exercise has been described as a ‘wonder drug’ or ‘magic pill’ which, if used in the right measures can:

- Reduce the risk of heart disease by 40 per cent
- Lower the risk of stroke by 27 per cent
- Reduce the incidence of diabetes by almost half
- Reduce the risk of recurrent breast cancer by almost half
- Lower the risk of colon cancer by over 60 per cent
- Decrease depression as effectively as Prozac

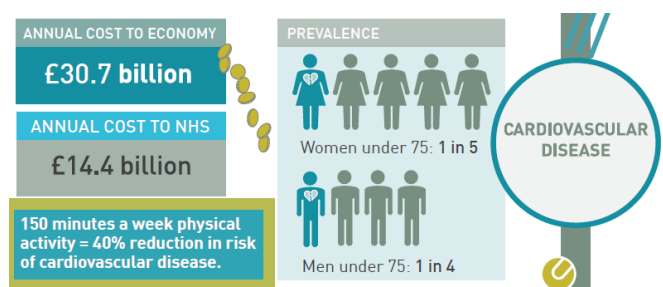
Staying physically active is one of the best ways to maintain the ability to perform activities of daily living and improve overall quality of life (British Heart Foundation).

Being active is associated with reduced risk of depression and dementia in later life, it is effective in the treatment of clinical depression and can be as successful as psychotherapy or medication, particularly in the long term. More generally, physical activity helps people feel better and feel better about themselves, as well as helping to reduce physiological reactions to stress.



Around 60% of adult men, 72% of adult women and 68% and 76% of boys and girls (respectively) aged 2–15 do not meet the UK Chief Medical Officers' [physical activity recommendations](#), these include:

- a lifetime approach
- an emphasis on daily activity
- recognition of the importance of vigorous-intensity activity



- advocating a combination of moderate and vigorous-intensity activity
- new guidelines on combatting sedentary behaviour.

In recent years, studies have shown that regular physical activity also has benefits for our mental health. Exercise is associated with a reduced risk of depression and can prevent some people becoming depressed in the first place.

Studies also demonstrate that there are strong positive links between our physical and mental health and the level of contact with the natural environment. People living in areas with high levels of greenery are thought to be three times more likely to be physically active and 40% less likely to be overweight or obese than those in areas with low levels of greenery.

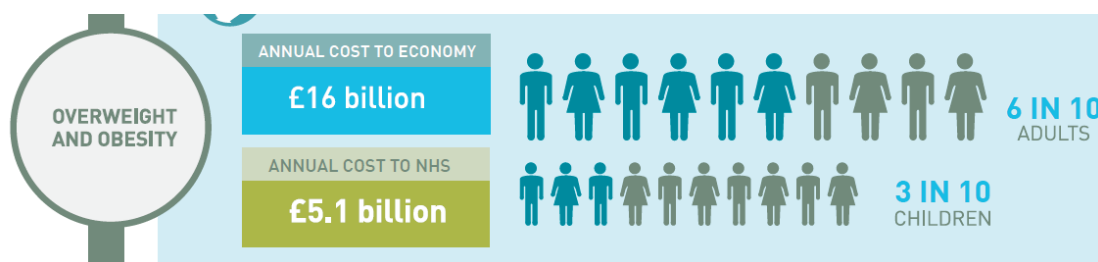
Economic Costs

In Bath and North East Somerset it is estimated that £45.8 million was spent by the NHS in 2010 on disease related to overweight and obesity and is set to rise to £49 million by 2015.

The cost of inactivity in B&NES is estimated at £15m.

The cost to the NHS for treating CHD, stroke, obesity and other health problems caused by physical inactivity is high and places an enormous financial burden on the Health Service. The cost of physical inactivity in England –including direct costs of treatment for the major lifestyle related disease, and the indirect costs caused through sickness absence – has been estimated at £8.2 billion a year.

In England, the costs of lost productivity from sickness absence and premature death have been estimated at £6.5 billion per year ([Start active, stay active](#)). Physical activity programmes at work have been found to reduce absenteeism by up to 20%: physically active workers take 27% fewer sick days.



PHYSICAL INACTIVITY CAUSES DISEASE AND COSTS THE NHS HUNDREDS OF MILLIONS EVERY YEAR



WHILST USAIN BOLT RUNS 100 METRES (9.58 SECONDS), THE NHS SPENDS AROUND £10,000 ON TACKLING PREVENTABLE ILL HEALTH

The cost to the NHS in 9.58 seconds for five mental/physical illnesses

Obesity	1	£1,548
Diabetes	2	£2,740
Cardiovascular Disease	3	£4,370
Depression and Anxiety Disorders	4	£880
Dementia	5	£571
		Total £10,109

Who needs to become more active?

Current Participation

Physical activity rates in Bath and North East Somerset show a mixed picture (see *Joint strategic Needs Assessment: <http://www.bathnes.gov.uk/services/your-council-and-democracy/local-research-and-statistics/wiki/physical-activity>*).


The overall message is that being inactive is bad for our health and that more of us need to become more active. B&NES's residents are likely to face many significant and growing health challenges in the future.

Most adults over the age of 35 are now overweight (APHO and Department of Health data)

- 23.6% of adults are obese (APHO and Department of Health data)
- 75% of pregnant women in B&NES are an unhealthy weight
- 48% of adults are inactive (Sport England Active People Survey)
- Only 21% of the population nationally are taking part in sport or active recreation 3 times per week (Sport England Active People Survey)

Over half (55.7%) of adults in B&NES are estimated to be overweight or obese, although this is significantly lower than regional and national figures.

- Rates of recorded obesity are rising in adults in B&NES but are lower than national rates.
- In the 2013/13 school year, 23.3% of reception aged children had an unhealthy weight (overweight or obese), higher than national and regional levels, this represents a slight decrease on the 12/13 figure of 25.9%.
- 26.4% of year 6 children attending schools in B&NES had an unhealthy weight (overweight or obese), significantly lower than national and regional levels.

More than
1 in 4 Children

are an unhealthy weight
at year 6 (age 10/11)

Who are the inactive?

We have identified specific priority group who are experiencing health inequalities, they are:

- People living in geographical areas of inactivity (See map in appendix 2)
- 11-18 year olds (particularly females) – this is the age where levels of activity start to drop
- Families (particularly expectant mothers and those with pre-school aged children)
- Older People
- Those who are carrying excess weight in both children and adults
- Those with disabilities and long term health conditions
- Ethnic Minorities

Stakeholder and Partner consultation

A wide range of consultation was carried out to inform the development of the strategy, more detail on this is provided in appendix 3.

Headline findings from the consultation process

Although 97% state regular activity is either very important or important, slightly under a half state they are **not** undertaking as much activity as they would like to (46%). Women are currently less satisfied than men with the amount of activity they are currently doing.

Slightly under half (47%) of the sample would like to undertake more physical activity than they currently are. Female respondents show a higher desire to take part in more activity/exercise than men and those age 55+ are the least likely to take part in more activity.

Of those who would like to do more activity but don't, the main barrier preventing them from doing so is the lack of time due to work pressure at 54% (nationally 47%), followed by lack of time due to home pressures at 22% (nationally 5%). Lack of motivation is a higher barrier in this area than nationally at 11% (nationally 2%).

The key issues to be addressed according to respondents were availability of time at 55% and direct costs at 40% stating either very important or important, followed by accessible and good quality facilities at 26%.

Key Themes

Several cross cutting themes came out of the consultation with focus groups held with population groups known to have lower physical activity levels.

1. Most inactive people know they need to be more active and say they want to be
2. Recognition of individuals own responsibility to be active
3. Being part of a groups or exercising with friends helps motivate people to exercise more
4. Outdoor spaces/environment a great opportunity to be active for this area
5. Club base is strong at both recreational and elite level
6. Awareness of what is already happening could be better – better marketing and communications needed
7. Local facilities perceived generally to be adequate to good with friendly, supportive staff and management, although both Bath and Keynsham were seen as being a bit tired and “not as good as they used to be”
8. Feeling that the council could engage better and more consistently

Further to this there has been strong representation amongst the consultation for more accessible warm water swimming within the area.

Cycling

The majority of the sample does not cycle and do not want to (55%). Of those that do 27% overall do so for leisure purposes, a further 16% do not currently but would like to. 50% of those who do cycle do so alone, a further third with friend and a third with family. Men are more likely to cycle alone but women are more likely to cycle with family. This would also explain why women prefer off road (45%) and men prefer road cycling (51%) although men are also using cycling for travel purposes more than women.

Sports Club Consultation

We have also consulted local sports clubs as part of the playing pitch strategy process to understand what their key issues are. The majority of clubs are keen to increase the number of members they have and are looking for support to do this. They have highlighted the following:

- The need for greater access to floodlit training
- The need for better/improved facilities
- The need to reduce the costs of sport to participants
- Support in accessing grants
- The need to develop more coaches
- The need to find more volunteers
- The cost of hiring/using facilities
- The lack of funds within the club to make the improvements needed

Addressing Health and Wellbeing Strategy Priorities

The Council's health and wellbeing strategy has outlined the key priorities that the Council needs to address to improve the health of its population. Physical activity can make a significant contribution to this agenda.

Helping people to stay healthy

- **Healthy weight** - Physical activity along with a healthy diet is key to reversing the rising obesity levels. It can help to reduce rates of childhood and adult unhealthy weight through increased activity levels among young people and targeted programmes at those with most need
- **Supporting the Connecting families project** - The government believes that there are 220 families in B&NES experiencing a range of complex needs including children known to social services, mental health problems and domestic violence. Access to physical activity opportunities, training and skill development programmes and access to targeted health programmes could help improve health, self-esteem and better connect these families to their communities.
- **Supporting the local economy** – The physical activity sector can add to the area's attraction to inward investment/business expansion through provision of modern, attractive built and natural facilities and by providing a range of opportunities to local employees to take part. Providing events such as half-marathons, sporting festivals and competitions could help to boost the visitor economy. Encouraging active workplace schemes will lead to improve employee health & wellbeing and productivity. The sector can also provide employment, training and volunteer opportunities to enhance individuals' skills and employability.
- **Creating Healthy and Sustainable Places** - Providing fit for purpose leisure facilities with investment as identified through this strategy aimed at attracting new types of customers and increasing participation levels.

Improving the quality of people's lives

- **Ageing Well** - With increasing age, the profile of disease and cause of death changes, with increased prevalence of physical and mental frailty during the years and months prior to death. Physical activity can help to increase mobility reduce the risk of falls, reduce social isolation and help maintain independence for longer
- **Positive mental health** –Physical activity has been shown to be as effective as medication at alleviating the symptoms of depression and is recommended by NICE guidance to be provided alongside talking therapies and medication as a treatment option to patients.
- **Self Help** - To support people to take a greater ownership of their own health and wellbeing through increased physical activity and the provision of educational material

The population is aging, we think there will be over **2.5x** as many people aged 80+ by 2026 compared with 1981

Creating fairer life chances

- **Employability** - Physical activity can provide volunteering opportunities, training, new skills, improved confidence and a route to employment.
- **Stronger communities** - 7 out of 10 teenagers believe that anti-social behaviour happens because young people are bored. Physical activity can provide diversionary activities, help to reduce social isolation and be a positive force in bringing communities together to help reduce this problem.
- **Reducing Inequality** – Physical activity is key to reducing the health inequalities that exist within the area, our research has shown that the most deprived areas with the lowest life expectancy are also the least active. Specific targeted programmes aimed at the prevention of ill-health and the promotion of wellbeing, such as exercise on referral schemes, will address those with the highest need.



Key Themes

Active Lifestyles:

More people are participating in everyday activities which are fun and sociable and help to build and strengthen communities.

Active Lifestyles is about increasing opportunities and participation for everyday activity, sport and recreation and preventing as well as treating ill health for all ages and abilities across the locality. We will seek to develop and support activities that start where people are, are fun and sociable and help to build and strengthen communities.

Sport plays a key part in the culture of B&NES, with Bath Rugby and Bath City Football clubs prominent forces in the city and the world class training facilities and athlete's resident at the University of Bath. There is a strong culture of sports clubs in the area with well above average membership levels and a large volunteer workforce providing a myriad of sporting and physical activity opportunities.

Team facilitated sports and games help both children and adults to build friendships, social networks, give people a sense of belonging and help to break down social barriers.

Children and young people:

The *fit for life* strategy aims to introduce a moving culture across the generations.

Physical activity is fundamental to the development of children and young peoples' health and wellbeing, and their ability to lead healthy, active lifestyles. Healthy pupils are more likely to be more effective learners.

Regular participation in physical activity can impact on children and young people's attainment through:

- Increased attendance at school
- Improved behaviour
- Increased confidence
- Increased sense of belonging
- Raised aspirations
- Develop life/employability skills
- Support for cross-curricular learning

The population is aging, we think there will be over **2.5x** as many people aged 80+ by 2026 compared with 1981

THE AVERAGE SPORTS CLUB HAS **20** VOLUNTEERS.
OF THE **23.7%** OF ADULTS IN ENGLAND WHO VOLUNTEER
1 IN 5 VOLUNTEER IN SPORTS AND RECREATION.

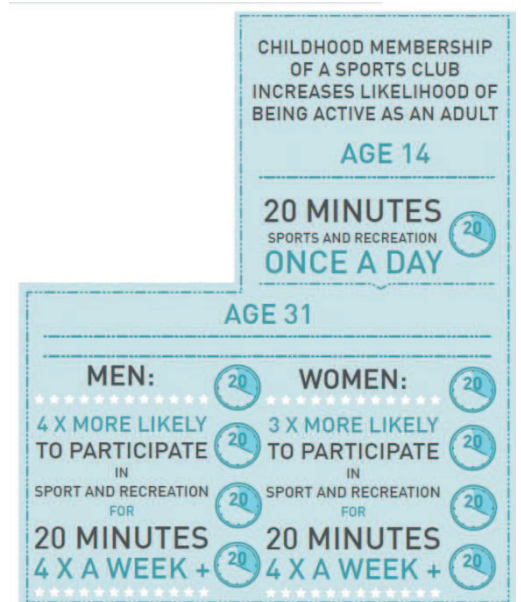
7 OUT OF 10 TEENAGERS BELIEVE ANTISOCIAL BEHAVIOUR OCCURS BECAUSE YOUNG PEOPLE ARE BORED

- Increased knowledge of healthy lifestyles

Physical activity is also a powerful way to develop children's wider skills, qualities and aspirations as participants, leaders and organisers, which improve the overall school environment.

What do we know:

- Children's play is an important contribution to reducing obesity in children and young people
- Outdoor and unstructured play is one of the best forms of exercise for children
- Walking and playing provide children with more physical activity than most other activities
- Children need a variety of inspiring, challenging formal and informal play provision for different age groups and abilities
- Children need to feel safe from bullying
- Children from lower socioeconomic groups and some black and minority ethnic groups do less sport and exercise than those from higher socioeconomic groups
- Physical activity positively effects cognition in children. Being physically active releases hormones, neurotransmitters and a protein responsible for learning, memory and higher thinking.
- Sport and recreation can also lead to increased self-esteem and the development of motivation and determination.
- Children are most active at primary school age with activity levels dropping with age, particularly at 11-18 and especially in girls



Information from the Schools Health Education Unit (SHEU) survey conducted in B&NES schools:

- Most children say that they enjoy physical activities
- At Primary School around 50% of our pupils walk to school, this drops to 40% at Secondary School
- Physical activity has to compete with activities such as watching TV, playing computer games, the internet, meeting friends, homework, playing musical instruments, listening to music etc. and so has to be engaging and fun
- Just over 80% of young people say they watched TV, DVD's or videos on the day prior to the survey
- 93% of our Primary School children own a bicycle

1/3 Children



are an unhealthy weight at year 6 (age 10/11)

What we will do:

- Ensure physical activity is a consideration in all policy development that impacts on children and young people
- Work across sectors to maximise the opportunities for physical activity in commissioned and delivered services
- Reduce the rise in unhealthy weight
 - Commission targeted healthy lifestyle programmes for children young people and families and expectant mothers

What we will do in partnership:

- Increase opportunities to stimulate engagement in physical activities
 - Develop and increase family focussed programmes
 - Increase the range of activities and opportunities for children and young people to be active outside of school
 - Encourage schools and clubs to work together in increasing participation
 - Promote activities which children can do independently and those they can enjoy with their family and friends.
- Increase access to physical activity in settings
 - Continue to support early years and educational settings to encourage healthy lifestyles and physical activity opportunities and to provide good quality information on these subjects
 - Support children and young people's settings to promote physical activity and active play during school hours, evenings, weekends and holidays.
 - Support schools to be community hubs providing access to their facilities in their local community to raise awareness and encourage families to be more active
 - Continue to work with the school sports partnership to continue to ensure high quality sport and physical activity opportunities are delivered within schools
 - Develop effective strategies for increasing activity levels in the key transition points for young people (between primary and secondary school and secondary and further education)
 - Map safe routes to school, local play and leisure facilities

How will we know if we have made a difference:

- More children playing outdoors
- The SHEU survey shows activity levels increasing
- We reduce the drop off in activity levels at 11-18 years
- More children are a healthy weight
- More children are reducing screen time
- We have increased the number of school to club links

- We have increased number of young leaders being trained
- We have increased number of competitions and competitors taking part in schools
- Increase in number of early years and educational settings promoting active play

ACTIVE ADULTS and ACTIVE AGEING

Being an active adult helps to prevent and helps to manage conditions such as coronary heart disease, type 2 diabetes, stroke, mental health problems, musculoskeletal conditions and some cancers. It has a positive effect on wellbeing, mood, sense of achievement, relaxation and release from daily stress.

As we get older, many of us accept weakness pain and loss of function as an inevitable consequence of the ageing process. However many of these symptoms are not due to ageing but are due to lack of physical activity. By maintaining strength through physical activity falls can be reduced, we have better cognitive function and we are able to enjoy active physical functioning well into our eighties and nineties.

What we know:

- The main barriers to increasing participation are cost, transport and time but these barriers will be greater for vulnerable groups
- Although adult participation in leisure is above the national average, more provision is wanted by all age groups and there are areas of specific need
- The majority of our local clubs would like to increase the number of members they have, but are experiencing a range of challenges in doing this from lack of facilities, to lack of volunteers and coaches and increasingly challenging funding issues
- 80% of employers value volunteering on a CV and 9 in 10 employers believe that volunteering can have a positive effect on career progression. The average sports club has 20 volunteers. Of the 23.7% of adults in England who volunteer 1 in 5 volunteer in sports and recreation.
- Being active before, during and after pregnancy enables women to be better prepared for the physical demands of birth and parenthood. There are also long term benefits for children as physical activity can be incorporated into a family's life early on, so that it becomes a habit. It can also help women to return to their pre-pregnancy weight more quickly after childbirth.

Adults and older people

What we will do:

- Increase Opportunities to stimulate engagement in physical activities

- Deliver events aimed at engaging new people, promoting positive messages and providing education about sport and physical activity
- Ensure that major events that take place in the area provide a legacy of increased participation as an agreed and planned objective of the event, as well as enhancing the visitor economy and making links to the arts/culture sector where relevant
- Develop appropriate services which promote the use of both indoor/outdoor space across the life course
- Offer interventions which are whole family/carer centred and combine play with exercise.
- Promote activities which are holistic and combine improved mental wellbeing and exercise
- Increased participation and client outcomes in targeted healthy living programmes aimed at reducing health risk factors or rehabilitation
- Create fairer life chances by improving participation in physical activity for priority groups: disadvantaged areas, sedentary, those with a disability, BME
- Increase opportunities for walking and cycling for leisure such as:
 - Promoting community cycling clubs
 - Increase number of walking and cycling interventions - (linking routes with opportunities in social settings as rest points)
 - Develop arts/cultural landmarks on walk routes which promote reminiscence learning
- Support people in maintaining a healthy weight:
 - Ensure a range of level 1 and level 2 weight management services are on offer adults who carry excess weight
- Improve skills and employment in disadvantaged groups
 - Improve opportunities for those persons not in employment, education or training to access training and volunteer opportunities within sport and physical activity

What we will do in partnership:

- Promote activities which encourage people to re-engage with sport
- Improve access to local sports clubs and leagues and competitions working closely with Wesport and the National Governing Bodies of Sport
- Increase access to elite squads and athlete support schemes
- Increase access to and participation in sustainable physical activity programmes in community settings (e.g. green gym, community food growing)
- Continue to support the B&NES Inclusive Sport and Physical Activity partnership to improve opportunities and access to sport and physical activity for those with disabilities
- Increased participation and client outcomes in targeted healthy living programmes aimed at reducing health risk factors or rehabilitation
 - Work with the NHS to develop a self-care and prevention strategy for Long Term Conditions (including Type 2 diabetes, moderate and

- severe mental illness and related non communicable diseases (e.g. cardiovascular disease)
 - Support the development of exercise for health programmes for patients with medical problems that can be improved by participating in physical activity
 - Ensure a range of level 3 and level 4 specialist weight management services are on offer adults who carry excess weight
- Build inclusive networks, supporting people with a disability or impairment to try new sports through taster events and links to their local sports clubs
- Signpost sports clubs to training and funding to support delivery of inclusive sessions
- Increase resilience in people and communities including action on loneliness
 - Provide structured exercise in a range of community settings for older people
 - Develop activities which help reduce social isolation in older people
 - Contribute to the reduction in number of falls

How will we know we have made a difference:

(See appendix 6 for Sport England Measured KPI's for the area):

- Club membership stays at its current high level
- The inequality between the most active and least active areas narrows
- Participation increases amongst our priority groups
- We have reduced health inequalities in areas of greater need, through a range of health referral and physical activity programmes, focussing on those at risk of developing chronic health conditions
- There has been an increase in numbers of people physically active

Active Environments

Our leisure facilities and green infrastructure are well used and enjoyed by local residents and visitors.

Built Facilities

The majority of the Council owned stock of facilities was built in the 1970's and like much of the country's leisure estate, is ageing and in need of modernisation and investment to ensure it is fit for purpose to meet the needs of the local population. These facilities also need to ensure that they can be financially viable to ensure their long term future and this needs to take into account lifecycle costs and realistic repair and maintenance costs to ensure that there is no repeat of the current problem.

Bath is unusual in its low levels of private sector leisure provision, however there is a larger than usual contribution made to the offering by Private Schools and the University of Bath, although it must be recognised that public provision is not the core business of these facilities and so access is restricted.

The newly built cycle circuit at Odd Down Playing Fields has helped to fuel increases in the number of cyclists in the area as well as providing a good example of partnership working between local agencies to drive participation levels up. Building on and learning from this partnership approach will be key to ensuring the future of local sports clubs facilities within this challenging financial climate where pooling of resources and multi activity sites are likely to prove more viable than multiple small groups and single use small sites.

The area has some very good examples of dual use leisure provision on state school sites using a differing models of delivery and encouraging and supporting community access to school facilities is seen as a much more realistic proposition than the large scale development of new facilities.

What we know:

- There are significant pockets of deprivation with B&NES and that these areas have the lowest levels of physical activity, Culverhay Sports Centre is very well located to lead the work on narrowing the inequalities in Bath
- Our key leisure facilities play a significant role in leisure provision receiving over 1.1 million visits per year
- The facilities are in need of investment to improve the customer experience and sustain and increase participation levels.
- Detailed condition survey reports have been carried out on the leisure centres showing that there is a significant backlog of maintenance and repairs that needs to be addressed and highlights the current poor condition and unattractive nature of the facilities
- Visits to our leisure centres have dropped and recovered in recent years due to a variety of factors and are currently at the same level as they were

in 2006, to improve the health of the area we need to make a step change in these levels

- There is an undersupply of fitness suite stations in the area, perhaps due to an absence of the larger private sector health clubs commonly found in comparable locations
- A number of sports halls have been built within Bath and North East Somerset on school sites in recent years leading to an oversupply of this type of facility
- There is a lack of dedicated swimming teaching space within the area
- Fitness suites, studio space and swimming pools deliver far greater participation numbers than sports halls and squash courts
- The current leisure centre in Keynsham in an area that has been assigned for redevelopment.
- There is a shortage of 3G astro turf pitches within Bath and North East Somerset, leaving pitch-based sports like football less resilient in periods of wet weather and limiting opportunities for teams to train.
- The Norton Radstock area currently has 2 primary leisure facilities – Writhlington Sports Centre and South Wansdyke Leisure Centre, the area would be best served by these facilities working together rather than in competition

What will we do: (Conclusions drawn from the Council's Built Facilities Strategy, a thorough assessment of local needs evidence):

- Commission a new leisure facilities contract to ensure Council owned leisure and sports facilities are fit for purpose for the next 25 years

What we will do in partnership:

- Generate Investment and improved and updated Sports and leisure Facilities to meet the needs of the community and secure the financial future of these facilities
- Bath
- Redevelop Bath Sports and Leisure Centre to increase participation levels, better serve the strong visitor economy of the city and
 - Build a new facility in Keynsham to replace the existing leisure centre, including a teaching pool to address the lack of this type of space within the area
 - Continue to work with Wellsway School and Broadlands Schools in Keynsham to develop their facilities to complement the offer of a new build. Aspirations include the development of a community entrances, parking and dedicated community changing for the leisure facilities alongside further development of the existing offer including indoor tennis facilities.
 - Explore the possibility of asset transfer for South Wansdyke Sports Centre to the Writhlington Sports Trust to improve coordination of facilities in the Norton Radstock area
- Increase customer satisfaction levels with facilities
 - Ensure the services provided at these key facilities are affordable, culturally acceptable and accessible by public transport or by safe 'active travel' routes.

- Support schools, colleges and university to provide facilities that can deliver positive experiences of sport and physical activity and develop community access to these key dual use facilities

How we will know we have made a difference:

- Increase in number of users and visits across the sites
- Increase in members and users from our priority groups
- Increased number of children and young people and families using the sites
- Members and users show increased activity levels
- Successful delivery of exercise as a form of treatment for ill health schemes through our facilities
- Jobs, training opportunities and apprenticeships are aimed at B&NES residents
- New leisure centre delivered in Keynsham and investment secured for other sites to modernise

Green Infrastructure

The term “green infrastructure” describes the networks of natural spaces and corridors across a given area. Green infrastructure is made up of a wide range of green assets such as open spaces, parks and gardens, allotments, woodlands, street trees, green roofs, fields, hedges, lakes, ponds, meadows and grassland playing fields, as well as footpaths, cycleways and waterways. These are the “soft” places and edges of our built communities and the natural habitats and beautiful landscapes of our rural areas that together quietly control the background to our health and well-being.

B&NES as an area benefits from some outstanding natural environment, with Bath in the unique position of being the only City in the world to achieve world heritage site status. This strategy is keen to maximise the benefits of the green infrastructure as a resource to encourage more people to be active. Indeed the City is built on a history of recreation and leisure rather than industry or trade, with it being considered a leisure destination akin to an outdoor hotel through its history.

Outside Bath City access to green infrastructure is good with a wide range of opportunities for people to be active on their doorstep, encouraging and supporting this is central to the strategy.

What we know:

- The B&NES area benefits from a unique and in places, outstanding natural environment, parks and green spaces. There are exceptional leisure and recreational opportunities available through this invaluable asset for developing and supporting healthy, happy and vibrant local communities

- Streets and parks designed to be safer and more attractive were the most common changes people reported which would encourage them to walk more – RIBA, 2014
- Access to green spaces is associated with a decrease in health complaints such as high blood pressure and high cholesterol, improved mental health and reduced stress levels.
- People living closer to green spaces are shown to be more physically active and less likely to be overweight or obese.
- Green Infrastructure contributes to all aspects of health and well-being including increasing levels of physical activity which would alleviate pressures on the NHS
- Simply being outside in a green space can promote mental well-being, relieve stress, overcome isolation, improve social cohesion and alleviate physical problems so that fewer working days are lost to ill health
- Living near parks, woodland or other open spaces helps to reduce health inequalities, regardless of social class.
- In urban areas people are more likely to rate their health as good if there is a safe and pleasant green space in their neighbourhood: an increase from 48% to 58%.
- 60% of interviewees thought pleasant local green spaces would improve their overall physical health, 48% thought it could improve their mental health, and 46% thought it would make them feel better about their relationships with family and friends.¹
- 91% of people believe that public parks and open spaces improve quality of life.²
- In a national survey of 5831 respondents, 79% agreed with the statement: “Parks and open spaces help me stay fit and healthy”. Only 4.5% of respondents disagreed with the statement.
- Parks and green space facilities provide easily accessible recreational opportunities, which are usually free. A brisk walk every day, in your local park, can reduce the risk of heart attacks by 50%, strokes by 50%, diabetes by 50%, fracture of the femur by 30%, colon cancer by 30%, breast cancer by 30% and Alzheimer’s by 25%.
- Green exercise has important implications for public and environmental health. Evidence suggests that participants in exercise programmes based in outdoor green environments are more likely to continue with their programme than if it is based within a gym or leisure centre.
- There is a shortage of sports pitches for sports like football and rugby in Keynsham which are resilient in periods of wet weather. The extent of this will be highlighted in the review of the playing pitch strategy. The Wellsway School site has established pitches which do not flood.

What will we do:

- Support a well-connected and multifunctional network of green Infrastructure

¹ CABE Space. (2010). Community Green: Using local spaces to tackle inequality and improve health

² CABE. (2009). Future Health: Sustainable places for health and well-being

- Ensure there is a good supply of resilient, well-managed, maintained and fit for purpose green spaces and playing pitches that meet the needs of the community they serve as well as safeguard against the loss of open space and recreational facilities.
- Maximise on opportunities for integrating walking and cycling routes with art and culture and world heritage sites

What we will do in partnership

- Work closely with and through a number of linked strategies, including the Sustainable Transport Strategy, Green Infrastructure Strategy and Green Spaces Strategy to deliver “Fit for Life” priorities
- Protect playing pitches and outdoor opportunities for physical activity from development
- Provide safe open spaces and play areas which are stimulating and challenging for children
- Develop age appropriate play facilities for children and young people
- Create family friendly environments that enable opportunities for active play and planned physical activity
- Encourage schools to make use of available facilities to children and young people out of school hours and holidays, offering physical activity programmes and opportunities for physically active play.
- Create more opportunities for people to access sport and physical activity on their doorstep (own community), particularly utilising a parks and open spaces
- Seek to influence future developments of the canals, rivers and towpaths to ensure they maximise opportunities for being active.
- Promote greater usage of our parks, green spaces and natural environment.
 - Address any concerns about safety, crime and inclusion in our parks and open spaces.
 - Ensure spaces and facilities used for physical activity meet recommended safety standards for design, installation and maintenance.
 - Increase the availability and accessibility of holistic growing schemes, allotments and community gardens so that they attract a wider audience.
 - Deliver improvements at Lansdown Playing fields in partnership with local schools and clubs to enhance the user experience and drive greater participation recognising the key strategic nature of this site for sports provision.

How we will know we have made a difference:

- Usage of our green infrastructure increases
- We are able to protect our parks and green spaces against development
- Increase in the number of outdoor play opportunities

Active Design

Our neighbourhoods are designed to offer easy access to a choice of opportunities for physical activity enabling communities to be more active and healthy.

What we know:

Being active should be an intrinsic part of everyone's life pattern. The master planning of major new housing and mixed use development schemes has a vital role in providing easy access to a choice of opportunities for sport and physical activity, making new communities more active and healthy.

Active Design has three key principles – improving accessibility (improving availability of facilities and infrastructure), enhancing amenity (Ensuring high quality design of facilities and infrastructure with good links to other developments, local communities and the wider public realm) and increasing awareness (making sure opportunities to be physically active are prominent within developments and well signposted).

These three key elements have been developed into a criteria based approach to be used at the master planning stage of major developments to help create environments that maximise opportunities for participation in sport and physical activity. These criteria should help to inform the development requirements for site allocations in the Placemaking Plan.

Master planning components that can contribute towards promoting physical activity and active travel have been broken down into the following broad categories:

- **Everyday Activity Destinations** – these are those places where people spend most of their time and which are essential to meeting people's day to day needs. They include schools, workplaces, shops, homes and community facilities. Where possible the linkages between them should provide safe, convenient and direct access for walking, running or cycling between different places.
- **Informal Activity and Recreation** – these are facilities that could be available more locally to people's homes such as children's play areas, multi-use games areas, skate parks, home zones, allotments, parks and gardens and other informal parkland, natural green space and civic spaces.
- **Formal Sports and Leisure Activities** – these are those facilities where sport or physical activity will be the deliberate and primary purpose of the visit. This includes swimming pools, fitness clubs, formal pitches and indoor facilities used for team sports, athletics, countryside and water sports.

What we will do:

- Improve design and planning process to take into consideration the impact of physical activity

- Ensure that this guidance has been considered during the preparation of the Placemaking Plan and other planning policy documents
- Ensure developers are aware of the guidance and are making use of it when developing schemes
- Ensure all new major developments are health impact assessed to gauge their impact on activity levels
- Support a planning policy framework which seeks to safeguard and enhances open areas which are used for leisure activities through the Placemaking Plan
- Support a planning policy framework that seeks to direct development to sites that will encourage physical activity through walking and cycling
- Assess all proposals for signs restricting physical activity in public places and facilities to judge effect on physical activity levels.

What we will do in partnership

- Make physical activity an easy option when designing spaces and so that they are inviting for all
- Improve walking and cycling opportunities between everyday activity destinations
- Ensure building design helps to encourage use of the stairs ahead of the lift

How we will know we have made a difference:

- New developments clearly demonstrate how this advice has been implemented
- Physical activity, sports and leisure facilities, green space and access to the natural environment are key considerations in the planning process
- Health impact assessments are completed for new developments

Active Travel

More people are walking or cycling as a means of getting around as part of everyday life

Creating an environment where people actively choose to walk and cycle as part of everyday life can have a significant impact on public health and may reduce inequalities in health. It is an essential component of a strategic approach to increasing physical activity and may be more cost-effective than other initiatives that promote exercise, sport and active leisure pursuits. More walking and cycling also has the potential to achieve some of the Council's wider objectives, it:

- supports local businesses and promotes vibrant town centres
- provides a high-quality, appealing public realm
- reduces car travel, air pollution, carbon dioxide emissions and congestion
- reduces road danger and noise
- increases the number of people of all ages out on the streets, making public spaces seem more welcoming and providing opportunities for social interaction and children's play
- provides an opportunity for everyone, including people with impairments, to experience and enjoy the outdoor environment.

There is an extensive evidence base for effective action on active travel. The most relevant and recent review has been conducted by NICE, looking specifically at local measures to promote active transport.

The small size of the City of Bath makes it a much more walkable proposition than many other places and this should be exploited both for residents and tourists with readily available walking routes highlighting the strong heritage of the city in the way that many other European cities do. In partnership with the more infrastructure and commuter led approach of the Transport Strategy the opportunities for walking any cycling as a leisure pursuit should be considered as an important part of building healthy lifestyles.

What we know:

There is potential for increasing the number of journeys taken by bicycle. Currently, these trips make up just 2% of all journeys in Britain. Twenty percent of all trips made cover less than 1 mile – and just over half of all car journeys cover less than 5 miles ([Transport trends 2009](#)). Although most children can cycle, only 2% of trips to school are made by bike ([Taking part: The national survey of culture, leisure and sport. Adult and child report 2009/2010](#)).

What we will do:

- Improve Access to public services and local amenities
- Improve Walking and cycling conditions by:
 - Safe, attractive walking and cycling networks linking every day destinations
 - Develop a coordinated pack of individualised travel marketing
 - Develop school and work travel plans
 - Provide high quality cycle training
 - Support the delivery of walking programmes
- Contribute to the implementation of the Bath Transport Plan
- Increase the number of healthy living road shows to support people in making the choice to walk or cycle for both work and leisure.
- Provide interventions and services that support people in making the choice to walk and cycle more as a recreational activity
- Make use of the Odd Down Cycle Circuit as a safe off road venue for skill development and improving confidence in cyclists
- Work with early years and educational settings to continue to encourage a culture of physically active travel, supporting them to provide cycle and road safety training for all children.
- Promote active travel in schools and workplaces.

What we will do in partnership:

- Continue to support local cycling clubs to increase their membership through the partnership working with British Cycling that has successfully delivered the Cycle Circuit and its development plan
- Work with providers of public transport to promote the benefits of travelling sustainably – linking walking and cycling routes with public transport networks

How we will know we have made a difference:

- Walking and cycling as a leisure activity and commuter travel increases across all ages
- Targets are in place to measure uptake of walking and cycling

Cross Cutting Themes

- Workforce and Volunteering
- Evidence and Evaluation
- Communications, Information and Resources

Workforce and Volunteering

The positive impact that employment can have on health and wellbeing is well documented. There is strong evidence to show that having a healthy workforce can reduce sickness absence, lower staff turnover and boost productivity – this is good for employers, workers and the wider economy.

Physical activity can provide volunteering opportunities, training, new skills, improved confidence and a route to employment to help support work on the worklessness agenda.

Through a partnership approach we will:

- Work with local employers to create healthy, active workplaces which improve the health of the working age population.
- Create opportunities for volunteering to successfully increase people's physical activity and promote good mental health and well-being as well as increasing the potential for employment.
- Work with local employers to implement a Workplace Wellbeing Charter which is an opportunity for employers to demonstrate their commitment to the health and wellbeing of their workforce.
- Offer support to local employers who want to encourage their employees to be more physically active by implementing local physical activity programmes and developing workplace travel plans to enable people to be physically active throughout the day
- Ensure continuing professional development (CPD) programmes for people involved in organising and running formal and informal physical activities
- Ensure new workplaces are linked to cycling and walking networks.

Evidence and Evaluation –

We will provide and develop clear information about the positive effects of being active, what works best for different people and different settings, and use an evidence based approach to the development of policy and practice.

We will work with partners to agree a performance measurement system as well as accurate baseline measures so that progress can be measured.

We will also utilise the potential for developing research projects with the University of Bath and others.

Communications, Information and resources

What we will do:

We will establish a Physical Activity Network and strategic partnership to support and coordinate work in the sector.

The Physical Activity Strategic Partnership will be responsible for ensuring that lines of communication are clear and that the public are aware of what opportunities are available from different organisations.

We will develop a communications plan, which will involve much greater use of local intelligence and the market segmentation information to identify suitable marketing strategies that would appeal to the lowest participating groups.

The communication plan will:

- Promote the use of the Change4Life and Start4Life campaigns, plus other national campaigns that may emerge over the next three to five years (www.change4life.co.uk)
- Improve communication between the partners and sharing good practice
- Improve consistency of key messages
- Promote local opportunities
- Develop and maintain easily accessible resources about what's available across Bath and North East Somerset, taking into account a wide range of interests and preferences. As part of this create a high quality digital hub for signposting and promotion with an effective online physical activity finder.
- Create a B&NES brand

Through a partnership approach, we will:

- Work with local and regional networks, clubs and forums to engage stakeholder and local residents in increasing participation rates and promoting the benefits of being active.
- We will seek to connect people with Physical Activity opportunities across the lifespan using clear and consistent, simple and value based marketing messages for physical activity making use of social marketing and information technology to support campaigns.
- Maximise on community resources to improve awareness of key messages and to increase accessibility to interventions.

Appendix 1

Outcomes Framework

Measures of success

How we will measure the outcomes of the strategy

Outcomes Framework

Outcomes	National and local Indicators the strategy contributes to:	Linked Strategies/plans	Strategy Objectives	Examples of local Activity/Programmes	Performance Measures
Active lifestyles					
All People are active enough to benefit their health	Under 75 Mortality from all cardiovascular diseases (including heart disease and stroke) Mortality from causes considered Preventable % of adults achieving at least 150 minutes of physical activity per week in accordance with UK CMO recommended guidelines on PA.	HWBB strategy CCG strategic plan	Increase opportunities to stimulate engagement in physical activities. Increased participation and client outcomes in targeted healthy living programmes aimed at reducing health risk factors or rehabilitation Create fairer life chances by improving participation in physical activity and sport for priority groups : disadvantaged areas, sedentary, those with a disability, BME	Programme of events to stimulate new activity and engagement, particularly in families e.g. sky ride , bath half marathon Lifestyle services including Exercise referral programmes e.g. Passport to Health Rehabilitation programmes Programme of support for settings which	Numbers attending events and the % stating they will exercise more as a result Numbers participation in activities/ services Client satisfaction levels with services Client outcomes for people accessing programmes e.g.

	<p>(Active People Survey, Sport England)</p> <p>Numbers less than exercising 0 x 30 mins per week</p> <p>Numbers active 3 x 30</p> <p>Numbers reaching 5 x 30</p> <p>The gap in activity levels between the most and least deprived wards (measured by active people)</p> <p>Self-reported activity levels and barriers to exercise (Voice box street survey)</p>		<p>Develop the workforce to be able to promote physical activity</p> <p>Raise awareness of the benefits of physical activity</p> <p>Support people to self help</p> <p>Increase access to physical activity in settings</p> <p>Increase opportunities for walking and cycling for leisure</p>	<p>includes physical activity e.g. Workplace charter , DPH award</p> <p>Walking programmes</p> <p>Cycling development for leisure - promotion , training , disability cycling</p> <p>Play provision</p> <p>Swimming programmes</p> <p>Programme of School sports activities</p> <p>Programme of sports clubs , leagues and competitions</p> <p>Targeted activities for priority groups :children at risk from exclusion, NEETS, complex families, people with mental health issues, BME , disabled e.g. Breakthrough</p>	<p>Numbers exiting Passport to Health Scheme still active 3 x 30 minutes 6 months post programme</p> <p>Number of children who can now swim 25 metres</p> <p>Numbers of staff trained</p> <p>Levels of media coverage / web hits</p> <p>Sports club membership</p>
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				<p>mentoring programme</p> <p>Staff Training for brief interventions</p> <p>Social marketing activity e.g. Change for life</p>	
<p>Older people are active enough to and enjoy good quality of life and maintain independent living</p>	<p>% of over 65s reporting any exercise lasting at least 10 minutes during a 4 week period (Health Survey for England)</p> <p>Reduction in falls in over 65s by age and gender</p>	<p>CCG Strategic plan</p> <p>Avonsafe Injury Prevention Strategy</p>	<p>Improved Services which support and encourage independent living</p> <p>Increase resilience in people and communities including action on loneliness</p> <p>Reduction in the number of falls</p>	<p>Falls and balance clinics</p> <p>Targeted physical activity programmes for older people</p>	
<p>All Children and adults maintain a healthy weight (inc pregnancy)</p>	<p>% of children aged 4-5 classified as overweight or obese (as measured by NCMP)</p> <p>% of children aged 10-11 classified as overweight or obese (as measured by NCMP)</p> <p>% of children</p>	<p>Healthy Weight Strategy</p> <p>Children and Young People's Plan</p> <p>Play Strategy</p> <p>CCG Strategic Plan</p>	<p>Reduce the rise in unhealthy weight</p> <p>Maintain healthy weight during pregnancy</p>	<p>Healthy weight pathways</p> <p>Weight management programmes e.g. SHINE, Health in pregnancy</p> <p>Social marketing activity</p>	<p>Coverage for NCMP data</p>

	<p>overweight or obese in bottom quintile</p> <p>% of children walking/cycling to school (The Health-Related Behaviour Survey) The Schools Health Education Unit</p> <p>Increase in perception of safe areas to play for children and families (play spaces survey/Youth Parliament)</p> <p>% of adults classified as overweight or obese (as measured by Sport England research)</p>				
<p>People increase their employability via physical activity</p>	<p>Sickness Absence - % of working days lost due to sickness absence</p>	<p>Economic strategy</p>	<p>Improve Skills and Employment in disadvantaged groups</p>	<p>Training and development and volunteer opportunities and apprenticeships for young people related to physical activity</p>	<p>Numbers participating</p>

Active Environments

<p>All people have access to affordable high quality and sustainable facilities</p> <p>All people have access to high quality natural environment and outdoor places</p>	<p>% of people using outdoor space for exercise/health reasons (as measure MENE survey by Natural England)</p>	<p>Placemaking plan</p> <p>Green Infrastructure Strategy</p> <p>Playing Pitch strategy</p>	<p>Generate investment and Improved and updated Sports and Leisure Facilities to meet the needs of the community</p> <p>Increase customer satisfaction levels with facilities</p> <p>Increase usage of the facilities</p> <p>Protect playing pitches and outdoor opportunities for physical activity from development</p> <p>Provide open spaces and paly areas which are stimulating and challenging</p> <p>Promote greater use of parks and open spaces and natural environment</p>	<p>Re tender the Leisure contract delivering value for money</p> <p>New Build Leisure Centre for Keynsham</p> <p>Refurbishment of Bath and North East Somerset sports centre</p> <p>Redevelopment of facilities (Odd Down, Lansdown, South Wansdyke Sports Centre), to deliver both improved service and greater commercial return</p> <p>Develop and apply supportive policies</p> <p>Provision of outdoor activity e.g. green gyms</p>	<p>Visits to leisure facilities</p> <p>Lower operating costs (£0 revenue cost to Council)</p> <p>customer satisfaction levels</p> <p>Life cycle costs accounted for</p> <p>New members not active in previous 12 months</p> <p>Playing pitch and built facility strategies are adopted and informing Council's regulation 123 statement.</p>
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Active Travel

<p>All people have opportunities to travel sustainably to key destination points</p>	<p>Self-reported modes of transport for work/school and barriers to walking and cycling as a means of active travel (Voice box street survey)</p>	<p>Transport plan Economic strategy Sustainable Construction SPD</p>	<p>Improve access to public services and local amenities Improve walking and cycling conditions</p>	<p>Bicycle hire schemes Cycle infrastructure development Sustainable transport plans in schools Sustainable transport road shows Implement 20 MPH or lower speed limits Driver training</p>	<p>Usage of bike schemes User satisfaction Number of transport plans Engagement with road shows</p>
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Active Design

<p>All new developments and buildings support people to be physically active</p>	<p>Number of health impact assessments complete Further indicators to be developed</p>	<p>Core strategy Placemaking Plan</p>	<p>Improve design and planning process to take into consideration the impact on Physical activity</p>	<p>Application of design checklist Health impact assessments</p>	<p>Policies in place to levy fees from developers via CIL to support facility development Number of planning applications which have been Health Impact assessed</p>
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Appendix 2

Evidence Base – Additional Information

In 2010, 47% of children's trips to and from primary school were made on foot, compared to 53% in 1995/97. The proportion of trips by car increased by about the same proportion. Similar patterns are seen among secondary schoolchildren, but they make fewer school trips on foot (36% in 2010) ([National travel survey: 2010](#)).

White adults are more likely than those from black and minority ethnic groups to say that they can cycle. Cycling proficiency is also linked to where people live, with those in more deprived neighbourhoods less likely to report being able to cycle ([Taking part 2011/12 quarter 3: statistical release](#)).

People living in the most deprived areas are less likely to take part in active sport than people in the least deprived areas (43.5% versus 57.2%) ([Sport overview figures](#)).

The proportion of people aged 65–74 involved in active sport has increased (from 35.3% in 2005/06 to 36.9% in 2010/11), but there has been a decrease among those aged 16–24 (from 75.8%–71.9%) ([Taking part 2011/12 quarter 3: statistical release](#)).

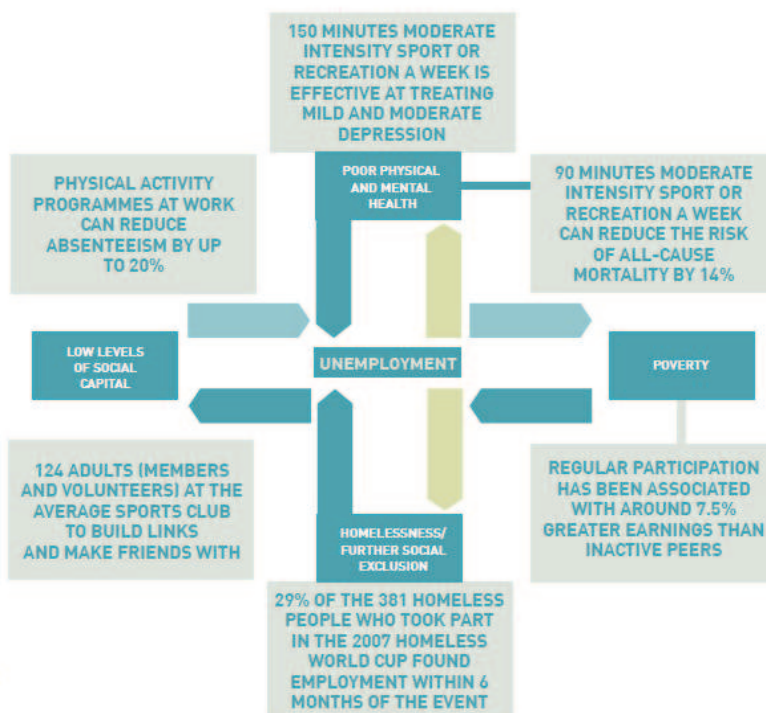
Women are less likely than men to have been involved in active sport in the last 4 weeks. Sports participation rates among women have declined (from 47.7% in 2005/06 to 45.9% in 2010/11), while rates for men have remained steady at around 60% ([Sport overview figures](#)).

EDUCATION AND YOUTH PARTICIPATION IN SPORTS AND RECREATION **A+**

PHYSICAL ACTIVITY POSITIVELY EFFECTS COGNITION IN CHILDREN.

BEING PHYSICALLY ACTIVE RELEASES HORMONES, NEUROTRANSMITTERS AND A PROTEIN RESPONSIBLE FOR LEARNING, MEMORY AND HIGHER THINKING.

SPORT AND RECREATION CAN ALSO LEAD TO INCREASED SELF-ESTEEM AND THE DEVELOPMENT OF MOTIVATION AND DETERMINATION - THESE SKILLS ARE USEFUL FOR ACQUIRING NEW INFORMATION FOR PASSING EXAMS.



ANNUAL COST TO SOCIETY

£23 billion

The risk of developing dementia is reduced by two to three times amongst the most active.

What does the needs assessment say?

There is a life expectancy gap of 6.3 years for men and 3.5 years for women between the wards at either ends of the spectrum – If everyone in B&NES had a similar health experience to those who suffer the least inequalities, then it may be possible to prevent 40% of premature deaths in males and 9% of premature deaths in females (over 220 deaths over a three year period).

We know that 73% of adults not getting enough physical activity to benefit their health, 43.7% of adults are doing no physical activity at all and that there are 598 deaths per year that are preventable through physical activity in B&NES

5.5% of current 16-18 year old are NEET (Not in Education, Employment or Training).

An estimated

£16,000,000

is spent on our most
complex families every
year

Nationally the cost of responding to incidents of anti-social behaviour is £3.4 billion per year.

The Local Picture

There are over 73,000 people in Bath and North East Somerset with at least one long term health condition. Older people in particular often live with several long term health conditions at the same time.

Within Bath and North East Somerset, approximately 18 per cent of our local population have experienced mental ill-health which includes depression and anxiety.

Our population is changing as people are living for longer. Statistical projections suggest that by 2026 people aged over 75 will represent 11 per cent of the local population, compared with 9 per cent in 2011. This will increase the demand for services that help older people to stay healthy, active and independent for as long as possible.

Our local surroundings and social environment play an important part in our health and wellbeing. There is a link between loneliness and isolation and a range of health and wellbeing issues such as high blood pressure, depression and heart disease, particularly amongst the aging population.

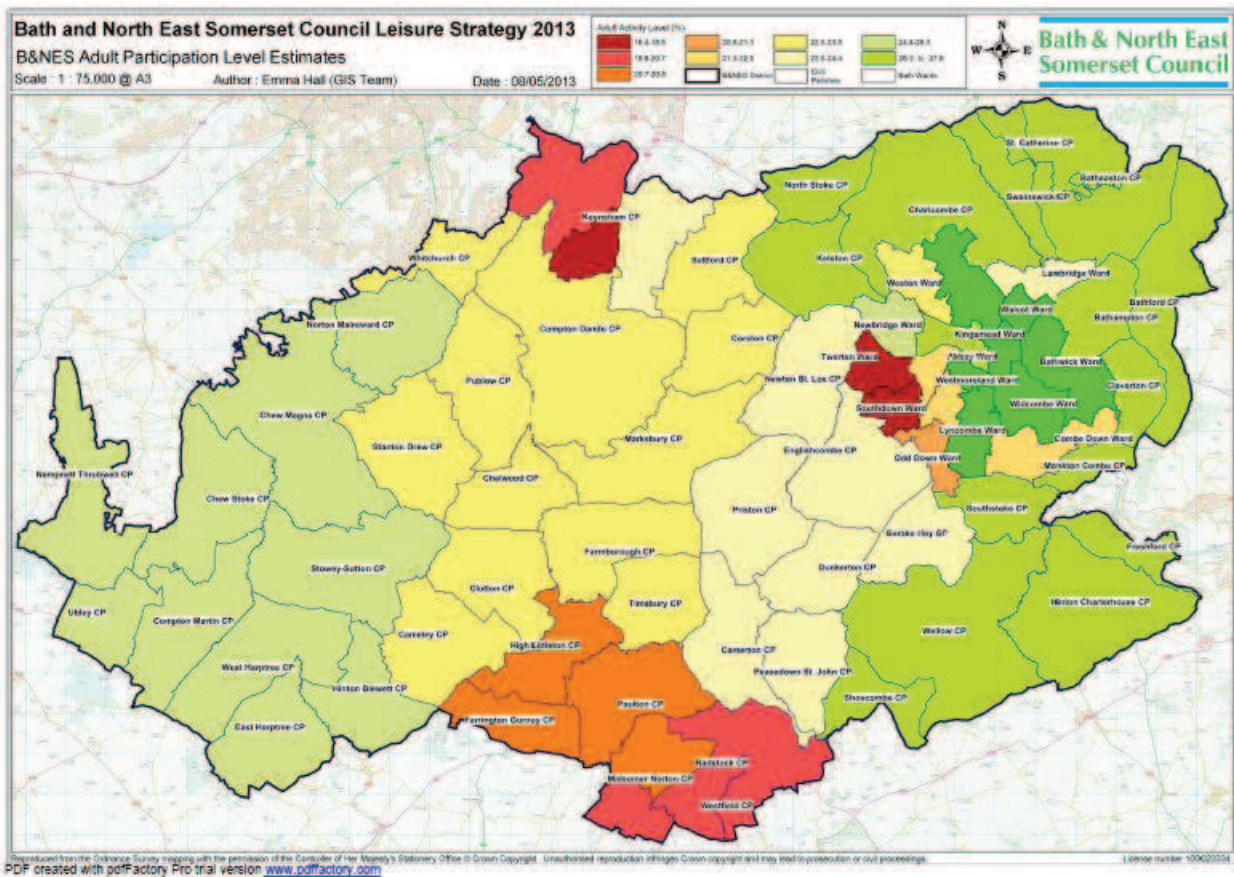
There are a number of groups which may be particularly vulnerable to social isolation and loneliness including young care-leavers, those with mental ill-health and the older population.

Activity Levels

Bath and North East Somerset is above the national average for activity levels with 25.9% of adults getting at least 3 x 30 minutes of exercise per week compared to 23.7% nationally (Active People Survey 6 data).

There are clear inequalities in how active people are depending on where they live within the area. The map shown below shows activity levels broken down by ward.

The highest level is 27.6% of people active 3 x 30 minutes per week which contrasts with a mere 16.4% in the least active area. Low levels of activity overlay closely with deprivation levels suggesting that a focus for the strategy should be areas such as Twerton, Southdown and Whiteway in Bath as well as areas of Keynsham and Radstock.



Appendix 3 - Consultation Process for the strategy

A stakeholder day was held in July 2013 to look at priority groups and key areas for the strategy to consider. A wide range of partners attended with representation from services across the Council, Governing Bodies of Sport, Sport England, local Town Councils, leisure providers and the County Sports Partnership. Further to this consultation meetings were held with the Clinical Commissioning Group (Operational Leadership Team), People Directorate Senior Management Team, Health and Wellbeing Board and Cllrs Simon Allen and David Dixon who are the relevant Cabinet members for this area of work.

This work led to the following:

Priority groups for increasing participation in Sport and Active Lifestyles

- Ethnic Minorities
- 14-18 year olds (particularly females) – this is the age where levels of activity start to drop
- Middle aged men
- Families
- Those experiencing health inequalities
- Older People
- Those who are carrying excess weight in both children and adults
- Those with long term health conditions
- Those with disabilities

Areas for the strategy to address

- Increasing Participation in all areas
- Targeted Health intervention schemes
- Tackling obesity – including pre surgery weight loss
- Increasing participation in active lifestyles (walking, cycling, swimming) and sport
- Providing education on healthy living
- Outreach programmes, not just focused around facilities, making the best use of the free facilities and environment such as parks and open spaces
- Promoting active travel and creating links with the transport strategy
- Taking a view on the quality, quantity and accessibility of facilities
- Ensuring clear governance for delivery of the strategy

What does the community tell us?

The Council commissioned a street survey of 1000 people in November 2013 to understand local people's views on physical activity to help shape the strategy.

B&NES street survey headline findings

Nationally, 61% feel regular activity is very important with a further third (34%) viewing it as important. Similar to the respondents in the Bath & NE Somerset area with 62% stating very important and a further 35%

Although 97% state regular activity is either very important or important, slightly under a half state they are **not** undertaking as much activity as they would like to (46%). Women are currently less satisfied than men with the amount of activity they are currently doing.

For those who do undertake regular physical activity 43% state they use a Leisure Centre or health club. Bath Sports and Leisure Centre was the most popular of this sample. The most popular form of independent activity is walking/jogging in the streets/parks (84%), followed by gardening at 16%.

Slightly under half (47%) of the sample would like to undertake more physical activity than they currently are. Female respondents show a higher desire to take part in more activity/exercise than men and those age 55+ are the least likely to take part in more activity.

The main reason given for wanting to take part in more activity/exercise is to improve/maintain health at 59% lower than the national benchmark of 64%, followed by improve/maintain body tone/shape (22%), which is higher than the national benchmark of 15%

Of those who would like to do more activity but don't, the main barrier preventing them from doing so is the lack of time due to work pressure at 54% (nationally 47%), followed by lack of time due to home pressures at 22% (nationally 5%). Lack of motivation is a higher barrier in this area than nationally at 11% (nationally 2%).

Of those who do not want to do more physical activity the main reason given as to why not is 'do enough/no need' (50%), followed by 'just don't want to' (13%), and 'not enough time due to work' (12%).

Only 15% is either very likely or quite likely to increase their activity in the near future, considerably lower than the national benchmark of 38%.

The key importance factors to be addressed according to respondents were availability of time at 55% and direct costs at 40% stating either very important or important, followed by accessible and good quality facilities at 26%.

The sample as a whole shows 43% would consider using Bath & NE Somerset Council leisure facilities. The main reasons they don't currently use any of Bath & NE Somerset Council's Leisure Centre's/facilities, were 'no time' 20%, slightly higher than the national average at 18%, followed by 'cost' at 17% (nationally 22%) and happy where I am 8% (nationally 4%).

According to the respondents, the main factor that Bath & NE Somerset Council could introduce to encourage more usage, would be to lower costs 59%,(nationally 65%), followed by better range of facilities at 39% and improved facilities also at 39%

The most popular place to gain information regarding sport and leisure is to go to the council website (43%) followed by visiting another website (36%)

Cycling

The majority of the sample does not cycle and do not want to (55%). Of those that do 27% overall do so for leisure purposes, a further 16% do not currently but would like to.

50% of those who do cycle do so alone, a further third with friend and a third with family. Men are more likely to cycle alone but women are more likely to cycle with family. This would also explain why women prefer off road (45%) and men prefer road cycling (51%) although men are also using cycling for travel purposes more than women.

Parks & Green Space

Overall 87% have visited a park or green space in the last 12 months. A third of those who have visited a park or green space have done so at least once a week with a further 28% once a month. The introduction of outdoor gym equipment would definitely be used by 20% and 27% would try although 53% would definitely not use.

Focus Groups

This consultation was carried out by Leisure-net as a follow up to the Community Survey completed in November 2013. This survey was designed to investigate attitudes and behaviour around physical activity and exercise in general and more specifically to find out what certain target groups in the area think about the facilities provided by Bath & NE Somerset Council, and what would encourage them to use their leisure facilities and outreach programmes in the future. The focus group and stakeholders interviews in this report were designed to drill deeper into some of the issues coming out of the research and to provide some more qualitative data.

Groups/interviews held

The following groups/interviews were held over a three week period targeting key groups across different areas geographically;

- Focus group in Bath – middle aged inactive men
- Focus group in Bath – people with disabilities
- Focus group in Bath – Warm water Group – WWISE
- Focus group in Southside – young mothers with pre-school children
- Focus group in Keynsham – 65 plus and people with disabilities
- Interview in Southside – Re-generate – Community worker in Southside
- Interview in Bath – Cordelia Johnney – Trustee of Percy Community Centre and Organiser of the Bath Steel Band

Key Themes

Several cross cutting themes came out of the consultation.

9. Most inactive people know they need to be more active and say they want to be

The issue is not one of education but of motivation.

10. Recognition of individuals responsibility

Most people recognise that whilst the council and others can make it easier for them to be active, in the end it is their own decision to start, and their own motivation that will keep them going.

11. But that groups/friends help motivate

Opportunities to do activity with others is crucial to keeping things going. Most people know that group/family/peer activities are more fun and motivational than individual activities.

12. Outdoor spaces/environment an opportunity

Bath and its environs have extensive open spaces which offer great opportunities for encouraging physical activity. The parks, riversides and surrounding countryside could be better utilised and schemes such as marked walks and bike rides, fit trails and led health walks/rides are all seen as attractive activities.

13. Club base is strong at both recreational and elite level

The area has a very strong base of clubs operating at all levels and with strong community links. Several groups identified their local sports clubs as being ideal opportunities for local physical activity opportunities to be developed. Some clubs could do more to be more open and inclusive it was felt.

14. Awareness of what is already happening could be better

Quite often groups came up with ideas that someone else knew was already happening, so perhaps there is an issue of improving awareness of what is already happening as an easy first step to improving activity opportunities.

15. Local facilities perceived generally to be adequate to good with friendly, supportive staff and management

The local leisure centres were generally viewed positively, although both Bath and Keynsham were seen as being a bit tired and “not as good as they used to be”. The staff and management were viewed positively though.

16. Feeling that the council could engage better and more consistently

There was a view from several of the target groups that the council could engage with them on a better and more regular basis. Some expressed the opinion that this sort of consultation only happened when it had to happen, and a more formal on-going way of engaging was needed. However others within the disability groups for example felt that the council officers they worked with were excellent and really tried to make a difference.

Sports Club Consultation

We have also consulted local sports clubs as part of the playing pitch strategy process to understand what their key issues are. The majority of clubs are keen to increase the number of members they have and are looking for support to do this. They have highlighted the following:

- The need for greater access to floodlit training
- The need for better/improved facilities
- The need to reduce the costs of sport to participants
- Support in accessing grants
- The need to develop more coaches
- The need to find more volunteers
- The cost of hiring/using facilities
- The lack of funds within the club to make the improvements needed

Appendix 4 – Background – progress made – the Get Active Strategy

In 2008, the first Get Active Vision was produced. Its purpose was to: create a framework to increase physical activity levels in Bath and North East Somerset and to create a platform on which a wide range of partners could join together raise awareness of the role that Sport and Active Lifestyles can play in improving and the health and wellbeing of local residents.

Since 2008, there has been much progress resulting in increased levels of participation from 22.5% for 2006/8 period (Active People Survey 2/3 NI8 data, data is aggregated over a 2 year period to enhance sample size) to 27.2% for the 2011/2013 period (Active People 6/7 NI8 data).

This refreshed strategy has been produced to further develop the work that has been done with partner organisations. It seeks to reinvigorate and build on the 'Get Active Partnership' that was created as part of the previous strategy and played an important role in bringing partners together.

The role of this strategy is to support and improve the health and wellbeing of the population by ensuring sustainable, high quality sport and physical activity infrastructure and opportunities to enable residents to live active lives, helping to prevent ill health, reduce social isolation and maintain independence for longer.

Appendix 5 - Government Recommendations on activity levels

The national recommendations on [physical activity](#) for everyone are:

- Aim to be active daily. Over a week, activity should add up to at least 150 minutes of moderate-intensity activity in bouts of 10 minutes or more. This could be achieved by doing a 30-minute session at least 5 days a week. Undertake physical activity to improve muscle strength on at least 2 days a week. Minimise the amount of time spent being sedentary for long periods.
- To lose weight: most people may need to do 45–60 minutes of moderate-intensity activity a day, particularly if they do not reduce their energy intake².
- People who have been obese and have lost weight may need to do 60–90 minutes of activity a day to avoid regaining weight.

There is also age specific advice as follows:

UNDER 5s

Who are capable of walking unaided should be physically active daily for at least **180 minutes** (3 hours), spread throughout the day. Physical activity should be encouraged from birth, particularly through floor-based play and water-based activities in safe environments.

5-18 YEAR OLDS

Should engage in moderate to vigorous intensity physical activity for at least **60 minutes** and up to several hours every day. Vigorous intensity activities, including those that strengthen muscle and bone, should be incorporated at least 3 days a week.

19-64 YEAR OLDS

Should aim to be active daily. Activity should total **150 minutes** (2.5 hours) of moderate intensity activity per week or **75 minutes** vigorous intensity activity or a combination of both. Adults should also undertake physical activity to improve muscle strength on at least 2 days a week.

65+ YEAR OLDS

Should aim to be active daily. Activity should total at least **150 minutes** (2.5 hours) of moderate activity per week. Active older people could achieve comparable benefits from **75 minutes** of vigorous intensity activity per week or a combination of both.

Older adults should also undertake physical activity to improve muscle strength on at least 2 days a week.

Older adults at risk of falls should incorporate physical activity to improve balance and co-ordination on at least 2 days a week.

It is important that people of all ages minimise the amount of time spent being sedentary for extended periods.

Appendix 6 - KPI's measured by Sport England's Active people survey are as follows (National figure in brackets):

Performance measure	Active People Survey 4	Active People Survey 5	Active People Survey 6
3 x 30 sport – At least 3 sessions x 30 minutes, moderate intensity sport per week	16.9% (16.5%)	20.0% (16.3%)	18.3% (17.3%)
KPI 1 – At least 3 days x 30 minutes, moderate intensity participation (sport and recreational walking and cycling) per week	23.7% (22.1%)	26.0% (21.8%)	27.9% (22.9%)
KPI 2 – At least 1 hour of volunteering to support sport per week	* (*)	18.1% (13.6%)	* (14.0%)
KPI 3 – Member of a sports club	25.8% (23.9%)	27.0% (23.3%)	29.5% (22.8%)
KPI 4 – Received sports tuition or coaching	22.9% (17.5%)	23.1% (16.2%)	23.6% (16.8%)
KPI 5 – Taken part in organised competitive sport	18.7% (14.4%)	17.8% (14.3%)	* (14.4%)

* Data unavailable, question not asked or insufficient sample size