

Cabinet

Date: Thursday 13th November 2025

Time: 6.30 pm

Venue: Council Chamber - Guildhall, Bath

Agenda

To: All Members of the Cabinet

Councillor Kevin Guy (Leader of the Council, LD Group Leader, Member Advocate for Armed Forces and Veterans), Councillor Alison Born (Cabinet Member for Adult Services), Councillor Mark Elliott (Deputy Council Leader (non-statutory) and Cabinet Member for Resources), Councillor Joel Hirst (Cabinet Member for Sustainable Transport Strategy), Councillor Lucy Hodge (Cabinet Member for Sustainable Transport Delivery), Councillor Paul May (Cabinet Member for Children's Services), Councillor Matt McCabe (Cabinet Member for Built Environment, Housing and Sustainable Development), Councillor Manda Rigby (Cabinet Member for Communications and Community), Councillor Paul Roper (Cabinet Member for Economic and Cultural Sustainable Development) and Councillor Sarah Warren (Deputy Council Leader (statutory) and Cabinet Member for Sustainable Bath and North East Somerset)

Chief Executive and other appropriate officers
Press and Public

The agenda is set out overleaf.



Marie Todd

Democratic Services

Lewis House, Manvers Street, Bath, BA1 1JG

Telephone: 01225 394414

Web-site - <http://www.bathnes.gov.uk>

E-mail: Democratic_Services@bathnes.gov.uk

NOTES:

1. **Inspection of Papers:** Papers are available for inspection as follows:

Council's website: <https://democracy.bathnes.gov.uk/ieDocHome.aspx?bcr=1>

2. **Details of decisions taken at this meeting** can be found in the minutes which will be circulated with the agenda for the next meeting. In the meantime, details can be obtained by contacting as above.

3. Recording at Meetings

The Openness of Local Government Bodies Regulations 2014 now allows filming and recording by anyone attending a meeting. This is not within the Council's control. Some of our meetings are webcast. At the start of the meeting, the Chair will confirm if all or part of the meeting is to be filmed. If you would prefer not to be filmed for the webcast, please make yourself known to the camera operators. We request that those filming/recording meetings avoid filming public seating areas, children, vulnerable people etc; however, the Council cannot guarantee this will happen.

The Council will broadcast the images and sounds live via the internet www.bathnes.gov.uk/webcast. The Council may also use the images/sound recordings on its social media site or share with other organisations, such as broadcasters.

4. 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 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 Thursdays notice must be received in Democratic Services by 5.00pm the previous Monday.

Further details of the scheme can be found at:

<https://democracy.bathnes.gov.uk/ecCatDisplay.aspx?sch=doc&cat=12942>

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

6. Supplementary information for meetings

Additional information and Protocols and procedures relating to meetings

<https://democracy.bathnes.gov.uk/ecCatDisplay.aspx?sch=doc&cat=13505>

Cabinet - Thursday 13th November 2025

in the Council Chamber - Guildhall, Bath

A G E N D A

1. WELCOME AND INTRODUCTIONS

2. EMERGENCY EVACUATION PROCEDURE

The Democratic Services Officer will read out the emergency evacuation procedure as set out in the notes.

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 4.4 Appendix 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 an undertaking to respond within 5 working days of the meeting. Councillors may ask one supplementary question for each question they submit, up to a maximum of two per Councillor.

7. STATEMENTS 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 MEETINGS (Pages 7 - 16)

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

Cabinet Meeting held on 11th September 2025

Special Cabinet Meeting held on 25th September 2025

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. SINGLE MEMBER CABINET DECISIONS TAKEN SINCE PREVIOUS CABINET MEETING (Pages 17 - 22)

To note the list of Cabinet Single Member decisions taken and published since the last Cabinet meeting (no debate).

11. MATTERS REFERRED BY POLICY DEVELOPMENT AND SCRUTINY BODIES

This is a standing agenda item (Constitution rule 3.3.14) for matters referred by Policy Development and Scrutiny bodies. The Chair of the relevant Policy Development and Scrutiny Panel will have the right to attend and to introduce the Panel's recommendations to Cabinet.

12. GREENER PLACES PLAN FOR BATH AND NORTH EAST SOMERSET 2025-2035 (Pages 23 - 120)

The new Greener Places Plan for Bath and North East Somerset sets a framework for action and investment to ensure we make the most of our green spaces, both on Council land and across the wider district. It promotes understanding of what Green Infrastructure is, the multiple benefits it provides and how to deliver it where it is needed most, for people and nature.

13. ANNUAL CLIMATE AND NATURE PROGRESS REPORT 2025 (Pages 121 - 242)

The report updates Cabinet on the progress made in tackling the Climate and Ecological Emergencies in 2024/25, both as a Council and as a wider district.

14. ESTABLISH A LIMITED LIABILITY PARTNERSHIP (LLP) FOR THE REGENERATION OF THE BATH QUAYS RESIDENTIAL DEVELOPMENT PLOTS (Pages 243 - 304)

The report proposes the establishment of a Limited Liability Partnership delivery vehicle for the delivery of housing development to further the Bath Quays regeneration.

15. CARE QUALITY COMMISSION (CQC) LOCAL AUTHORITY ASSESSMENT - ADULT SOCIAL CARE IMPROVEMENT PLAN PROGRESS UPDATE (Pages 305 - 322)

The report outlines the progress that has been made towards the Adult Social Care Improvement Plan alongside key activity that the Adult Social Care Leadership Team is undertaking to enable sustainable improvement since the publication of the B&NES CQC inspection report in January 2025.

16. ADOPTION WEST CONTRACT (Pages 323 - 348)

To consider options for the delivery of adoption services beyond the expiry of the current arrangements with Adoption West which expires 28 February 2027. This is a Teckal Company, wholly owned by the participating Local Authorities.

17. LOCAL GOVERNMENT ASSOCIATION (LGA) CORPORATE PEER CHALLENGE ACTION PLAN (Pages 349 - 384)

To consider the draft action plan, reflecting the feedback and recommendations from the Local Government Association's Corporate Peer Challenge that took place in July 2025.

18. QUARTER 2 CORPORATE STRATEGY PERFORMANCE REPORT (Pages 385 - 388)

The report provides information and background on performance metrics collected as part of the Council's monitoring of Corporate Strategy priorities.

19. 2026/27 MEDIUM TERM FINANCIAL STRATEGY (Pages 389 - 422)

The Medium-Term Financial Strategy (MTFS) sets out the strategic direction and priorities for the Council as well as outlining the financial context and challenges the Council faces over the next five years and the strategy that will be used to inform its annual budget process.

20. REVENUE & CAPITAL BUDGET MONITORING, CASH LIMITS AND VIREMENTS – APRIL TO SEPTEMBER 2025 (Pages 423 - 466)

The report presents the financial monitoring information for the Authority for the 2025/26 financial year, using information available up to the end of September 2025.

21. TREASURY MANAGEMENT PERFORMANCE REPORT TO 30TH SEPTEMBER 2025 (Pages 467 - 488)

The report gives details of performance against the Council's Treasury Management Strategy for the first six months of 2025/26.

The Democratic Services Officer for this meeting is Marie Todd who can be contacted on 01225 394414.

This page is intentionally left blank

BATH AND NORTH EAST SOMERSET

CABINET

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

Thursday 11th September 2025

Present:

Councillor Kevin Guy	Leader of the Council, LD Group Leader, Member Advocate for Armed Forces and Veterans
Councillor Mark Elliott	Deputy Council Leader (non-statutory) and Cabinet Member for Resources
Councillor Joel Hirst	Cabinet Member for Sustainable Transport Strategy
Councillor Paul May	Cabinet Member for Children's Services
Councillor Matt McCabe	Cabinet Member for Built Environment, Housing and Sustainable Development
Councillor Manda Rigby	Cabinet Member for Communications and Community
Councillor Paul Roper	Cabinet Member for Economic and Cultural Sustainable Development
Councillor Sarah Warren	Deputy Council Leader (statutory) and Cabinet Member for Sustainable Bath and North East Somerset

16 WELCOME AND INTRODUCTIONS

The Chair welcomed everyone to the meeting.

17 EMERGENCY EVACUATION PROCEDURE

The Senior Democratic Services Officer read out the emergency evacuation procedure.

18 APOLOGIES FOR ABSENCE

Apologies for absence were received from Cllrs Alison Born and Lucy Hodge.

19 DECLARATIONS OF INTEREST

There were no declarations of interest.

20 TO ANNOUNCE ANY URGENT BUSINESS AGREED BY THE CHAIR

There was no urgent business.

21 QUESTIONS FROM PUBLIC AND COUNCILLORS

There were 10 questions from Councillors and 17 questions from members of the public.

[Copies of the questions and responses, 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.]

22 STATEMENTS OR PETITIONS FROM PUBLIC OR COUNCILLORS

There were no statements from members of the public or councillors.

23 MINUTES OF PREVIOUS CABINET MEETING - 10TH JULY 2025

RESOLVED that the minutes of the meeting held on Thursday 10th July 2025 be confirmed as a correct record and signed by the Chair.

24 CONSIDERATION OF SINGLE MEMBER ITEMS REQUISITIONED TO CABINET

No single member items were requisitioned to Cabinet.

25 MATTERS REFERRED BY POLICY DEVELOPMENT AND SCRUTINY BODIES

No matters were referred by Policy Development and Scrutiny Panels.

26 SINGLE MEMBER CABINET DECISIONS TAKEN SINCE PREVIOUS CABINET MEETING

The Cabinet agreed to note the report.

27 B&NES HOMES PROGRAMME - ENGLISHCOMBE LANE SUPPORTED HOUSING SCHEME

Cllr Matt McCabe, Cabinet Member for Built Environment, Housing and Sustainable Development, introduced the report, moved the officer recommendation and made the following points:

- The proposed development is not just policy compliant—it is award-winning and designed to meet critical local needs.
- The improved design replaces a previously approved 37-home scheme with a less dense, more sensitive plan based on community feedback.
- The development offers housing for 16 vulnerable residents, including individuals with autism or learning difficulties, and young people transitioning from children's services.
- The onsite services are designed with care professionals to provide a quiet, low-stimulus environment and onsite support for independent living.
- Despite a lack of national protection for local Tufa flushes, the scheme treats ecological features as assets, achieving a 20% biodiversity net gain—double the policy requirement.
- The scheme has received national recognition being shortlisted in the Design in Mental Health Awards and winning both a National Planning Award and National Design Award.
- The scheme was heavily shaped by local input. Residents who demanded a better alternative were heard and their feedback directly influenced the

redesign. There will be continuing community involvement during the build-out phase.

- Cllr McCabe thanked Homes England, council officers, and residents for their contributions to the scheme's success.

Cllr Paul May seconded the motion. He expressed support for the development and emphasised its importance for adults with complex needs. He highlighted the scheme's planning approval and budget authorisation as a vital step toward addressing a local shortage of supported living accommodation. The housing is designed to offer a peaceful, accessible environment with onsite care, enabling residents to live independently while staying close to their families and avoiding costly placements outside the area.

Cllr Mark Elliott also expressed support for the scheme. He noted that it would help to reduce financial pressure on Adult Services and would also improve the provision for those vulnerable people with complex needs for whom the Council has a statutory and moral duty to support. It also represents the best option available from an environmental perspective.

Cllr Joel Hirst welcomed the evolution of the housing scheme for this site. The Cabinet and officers have listened carefully to the concerns of residents regarding the original scheme. The new scheme is integrated into the community making it easier to access local amenities. The goal is to create a peaceful living environment for residents with high needs to be able to live as independently as possible.

RESOLVED (unanimously):

- (1) To implement the development, composed of 16 units of specialist supported housing, as approved in planning application reference number 24/01168/REG03, or its successors in function.
- (2) To delegate authority to the Director of Capital and Housing Delivery to accept Homes England Grant, associated with the development, and other relevant significant delivery decisions.

28 SOMER VALLEY ENTERPRISE ZONE (SVEZ) LOCAL DEVELOPMENT ORDER (LDO) AMENDMENT

Cllr Paul Roper, Cabinet Member for Economic and Cultural Sustainable Development, introduced the report, moved the officer recommendation and made the following points:

- Cllr Roper highlighted the work of the Regeneration Team to provide the Somer Valley Enterprise Zone (SVEZ) to encourage investment and regeneration to this area of North East Somerset. The team is working alongside Midsomer Norton Town Council and WECA to deliver this project.
- The SVEZ is an example of doing something difficult and challenging to create jobs for the local area. The scheme will bring around 1,000 new jobs to the Somer Valley.

- A decision is required to make a technical change to a roundabout and footpath. The road network will also be upgraded to provide safe travel routes.

Cllr Sarah Warren seconded the motion and noted that this is an important project providing local jobs alongside sustainable travel options.

RESOLVED (unanimously):

- (1) To adopt an amendment to the Somer Valley Enterprise Zone (SVEZ) Local Development Order (LDO) recommended by the Local Planning Authority, to meet the aims of policy SSV9 of the Local Plan, and to ensure compliance with relevant highway standards and guidance. The LDO amendment relates to condition 5 (supporting documents) and condition 12 (highway approved plans). It is proposed to adopt revised plans for the Thicket Mead roundabout and A362 works adjacent to Sunnyside. A minor revision to the LDO boundary for the off-site highways works at Sunnyside is proposed. The wording of condition 12 is proposed to be amended to remove its status as a 'fixed compliance' condition.
- (2) To delegate to the Director of Capital & Housing Delivery, in consultation with the Cabinet Member for Economic and Cultural Sustainable Development, the authority to adopt future amendments to the LDO as approved under Decision E3486. Such amendments shall be limited to those within the remit of section 96A and 73 of the Town and Country Planning Act 1990.

29 TREASURY MANAGEMENT MONITORING REPORT TO 30TH JUNE 2025

Cllr Mark Elliott, Cabinet Member for Resources, introduced the item, moved the officer recommendation and made the following points:

- The report describes a positive financial performance.
- The operational investment returns slightly exceeded the benchmark rate.
- Interest and capital financing costs are forecast to be £175k under budget, offering relief to the revenue budget.
- The upcoming "Fair Funding Review" by central government may negatively impact Bath & North East Somerset, making budget savings especially valuable.
- Borrowing increased by £3.5 million, totalling just under £280 million. This is standard practice for funding capital projects and is not unusual or excessive.
- The Capital Financing Requirement is forecast at £441.8 million, representing total planned capital scheme funding needs. Actual borrowing remains well below this figure due to prudent financial management.
- Cllr Elliott commended officers for effectively managing cash, investments and borrowing and prioritising use of reserves before taking on new debt. Performance indicators show that the council is within limits on all seven key Treasury Management Indicators.

Cllr Joel Hirst seconded the motion. He stated that the report shows that the Council has control over borrowing and takes an excellent approach to

investments. B&NES has been consistent at balancing the budget and managing finances well, which means that it is better able to deliver for residents.

RESOLVED (unanimously):

- (1) To note the Treasury Management Report to 30th June 2025, prepared in accordance with the CIPFA Treasury Code of Practice.
- (2) To note the Treasury Management Indicators to 30th June 2025.

The meeting ended at 6.52 pm

Chair _____

Date Confirmed and Signed _____

Prepared by Democratic Services

This page is intentionally left blank

Thursday 25th September 2025

Present:

Councillor Kevin Guy	Leader of the Council, LD Group Leader, Member Advocate for Armed Forces and Veterans
Councillor Mark Elliott	Deputy Council Leader (non-statutory) and Cabinet Member for Resources
Councillor Joel Hirst	Cabinet Member for Sustainable Transport Strategy
Councillor Lucy Hodge	Cabinet Member for Sustainable Transport Delivery
Councillor Paul May	Cabinet Member for Children's Services
Councillor Matt McCabe	Cabinet Member for Built Environment, Housing and Sustainable Development
Councillor Manda Rigby	Cabinet Member for Communications and Community
Councillor Sarah Warren	Deputy Council Leader (statutory) and Cabinet Member for Sustainable Bath and North East Somerset

30 WELCOME AND INTRODUCTIONS

The Chair welcomed everyone to the meeting.

31 EMERGENCY EVACUATION PROCEDURE

The Senior Democratic Services Officer read out the emergency evacuation procedure.

32 APOLOGIES FOR ABSENCE

Apologies for absence were received from Cllr Alison Born and Cllr Paul Roper.

33 DECLARATIONS OF INTEREST

There were no declarations of interest.

34 TO ANNOUNCE ANY URGENT BUSINESS AGREED BY THE CHAIR

There was no urgent business.

35 QUESTIONS FROM PUBLIC AND COUNCILLORS

There were no questions from Councillors or members of the public.

36 STATEMENTS OR PETITIONS FROM PUBLIC OR COUNCILLORS

37 MATTERS REFERRED BY POLICY DEVELOPMENT AND SCRUTINY BODIES

No matters were referred by Policy Development and Scrutiny Panels.

38 RESET LOCAL PLAN OPTIONS DOCUMENT

Cllr Matt McCabe, Cabinet Member for Built Environment, Housing and Sustainable Development, introduced the report, moved the updated officer recommendation and made the following points:

- Thanked officers for producing the consultation document within a compacted timescale.
- An options consultation had been launched last year but the change in government had resulted in a new housing calculator being brought forward.
- There had been an increase in housing targets for Bath and North East Somerset from 700 houses per year to 1500 (27,000 over 18 years).
- Anyone who had responded to the consultation last year would have their comments assessed as part of the new consultation.
- The new targets resulted in the Council's 5-year land supply for housing being reduced to 2.7 years.
- The Council needed a robust Local Plan with a 5-year land supply for housing to avoid speculative development.
- The refreshed Local Plan would replace the existing plans and establish the framework in which planning decisions would be made until 2043.
- The options document set out the spatial options for the local plan. Four large strategic sites were being put forward by the Council: Hicks Gate, Keynsham North, West of Bath and Somer Valley.
- Identifying larger sites would allow a focus on infrastructure and sustainable development.
- All sites need to be tested against local knowledge and residents were encouraged to respond to the consultation to ensure the right houses were built in the right places.
- New policies were also proposed in relation to Retrofit First policy and HMO restrictions in Bath to protect affordable family homes.

Cllr Manda Rigby seconded the motion and emphasised that the consultation would be inclusive and focus on hard-to-reach groups. This would include a 'van with a plan' which would be touring the area to host drop-in sessions, publicise the consultation, facilitate and encourage participation. She clarified that the consultation did not imply preference for any specific site.

Cllr Paul May acknowledged that the housing target was a huge challenge for Bath and North East Somerset. He recognised the restrictions for developments within the city of Bath and spoke in support of larger developments to help unlock investment and benefit communities. He agreed with the need to consult on all options but expressed concerns about developer proposals around Whitchurch Village which would change the character of the village.

Cllr Sarah Warren emphasised the environmental benefits of the Local Plan reset including policies on Retrofit First, climate adaption, district heating, renewable energy, regenerative farming and the increase of biodiversity net gain from 10% to 20%.

Cllr Joel Hirst welcomed the approval of the options document for consultation and highlighted the need for appropriate transport infrastructure, building communities which had a balance of employment opportunities and appropriate social infrastructure and ensuring that affordable family housing was available across the district.

RESOLVED (unanimously):

- (1) To approve the Reset Local Plan Options document (Appendix 1 of the report) for public consultation for a period of six weeks from 3rd October to 14th November 2025, subject to the amendments set out in the schedule to the revised officer recommendation.
- (2) To agree and authorise the Executive Director for Sustainable Communities, in consultation with the Cabinet Members for Built Environment, Housing and Sustainable Development and Communications and Community, to issue communications relating to the reset Local Plan Options and to undertake consultation as summarised in section 10 of the report and outlined in the communications and engagement plan (Appendix 2 of the report).
- (3) To delegate authority to the Executive Director for Sustainable Communities, in consultation with the Cabinet Member for Built Environment, Housing and Sustainable Development, to agree textual changes to the Options document (Appendix 1 of the report) prior to its publication for consultation.

39 THE MOVEMENT STRATEGY

Cllr Joel Hirst, Cabinet Member for Economic and Cultural Sustainable Development, introduced the report, moved the officer recommendation and made the following points:

- The Movement Strategy would provide the framework to support 'Journey to Net Zero' goals by addressing traffic congestion, air pollution, and carbon emissions.
- The strategy proposed rebalancing the traffic network and improving active travel and bus flow.
- The vision was a 'virtuous circle' of quality places, improved travel choices and reduced traffic.
- The strategy included short, medium, and long-term interventions and would help secure regional investment from WECA for schemes such as mass transit options, improved strategic travel corridors, improved rail networks with new stations and improved travel interchanges.
- The benefits of the strategy included better travel to work options, improved pedestrian safety, improved mobility in the city centre for all, better parking, more reliable bus networks, prioritised bus corridors, better real time travel information and expanded EV infrastructure.
- The consultation would run from 14 October to 28 November.

Cllr Sarah Warren seconded the motion and highlighted that the benefits were beyond carbon reduction and would have a positive impact on health, heritage and the economy.

Cllr Lucy Hodge welcomed the strategy, stating that it would provide a timely and comprehensive framework to prioritise activity, ensure schemes linked up and improve the quality of life for everyone.

Cllr Matt McCabe referred to the timeliness of the strategy to coincide with the re-set of the Local Plan and encouraged everyone to engage with the public consultation.

Cllr Paul May referred to the trials around school streets and confirmed that he would be promoting the concept of school streets as part of this strategy.

RESOLVED (unanimously):

- (1) To approve the development of a Movement Strategy.
- (2) To agree the strategic objectives for the Movement Strategy. The objectives are creating a great quality place, improve travel choices and reduce private vehicular traffic.
- (3) To approve proceeding to public consultation from Tuesday 14th October to Friday 28th November 2025.

The meeting ended at 5.15 pm

Chair _____

Date Confirmed and Signed _____

Prepared by Democratic Services

Bath & North East Somerset Council

Cabinet Single-Member Decisions and Responses to Recommendations from PDS Panels

published from 3rd September until 4th November 2025

Further details of each decision can be seen on the Council's Single-member Decision Register at <http://democracy.bathnes.gov.uk/mgDelegatedDecisions.aspx?&dm=3>

Public consultation on draft character appraisal, proposed boundary changes and management proposals for Radstock Conservation Area

A draft conservation area character appraisal and management proposals have been prepared for the Radstock Conservation Area, including proposed changes to the boundary. Public consultation needs to take place on these proposals. Once finalised the appraisal will support development management decisions regarding the conservation and enhancement of local character, as well as informing current and future council strategies for this area.

Decision Maker: Cabinet Member for Communications and Community

Decision published: 27/10/2025

Effective from: 04/11/2025

Decision:

To agree that a six-week public consultation takes place from November 2025 on the draft Radstock Conservation Area Character Appraisal, including proposed boundary changes and management proposals.

Wards affected: Bathavon South; Peasedown; Radstock; Westfield

Lead officer: Paula Freeland

Somer Valley Draft Design Code Supplementary Planning Document

To facilitate the delivery of high-quality development in the Somer Valley a design code is being prepared which it is intended to adopt as a Supplementary Planning Document (SPD). The design code sets out the design requirements for new housing within the Somer Valley which would include the wards of Midsomer Norton North, Midsomer Norton Redfield, Paulton, Peasedown, Radstock and Westfield.

The code has been prepared following engagement with stakeholders and parish and town councils. It is intended that the code will be used alongside and to supplement the current adopted Development Plan and the emerging Local Plan to influence the design of housing developments. This report seeks approval of the draft Design Code SPD for public consultation.

Decision Maker: Cabinet Member for Built Environment, Housing and Sustainable Development

Decision published: 06/10/2025

Effective from: 14/10/2025

Decision:

(1) To agree that the draft Somer Valley Design Code Supplementary Planning Document (SPD) for public consultation is issued for statutory consultation under Regulation 12(b) of the Town and Country Planning (Local Planning)(England) Regulations 2012.

(2) To delegate authority to the Head of Planning to make any necessary editorial changes, in consultation with the Cabinet Member for Built Environment, Housing and Sustainable Development, prior to consultation on the draft Somer Valley Design Code SPD.

Wards affected: Midsomer Norton North; Midsomer Norton Redfield; Paulton; Peasedown; Radstock; Westfield

Lead officer: Richard Daone

Estate Rationalisation, Bath

Bath & North East Somerset Council is implementing an Estate Rationalisation project to improve service efficiency, reduce property costs, and support its capital investment programme.

A key part of this initiative is the proposed sale of Lewis House, which will generate capital receipts and save the Council in running costs. To enable the disposal, Council services currently based at Lewis House will be relocated to refurbished facilities at the Guildhall, Parkside, and Pixash.

The project includes a £2.69m investment to upgrade these sites, with sustainability improvements at Parkside supporting the Council's 2030 Decarbonisation targets.

This rationalisation supports the Council's long-term goals of financial sustainability, improved service delivery, and environmental responsibility.

Decision Maker: Cabinet Member for Economic and Cultural Sustainable Development

Decision published: 01/10/2025

Effective from: 09/10/2025

Decision:

(1) To approve the relocation of operational services currently based at Lewis House. The Housing Welfare and Advice Service (HWAS), Safeguarding/Case Conferences, and Youth Justice will move to the Guild Area of the Guildhall. The Mail Room, CCTV, Emergency Planning, and Environmental Protection/Safety Standards will be relocated to Parkside. Taxi Licensing will be transferred to Pixash.

(2) To approve an increase in the Asset Rationalisation capital programme from £60k to £2.69m. This funding will support refurbishment work at both the Guildhall and Parkside and includes a £140k repayment to the Project Initiation Fund as well as a £50k transfer from the Security Surveillance Hub Plan budget.

Wards affected: Kingsmead

Lead officer: Jennifer Raagas

Keynsham Town Centre Regeneration Action Plan

To endorse the Keynsham Town Centre Regeneration Action Plan as a basis for decision making and funding bids in order to seek to deliver the priority projects.

Decision Maker: Cabinet Member for Economic and Cultural Sustainable Development

Decision published: 01/10/2025

Effective from: 09/10/2025

Decision:

To endorse the Keynsham Town Centre Regeneration Action Plan as a basis for decision making and funding bids in order to seek to deliver the priority projects.

Wards affected: Keynsham North

Lead officer: Caroline Lightfoot

Land (Stanton Drew Play Area), The Drive, Stanton Drew, Bristol BS39 4DQ - Community Asset Transfer

Agree the land at The Drive (aka Stanton Drew Play Area) is a suitable asset for transfer to Stanton Drew Parish Council, by way of Community Asset Transfer.

Decision Maker: Cabinet Member for Economic and Cultural Sustainable Development

Decision published: 01/09/2025

Effective from: 09/09/2025

Decision:

(1) To determine that the subject asset be transferred to Stanton Drew Parish Council via a Community Asset Transfer.

(2) To delegate to the Head of Corporate Estate, in Consultation with the Section 151 Officer, the power to enter a Community Asset Transfer.

Wards affected: Chew Valley

Lead officer: Glenn Chinnock

Abbot Alphege Academy, Beckford Drive Lansdown Bath - New leases for commissioned services at less than best consideration

The Single Member Decision report sets out the rationale to grant 2 new Alternative Provision school leases at Abbot Alphege on terms at less than best consideration.

Decision Maker: Cabinet Member for Economic and Cultural Sustainable Development

Decision published: 01/09/2025

Effective from: 09/09/2025

Decision:

To delegate authority to the Head of Corporate Estates to grant two leases at less than best consideration, with a combined undervalue not exceeding £112,600 per year, based on the outlined terms. This includes a new three-year lease to Midsomer Norton Schools Partnership (MNSP) for the ground floor at Abbot Alphege School at nil rent, where tenants will cover service charges and utilities up to a capped amount, and a new three-year lease with annual break clauses to The Partnership Trust (TPT) for the first floor, also at nil rent, with service charges and utilities paid by the tenant but similarly capped.

Wards affected: Lansdown

Lead officer: James Young

Amendments to Development Facility Loan Agreement for Aequus Construction Ltd and Aequus Developments Ltd

Some amendments are required to the Council's Development Facility Loan Agreement for the Council's wholly owned housing company:

- to update the market rate of interest rate to take into account the UK subsidy control framework
- to update the total loan commitment amount to align to the recently approved Aequus Strategic Business Plan 2024-30 and the associated provision for loans included in the Council's 5 Year Capital Programme
- to reaffirm the delegation of future decisions on the loan agreements and the granting of specific loans to Aequus to the S151 Officer and CX in consultation with the Cabinet Member for Resources and the Cabinet Member for Built Environment, Housing and Sustainable Development

Decision Maker: Cabinet Member for Resources

Decision published: 27/08/2025

Effective from: 04/09/2025

Decision:

The Cabinet Member agrees that:

(1) The change to the market rate of interest used in the Development Facility Loan Agreement, taking into account the UK subsidy control framework, is approved.

(2) The total loan commitment amount reflected in the loan agreement is updated to align to the recently approved Aequus Strategic Business Plan 2024-30 and the associated provision for loans included in the Council's 5 Year Capital Programme in line with the February 2025 Council Budget Report.

(3) The delegation of future decisions on the loan agreements and the granting of specific loans to Aequus is updated to the S151 Officer in consultation with the Cabinet Member for Resources.

Wards affected: All Wards

Lead officer: Gary Adams

This page is intentionally left blank

Bath & North East Somerset Council		
MEETING/ DECISION MAKER:	Cabinet	
MEETING/ DECISION DATE:	13 th November 2025	EXECUTIVE FORWARD PLAN REFERENCE:
		E 3668
TITLE:	Greener Places Plan for Bath and North East Somerset 2025-2035 and Investment & Delivery Plan 2025-2030	
WARD:	All	
AN OPEN PUBLIC ITEM/		
List of attachments to this report:		
Appendix 1 - Greener Places Plan for Bath and North East Somerset 2025-2035		
Appendix 2 - Greener Places Investment & Delivery Plan 2025-2030		
Appendix 3 - Greener Places Plan Equalities Impact Assessment		

1 THE ISSUE

- 1.1 The new Greener Places Plan (GPP) for Bath and North East Somerset sets a framework for action and investment to ensure we make the most of our green spaces, both on Council land and across the wider district. It promotes understanding of what Green Infrastructure (GI) is, the multiple benefits it provides and how to deliver it where it is needed most, for people and nature. The accompanying Investment & Delivery Plan 2025-2030 takes the GPP forward over the next five years, to deliver planned and managed green and blue connected spaces where they are needed, for our residents' health and wellbeing, for nature recovery, to support growth and to adapt to climate change.

2 RECOMMENDATION

The Cabinet is asked to;

- 2.1 Approve the Greener Places Plan for Bath & North East Somerset and accompanying five-year Investment and Delivery Plan 2025-2030**

3 THE REPORT

- 3.1 The Greener Places Plan (GPP) 2025-2035 sets out the purpose and context of the Greener Places Framework, the other components of the Greener Places

Framework being the five-year Investment & Delivery Plan, GI mapping, Local Plan GI policy and GI Standards. The GPP explains what GI is and the case for investment in managing existing and creating new green and blue spaces. This includes use of greening to address sustainability issues (e.g. mental and physical health, air pollution, biodiversity loss, noise, climate change) that have an economic cost and impact on potential growth.

3.2 The approach set out in the GPP is needed to ensure appropriate green infrastructure is provided through new development, urban retrofit, including integrated into our highways, transport and public realm schemes (e.g. raingardens, planting and trees). These will ensure that the council is able to:

- evidence to support preparation of the new Local Plan and its delivery including securing new greenspace for planned growth
- support development of place shaping plans and community initiatives to address inequalities in access to greenspace, as well as quality and purpose of greenspaces to ensure they meet local needs
- have effective policy, processes and practice in place to plan, manage and maintain GI.
- Continue delivery of GI, nature recovery and climate resilience partnership projects delivering for the core priorities and targets for these, and addressing sustainability issues including inactive lifestyles, air and noise pollution.

3.3 The GPP will benefit communities and residents in the following ways:

Better places to live and work - creating attractive, sustainable, nature-rich neighbourhoods and landscapes. Including:

- greener neighbourhoods and streets through place shaping, supported by community engagement and activity
- improved play spaces and greenspaces, and new ones created
- improved community health and wellbeing
- improved access, with provision to meet particular equality group needs
- nature being restored, re-connected and recovering all around us, and helping us adapt to climate change

Visible reassurance that our future security is being safeguarded, and our communities and landscapes are becoming more resilient.

Prioritised spend to where need is greatest and most effective.

Community engagement and cohesion by involving residents and businesses in **care, maintenance and future planning**.

Sustainable support for the long term by **securing ongoing funding** and **engaging residents and businesses** in solutions.

Community **access to data and mapping to inform local action** and **support funding bids** by the council and communities.

4 STATUTORY CONSIDERATIONS

- 4.1 Each of the interventions within the GPP will adhere to the appropriate statutory considerations.
- 4.2 The revised Local Plan GI policy is being taken forward as part of that statutory process. The Local Plan Options Report (2024) included the option of amending the current GI policy to include the NE GI Standards. No objections were received to this proposal.
- 4.3 The GI Standards align with National GI Standards and are updates of B&NES Green Spaces Strategy (2015) greenspace requirements, except the Urban Greening Factor (UGF) Standard that is subject to new Local Plan adoption

5 RESOURCE IMPLICATIONS (FINANCE, PROPERTY, PEOPLE)

- 5.1 The GPP and Investment & Delivery Plan will be used to prioritise and direct S106 and grant funding bids as well as existing allocated budgets. The Investment & Delivery Plan includes schemes within the current capital programme and identifies projects and programmes that will be prioritised for new external funding bids.

6 RISK MANAGEMENT

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

7 EQUALITIES

- 7.1 An Equalities Impact Assessment has been undertaken and is attached. The GPP Investment & Delivery Plan includes specific actions to address where there is known to be inequalities in provision and access to greenspace and actions to better understand specific equality groups' needs. Project leads for site or place specific initiatives will be required to undertake EIAs to ensure that each equality group is considered. This includes Parks & Open Spaces team who have programmes of work to address parks and play provision. Sustainable Places & Regeneration in developing plans for place and site masterplans already seek to engage with all groups to identify and address needs. In future this will include greater focus on incorporation of greening for climate resilience, nature recovery and what people need.
- 7.2 The GPP vision specifically refers to addressing inequalities - 'Green infrastructure will play a key role in ensuring Bath and North East Somerset has a more sustainable, nature-rich and climate resilient future. It will be well maintained and valued, and will optimise the right social, economic, and environmental benefits in the right locations. There will be equitable access to high-quality and inclusive green infrastructure, ensuring that every member of the community benefits.

8 CLIMATE CHANGE

- 8.1 The GPP vision states the need for green infrastructure as part of planning and ensuring a climate resilient future, as well as addressing the ecological emergency. It takes forward the Corporate Strategy overriding purpose to improve people's lives and policy to tackle the climate and ecological emergencies.
- 8.2 The GPP includes how to take forward the Ecological Emergency Action Plan ambition to create and manage more space for nature. As stated in the GPP Executive Summary we need to integrate planting, trees and multifunctional accessible greenspaces in our streets and neighbourhoods that support active travel, biodiversity, and climate resilience. In our rural areas we need to restore and better manage our natural assets and protect and enhance the services that they provide, that we all depend on to and or benefit us including food, water, cooling, and carbon sequestration.
- 8.3 The GPP will deliver multifunctional greener places through stronger Local Plan policy requiring standards to be met in new development that deliver connected permeable, accessible greenspace, and nature-rich spaces. Enhancing our strategic green and blue corridors through GI programmes and embedding GI in service delivery, will encourage people to walk and cycle and help management of our landscape's natural assets and water catchments. These will contribute to EEAP ambition for 30% land to be managed for nature and delivery of new and enhanced habitats as part of the West of England Local Nature Recovery network. They will also support the ambitions of the emerging Climate and Nature Strategy.

9 OTHER OPTIONS CONSIDERED

- 9.1 None

10 CONSULTATION

- 10.1 The development of the GPP has included external stakeholder engagement through two workshops- Sept 2023 and July 2024. Stakeholders included wide range of local, regional and national organisations and partnerships including Your Parks Bristol & Bath, Bath Preservation Trust, Bristol Avon Rivers Trust, West of England Nature Partnership, Bristol Avon Catchment Partnership, National Trust, Environment Agency, Natural England. Internal consultation with senior managers across council services has been undertaken via the GI Framework Review Group and bespoke workshops including through the Natural England embedding GI Framework programme (Jan- March 2024).

The S151 Officer and Monitoring Officer have reviewed this report.

Contact person	Sarah Jackson - Green Infrastructure & Climate Resilience Manager - Sarah.Jackson@bathnes.gov.uk
Background papers	None
Please contact the report author if you need to access this report in an alternative format	

**Greener Places - Green Infrastructure Framework
for Bath and North East Somerset**

Greener Places Plan 2025 to 2035

Our Vision

Our Vision for green infrastructure in Bath and North East Somerset developed with partners is:

Green infrastructure plays a key role in ensuring Bath and North East Somerset has a more sustainable, nature-rich and climate resilient future. It is well maintained and valued, and optimises the right social, economic, and environmental benefits in the right locations. There is equitable access to high-quality and inclusive green infrastructure, ensuring that every member of the community benefits.

Partners delivering this vision we want to ensure that all residents and communities can easily access high-quality green infrastructure. We recognise that within communities, there are groups that will have specific needs, and we aspire to ensure accessibility for all.

This Plan has been produced by Bath & North East Somerset Council (B&NES) and is **one of five components** that make up the Greener Places - Green Infrastructure Framework for Bath and North East Somerset 2025 to 2035. The Greener Places Plan sets out the purpose and context of the Framework and its constituent components and makes the case for significant and coordinated investment.

Contents

Our Vision	2
Introduction	4
Executive Summary	4
Delivering in partnership	6
The Framework's purpose and priorities	7
Introduction	8
Green infrastructure	9
Green infrastructure	9
Green infrastructure networks	9
Strategic green and blue corridors	10
How natural capital, ecosystem services and net gain contribute to green infrastructure networks and environmental planning	13
The Case for Investment in Green Infrastructure	15
Integration of green infrastructure in plan and strategy delivery	19
B&NES Council's Accessible Greenspaces	22
Greenspace commitments	23
Priority Themes	24
Improving and maintaining quality of accessible greenspaces	34
Improvement programme and maintenance programme	35
Introduction to the other Framework components	37
1. Greener Places – Investment & Delivery Plan for Bath and North East Somerset	38
2. Green Infrastructure Mapping	41
3. Green Infrastructure Standards	44
4. Green Infrastructure Local Plan policy	49
Monitoring and reporting	52
Glossary	53
Appendix 1	56
Appendix 2	57
Image credits	59

Executive Summary

The Greener Places Plan sets out the purpose and context of the Green Infrastructure Framework. Its purpose being to provide a better understanding of the multifunctional benefits of green infrastructure (GI) and how to deliver the planned and managed green and blue connected spaces needed for our communities for their health and wellbeing, for nature recovery, to support growth and adapt to climate change.

Whilst produced by Bath & North East Somerset Council, delivery requires continued partnership working and engaging with a wide range of stakeholders.

In our urban areas we need to integrate planting, trees, and multifunctional accessible greenspaces in our streets and neighbourhoods that support active travel, biodiversity, climate resilience and health and wellbeing, addressing inequalities in access and health outcomes. This will create more space for nature, socialising and play.

In our rural areas we need to restore and better manage our natural assets and protect and enhance the services they provide, that we all depend on and or benefit us including food, water, cooling, carbon sequestration, recreation and aesthetic experience.

We need to integrate the value of nature into economic decision making to achieve sustainability and long-term prosperity,

The climate and ecological emergencies make GI an essential element of place shaping and management of our natural resources.

This Plan is to progress what has been achieved since the Valuing People, Place and Nature – A Green Infrastructure Strategy for B&NES was published in 2013.

Delivering in partnership

The strategic projects identified in 2013 are embedded within the wider established council led **partnerships** that are Bathscape, Chew Valley Reconnected, Somer Valley Rediscovered and WaterSpace. Each is working to deliver multiple benefits for people, place and nature at a catchment and or landscape scale.

The partnerships have provided a strong foundation to build on and have enabled partners to deliver projects that have attracted significant investment in the improvement and management of our green and blue infrastructure. Benefits to individuals and communities, wildlife habitats, and local economy have been

The council are committed to

- Improve policy, practice, and process to create, restore and maintain green infrastructure including securing long-term investment, to help meet climate and nature targets and address sustainability issues.
- Build, manage and maintain robust evidence to inform decision making and monitor progress of delivery.
- Increase urban greening in our streets and neighbourhoods to restore nature, provide climate resilience, create healthy places to live and attract investment.
- Reduce inequalities in access to greenspace, improve quality and ensure provision meets the needs of local communities.
- Continue leadership and support for our local and regional partnerships to deliver existing and expanded landscape scale programmes to deliver the multiple benefits that green infrastructure provides.

delivered through a range of projects, events and activities. We are keen to build on the invaluable learning and experience to continue to deliver collaboratively at a larger scale to address the pressing need to build a more resilient and nature friendly landscape for future generations.

We also work with **regional partnerships** including West of England Nature Partnership and Bristol Avon Catchment Partnership delivering on regional ambitions in the West of England Joint Green Infrastructure Strategy and Local Nature Recovery Strategy, for nature recovery and climate resilience and supporting the regional growth agenda.

To deliver these commitments we recognise the need to work with others to secure increased and long-term investment in GI.

The use of GI to address sustainability issues is evidenced. Issues including poor mental and physical health, inactive lifestyles, biodiversity loss, and air and noise pollution are estimated to cost the Bath and North East Somerset economy £2.4 billion per year.

Strengthening our **Local Plan GI policy** and applying it together with new **GI Standards** and revised planning obligations will ensure new growth provides the necessary GI including greenspace for healthy living. Our **GI mapping** provides evidence for the policy, standards and projects.

The Plan sets out the importance of council services taking account of nature and climate in operational practices and project delivery to contribute to the GI Standards and targets. This includes Highways, Transport and Housing Delivery integrating greening in both new and retrofit schemes including sustainable urban drainage, rain gardens, trees, and new greenspaces.

The Plan introduces the new Nature Towns and Cities accreditation (launched by Natural England, National Trust and The National Lottery Heritage Fund) as integral to the council's approach to place shaping, to identify and listen to what urban communities need and want, to create accessible greenspaces, streets and neighbourhoods that are good for wildlife, people and are climate resilient.

Actions to deliver on this Plan over the next 5 years are set out in the Greener Places Investment & Delivery Plan 2025- 2030.

The Greener Places Plan, along with the other components of the Green Infrastructure Framework are intended for use by council officers and members, delivery partners and developers, local town and parish councils and community organisations.

Our web pages provide additional information and supplement the Framework. Full description of diagram in [Appendix](#).

There are national, regional and local nature and climate standards and targets that green infrastructure will directly contribute to. Our district targets include:

- 30% land managed and protected for nature by 2030
- 30% of B&NES Corporate Estate managed and protected for nature by 2030
- 20% BNG for major development
- Net zero by 2030

Delivering in partnership

Greener Places – GI Framework for Bath and North East Somerset (5 components)

1. Greener Places Plan 2025-2035
2. Greener Places Investment & Delivery Plan 2025-30
3. GI Mapping
4. GI Standards
5. Local Plan policy

Page 32



West of England GI principles

Educate
Embed
Collaborate
Communicate
Evidence
Invest

Delivering in partnership

Supporting and developing resilient and effective cross-sector partnerships and stakeholders operating at the landscape scale.

Harnessing expertise across existing governance structures.

Engaging with stakeholders and the public at the scale appropriate to strategic issues to ensure join up and shared visions at local and neighbourhood scales.

Championing multifunctionality and land sharing both in placemaking and place keeping.

Building and maintaining a robust evidence base including ecosystem mapping.

Partnerships

West of England Nature Partnership
Bristol Avon Catchment Partnership
Cotswold National Landscape
Mendip Hills National Landscape
Natural History Consortium
Bathscape
Chew Valley Reconnected
Somer Valley Rediscovered
WaterSpace

National and local organisations include: Natural England, Environment Agency, National Trust, Avon Wildlife Trust, Avon Needs Trees, Bristol Avon Rivers Trust, Forest of Avon Trust and Your Park Bristol & Bath

Developers and businesses

Land and natural capital managers

Town and parish councils

Communities and residents

The Framework's purpose and priorities

The overriding purpose of the Framework through its various components, including this Plan, is to bring about a better understanding of the multifunctional benefits and value of green infrastructure. How we plan, deliver and manage green infrastructure to ensure we have resilient places for people requires changes in our approach as a council and continued partnership working with a wide range of organisations, businesses and our communities. This Plan sets out the urgent need to invest in green infrastructure to address sustainability issues and meet the climate and nature targets that the council has committed to.

This requires embedding green infrastructure in strategies and plans across multiple policy domains and improving joint working to maximise resources. This Plan identifies the changes that need to be made to existing practice and where additional resources are required to implement new and changed policy and practice, including delivery of the Green Infrastructure Standards.

The priorities to achieve greener places are:

1. Improve policy, practice and process to create, restore and maintain green infrastructure including securing long-term investment, to help meet climate and nature targets and address sustainability issues.
2. Build, manage and maintain robust evidence to inform decision making and monitor progress of delivery.
3. Reduce inequalities in access to greenspace, improve quality and ensure provision meets the needs of local communities.
4. Increase urban greening in our streets and neighbourhoods to restore nature, provide climate resilience, create healthy places to live and attract investment.
5. Continue leadership and support for our green infrastructure and regional partnerships to deliver existing and expanded landscape scale programmes to deliver the multiple benefits that green infrastructure provides.



Introduction

'Valuing People, Place and Nature – A [Green Infrastructure Strategy for B&NES](#)' was innovative and ground-breaking when it was published in 2013. It set out key objectives for placemaking including achieving healthy and thriving communities, using natural solutions to tackle climate change, maintaining and creating robust ecological networks, and contributing to a green economy and nature tourism.

The strategic landscape scale projects that it proposed now have well-established partnership delivery programmes. These include [Bathscape](#), [Somer Valley Rediscovered](#) and [WaterSpace](#), each delivering multiple benefits for people, place and nature.

Since 2013, the world has changed significantly with new evidence and policy driving the need for the Greener Places - Green Infrastructure Framework.

The council's [Corporate Strategy](#) has one overriding purpose – to improve people's lives and two core policies – tackling the Climate and Ecological Emergencies and giving people a bigger say.

Key policy documents supporting the Framework are the council's [Economic Strategy](#), [Health and Wellbeing Strategy](#), Climate and Nature Strategy (pending publication) and [Local Plan](#).

In addition to these documents, key drivers for the Green Infrastructure Framework are:

- **Natural England's Green Infrastructure Framework.** The first of the five [Headline Green Infrastructure Standards](#) encourages local authorities to have a Green Infrastructure Strategy. This with the other Standards deliver on the UK Government's 25-year Environment Plan.
- **The West of England [Joint Green Infrastructure Strategy](#)** is endorsed by the council, together with the West of England Combined Authority, Bristol, North Somerset, and South Gloucestershire councils. The council has a commitment to work in partnership to deliver the eight key outcomes and the Action Plan.
- **West of England [Local Nature Recovery Strategy](#) and [West of England Nature Partnerships Priority Programmes](#)**
- **The need for a joined-up approach and new funding mechanisms** to finance the planning, delivery, management, maintenance and monitoring of green infrastructure both within the council, and working with communities, developers and others who own or manage land and property.

Green infrastructure

Green infrastructure

The council defines green infrastructure (GI) as set out in the National Planning Policy Framework.

Green infrastructure is ‘a network of multifunctional green and blue spaces and other natural features, urban and rural, which is capable of delivering a wide range of environmental, economic, health and wellbeing benefits for nature, climate, local and wider communities and prosperity.’

GI includes:

- Parks and Gardens – urban parks, country and regional parks, formal gardens
- Amenity Greenspace – informal recreation spaces, housing greenspaces, domestic gardens, village greens, urban commons, other incidental space
- Natural and semi-natural urban green and blue spaces - woodland and scrub, grassland, heath or moor, wetlands, open and running water, wastelands and disturbed ground
- Green and blue corridors – rivers and canals including their banks, road and rail corridors, green bridges, field margins, cycling routes, pedestrian paths, and rights of way
- Vegetated sustainable drainage systems - green roofs, blue roofs, rainwater harvesting and smart controls, downpipe disconnection planters, rain gardens and biofiltration strips, swales, ponds, detention basins
- Features for species such as bird and bat boxes, swift bricks and hedgehog holes
- Other - street trees, allotments, community gardens and orchards, private gardens, city farms, green walls, ponds, cemeteries and churchyards

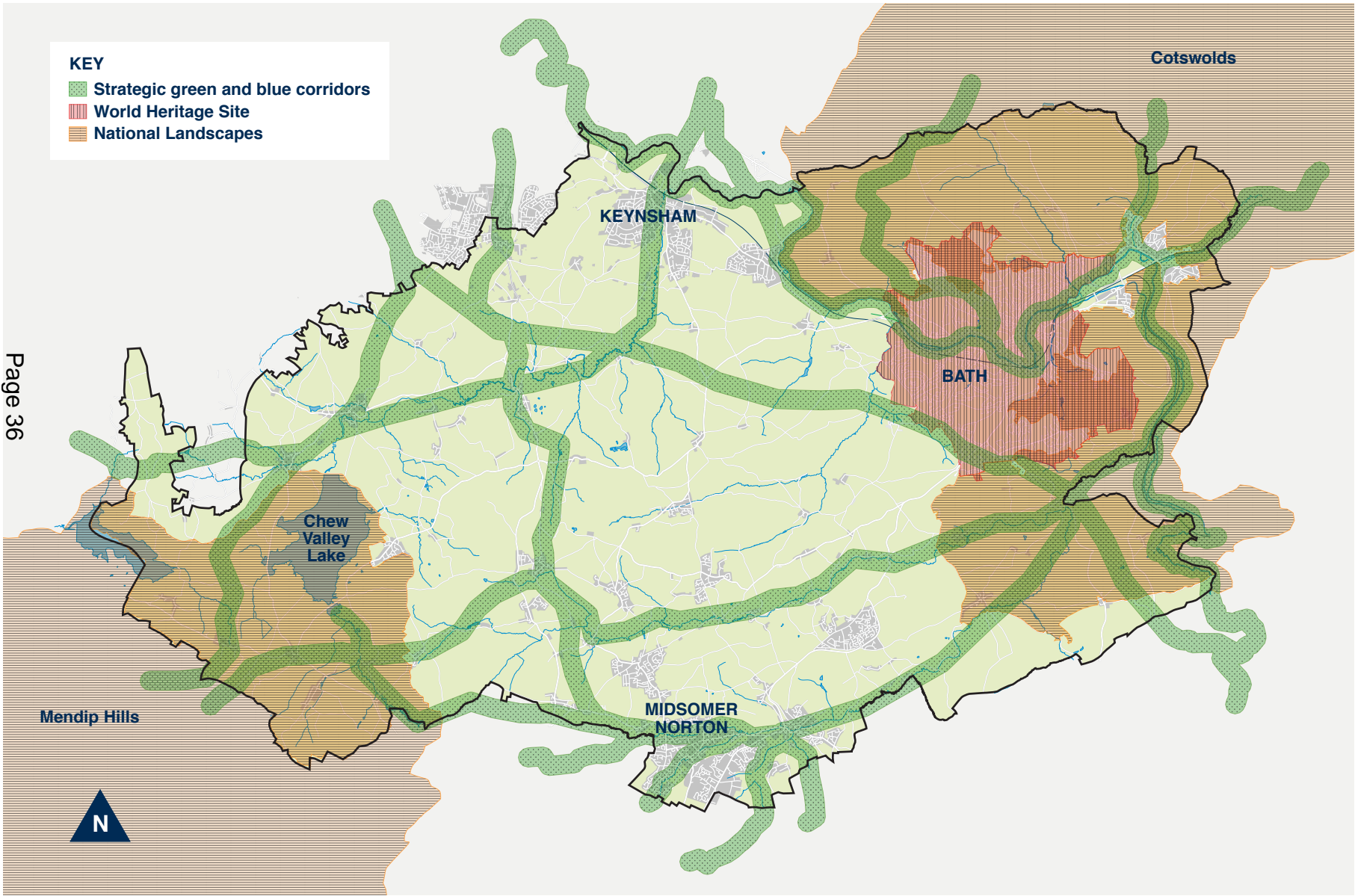
Green infrastructure networks

The GI network hierarchy that we need to enhance consists of the following:

- Primary Networks - these are the strategic green and blue corridors across Bath and North East Somerset that connect with networks beyond the authoritative boundary. This includes connected large open spaces, waterways and open countryside. These are recognised in the Local Plan.
- Secondary Networks - these are the green and blue corridors at a residential area scale, that connect with the primary network. This includes parks and local and neighbourhood centres, connected by green streets and/or streams or rivers.
- Tertiary Networks - these are within developments and estates, individual properties and private gardens, that connect to the primary and secondary networks.

This green and blue multifaceted and integrated network is an integral part of sustainable places. It enables people and wildlife to move easily through attractive and diverse urban and rural landscapes, in turn creating sustainable and healthy communities.

Strategic green and blue corridors



Full description of map in [Appendix](#).

Benefits green infrastructure provides include:

- Promoting economic growth, employment and skills improvement
- Supporting resilient ecosystems and biodiversity
- Mitigating and adapting the natural and built environment to climate change
- Conserving and enhancing a legible network of greenspaces
- Reducing and managing flood risk and drought
- Improving mental and physical health, and the cohesion of local communities
- Increasing the sustainability of food production
- Maintaining and enhancing cultural heritage, landscapes and natural resources

Page 37

Green infrastructure outcomes and principles

The [West of England Joint Green Infrastructure Strategy \(JGIS\)](#) identifies eight GI Outcomes for the West of England:

- Create and maintain sustainable places
- Create and maintain valued healthy landscapes
- Health and wellbeing for all
- Support sustainable and local food production
- Greater resilience to climate change
- Build a resilient economy
- Sustainable water management
- Improved and better-connected ecological networks

The GI outcomes are to be achieved through the application of the six GI principles for the West of England. These are complimentary to Nature England's 'how' principles and are to be applied in delivery of the Green Infrastructure Framework for Bath and North East Somerset.

West of England green infrastructure principles

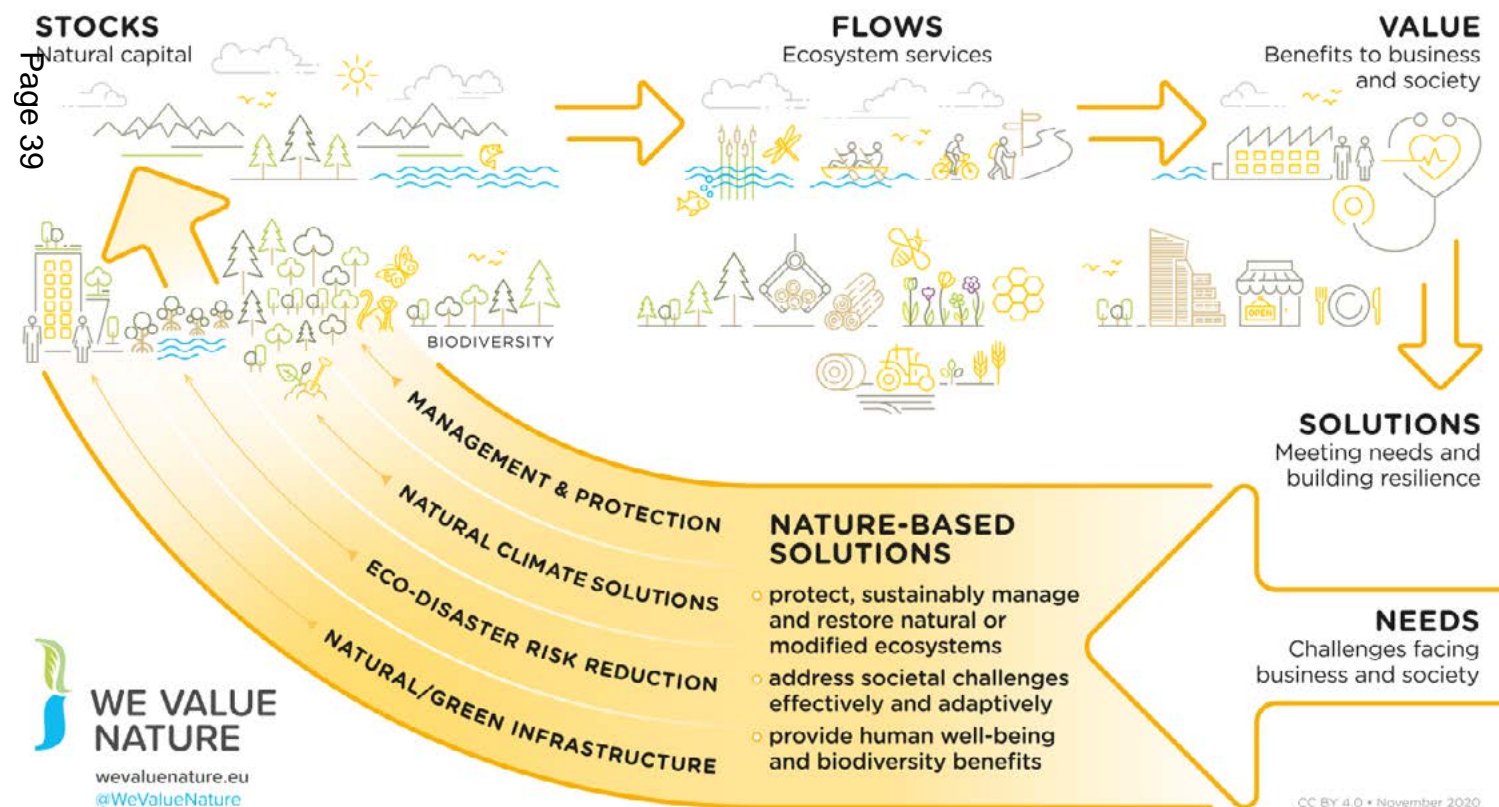
- **Educate** - Ensure that the multifunctional benefits of GI are better understood and recognised
- **Embed** - Apply a natural capital approach to ensure that new development delivers a net gain in natural capital whilst protecting irreplaceable habitats, and supports the maintenance and enhancement of the strategic GI network
- **Collaborate** - Ensure early, continuous and effective engagement with stakeholders and the public at the scales most appropriate to identified issues, and where appropriate join up at a local and neighbourhood scale with a shared vision
- **Communicate** - Promote wider public understanding of GI and natural capital, the benefits it provides and opportunities to enhance GI
- **Evidence** - Build and maintain a robust evidence base
- **Invest** - Secure investment in GI through the planning process and other delivery and funding mechanisms to deliver strategic GI priorities and its long-term stewardship



How natural capital, ecosystem services and net gain contribute to green infrastructure networks and environmental planning

It is important to understand the terms 'natural capital', 'ecosystem services' and 'net gain' as they are integral to environmental policy and planning. They all feature along with GI in national guidance including the [government's 25 Year Environment Plan](#) and the [National Planning Policy Framework](#). These terms aid mainstreaming the environment and provide context to inform decision-making processes. In simple terms, natural capital is the stock of nature that delivers multifunctional benefits via nature's ecosystem services where GI is one of the principal delivery mechanisms. Projects, programmes, policy and plans will result in net gains or losses of nature and it is important to recognise that different ecosystem services have trade-offs against each other.

The [natural capital approach](#) considers the value of the natural environment (the asset) for people and economy, and helps to better understand the tangible value of investment in GI.



Environment and biodiversity net gain simply mean delivering more than currently provided. Environment net gain includes gain for natural capital and ecosystem services, recognising that there will be trade-offs depending on project priorities. Biodiversity Net Gain (BNG) is mandatory for new development and requires a specific percentage increase.

Infographic from Natural Capital Protocol that shows how the stock of natural capital provides a flow of ecosystem services. Copyright: Creative Commons Attribution 4.0.

Full description in [Appendix](#).

Ecosystem services include:

- **Provisioning services** – products from nature such as food, water, energy and materials. This includes agriculture, water extraction, renewable energy and mineral extraction
- **Regulating services** – services helping to maintain the quality of our environment, such as carbon sequestration to remove greenhouse gases, parks and blue spaces to cool, and vegetation to remove air pollutants
- **Cultural services** – these are non-material benefits people obtain from natural capital, such as tourism, recreation and aesthetic experience

Protecting, enhancing and extending GI networks is key to ensuring that our natural capital and ecosystem services on which we depend are protected and enhanced.



The Case for Investment in Green Infrastructure

There is robust evidence that demonstrates GI can make a cost-effective and significant contribution to tackling sustainability issues, thereby enabling an economy to grow in a sustainable way. This evidence includes the [Dasgupta Review \(2021\)](#) commissioned by the HM Treasury UK Government. [Enabling a Natural Capital Approach Defra guidance](#) and a [2019 Valuing Nature publication](#) provide a good introduction to what benefit to cost ratios are and how to calculate them. [The Treasury Green Book](#) now includes natural capital mainstreamed into project appraisal.

Benefits stated in [Natural England's State of Natural Capital Report for England \(2024\)](#) include:

- Avoided health outcomes provided by the removal of air pollution by natural capital in 2021 is estimated to have an annual value of £2.5 billion
- Annual expenditure on tourism and recreation in the natural environment in 2022 is estimated at £10.6 billion
- The associated annual health benefits in 2023 were valued at around £7 billion

Making the Case for Investment in Green Infrastructure in Bath and North East Somerset Report (2024) was commissioned to demonstrate that investment in GI is fundamental to sustainable future growth, and achieving positive social, economic, and environmental outcomes. The Report identified the benefits of using GI to address sustainability issues. Additional cost-benefit information is provided in a further report that analysed eight key council and regional plans and strategies.

The Making the Case for Investment Report highlighted eight issues, which are impacting future growth and are causing significant economic cost to Bath and North East Somerset's Gross Value Added (GVA) each year. See table below.

There is robust evidence that demonstrates GI can make a cost-effective and significant contribution to tackling sustainability issues, thereby enabling an economy to grow in a sustainable way.

Making the Case for Investment in Green Infrastructure in Bath and North East Somerset

8 sustainability issues cost Bath and North East Somerset GVA £2.5 billion per annum:

- Mental health - **£1,026 billion**
- Biodiversity loss - **£606 million**
- Climate change - **£253 million**
- Obesity - **£251 million**
- Transport - **£156 million**
- Air pollution - **£80 million**
- Noise - **£48 million**
- Inactive lifestyles - **£26 million**

Green infrastructure solution
Every £1 invested generates £4 of benefits

- Invest £50 million per annum x 26 years

£5.2 billion benefits from green infrastructure by 2050:

- Reducing flood risk
- Climate change adaptation & mitigation
- Improving air quality
- Thriving biodiversity
- Supporting housing development
- Sustainable transport
- Better health & wellbeing

Figures are from Case for Investment Report 2024

The eight sustainability issues cost an estimated GVA of £2.5bn every year, representing over 48% of the districts GVA which B&NES Economic Strategy estimates at £4.5bn. This equates to £12,780 per person living in Bath and North East Somerset based on the ONS Mid-term 2022 population estimate of 195,618.

Economic studies on the value of GI suggest that a 4:1 Benefit Cost Ratio (BCR) is a conservative and reasonable assumption. That means for £1 invested in GI, £4 of benefit is generated.

To make a substantial difference, a substantial amount of investment is required. The Making the Case for Investment Report for Bath and North East Somerset proposes an investment of £50 million per year in GI over 26 years (up to 2050) to grow the economy sustainably. This can be estimated using the BCR to generate an annual economic benefit of at least £200 million. As part of investment, ongoing management costs must be considered.

Page 17
Chapter 3
A combination of private and public sector investment is required. This includes investment through planning requirements and major public and private infrastructure schemes e.g. highways and utilities provision, and the National Health Service.

In Bath and North East Somerset, we have seen several strategic GI programmes and projects develop using a variety of funding sources. These include [WaterSpace](#) and [Bathscape](#). Both programmes have secured substantial investment from partners including Wessex Water, National Trust, university research, and developer contributions. There is further scope and opportunity for investment through Biodiversity Net Gain, [Nature Restoration Fund](#), and future payments for ecosystem services as knowledge and work in these areas intensifies.

The Somer Valley and Chew Valley catchments will benefit from funding provided by Wessex Water and Bristol Water, secured via the Water Industry National Environment Programme (2025-2030).

Addressing sustainability issues

There is a strong case for investment in GI in Bath and North East Somerset given the multiple benefits that GI provides and a need for strategic, sustainable, and cost-effective measures to tackle the eight sustainability issues.

Sustainability issue	Green infrastructure benefits include:
Mental health	<ul style="list-style-type: none"> • Enables recreation and leisure – relaxation and play benefits • Improves public health • Promotes equity and access • Fosters stronger communities - social interaction, inclusion and cohesion • Improves psychological health and mental wellbeing - eco therapy • Connects people with nature, heritage, culture and landscape
Obesity and overweight	<ul style="list-style-type: none"> • Improves levels of physical activity and health • Increases life expectancy and reduces health inequality
Biodiversity loss	<ul style="list-style-type: none"> • Maintains and restores habitat • Increases habitat area • Increases populations of protected species • Increases species movement
Climate change	<ul style="list-style-type: none"> • Provides climate change mitigation, adaptation and community resilience • Provides flood alleviation, water management and mitigates storm water/flooding • Regulates climate - reducing heat in urban areas, lowering rates of heat related illness and death • Sequesters carbon • Passive benefits to buildings including shading
Transport – congestion/accidents	<ul style="list-style-type: none"> • Improves sustainable modes of transport and transport links
Air pollution	<ul style="list-style-type: none"> • Improves air quality
Noise	<ul style="list-style-type: none"> • Provides noise screening
Inactive lifestyles	<ul style="list-style-type: none"> • Improves levels of physical activity and health

Integration of green infrastructure in plan and strategy delivery

The following eight strategies were assessed to identify how well they integrate GI and for references to the key sustainability issues:

- Active Travel Masterplan (2024)
- Climate Emergency Strategy 2019 - 2030
- Ecological Emergency Action Plan 2023 - 2030
- Economic Strategy 2024 - 2034
- Flood Risk Strategy 2015 – 2025
- Health and Wellbeing Strategy (2023)
- West of England Joint Local Transport Plan 4: 2020 to 2036
- Journey to net zero – Reducing the environmental impact of transport in Bath (2022)

These were chosen as GI delivers on the primary policy objectives of each strategic document, while also delivering positive outcomes for the eight sustainability issues. The bespoke reports identify opportunities of how use of GI can assist deliver the aims of each of the eight plans and strategies. The reports are to assist joint working to co-design projects to achieve multiple benefits and shared outcomes.



Integration of green infrastructure in plan and strategy delivery to achieve shared targets and outcomes

The **Green Infrastructure Framework** supports and guides implementation of regional and local strategies

Delivery of GI is implemented through a range of **strategies and plans**

Strategies and plans deliver a range of **activities**

Measured using a range of **metrics**

Delivering shared **targets and outcomes**

Greener Places - Green Infrastructure Framework

B&NES key policy documents

Local Plan
Economic Strategy
Health and Wellbeing Strategy
Climate and Nature Strategy

West of England strategies including:

Joint Green Infrastructure Strategy
Local Nature Recovery Strategy
Climate and Ecological Strategy Action Plan
Tree and Woodland Strategy

Ecological Emergency Action Plan

Tree and Woodland Strategy

Local Food Strategy

+ Various other plans and strategies including; Playing Pitch Strategy, Local Flood Risk Strategy, Journey to Net Zero and City of Bath World Heritage Site Management Plan

Review of Local Plan policies and new policies

Implementation of Local Plan policy and Planning Obligations

Projects including those led by organisations, partnerships and communities

Strategic capital projects

Operational changes across all services

BNG Metric

Urban Greening Factor

Number of trees planted

Percentage increase in land managed for nature

Other indicators including:

Air quality
Health indicators
Green jobs created

30% land managed for nature by 2030

20% BNG target for major development

Net zero by 2030

GI Standards:

GI Strategy
Accessible Greenspace
Nature Recovery
Urban Greening
Tree Canopy Cover
Local Food Growing
Play Space

8 West of England GI outcomes

In addition to the Health and Wellbeing Strategy, GI plays an important role in supporting the delivery of other health related strategies and plans that are in development. These include B&NES Be Well Strategy (a health improvement strategy), B&NES Social Prescribing Framework (including green social prescribing), and B&NES Local Food Strategy, through which good access to GI such as community growing spaces and edible landscapes will be promoted.

Within the council and the West of England region, there are various plans and strategies, each with their own objectives and targets, that address one or more of the eight sustainability issues. There is a need for join up between plans and strategies, and integration of GI to achieve objectives.

There is also a need for greater collaboration and new ways of working to deliver the green transformation required to achieve greater benefits and meet our targets for climate and nature. It is critical that we find new ways of funding the GI required to support healthy communities and to maintain and grow our natural capital. This is complex, but there is an urgent need for this, as recognised by the declaration of the Climate and Ecological Emergencies.



B&NES Council's Accessible Greenspaces

The council defines accessible greenspace as set out in Natural England's Green Infrastructure Framework (2023). This is defined as greenspace specifically provided for public access, or one to which the public would usually expect to access (such as a cemetery), or one over which there is a public right to open access and deemed likely to be accessible to the public at any reasonable time, free to entry and available for a range of pastimes. This does not cover formal sports provision, nor play provision, however, play spaces are an important element of accessible greenspace.

The location of all the council's greenspaces can be viewed here:

www.bathnes.gov.uk/find-park-or-green-space

The following sets out the council's key commitments to ensure that its accessible greenspaces contribute to people's health and wellbeing and respond to the Ecological and Climate Emergencies.

The council will work collaboratively with others who are responsible for accessible greenspace to achieve regional and local outcomes and standards for GI provision and climate and nature targets.

Greenspace commitments

The council recognises the role accessible greenspace plays in realising the vision for GI and wants more people than ever before to enjoy accessible greenspaces, stay for longer and to take part in activities which make them healthier and happier. The council aims to provide a thriving network of accessible greenspaces for local people, that communities consider are inclusive, safe, fun and rich in nature and wildlife.

The council are committed to ensuring accessible greenspaces are:

- thriving places for nature and play a significant role in tackling the Ecological Emergency
- helping to tackle the Climate Emergency through contributing to water management and keeping places cool
- helping to improve health outcomes for residents
- sustainable long-term community assets
- managed strategically to prioritise areas of greatest need
- managed in partnership with communities. The power and resilience of community groups will be improved through their access to and involvement in the management of accessible greenspaces. The council will also support partners and communities to create food growing spaces to achieve greater food equality and sustainable food growing

In addition to these, we have identified commitments under priority themes.

Our work will deliver the following benefits for greenspaces



Priority Themes

Nature recovery and climate resilience

The commitments listed below support local and regional ambitions.

The council are committed to:

- Working with partners, communities and parks groups to manage and protect 30% of land within the Corporate Estate for nature by 2030
- Securing funding to support nature recovery and exploring new opportunities such as Biodiversity Net Gain
- Identifying priority areas where the provision of more natural vegetation, including trees, would help keep communities cooler as we expect more extreme hot weather due to climate change
- Ensuring habitats are designed to thrive in changing climate conditions and contribute to urban and rural nature networks and the West of England Local Nature Recovery Network
- Considering how the council's greenspaces could host low carbon energy infrastructure (such as heat networks) in a way that maintains the other benefits of our spaces
- Identifying opportunities to provide flood protection such as sustainable drainage systems

Case study – Keynsham Memorial Park River & Weir Improvement Project

The River Chew flows through the park before joining the River Avon in north Keynsham. Public consultation has previously highlighted how important the greenspace, wildlife, and access to the river is for residents.

The council, working in partnership with Bristol Avon Rivers Trust, Environment Agency and Bristol Water is developing a project to explore options to increase people's access to nature, celebrate the Memorial Park's heritage, and improve biodiversity through river restoration and improved fish passage. The council, with support of partners, will utilise relevant data and evidence and undertake consultation with local groups and residents to develop the project to meet these aims.

The weir and surrounding remains of the mill structure and adjacent bandstand will be a key consideration of the project. These structures are an important part of the Town's local heritage. These structures are also the most downstream barriers to fish passage in the River Chew catchment. They currently obstruct endangered migratory fish such as Atlantic salmon, sea trout, sea lamprey and European eel from moving up the river to spawn in the headwaters of the Chew catchment.

This project will seek to balance opportunities for improving river habitat and biodiversity, celebrating the cultural heritage of the town, and providing recreational and educational opportunities for all park users.



Health and wellbeing

The council's Health and Wellbeing Strategy's vision for 2030 sets out four priorities to help people have the best start in life, live well in caring, compassionate communities, and make it easier for people to live physically and emotionally healthy lives.

Provision of accessible greenspaces contribute to all four priorities:

- **Priority 1:** Ensure that children and young people are healthy and ready for learning and education
- **Priority 2:** Improve skills, good work and employment
- **Priority 3:** Strengthen compassionate and healthy communities
- **Priority 4:** Create health promoting places

Accessible greenspaces play a key role in supporting communities to live healthier lifestyles and preventing ill-health. They provide a solution to key health and wellbeing needs, including maintaining a healthy weight through sport and general physical activity, and good mental health as people can relax and make a positive contribution to their neighbourhood through volunteering.

The council are committed to:

- Conducting research to understand why some people do not use parks and greenspaces, or only do so occasionally, and support work to increase active recreation in these spaces
- Using evidence to make the health benefits of parks and greenspaces more within reach for all people and target health interventions for those who would benefit most
- Improving quality of existing greenspaces in areas of highest deprivation, ensuring plans for maintaining quality are in place including support for community volunteering
- Ensuring an appropriate mix of accessible greenspaces to meet our GI Standards as the area's population grows and new housing is delivered

Case study - Staddlestones Riverside Park improvements and wellbeing activities

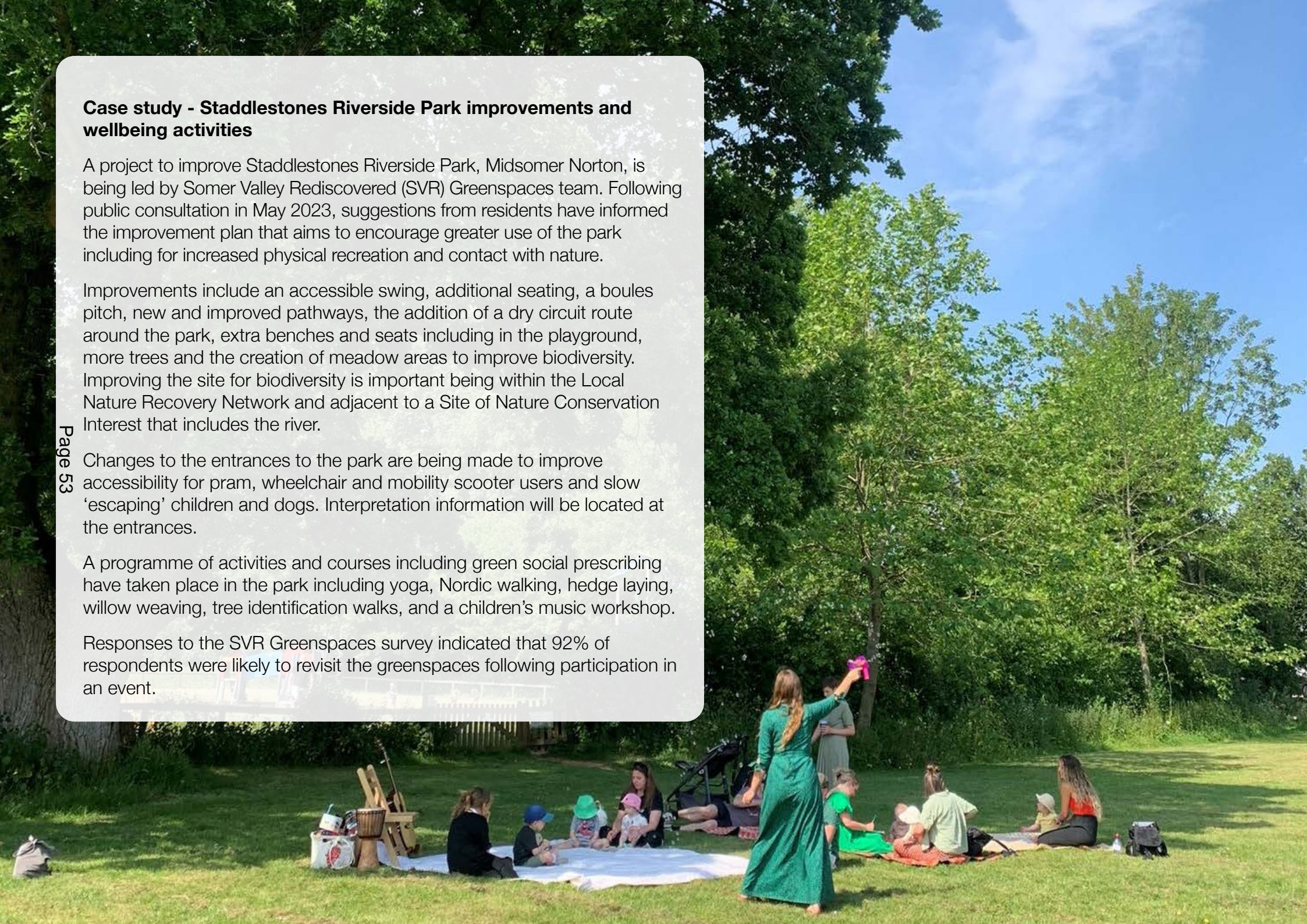
A project to improve Staddlestones Riverside Park, Midsomer Norton, is being led by Somer Valley Rediscovered (SVR) Greenspaces team. Following public consultation in May 2023, suggestions from residents have informed the improvement plan that aims to encourage greater use of the park including for increased physical recreation and contact with nature.

Improvements include an accessible swing, additional seating, a boules pitch, new and improved pathways, the addition of a dry circuit route around the park, extra benches and seats including in the playground, more trees and the creation of meadow areas to improve biodiversity. Improving the site for biodiversity is important being within the Local Nature Recovery Network and adjacent to a Site of Nature Conservation Interest that includes the river.

Changes to the entrances to the park are being made to improve accessibility for pram, wheelchair and mobility scooter users and slow 'escaping' children and dogs. Interpretation information will be located at the entrances.

A programme of activities and courses including green social prescribing have taken place in the park including yoga, Nordic walking, hedge laying, willow weaving, tree identification walks, and a children's music workshop.

Responses to the SVR Greenspaces survey indicated that 92% of respondents were likely to revisit the greenspaces following participation in an event.



Children and young people

Accessible greenspaces provide opportunities for socialising, play, learning and healthy development. The council's approach to delivery will be informed by the principle that every child and young person should have a high-quality and spacious place to play.

Research tells us that children in urban areas and from low socio-economic backgrounds spend less time in gardens and nature (Natural England 2025). This impacts on children's development and life chances.

There are 38,863¹ children and young people in Bath and North East Somerset who could use greenspaces for recreation, social opportunities and many other benefits that these spaces provide. There is, however, unfair access and are barriers to access which the council are aware of and committed to improving to ensure that more children and young people can access greenspace.

It is not just the physical spread of accessible greenspaces which impacts unfair access. Layout and design of these spaces can create barriers to girls and other sectors of the community, as well as making them feel unsafe and not welcome in them.

The council are committed to:

- Involving children and young people in decision-making about play provision and play experiences, aiming to be inclusive and relevant to the needs of communities
- Seeking to provide a children's play space within 600m (a 10 minute walk from home) and youth play space within 720m (a 12 minute walk from home)
- Exploring ways of integrating play, education and learning. Where possible, the council will work with local councillors and communities to commit resource to improving play facilities where they are most needed

¹ <https://www.bathnes.gov.uk/strategic-evidence/document-library/population>

Case study – Brickfields Park, Bath - Improving access, safety and usage for teenage girls

Your Park Bristol and Bath (YPBB) have co-designed new features at Brickfields Park in Bath with local teenage girls. Their input has played a central role in shaping the future of this community space. To understand what young people wanted from the park, YPBB carried out a consultation and worked with Make Space for Girls early on to address the specific needs of teenage girls.

Brickfields Park is surrounded by three areas of multiple disadvantage: Whiteway, Twerton and Southdown. It is a large park mainly used as a space for dog walking and as a pass-through for commuters, but otherwise was being underused, other than for its free full size basketball court (only one in Bath), due to a high antisocial behaviour rate.

Within the locality:

- 23% of people live in purpose-built blocks of flats with extremely limited outdoor space
- Over double the amount of people compared to B&NES as a whole are in very bad health

YPBB recognised that teenage girls were not regular users of the park and reached out to Make Space for Girls to provide support in ensuring that teenage girls were represented in the 2021/2022 consultation to improve the park.

The redevelopment of Brickfields Park was driven by this research and an understanding of how the space was used and what was missing.

The improvements at Brickfields Park opened in March 2025 and includes: a five-way swing, accessible entrance gateways, tree trunk social seating and climbing areas, a bespoke figure-of-eight bench and somersault bars. Hedgerow heights have also been reduced to improve sightlines and safety.

The project has been a collaboration between YPBB, local schools, the council, and the wider community. Key partners included Hayesfield Girls' School and the Mixed Sixth Form.

The £75,000 worth of improvements were funded through donations and support from the council's Community Infrastructure Levy.

Continuing to work with YPBB, the changes at Brickfields Park are just one step towards creating more inclusive and accessible spaces across Bath and North East Somerset.



Community participation

The council value the work of Bath and North East Somerset's residents, community groups and organisations that fundraise and work hard to keep accessible greenspaces looking good and inclusive for everyone. Without this support, accessible greenspaces would struggle to sustain the level of service provision they maintain today.

The council will empower greenspace users, volunteers and community groups to engage in their maintenance and improvement; and work collaboratively with local partners to support communities to make the most of their greenspaces. The council will be looking at ways in which to grow the support from community groups, volunteers, and other organisations. The council will seek to design and deliver ways to devolve responsibility for the management of spaces to communities.

Greenspaces should be accessible, safe and welcoming for all, but this is not always the case. The council will use research, guidance and best practice developed by neighbouring councils and organisations such as Your Park Bristol and Bath (YPBB) to improve accessibility and safety.

The council are committed to:

- Providing more opportunities to take part and volunteer, and generating opportunities for people to develop new skills and become more connected to their local community
- Developing projects together with YPBB, a key charitable organisation and partner, that can help support volunteering, community grant funding and help grow the capacity in communities to make greenspace management decisions
- Investing in the council's workforce and developing services to ensure the skills, processes and structures are in place to engage with communities who want to improve, invest in and develop their local spaces

Case study - Bath Activator Project

Working with local communities, volunteers and Friends of Groups this project, led by Your Park Bristol and Bath (YPBB) aimed to create and maintain sustainable natural habitats in Bath's greenspaces. The ultimate aim is to work alongside communities and volunteers to reintroduce natural habitats to Bath's greenspaces at scale, boost the city's biodiversity and invest in the infrastructure and resource needed to sustain these habitats permanently.

Funded by Community Infrastructure Levy and WECA's Pollinator Fund 2023 - 2024, the project developed and tested management plans with the council's Parks & Open Spaces team and Friend's of Groups, enabling the community to jointly manage parks more easily after the project ended in March 2025.

Volunteers, working in 20 greenspaces, have taken part in activities including bulb planting, tree planting, tree care, mulching, meadow creation and ongoing maintenance, wildflower seed-saving, physical grassland management by scything, pond creation and ongoing maintenance, new hedging, creation of dead wood habitats such as log features, dead hedging and making a 'stumpery', scrub bashing, making bug hotels and beetle banks, hurdle-making, orchard pruning, litter picking, balsam bashing, and erecting fencing.

YPBB recruited and supported a roving volunteer group who worked across the 20 sites over the project period. They were also the primary providers of support to Friend's group volunteers who have been encouraged to take on more sensitive management of key habitats, such as wildflower meadows. YPBB supported groups to develop and deliver plans to support more wildlife and groups and the roving volunteers were frequently brought together to take on bigger projects at certain sites. YPBB were able to provide a programme of training in 2023 and 2024 to increase volunteer skills and knowledge, and increase the likelihood of volunteer sustained maintenance.

Due to current funding ending, YPBB have significantly less resource to continue the level of habitat management on key sites where they have worked for the past 2 years. Having made significant habitat and biodiversity gains, YPBB have crafted a model of continuing volunteer participation in park maintenance and enhancement.

It is recognised that there is a gap between what the Parks & Open Spaces operations staff can do with limited resources, and what would be needed to fully embrace the complexity of managing parks for people and wildlife.

YPBB and the council are working with others to secure funding to continue this projects work, building capacity of groups in practical skills and boost their confidence to become more self-sufficient to manage greenspaces.

A total of **10,737m²** of natural habitat has been improved or created comprising:

2110m² of new meadows

2332m² of enhanced meadows

3 new ponds (**30m²**)

5226m² of trees and hedgerows

145m² of bulb planting

894m² miscellaneous/other



Culture

The West of England Cultural Plan and the council's emerging Cultural Development Plan both identify the cultural importance of the region, and Bath's cultural heritage and potential to drive inclusive growth throughout the area. Parks and greenspaces play a key role in Bath and North East Somerset's cultural offer.

Whether as part of the City of Bath World Heritage Site (including the parks of Sydney Gardens, Royal Victoria Park, Hedgemoor Park, Henrietta Park, Alexandra Park and Alice Park) or Keynsham Park (for its Roman archaeology), our parks and accessible greenspaces contribute to the area's cultural identity. Preserving and celebrating these spaces will ensure we contribute to the area's rich cultural legacy.

Regular engagement with greenspaces and their cultural offerings has been linked to improved mental health, reduced stress levels, and increased overall wellbeing.

The council are committed to:

- Working with a network of stakeholders to ensure decision-making around cultural offerings in parks and greenspaces is aligned to the needs and aspirations of communities

Case study – Sydney Gardens, Bath

Sydney Gardens date from 1795 and are one of Britain's most extensive and attractive Georgian pleasure gardens. Historically the gardens attracted fashionable society. Early patrons included Jane Austen, who lived for several years in adjoining Sydney Place.

A major restoration of the gardens was undertaken 2019-2022 by a partnership between our Parks & Open Spaces team, The Friends of Sydney Gardens, residents groups and the Holburne Museum. Grant funding of £3.4 million from the National Lottery Heritage Fund was used to restore historic buildings, enable landscape and garden restoration works, and create new play areas for all ages and provide a Community Pavilion to retain an event space.

A programme of events and activities was delivered, centred around art, nature, horticulture, wildlife, play, sport, archaeology and history; celebrating the fascinating history of the gardens and engaging with a wide range of residents and visitors.

Friends of Sydney Gardens formed in 2013 to preserve and improve the Gardens, run regular gardening sessions, tours and talks. Forest schools and exercise classes also take place in the gardens.



Improving and maintaining quality of accessible greenspaces

Quality standard

We will continue to use the Green Flag Standard as a guide to ensure our quality standards are robust and measurable. The Parks that are currently meeting the benchmark standard annually are:

- Royal Victoria Park
- Bloomfield Green
- Alexandra Park
- Sydney Gardens
- Henrietta Park
- Hedgemoor Park
- Haycombe Cemetery & Crematorium

The cost of applying and preparing for the Green Flag Award means that it will only be suitable for the key heritage parks with a high profile. There is, however, a benefit in having a quality standard that is applicable for all our greenspaces, and we plan to develop our own benchmark standard alongside the Green Flag entries.

Our strategic aim is to prioritise raising the quality of greenspaces in areas of higher deprivation and where satisfaction is low. Continuing to work with Your Park Bristol and Bath with whom we have developed a strong partnership is key to achieving this aim.

The council's **Parks & Open Spaces team's ongoing improvement and maintenance programmes**, in which projects will change over time, are listed below:

Improvement programme

Parks Pulse Programme – Installation of outdoor gym/exercise equipment across the parks portfolio to encourage increased diversity of offering, increased footfall, increased health and wellbeing (through exercise, promoting being outdoors and social interaction) and improved passive safety through increased use of parks.

Parks For All Programme – Programme of improvements to improve accessibility and equality across the parks portfolio. This will include new and improved paths, entrances, furniture and play and exercise equipment.

Events Implementation support –

Improvements to Parks and greenspaces to enhance commercial revenue earning events and mitigate potential damage to infrastructure caused by high frequency of large events.

Maintenance programme

Parks Tree Programme – Inspect, report and maintain parks tree assets.

Parks Capital Cyclical & Planned Maintenance Programme – Inspect, report, repair and maintain parks built assets (including conservation of heritage elements).

Parks Play Equipment Replacement Programme – Inspect, report, repair and maintain parks play assets.

Parks Equipment Replacement Programme – Inspect, report, repair and maintain parks equipment.



B&NES Council accessible greenspace facts



17 Friends and volunteer groups



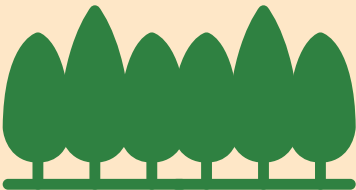
53 Listed buildings and structures



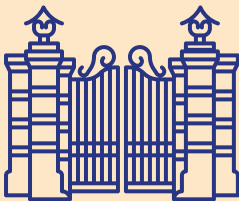
1,221 Allotment plots in Bath



55 Play areas to inspect



1000 ha of woodland



6 Heritage Parks including 4 Registered Parks and Gardens



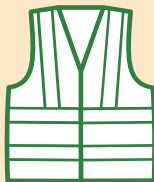
5 Cafes



8 Cemeteries and crematoriums



44 Sites of Nature Conservation Interest



50 Parks & Open Spaces staff



3 Parkruns



44 Events in parks



131,940 People attended events in parks



10,737m² Habitat enhancement by Your Park Bristol & Bath

(all the above are 2024 figures)

Introduction to the other Framework components



1. Greener Places – Investment & Delivery Plan for Bath and North East Somerset

Whilst the Greener Places Plan is for a 10-year period, the Greener Places - Investment and Delivery Plan is for five-year period. The Plan identifies priority actions and where investment is needed. Some of the actions involve activities that extend outside the authoritative boundary of Bath and North East Somerset to deliver benefits and address issues and needs at a landscape and water catchment scale.

The Plan identifies actions under the following headings:

Building and maintaining green infrastructure evidence

This section focuses on developing mapping tools. Digitally mapping GI will ensure that we prioritise where investment in GI will make the most difference. Making this information easily accessible will increase awareness and support engagement with a wide range of partners and residents.

Managing and investing in our Corporate Estate

This section identifies priorities for the council in managing its estate with regard to greenspaces for people, nature recovery and climate resilience.

Improving practice and processes within the council to support green infrastructure delivery

This section focuses on the actions required to deliver green transformation of council services, and new Local Plan policy, to ensure GI and nature recovery targets are met. This includes a review of current practice and staff resources to ensure there is an appropriate provision of specialist advice and support.

It includes an action to seek Nature in Towns and Cities Accreditation as part of the council's approach to place shaping. This aligns with the ambition of the West of England Combined Mayoral Authority on behalf of the unitary authorities, to achieve the accreditation for the region.

Delivering new and maintaining existing green infrastructure to support growth

This section is to ensure GI is incorporated into plans and strategies including those focused on new development and place shaping. Provision needs to be made for the long-term management, maintenance and monitoring of new and existing GI assets, in the same way as grey infrastructure is budgeted for.

This aligns with the ambition of the West of England Combined Authority, to achieve the accreditation for the region.

● **Nature Towns and Cities accreditation**

Launched in 2025 by Natural England, National Trust and National Lottery Heritage Fund (NLHF) accreditation will:

- ◆ Strengthen and formalise partnership working under one shared vision
- ◆ Ensure the right foundations are in place to deliver transformational change
- ◆ Set benchmarks, best practice and progress
- ◆ Provide assurance to potential investors and funders that our towns or city are a good investment or funding opportunity
- ◆ Re-establish that GI is vital for the long-term success and resilience of a town or city

Obtaining accreditation, that necessitates producing a Green Infrastructure Strategy for each place, will demonstrate to investors (including NLHF who have supported many projects in Bath and North East Somerset) that our towns and city are good places to invest in.

Whilst accreditation is not a requirement of applying to NLHF, accreditation demonstrates that there is local and regional leadership support for prioritising urban greening, thereby reducing the risk associated with any investment and provides more confidence from an investor viewpoint.

Accreditation aligns with obtaining Green Flag Awards, which for some parks, are a condition of NLHF for work completed (e.g. Sydney Gardens and Royal Victoria Park), to demonstrate that we are maintaining standards and investing in our heritage.

Neighbourhood Plans and Local Climate and Nature Action Plans produced by parishes and rural communities will also feed into place shaping and set ambitions and actions for the delivery of GI.

● **Retrofitting the urban environment for climate resilience, people and nature**

This section focuses on actions to incorporate more green and blue spaces into our urban environments to address climate change and loss of nature.

● **Landscape scale delivery and interventions**

This section focuses on existing landscape scale programmes and the development of new area-wide initiatives. These support delivery of the West of England Green Infrastructure Outcomes, address key sustainability issues, and contribute towards meeting the council's climate and nature targets and Green Infrastructure Standards. It includes council and partner led partnership programmes and projects at a local and landscape scale.

Partnerships that the council contributes to are the West of England Nature Partnership, Bristol Avon Catchment Partnership, Natural History Consortium and Cotswolds and Mendip Hills National Landscape partnerships. To avoid duplication with other delivery plans, not all partnership activities are included in the Greener Places - Investment & Delivery Plan.

Key partnership delivery plans:

[West of England Nature Partnership Priority Projects Programme](#)

[Bristol Avon Catchment Plan](#)

[Mendip Hills National Landscape Management Plan](#)

[Cotswolds National Landscape Management Plan](#)

● **Current landscape and catchment programmes (and their partnerships where they exist) include:**

- ◆ [Chew Valley Reconnected](#) (Chew Valley Reconnected Partnership) – projects include: Lower Chew Forest, Great Avon Wood, Chew Valley Lake Recreational Trail, Chew Valley Farm Cluster, Landscape Recovery on the Lower Chew, Pollinator Pathways, Keynsham Memorial Park River & Weir Improvements
- ◆ Landscape City – including [Bathscape](#) NHLF programme (Bathscape Board), [Bath River Line](#), and [Landscape City](#) Framework
- ◆ [Somer Valley Rediscovered](#) (Somer Valley Rediscovered) – projects include: Greenspaces; Cam & Wellow Farm Cluster and Cam & Wellow River Restoration Project
- ◆ [WaterSpace](#) (Waterspace Partnership) – the partnership provides strategic direction and steer for the River Avon corridor and links to projects such as Bath River Line and WaterSpace Connected
- ◆ [Limestone Link](#) – currently in development, this partnership programme will focus on the area between the Mendip Hills and the Cotswolds around the Limestone Link footpath, delivering better protected and ecologically enhanced habitats, including grasslands
- ◆ [Western Forest](#) – includes the whole of Bath and North East Somerset (partnership in development)

There are numerous community and volunteer groups connected to the programmes mentioned above. In addition to these, there are other projects across the area, led by individuals, town and parish councils and community organisations, contributing to shared outcomes.

● **Research, training and green social prescribing as part of a regional approach**

This section recognises the need for additional research to inform prioritising investment in GI, and actions to develop green skills and support volunteering initiatives that engage people in greenspaces, benefitting their health and wellbeing.



2. Green Infrastructure Mapping

The first phase of work has focused on mapping data to evidence the Green Infrastructure Standards.

Mapped data will show existing Green Infrastructure provision, the range of assets and deficiencies. The maps will provide context and evidence to support decisions and investment to protect, improve and create GI. This includes developing GI strategies for specific places including Keynsham and Saltford, Bath, and rural areas, as part of the councils approach to place shaping.

A GIS Data Maintenance Plan will be produced to ensure that there is an understanding and commitment by the council to maintain the mapping and update the data.

Recognising that other bodies and organisations have or are developing environment data platforms, it is essential that the council works with partners to establish shared mapping platforms and review mapping and data. This is to ensure consistency, save on resources, avoid duplication and ensure there are appropriate resources to support ongoing management of these platforms.

Existing green infrastructure provision

Existing GI provision has been assessed including use of the mapping. A few key facts are provided below. Further evidence gathering, mapping and analysis work is planned as part of the Investment and Delivery Plan.

GI facilitates inclusive prosperity and regeneration, helping to create high quality environments

- In the B&NES Voicebox survey 2024, when asked what makes somewhere good to live 'Access to nature and greenspace' scored as the most important factor. In planning for new housing development, 'Greenspaces for nature and recreation' came second only to improved public transport.

- Green corridors contributing to the primary GI network, supporting movement for health and wellbeing, include Bath River Line, Bristol Bath Railway Path, River Avon Trail, Bath Linear Park, Colliers Way, and Norton Radstock Greenway.
- Regeneration schemes are combining heritage and GI by incorporating street planters and improving greenspaces in Keynsham, Midsomer Norton and Radstock, creating attractive settings to encourage investment.

GI supports movement and recreation, addresses health inequalities, and supports activities that are beneficial to health and wellbeing

GI enhancements in areas of high population density and high deprivation would provide a range of benefits addressing sustainability issues.

- Areas best served by **accessible greenspace** are generally found in Bath. Over 60% of households in Central Bath & Lansdown have accessible greenspace where the Neighbourhood standard and one of either the Doorstep standard or Local standard have been met. This is followed by Oldfield Park West (57%), Combe Down (54%) and Kingsmead (53%). The areas with less access are Keynsham South (6%), Pensford, Clutton and Temple Cloud (9%) and Odd Down (10%).
- The Cotswolds and Mendip Hills National Landscapes provide large and varied areas of open space and PRoW networks for recreation, however, lack of active travel provision and connections, and poor public transport make them difficult to access on foot, by bike or by public transport.
- New and improved walking and cycle routes have been delivered in Bathscape, Somer Valley Rediscovered areas and at Chew Valley Lake.

GI improves ecological connectivity, species rich habitats and connects people to nature

- Initial estimates suggest that 6.2% of land in the district is managed and / or protected for nature. Sites of Special Scientific Interest (SSSIs) make up the largest share. A further 16.96% of land is/or very likely to be providing some value for nature, but it is not possible to ascertain from current data if management is in place.
- There are seven Local Nature Reserves (LNRs), providing 0.78 ha per 1,000 population. Avon Wildlife Trust's Folly Farm reserve in the Chew Valley, is the largest, covering an area of over 98 ha. The only other rural LNR is Camerton Batch. The other LNRs are found in urban areas where they provide a refuge for nature and places for quiet enjoyment. Carrs Wood to the west of Bath and Manor Road Community Woodland in Keynsham are the largest of our urban LNRs, each covering over 20 ha.



GI helps mitigate climate change and address the effects of climate change

Soil and vegetation act as carbon stores and can support improvements to air quality, road and rail noise exposure, and mitigate against rising surface temperatures from climate change.

- **Large, vegetated areas** are more likely to be found in rural areas, however, there are large areas of soil and vegetation in urban areas across Bath and North East Somerset. These include Brown's Folly to the east of Bath, which covers an area of 54 ha, Waterside and West Hill Gardens in Westfield, that cover 40 ha and Keynsham Hams in Keynsham that covers an area of 39 ha.
- **Tree canopy** covers around 16% of land within Bath and North East Somerset. It is most extensive within our urban cities and towns, where collectively it covers almost 20% of the total area. There is, however, considerable variability across the urban area and areas such as Paulton, and Publow and Whitchurch have the lowest cover at 9% and 10% respectively. Collectively tree canopy cover is lowest in our rural towns and fringe, where it covers around 14% of the total area.

GI improves water quality and quantity and reduces flood risk

The district is in the Bristol Avon Catchment that includes the River Avon, River Chew, Cam Brook, Wellow Brook, and a network of streams and lakes.

Tree and hedge planting, buffer strips alongside rivers, restored soils, vegetated sustainable drainage schemes and restoring wetland can have many benefits for water management including: reducing flood risk and pressure on sewers, storing and purifying water resources, reducing risk of drought and restoring biodiversity. Frequency of surface water flooding or flash flooding in both urban and rural areas is likely to increase with climate change.

- Water quality is poor with only two of the 18 waterbodies in the district in good ecological status and physical barriers impacting on fish passage.
- Physical barriers on the River Chew, including the Keynsham Memorial Park weir, and the 18 barriers identified on the Cam and Wellow are known or are likely to be having an impact on fish passage.
- Fluvial flooding has been identified to be the most significant source of flood risk with events being associated with the main watercourses - the River Avon, River Chew, Cam Brook and Wellow Brook. An area upstream of Keynsham Weir on the River Avon has been identified to be tidally influenced and, therefore, may be susceptible to tidal flooding. Due to sea level rise, this area may become more susceptible to tidal flooding in the future.

3. Green Infrastructure Standards

The Green Infrastructure Standards define what GI is required to develop and support sustainable places and communities and address the Climate and Ecological Emergencies. The provision of GI needs to be planned strategically, and whilst the Standards are fundamental to delivering new growth, they are for all who have a role in the provision, management and maintenance of GI. This includes developers, landowners and managers, council officers, parish and town councils and communities.

The Standards are derived from [Natural England's Green Infrastructure Framework](#) Standards. A baseline assessment was undertaken in 2024 to assess the local context for Natural England's GI Standards and adapt them where appropriate. Standards for Bath and North East Somerset and targets will be confirmed as part of the Local Plan review and will form part of the revised Planning Obligations Supplementary Planning Document. Baselines, details for the baseline assessments and technical explanations for the methods used to define the Local Food Growing Space and Play Space Standards (that are not covered by Natural England) is provided in the Green Infrastructure Standards for Bath and North East Somerset Methodology Report. This also includes a section covering the application of the Standards.

The council will monitor and evaluate progress against delivery of the Standards for Bath and North East Somerset every five years.

A Green Infrastructure Standards Dashboard linked to the GI Mapping will update on progress. Information provided with the Dashboard will explain what data has been collated, its source and frequency of updates. This will be linked to and reported in the council's Strategic Evidence Base.



The Green Infrastructure Standards for Bath and North East Somerset are:

Standards		Targets
Green Infrastructure Strategy Standard	Major development Each major new development has a Green Infrastructure Plan	No target set
Accessible Greenspace Standards	<p>District At least 3 ha of publicly accessible greenspace per 1,000 population and no reduction in capacity of accessible greenspace per 1,000 population at a Middle layer Super Output Area (MSOA) scale</p> <p><u>Within 15 minutes' walk from home:</u> EITHER a Doorstep OR Local Accessible Greenspace i) A Doorstep Greenspace of at least 0.5 ha within 200m (under 5 minutes' walk), or a Local Natural Greenspace of at least 2 ha within 300m (5 minutes' walk) from home AND a Neighbourhood Accessible Natural Greenspace ii) A medium sized Neighbourhood Natural Greenspace of at least 10 ha within 1km (15 minutes' walk) from home</p> <p><u>Beyond 15 minutes' walk from home:</u> i) A medium / large wider Neighbourhood Natural Greenspace of at least 20 ha within 2km, and ii) A large District Natural Greenspace of at least 100 ha within 5 km</p> <p>Blue spaces are included where they are within the boundary of accessible greenspaces.</p>	No target set

Standards	Targets
<div>Page 72</div> <div>Nature Recovery Standards</div>	<p>Major development Major residential development (including purpose-built student and co-living accommodation) must be designed to provide at least 3 ha of publicly accessible greenspace per 1,000 population and should be designed to ensure each household has access to a Doorstep Greenspace or a Local Accessible Greenspace and a Neighbourhood Greenspace concurrently.</p> <p>Local Accessible Greenspace is preferred; however, the Doorstep Greenspace criterion has been introduced in recognition that in existing and densely built-up areas there may not be sufficient space to create new greenspaces of at least 2 ha in size.</p>
	<p>District Quality of greenspace meets the Green Flag Award criteria and any adopted B&NES greenspace quality criteria.</p>
	<p>District The proportion of land managed for nature is increased to meet the nature recovery targets. This includes enhancing and identifying new areas that qualify as Sites of Nature Conservation Interest (SNCI)</p> <p>At least 1 ha of Local Nature Reserve (LNR) per 1,000 population for nature conservation and quiet enjoyment</p>
	<p>Major Development Major residential (including purpose-built student and co-living accommodation) and commercial development must be designed to create, restore, and manage wildlife rich habitats, which can include establishing LNRs.</p>
	<p>30% of Bath and North East Somerset managed and protected for nature by 2030</p> <p>30% of B&NES Corporate Estate managed and protected for nature by 2030</p>

Standards	Targets
Urban Greening Standard	<p>Major development Major commercial development must achieve an Urban Greening Factor of at least 0.3. All major residential development (including purpose-built student and co-living accommodation) must achieve at least 0.4 on land that has previously been developed and in the case of residential greenfield development must seek to achieve 0.5.</p> <p>No target set</p>
Urban Tree Canopy Cover Standard	<p>District Aspire to a minimum of 20% tree canopy cover in urban areas²</p> <hr/> <p>Major Development Major residential (including purpose-built student and co-living accommodation) and commercial development is designed to meet the district standard, incorporate new and existing trees and new streets are tree lined (in line with NPPF requirements)</p> <p>No target set</p>
Local Food Growing Space Standard	<p>District At least 0.3 ha of local food growing space per 1,000 population and no reduction in capacity of local food growing space per 1,000 population at a Middle layer Super Output Area (MSOA) scale.</p> <hr/> <p>A local food growing space within 1200m (20 minutes' walk from home)</p> <hr/> <p>Major development Major residential development (including purpose-built student and co-living accommodation) must be designed to provide at least 0.3 ha of local food growing space per 1,000 population within 1200m (20 minutes' walk from home)</p> <p>No target set</p>

² Further details to come in forthcoming Bath and North East Somerset District Tree & Woodland Strategy (2026)

Standards	Targets
Play Space Standards	<p>District At least 0.05 ha of children's play space per 1,000 population and no reduction in capacity of children's play space per 1,000 population at a Middle layer Super Output Area (MSOA) scale</p>
	<p>No target set</p> <hr/> <p>At least 0.03 ha of youth play space per 1,000 population and no reduction in capacity of youth play space per 1,000 population at a Middle layer Super Output Area (MSOA) scale.</p> <hr/> <p><u>Within 15 minutes' walk from home:</u> i) A children's play space within 600m (10 minutes' walk), and ii) A youth play space within 720m (12 minutes' walk)</p> <hr/> <p>Major development Major residential development must be designed to provide at least 0.05 ha of children's play space per 1,000 population within 600m (10 minutes' walk from home) and 0.03 ha of youth play space per 1,000 population within 720m (12 minutes' walk from home).</p>

4. Green Infrastructure Local Plan policy

The National Planning Policy Framework (NPPF) 2024 recognises the importance of GI. References to use of GI in the NPPF include the GI Standards in the Golden Rules (para. 159), safe and healthy communities (para. 96(c)), climate change (para. 164), conserving and enhancing the natural environment (para. 188), and ground conditions and pollution (para. 199).

The UK's Planning Practice Guidance for Natural Environment states that:

'Green infrastructure is a natural capital asset that provides multiple benefits, at a range of scales. For communities, these benefits can include enhanced wellbeing, outdoor recreation and access, enhanced biodiversity and landscapes, food and energy production, urban cooling, and the management of flood risk. These benefits are also known as ecosystem services.'

The Local Plan, guided by national policy, is key to ensuring new development is creating healthy and sustainable places, and takes account of ecosystem services and the Climate and Ecological Emergencies.

The council's Local Plan (2022 - 2042) will include a revised GI policy that is expected to require developers submitting proposals for major development to submit a Green Infrastructure Plan for approval.

The Plan should be informed by local policy and evidence, and set out how the development meets the Green Infrastructure Standards and will deliver the Green Infrastructure Outcomes set out in the Greener Places Plan. The Green Infrastructure Plan will contribute to the wider urban design scheme (that considers design of buildings, groups of buildings, spaces and landscapes) to deliver a successful development.

The use of the [Environmental Benefits from Nature Tool](#) to assess environmental impacts and benefits, and use of other standards such as [Building with Nature](#) to support compliance with the policy will be encouraged.

The need to ensure that GI is featured in other policy sections of the Local Plan to explicitly address the multifunctionality of GI is recognised.

Delivery of planning policy

With a new GI Policy and Standards, there is a need to review existing process and practice to ensure there are sufficient resources to:

- **CREATE** new GI to address need and to meet growth
- **RESTORE** and enhance existing GI and improve quality and access to greenspace
- **MAINTAIN** existing and new GI through management, maintenance and monitoring arrangements

The changes place new demands on the council's Development Management team and those involved in the planning process (including landscape specialists and ecologists). Assessing the information submitted with an application (including the Green Infrastructure Plan) will require collaboration and a specialist officer with sufficient knowledge of GI and local requirements.

Within the Greener Places Investment and Delivery Plan the following actions have been identified to record and monitor the effectiveness of the new policy and Standards:

- **Planning application/decision monitoring** – establishing and maintaining a record of Green Infrastructure Plans submitted and Urban Greening Factors achieved
- **Monitoring success of delivery of planning schemes** - potentially linked to BNG monitoring
- **Recording of investment in GI** across council services. This is mainly investment through developer contributions, Community Infrastructure Levy and project funding



The **Planning Obligations Supplementary Planning Document (SPD)** sets out what developers are required to provide. **Section 106 Agreements (S106)** are legal agreements the council makes with developers to mitigate any negative effects a development might have on the local area. Funding secured through S106 may include payments for services or facilities, including provision or improvement of greenspaces and new trees, and is different to **Community Infrastructure Levy (CIL)** payments which are more strategic. Funding towards maintenance of new GI can also be secured through planning conditions and non-financial obligations.

CIL is a planning charge designed to help deliver infrastructure (such as schools, transport links, open spaces, recreational and waste facilities) to serve the residents and users of developments. CIL is payable on new developments, including housing, student accommodation, supermarkets and hotels.

The **Infrastructure Delivery Plan (IDP)** informs the infrastructure requirements for the current and emerging Local Plan (2022 to 2042). This is produced by the council and is accompanied by a schedule of infrastructure projects including GI, estimated costs, phasing and delivery arrangements, and potential funding sources.

Management, maintenance and monitoring of green infrastructure in new development

GI requires sustainable management and maintenance if it is to provide benefits and services for the long term. Arrangements for funding need to be identified as early as possible, factored into the design and implementation, and planned for the lifetime of the development. In the case of major development, this must be set out in a Green Infrastructure Plan.

Green Infrastructure Plans should be developed with the local community, as engagement can assist with management and tailoring provision to local needs. Communities and new residents provide an important role when it comes to monitoring the delivery and condition of GI, and in some instances report issues to the council. Involving communities makes them more likely to assist with future management.

Establishing separate bodies and community involvement, using management companies and service charge levies as a way of funding, is a common way of delivering ongoing maintenance for new development.

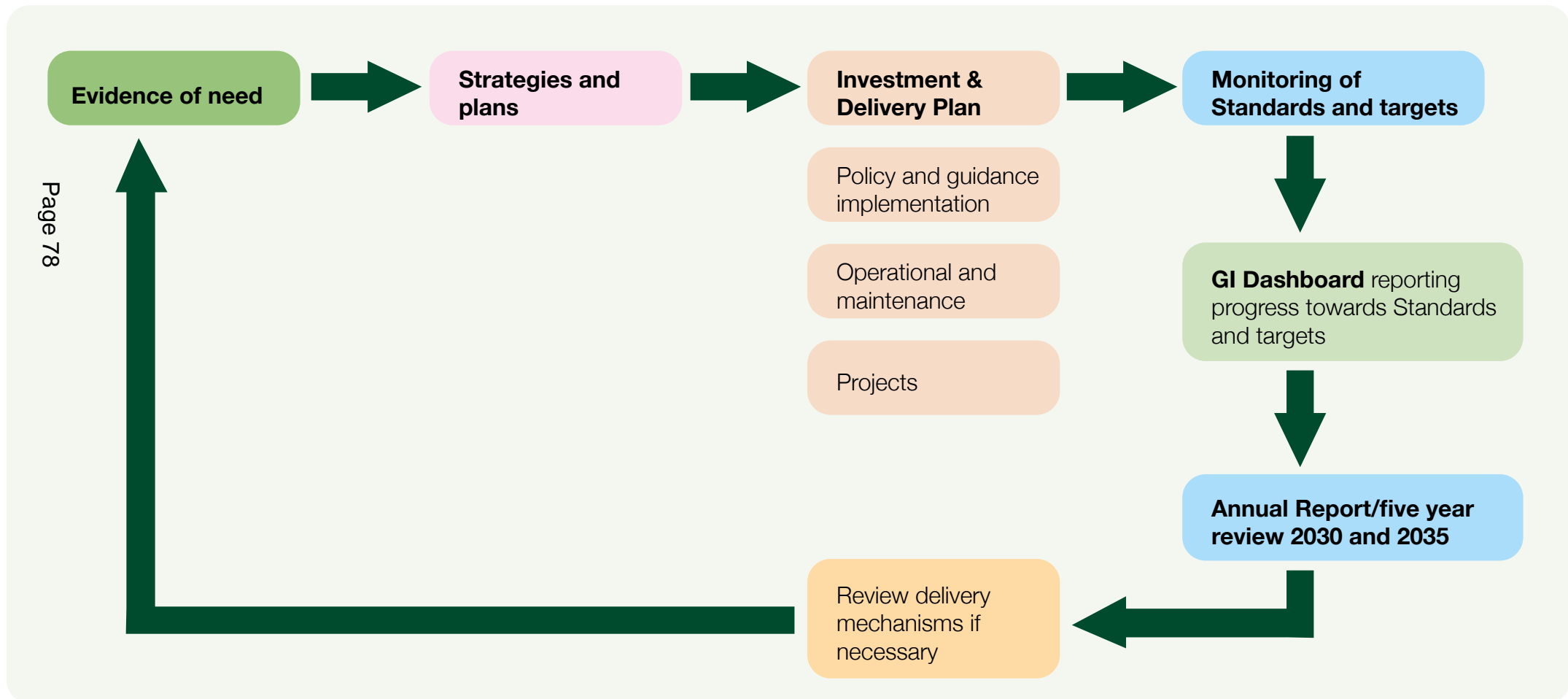
A monitoring schedule is required as part of the Green Infrastructure Plan to ensure the commitments are delivered.

[Natural England's 'Process Journey for Developers and Designers \(Stage 4 Funding and Obligations\)](#) provides clear guidance on how to approach management and maintenance. It articulates that GI is unlikely to affect the viability of a development on its own, and interventions such as sustainable drainage schemes can reduce management and maintenance costs over time.

Monitoring and reporting

Reviews will be undertaken in 2030 and 2035 to identify progress towards meeting the Green Infrastructure Standards and targets, and if the outcomes are being achieved.

Monitoring Greener Places delivery - Full description of diagram in [Appendix](#).



Glossary

Definitions – Accessible Greenspaces

District Accessible Natural Greenspace is defined as an accessible natural greenspace of at least 100 ha within 5km from home.

Doorstep Accessible Greenspace is defined as an accessible natural greenspace or playing field (which is available to all) of at least 0.5 ha within 200m from home. The incorporation of playing fields is unique to this typology.

Local Accessible Natural Greenspace is defined as an accessible natural greenspace of at least 2 ha within 300m from home.

Neighbourhood Accessible Natural Greenspace is defined as an accessible natural greenspace of at least 10 ha within 1km from home.

For the Green Infrastructure Framework for Bath and North East Somerset **playing fields** are large, flat areas of grass or specifically designed surfaces, which encompass at least one playing pitch, used primarily for outdoor sports i.e. football, rugby, cricket. N.B The Ordnance Survey depictions of ‘Playing Fields’ are not entirely in accordance with the Town and Country Planning Act definition, and this definition combines the two.

Sub-Regional Accessible Natural Greenspace is defined as an accessible natural greenspace of at least 500 ha within 10km from home.

Wider Neighbourhood Accessible Natural Greenspace is defined as an accessible natural greenspace of at least 20 ha within 2km from home.

Biodiversity Net Gain – Biodiversity Net Gain (BNG) is an approach to development that leaves biodiversity in a measurably better state than before the development. The legislated biodiversity objective is a target of at least a 10% net gain in biodiversity for habitats, hedgerows and watercourses. New development will need to be designed and planned to prioritise avoiding loss and harm to existing habitats before compensating to off-set damage.

<https://beta.bathnes.gov.uk/biodiversity-net-gain-bng>

Community Infrastructure Levy – (CIL) is a planning charge designed to help deliver infrastructure (such as schools, transport links, open spaces, recreational and waste facilities) to serve the residents and users of developments. CIL is payable on new developments, including housing, student accommodation, supermarkets and hotels.

Green Infrastructure Plan – A report which as a minimum sets out how a development will deliver green infrastructure in accordance with the Green Infrastructure Standards and Green Infrastructure Outcomes; will take account of the Local Nature Recovery Strategy and the creation and restoration of wildlife rich habitats; integrates with other relevant policy requirements including Biodiversity Net Gain; contributes towards meeting wider objectives identified in the Local Plan; and how the green infrastructure will be managed, maintained and monitored for a minimum of 30 years.

Green Infrastructure Standards (also see council web page for methodology) – The Green Infrastructure Standards define criteria and attributes for good green infrastructure and how to plan, deliver and maintain it. They include criteria / attributes relating to quantity, size, proximity, capacity, quality, accessibility, type and process (planning and management of green infrastructure) and are designed to be used consistently as a guideline.

Green Infrastructure targets – In the context of the Greener Places - Green Infrastructure Framework for Bath and North East Somerset, green infrastructure targets are performance goals to track the progress towards achieving the Green Infrastructure Standards.

Local Nature Recovery Strategy – Local Nature Recovery Strategies (LNRS) are ‘a new, England-wide system of spatial strategies that will establish priorities and map proposals for specific actions to drive nature’s recovery and provide wider environmental benefits’, as set out by Government in the Environment Act 2022. The West of England Combined Authority is the responsible body for the West of England LNRS.

<https://www.westofengland-ca.gov.uk/what-we-do/environment/the-local-nature-recovery-strategy/>

Local Nature Reserves – Local Nature Reserves (LNRs) are usually declared (designated) by local councils, but parish and town councils can also declare LNRs if they have the powers to do so delegated to them. LNRs can be large or small, and be created where there are wildlife or geological features that are of special local interest. They must have a management plan. LNRs are intended for people and wildlife and used for purposes such as habitat management, quiet recreation, study and to interact with nature and enjoy it.

Nature-based solutions – Nature-based solutions (Nbs) address societal challenges through actions to protect, sustainably manage, and restore natural and modified ecosystems, benefiting people and nature at the same time. They are increasingly recognised as a cost-effective way to replace, augment, or complement traditional grey infrastructure, and for their ability to support climate resilient infrastructure. Infrastructure projects that incorporate nature-based solutions are typically referred to as one of the following: nature-based infrastructure, green or green/grey infrastructure, blue or blue/green infrastructure, hybrid infrastructure, natural infrastructure.

Natural Capital – Natural Capital refers to the aspects of the natural environment that provide benefits to people. The benefits are wide ranging and can be anything from clean air and water, wildlife to enjoy, to crop pollination. The environment’s contribution to these benefits are referred to as ecosystem goods and services. These benefits can be valued.

A formal definition of natural capital from the Natural Capital Committee is ‘the elements of nature that directly or indirectly produce value to people, including ecosystems, species, freshwater, land, minerals, the air and oceans, as well as natural processes and functions.’

This quick start guide was produced by a team of natural capital specialists at Natural England:

<https://ecosystemsknowledge.net/sites/default/files/wp-content/uploads/Natural%20Capital%20Quick%20Start%20Guide%20%231.pdf>

Natural flood management – Natural flood management (NFM) involves working with nature to reduce the risk of flooding for communities. It uses various techniques to restore or mimic the natural functions of rivers, floodplains and the wider catchment. It aims to store water in the catchment and slow the rate at which water runs into rivers, to help reduce flooding downstream. NFM is also referred to as ‘working with natural processes’, ‘nature-based solutions’, ‘slow the flow’, ‘sustainable land management’ or ‘upstream management’.

Nature Towns and Cities – The programme has been set up by National Lottery Heritage Fund, National Trust and Natural England. It aims to help local authorities work together with communities and partners to bring nature into every neighbourhood for all to enjoy. The Nature Towns and Cities Accreditation scheme is being piloted in England and recognises towns and cities that are putting nature and green infrastructure at the heart of their plans.

<https://naturetownsandcities.org.uk/whats-on/>

Neighbourhood Plans – Communities can influence the future of their neighbourhood by preparing a Neighbourhood Plan that sets out the vision for the local area and general planning policies to guide developments. This can help determine where new homes and businesses can be built, and what they should look like.

Sustainable Drainage schemes – Sustainable Drainage schemes (SUDs) offer a more natural approach to managing drainage systems in and around properties and developments than traditional drainage systems. They are designed to temporarily store water during storm events, reduce peak flows and reduce surface water runoff, by mimicking the natural cycle of water management by retaining water where it lands. SUDs include retention ponds, swales, green roofs, rain gardens, permeable paving, and wetlands.

Urban Greening Factor – The Urban Greening Factor (UGF) assigns a factor score to each surface cover type which are weighted based on their potential for rainwater infiltration. This is used as a proxy for naturalness and functionality. Natural England has developed an Urban Greening Factor for England, as one of a suite of five Headline Green Infrastructure Standards within the Green Infrastructure Framework. The UGF is a planning tool to improve the provision of green infrastructure, particularly in urban areas. It is voluntary and can be used to increase urban greening and contribute to Biodiversity Net Gain.

Appendix 1

Diagram explanations:

Page 6 - Greener Places - Green Infrastructure Framework components and how it will be delivered in partnership with others

The left hand column lists the Greener Places GI Framework components that are: Greener Places Plan, B&NES Accessible Greenspaces Plan, Greener Places Investment & Delivery Plan, GI Mapping Tools, GI Standards and GI Local Plan Policy. Below this is a box with a list of GI principles. This box links to the components box and to the next column that lists how the Framework will be delivered in partnership. The column on the right lists partnerships, national and local organisations, developers and businesses, managers of land and natural capital, town and parish councils, communities and residents. [Back to page 6.](#)

Page 10 - Strategic green and blue corridors

Map shows the districts strategic green and blue corridors that provide a network across and beyond the district boundary. The City of Bath World Heritage Site, Cotswolds and Mendip Hills National Landscapes are shown as hatched areas. Location of Bath, Keynsham. Midsomer Norton and Chew Valley Lake are shown on the map. [Back to page 10.](#)

Page 14 - How the stock of natural capital provides a flow of ecosystem services

Diagram shows in bottom right needs, and challenges facing business and society. In a broad arrow it lists nature based solutions to address these needs. This links into the top left image of Stock - natural capital (trees, water, biodiversity), this links to Flows – ecosystem services, this links to Value – benefits to business and society, this links to Solutions-meeting needs and building resilience. [Back to page 14.](#)

Page 21 - Integration of GI in plan and strategy delivery to achieve shared targets and outcomes

Top of left-hand column states GI Framework supports and guides implementation of regional and local strategies. Below this the column lists the GI Framework and lists the key B&NES policy documents and regional strategies that the Framework supports delivery of. The next column lists key strategies and plans that will support delivery of the Framework. The next column lists various activities that result from plans and strategies to deliver GI including new policies, capital projects and operational changes. The next column lists the range of metrics to be used to measure what these activities deliver. The last column is a list of the targets and outcomes to be achieved by the activities. These include: 30% of land managed for nature, net zero by 2030 and the GI outcomes. [Back to page 21.](#)

Page 52 - Monitoring Greener Places delivery diagram

Evidence of need flows into strategies and plans, which then flows into Investment & Delivery Plan. The Delivery Plan includes policy and guidance implementation, operational and maintenance, and projects. This then flows into monitoring of Standards and targets, which flows into a GI Dashboard. This then flows into Annual Report and five year reviews. This then flows into review delivery mechanisms if necessary and back to evidence of need. [Back to page 52.](#)

Appendix 2

Development of the Green Infrastructure Framework and Investment & Delivery Plan 2025 to 2030

The Greener Places - Green Infrastructure Framework 2025-2035 has been produced in collaboration with internal council services and external partners via several workshops.

Internal engagement

An internal council **GI Review Group** was established to facilitate cross-service discussion and input to the Framework. Terms of reference were agreed, and monthly meetings were held December – April 2024.

The council participated in **Natural England's GI Framework (GIF) Stakeholder Training Programme January – March 2024** to help embed the GIF into local strategies, and ensure GI is considered and designed into council projects. This resulted in two bespoke cross-service workshops that sought to ensure officers have appropriate information and understanding of GI to devise Local Plan policy and standards including the Urban Greening Factor, and the appropriate data for the GI map tool.

External stakeholder engagement

In **September 2023**, an **external stakeholder GI Strategy Review Workshop** was held. Reflecting on the GI Strategy produced in 2013, the wide variety of stakeholders were asked the following questions. Below are a selection of the responses:

What would make the biggest difference to delivering effective GI in the next 10 years?

- More certainty on funding/additional resources to promote greater innovation
- Innovative finance and funding solutions to invest in GI/resilient landscapes
- Align with partners for larger pool of resources and outcomes
- Sustained local authority support, prioritising and funding
- More staff resource to support development of partnership projects and deliver feasibility work required to deliver large-scale interventions
- More cross-sector join up/ bring together the right range of people as early as possible/more diverse partners “getting on board” taking a role in shaping the future
- Effective and robust Local Plan policies supported by design guides and SPD/clear requirements/expectations for GI in new development in the Local Plan
- Better recognition through policy/legislation for need to deliver integrated land and water management
- Joined-up area visions, using GI as a basis for looking at spatial needs on water, climate and green travel across the district

What are the priorities?

- Urban greening/mitigating the urban heat island effect
- Limestone Landscape Link and Avon Corridor
- Safeguarding of the World Heritage Site Setting
- Making sure that the benefits of (financial, health, nature, transport, climate, etc) investing in GI are fully understood and considered in decisions at a site and strategic level
- Making the city of Bath and the district more resilient to climate change/cultural shift to climate change solutions
- Harvesting water / floodplains
- Sustainable commuting links
- Unlock investment through collaborative action to co-fund larger GI projects
- Support and enable community action/behavioural change
- Addressing inequalities in access

In **July 2024, the follow up stakeholder session** asked attendees to develop priorities into actions.

These have been combined with actions arising from two further internal GI placemaking workshops (also held in July 2024), with officers from services across the council, and supported by Alister Scott from Northumbria University. These workshops progressed the learning and discussions from the Natural England workshops held earlier in the year. A Jam Board was used to gather what officers saw as challenges or opportunities in delivering their work areas' priorities regarding placemaking, focusing on the relationship with GI and nature recovery objectives. Based on an understanding that green infrastructure and nature recovery objectives are fundamental aspects of wider placemaking, it is important that the new Local Plan considers how these objectives and GI Standards are articulated and delivered in new development, and integrated into wider placemaking objectives. This includes taking account of and helping to deliver measures on the Ecological and Climate Emergencies, as well as revised national policy and guidance.

The **Local Plan Options document (April 2024)** set out several new and revised policy options regarding the natural environment including Biodiversity Net Gain, Green Infrastructure Standards and the Local Nature Recovery Strategy. There are also currently adopted planning obligations and council targets for trees and greenspace typologies. A key challenge, as part of the Local Plan process, is working through how these are linked and work together to deliver across council priorities and the various plans and strategies. A further Options Report is due out for consultation October 2025.

As part of the Local Plan site concepts and requirements work, the council will also be testing the new GI Standards set out in the GI Framework and working on initial BNG requirements and potential solutions.

Image credits

Cover 1147405 © National Trust Images/Chris Lacey

Page 7 1623207 ©National Trust Images/James Dobson

Page 12 © Jessie Myers, Festival of Nature

Page 23 © Bristol Design, Bristol City Council

Page 29 © YPBB © Mark Simmons

Page 31 © YPBB

Page 37 © Meristem Design

Page 42 1147354 ©National Trust Images/Chris Lacey

All other images are ©B&NES Council

This page is intentionally left blank

Greener Places Investment & Delivery Plan 2025-2030

The Investment & Delivery Plan is a component of the Greener Places- Green Infrastructure Framework for Bath and North East Somerset 2025- 2035.

It identifies actions to deliver the Greener Places Plan 2025-2035 to achieve the vision for Bath and North East Somerset -

Green infrastructure plays a key role in ensuring Bath and North East Somerset has a more sustainable, nature-rich and climate resilient future. It is well maintained and valued, and optimises the right social, economic, and environmental benefits in the right locations. There is equitable access to high quality and inclusive green infrastructure, ensuring that every member of the community benefits.

The actions identified also contribute to delivery of the suite of regional strategies and plans including West of England Joint Green Infrastructure Strategy (JGIS), Local Nature Recovery Strategy, and Regional Growth Plan.

Leading and working with various partners and stakeholders, B&NES aim to:

- Improve policy, practice, process to create, restore and maintain green infrastructure including securing of long-term investment to help meet climate and nature targets and address sustainability issues.
- Build, manage and maintain robust evidence to inform decision making and monitor progress of delivery.
- Increase urban greening in our streets and neighbourhoods to restore nature, provide climate resilience, create healthy places to live and attract investment.
- Reduce inequalities for access to greenspace, improve quality and ensure provision meets the needs of local communities.
- Continue leadership and support for our GI and regional partnerships to deliver existing and expanded landscape scale programmes to deliver the multiple benefits that green infrastructure provides.

For further context including description of GI and the other Framework components (Local Plan policy, GI mapping and Standards), see the Greener Places Plan 2025-2035.

What we plan to do

‘Valuing People, Place and Nature – a Green Infrastructure Strategy for Bath and North East Somerset (2013), was innovative and ground-breaking at the time. It set out key objectives for place making including achieving healthy thriving communities, using natural solutions to tackle climate change, maintaining, and creating robust ecological networks, and contributing to a green economy and nature tourism.

The Greener Places Plan addresses the significant changes have taken place over recent years, including recognition of the climate and ecological emergencies, the publication of the West of England Joint Green Infrastructure Strategy 2020-2030 (JGIS) and various local and regional plans and strategies including the West of England Combined Authority Climate and Ecological Strategy Action Plan.

i) Landscape scale green Infrastructure programmes

Delivery of the landscape scale green infrastructure projects proposed in the 2013 strategy have progressed. Today they are part of wider partnership delivery programmes that are being co-designed and delivered.

Each programme contributes to delivery of the [Local Nature Recovery Strategy](#) (LNRS), from which the West of England Nature Partnership's (WENP) [Priority Programmes](#) are derived. These include Urban Nature, Restoring our Rivers, and 30 by 30. In providing evidence of the need and setting out the regions priorities for nature, the LNRS and WENP's Priority Programmes, are effective tools in attracting funding and facilitating partnership delivery.

Appendix 1 identifies the WENP programmes and West of England JGIS outcomes that the GI landscape and catchment programmes contribute to including:

Bathscape Phase 2 will be part of a new **Landscape City programme**, building on the legacy of the National Lottery Heritage Fund programme that will complete in 2026. It will be designed to deliver nature recovery and climate resilience of Bath and its surrounds, aligning with the aims of the World Heritage Site Management Plan and informing new development.

A key focus will be to continue to engage people in the management and enjoyment of the landscape surrounding Bath. We will continue to collaborate with health professionals to encourage more people to access our greenspaces and countryside, through green social prescribing initiatives. As part of the Landscape City programme, further phases of **Bath River Line** 10km route are planned providing enhanced river access and connecting greenspaces through and beyond Bath.

Somer Valley Rediscovered Partnership facilitated by the Council will enable the **Cam and Wellow Delivery Programme** to be co-designed and co-delivered by the partners. The programme will focus on partners working at a catchment scale to deliver the agreed outcomes, relating to improved nature recovery, climate resilience and healthier communities. Various funding mechanisms will be required to enable the development of delivery of interventions over the next five years. A bid to the Water Industry National Environment Programme (WINEP) is being progressed to support this work.

The Chew Valley Reconnected Partnership led by the council will co-develop the **Chew Valley Delivery Programme** for the Chew catchment to further expand the current partnership programme of work, focusing on water and environmental resilience and delivering health and wellbeing benefits for local communities. Various funding mechanisms will be required to enable the development of delivery of interventions over the next five years. A bid to the Water Industry National Environment Programme (WINEP) is being progressed to support this work.

Having completed the northern section of the **Chew Valley Lake recreational trail** in 2022, the council will continue to explore with Bristol Water options for improving recreational access to the lake and delivering nature recovery improvements for local communities.

The council is working in partnership to explore options for a **Keynsham Memorial Park (KMP)** project to increase peoples access to nature, celebrate the heritage, and improve biodiversity through river restoration and enabling fish passage. The **KMP River and Weir Improvement Project** will utilise relevant data and evidence and undertake consultation with local groups and residents to develop the project to meet these aims.

The detailed design and permissions completed for a **new bridge across the Avon and ecological enhancements at the Somerdale site** enable the Council to progress funding bids for delivery of the scheme.

Western Forest - £7.4 million has been secured from central government to create a new national forest that will incorporate the new woodlands that are being created in the Chew Valley by Avon Needs Trees and other partner initiatives in the district. The Forest will deliver multiple benefits including water management, new habitats and public access.

ii) Urban greening

The landscape and catchment programmes described above are now part of the council's **place shaping programmes**, for Bath, Keynsham & Saltford, Somer Valley and Rural areas, and provide connectivity between these places.

The councils place shaping programmes are engaging with local communities and key stakeholders to recognise the specific needs of each place and address current and future needs and help meet targets for net zero and nature recovery. Increasing urban greening is part of place shaping, addressing sustainability issues including inequalities in access to greenspace and climate resilience.

A key delivery tool for urban greening is the new **Nature Towns and Cities accreditation** described in the Greener Places Plan 2025-2035. This aligns with and supports WECA commitment to obtain the accreditation for the region.

Producing green infrastructure strategies as part of the accreditation for each place will ensure local communities are engaged in assessing their current and future greenspace needs, taking account of future growth and meeting the councils GI Standards.

Whilst NLHF have stated that accreditation is not a requirement of applying for funding, accreditation demonstrates that there is local and regional leadership support for prioritising urban greening, reducing the risk to Lottery and other investment from an investor viewpoint.

Economic studies on the value of GI suggest that a 4:1 Benefit Cost Ratio (BCR) is a conservative and reasonable assumption. That means for £1 invested in GI, £4 of benefit is generated.

The 2 levels of accreditation are shown below:



Contributing to place shaping and delivery of the GI Standards the councils **Parks and Open Spaces Team** is delivering the following:

i) Improvement programmes

Parks Pulse Programme – Installation of outdoor gym/exercise equipment across the parks portfolio to encourage increased diversity of offering, increased footfall, increased health & wellbeing (through exercise and promoting being outdoors and social interaction). Improved passive safety through increased use of parks.

Parks For All Programme – Programme of improvements to improve accessibility and equality across the Parks portfolio. This will include new and improved paths, entrances, furniture and play and exercise equipment.

Events Implementation support – Improvements to parks and greenspaces to enhance commercial revenue earning events and mitigate potential damage to infrastructure caused by high frequency of large events.

ii) Maintenance programmes

Parks Tree Programme - Inspect, report and maintain parks tree assets.

Parks Capital Cyclical & Planned Maintenance Programme – Inspect, report, repair and maintain parks built assets (includes conservation of heritage elements).

Parks Play Equipment Replacement Programme – Inspect, report, repair and maintain parks play assets.

Parks Equipment Replacement Programme - Inspect, report, repair and maintain parks equipment

iii) Local food growing and allotment provision

Through our Greener Places Plan we will support opportunities for local food growing that deliver multiple benefits for people and the environment. We will:

- **protect existing allotment provision** in line with existing planning policy, ensuring suitable alternative sites are provided where loss of existing sites cannot be avoided;
 - **promote the development of new allotments and community growing space** to meet needs arising from new development and in support of our emerging Food Strategy; and
 - **encourage action to modernise our existing allotments**, supporting improvements in facilities for individuals and community growers and in environmental outcomes through promoting nature positive growing and site management.
-

How we will deliver

The council's **Capital Programme and Project Management Team** has been established to realise the ambition to deliver priorities such as those laid out in the Greener Places Investment & Delivery Plan 2025-2030. The Team cuts across the B&NES Capital Programme, enabling Project and Programme Managers to work in an effective and efficient way with Green Infrastructure **Programme and Project Sponsors** to maximise delivery. The Parks & Green Infrastructure Programme Manager will have visibility across Corporate Landlord, Parks and Green Infrastructure Programmes and will be able to identify and realise additional value by managing interfaces and bringing funding streams together from each of these to add to the place based focus of the Greener Places Plan.

Funding will be secured from external funding, S106 and CiL for new GI and ensuring sufficient funding for maintenance and management of both existing and new GI.

The **Climate and Environment Team** are providing evidence and advice to the Place Managers as they develop and deliver place and GI programmes for Bath, Keynsham and Saltford, Somer Valley, and our Rural area and work towards accreditation. With our partnerships already working in these areas with partners and communities we can build on their knowledge and experience. This team will also scope and seek funding for new projects and programmes.

Sustainable Places and Regeneration Team are leading on developing and delivering place plans for the areas mentioned above, focusing where investment will deliver most benefit including those wards where urban greening and access to greenspace will address inequalities in provision and quality including Midsomer Norton, Keynsham and particular wards. The announcement in September 2025 of Government's Pride in Place funding of £20m over 10 years for Twerton in Bath will deliver significant benefits to the area.

The **Parks and Open Spaces Team** will continue ongoing improvement and maintenance programmes for parks and greenspaces as previously described. However, delivery is dependent on securing new funding, both for existing site improvements and creating new greenspaces, working with a range of partners and communities.

Partnership delivery

The council plays a key role in coordinating key partnerships that have already demonstrated success. Investing in these and new partnerships is key to how the council will ensure delivery of the landscape programmes.

Landscape Partnerships membership (2025)		
Bathscape B&NES Council Bath Spa University Bath University Bath Natural History Society Bath Preservation Trust Avon Wildlife Trust Cotswold National Landscape Federation of Bath Residents Associations National Trust Visit Bath Wessex Water Woodland Trust	Chew Valley Reconnected B&NES Council Bristol Avon Rivers Trust Bristol Avon Catchment Partnership Mendip Hills National Landscape Bristol Water Wessex Water Environment Agency Avon Wildlife Trust Chew Valley Nature Recovery Network Chew Valley Forum Natural England Catchment Sensitive Farming West of England Nature Partnership West of England Rural Network Avon Needs Trees Farming & Wildlife Advisory Group- South West	Somer Valley Rediscovered B&NES Council Somer Valley Rediscovered Greenspaces Project-- includes representatives from Radstock and Midsomer Norton Town Councils and Westfield Parish Council Bristol Avon Rivers Trust Avon Wildlife Trust Bristol Avon Catchment Partnership Wessex Water Natural England Environment Agency University of Bath Bath Spa University Bath College West of England Nature Partnership
WaterSpace B&NES Council Bristol City Council South Gloucestershire Council West of England Combined Authority Environment Agency Canal and River Trust National Trust Wessex Water Avon Frome Partnership		

Enabling others to deliver

In addition to working with partnerships, the council is committed to working with a wide range of other stakeholders to deliver the Greener Places Plan including town and parish councils, national and local organisations, developers, land managers, residents, and local interest groups.

The Investment & Development Plan includes actions that will provide information and guidance to inform local decision making and act. These include making

evidence available to make case for change and provision of guidance to developers on GI required for specific locations.

Greener Places Investment and Delivery Plan 2025-2030

Actions	Ref	Next steps	Ownership	Timescale
Building and maintaining green infrastructure evidence				
Develop and manage GI mapping tools	1.1	Develop Phase 1: data and mapping for accessible greenspace to provide evidence for Local Plan, GI Standards and to support decision making of where investment is needed	Climate & Environment Business Intelligence	Underway Year 1
	1.2	Identify future mapping phases, timetable for the work and resources required, linking where appropriate with other organisations mapping, data and websites eg CA, BART's Riverhub, BACP's water targets	Climate & Environment	Year 1
	1.3	Develop and manage a GI Dashboard and link to reporting of progress towards GI standards	Climate & Environment Business Intelligence	Underway Year 1
Review data to ensure it is accurate and clearly defined	1.4	Revisit tree canopy cover baselines using Urban Rural Classification (RUC) 2021 published in March 2025 (RUC 2011 used to date) and the latest National Forest Inventory (NFI 2020 used to date)	Climate & Environment	Underway Year 1
Provide methodology to support evidence	1.5	Produce GI Standards Methodology Report in readiness for the new Local Plan to include how to apply the standards	Climate & Environment	Underway Year 1
Support development of consistent regional approach to the use of evidence and tools to make case for nature based solutions to address sustainability issues	1.6	Agree which tools to assess and value Natural Capital and ecosystem services for assessment of environment, projects and planning. Consideration of South Gloucestershire Councils Investment in Climate and Nature Tool (ICAN)	Climate & Environment Sustainable Places & Regeneration	Underway Year 1
Commission an open space assessment to support the Accessible Greenspace Standards, Local Food Growing Space Standard and Play Space Standards	1.7	Commission an open space assessment for Bath and North East Somerset comprising: a) identification and mapping of publicly accessible greenspace using Natural England's methods b) a capacity assessment to understand provision of publicly accessible greenspace, local food growing space and play space per 1,000 population at an area-wide scale and at a Middle layer Super Output Area (MSOA) level c) a proximity assessment to understand the percentage of households with access to publicly accessible greenspace, local food growing space and play space at an area-wide scale and at a Middle layer Super Output Area (MSOA) level using Defra's methods and producing walk time buffer maps	Climate & Environment Planning Parks & Open Spaces Public Health & Prevention	Year 1-2
Collate evidence on level of communities satisfaction with access and quality of greenspace	1.8	Include assessment of satisfaction with greenspace as part of place shaping community engagement (see also 3.3)	Climate & Environment Sustainable Places & Regeneration	Year 1 -5
Managing and investing in our Corporate Estate				
Deliver on councils 30by30 ambition for 30% land managed for nature on council estate in contributing to Bath and North East Somerset and regional 30% land managed for nature target. (See 6.7 and 6.8)	2.1	Prepare costings for first phase of management plans and their delivery for SNCI's on council land	Climate & Environment Corporate Estate	Year 1

land managed for nature target. (See 6.7 and 6.8). (This is also in the Climate and Nature Strategy)	2.2	Develop costed proposal for Corporate Estate to deliver 30 by 30 commitment.	Climate & Environment	Underway Year 1
Improve existing greenspaces for people, nature and climate resilience See also Appendix 1 Additional Information-Programmes	2.3	Develop Keynsham Memorial Park masterplan (part of Chew Valley Reconnected) Enhanced management of the park for people and nature including; creation of new habitats and enhanced connectivity to other green space in Keynsham and Chew Valley via River Chew including river and weir improvements to aid fish passage	Parks & Open Spaces Sustainable Places & Regeneration	Underway Year 1-5
		Bath a) Develop Entry Hill Greenspace masterplan. Produce governance and finance model that is a financially viable scheme to satisfy Corporate Landlord. Deliver phased improvement of the site for nature recovery and physical activity	Sustainable Places & Regeneration Public Health and Prevention	Underway Year 1-5
		b) Odd Down Sports Ground - Deliver Nature trail and outdoor classroom element of site scheme together with community engagement to manage the nature trail lead walks as part of social prescribing/wellbeing activity programmes	Public Health & Prevention Sustainable Places & Regeneration	Underway Year 1-5
		c) Foxhill Masterplan delivery (5 greenspaces) infrastructure improvements to access and play: Hawthorn Grove – allotment provision Springfield Park – improved pathways and play area Backstones – conservation of grassland, tree planting and play features Springfield Quarry – provide better access, nature conservation improvements, learning (forest school type) Entry Hill open space – introduction of new play facilities and access improvements	Parks & Open Spaces Sustainable Places & Regeneration	Underway Year 1-3
		d) Royal Victoria Park & Botanical Garden ponds and cascade – seek sustainable water source, restore with improved wildlife habitats and increased biodiversity opportunities	Parks & Open Spaces on behalf of Corporate Landlord	Underway Year 1-3
		e) Bath Riverline - development of 10km linear park through heart of Bath including new and enhanced linear path and greenspaces	Sustainable Places & Regeneration Parks & Open Spaces	Underway Year 1-5
		SOMER VALLEY a) Staddlestones Riverside Park (part of Somer Valley Greenspaces project) - improvements for people and nature	Sustainable Places & Regeneration Parks & Open Spaces	Underway Year 1
		b) Norton Radstock Ecological Improvements at Foxhills and land adjacent to Colliers Way (part of Somer Valley Greenspaces project)	Sustainable Places and Regeneration	Underway Year 1-5
Increase food growing opportunities and nature friendly gardening	2.4	Aim to both expand allotment provision and support nature-friendly gardening practices. Exploring opportunities to bring underused land into cultivation, with sites to be identified.	Parks & Open Spaces	Underway Year 1-5
	2.5	Working with the Allotment Association promote regenerative gardening principles and improve accessibility across sites. A planned strategic visioning session will be arranged to ensure that allotment policy, provision, and practice are aligned with broader goals around nature, climate, and health.	Parks & Open Spaces	Underway Year 1-5

Ensure access and quality of greenspace and play space is considered and addressed, including as part of place plans and place making	2.6	Retain existing Green Flag Management Plans for 6 parks (Royal Victoria Park, Bloomfield Green, Alexandra Park, Sydney gardens, Henrietta Park Hedgemead Park) and Haycombe Cemetary in Bath to retain Green Flag Awards. (See also 2.7 quality audit)	Parks & Open Spaces Bereavement services (Haycombe Cemetary and Crematorium)	Annual commitment
	2.7	Pilot a parks accessibility audit that engages the community	Parks & Open Spaces	Year 1-2
	2.8	Undertake new greenspace quality audit (last undertaken in 2015),incorporating learning from accessibility audit pilot (2.5) and Bristol City Council's Nature in Towns and Cities work, to devise a B&NES greenspace quality criteria.	Climate & Environment Parks & Open Spaces	Year 1-2
	2.9	<p>Deliver and review Parks & Openspaces Team's ongoing improvement programmes</p> <p>Parks Pulse Programme – Installation of outdoor gym/exercise equipment across the parks portfolio to encourage increased diversity of offering, increased footfall, increased physical and mental health & wellbeing (through exercise and promoting being outdoors and social interaction). Improved passive safety through increased use of parks.</p> <p>Parks For All Programme – Programme of improvements to improve accessibility and equality across the parks portfolio. This will include new and improved paths, entrances, furniture and play and exercise equipment.</p> <p>Events Implementation support – Improvements to parks and greenspaces to enhance commercial revenue earning events and mitigate potential damage to infrastructure caused by high frequency of large events.</p>	Parks & Open Spaces	Underway Year 1-5
	2.10	<p>Deliver and review Parks & Openspaces Team's ongoing maintenance programmes;</p> <p>Parks Tree Programme - Inspect, report and maintain parks tree assets.</p> <p>Parks Capital Cyclical & Planned Maintenance Programme – Inspect, report, repair and maintain parks built assets (includes conservation of heritage elements).</p> <p>Parks Play Equipment Replacement Programme – Inspect, report, repair and maintain parks play assets.</p> <p>Parks Equipment Replacement Programme - Inspect, report, repair and maintain parks equipment</p>	Parks & Open Spaces	Underway Year 1-5
Invest in volunteering in parks	2.11	Secure funding to maintain programme of volunteer groups in parks (2024 - 20 sites) and significant potential to grow in line with Landscape City sites (+10) established with Combined Authority Be Bold Award funding.	Your Park Bristol & Bath Parks & Open Spaces Sustainable Places & Regeneration	Year 1-5

Improving practice and processes within the council to support green infrastructure delivery

Develop and support practice within B&NES to co-design projects to include GI in Project Initiation Documents/ Business Cases and demonstrate outcomes using Doughnut Decision Wheel	3.1	Agree how this will work as part of place shaping and for projects not directly engaged with place shaping programmes to ensure GI benefits and standards are achieved.	Corporate Policy	Underway Year 1
Review staff resources to understand roles required to deliver Local Plan policy -address design, delivery and compliance, to ensure an integrated approach is taken to climate, ecology, and healthy places.	3.2	Work with Climate & Environment, Planning, Development Management and Enforcement Teams	Climate & Environment Development Management Planning & Conservation.	Year 1
Use Nature in Towns and Cities accreditation to demonstrate councils commitment to improve nature and greenspace across our towns and city	3.3	Seek Nature in Towns and Cities accreditation in developing and delivering place shaping plans for Bath, Keynsham and Saltford, Somer Valley, that requires GI strategies for each place identifying what needs to be done to meet needs of those communities with regard B&NES GI Standards	Climate & Environment Sustainable Places & Regeneration	Year 1 - 5
Update B&NES Infrastructure Delivery Plan (IDP) to include GI projects identified in GI Framework Delivery Plan and allocate resources to manage the cumulative impacts of development on GI, especially greenspace management and maintenance	3.4	Produce updated IDP to ensure GI including greenspaces are allocated sufficient and timely finance and ensure new infrastructure links to and supports, parks and greenspace network	Climate & Environment Planning Parks & Open Spaces	Annual commitment
Simplify management and monitoring of allocation of S106 and CIL funding for GI (including greenspaces and trees).	3.5	Confirm responsibility and allocation of s106 and CIL for GI and how delivery will be monitored	Climate & Environment Planning	Underway Year 1
Support and develop a cultural change within B&NES to recognise need and benefits of investment in public realm and the GI network, identifying the means by which B&NES can ensure GI is funded, managed, maintained including adopted and adoption of additional land where that land delivers against GI standards and land for biodiversity	3.6	Develop and implement in house training programme to increase awareness and understanding of GI to incorporate GI into schemes and develop a proactive council approach to adopted land	Climate & Environment	Underway Year 1
	3.7	Identify new funding model to manage and maintain greenspace considering potential of a skilled and resourced 'Countryside Management Service' to look after greenspace delivered through GI projects, planning and BNG	Climate & Environment Parks & Open Spaces	Year 2

Delivering new green infrastructure and maintaining existing green infrastructure to support growth

Embed Natural England's GI Framework into Local Plan in line with the National Planning Policy Framework and develop appropriate GI design codes and planning conditions	4.1	Signpost to existing NE GI resources including guidance and seek support from NE regional officers in embedding in council and partner activities including Local Plan and Regional Growth Plan	Climate & Environment Planning Natural England	Underway Year 1
	4.2	Develop strategic planning for accessible greenspaces and nature recovery to include testing of GI Standards for Local Plan Strategic Development Locations, and place needs in meeting the standards; Keynsham/Saltford, Hicks Gate and Whitchurch, Bath area, Somer Valley and Rural Area	Climate & Environment Planning	Underway Year 1 -2

	4.3	Working with partner authorities identify potential locations for large district and sub regional Natural Greenspaces in line with the Accessible Greenspace Standards and taking account of new strategic development	Climate & Environment Planning	Year 1-2
	4.4	Produce design codes to support delivery of GI eg greener streets, SuDs, greening of public realm	Climate & Environment Sustainable Places & Regeneration Planning	Year 2
	4.5	Establish a record of GI Plans submitted and Urban Greening Factor achieved when Local Plan adopted and new GI policy implemented	Climate & Environment Development Management	Year 2
Embed GI in B&NES and regional plans and strategies to address relevant plan objectives and sustainability issues	4.6	Ensure GI is considered in revised and new plans / strategies including Regional Growth Plan, and regional transport plans to secure funding and deliver schemes with GI embedded within them with monitoring of the GI outcomes achieved	Climate & Environment Lead officers for plans and strategies	Underway Year 1 - 5
Provide food growing provision through Local Plan policy and identify new opportunities through GI projects, private and community initiatives	4.7	Develop and publish Local Food Strategy that identifies opportunities for community food growing including allotments, orchards, edible landscapes	Public Health & Prevention	Underway Year 1
	4.8	Support and enable more residents to garden in ways that support soil ecosystems and biodiversity, while also addressing the growing demand for allotment space	Parks & Open Spaces Climate & Environment	Underway Year 1 -5
Retrofitting the urban environment for climate resilience, people and nature				
As part of Climate adaptation, identify where and what type of GI / natural flood management will reduce impact of flooding e.g. SuDs, tree planting, permeable surfaces.	5.1	Place Shaping Managers working with stakeholders include consideration of site specific issues and seek solutions to management / maintenance of infrastructure, engaging those who 'own', manage and / or have management responsibilities for flood defence / drainage including riparian owners, and those who make decisions that impact on infrastructure including Planning Policy and Development Management teams	Sustainable Places & Regeneration Flooding & Drainage	Year 1-5
	5.2	Incorporate SuDS schemes as part of projects and in all developments, highways schemes, and as part of retrofit for buildings and streets	Sustainable Places & Regeneration Highways and Transport	Year 1-5
	5.3	Identify how SuDS projects will be funded and developed, delivered and maintained, both internally and working externally with partner organisations, including the water companies and NGOs	Sustainable Places & Regeneration Highways and Transport	Year 1-2
	5.4	Deliver B&NES Greener Streets project - fund opportunities, at a range of scales, to plant trees within the urban area to increase canopy cover within built up areas.	Parks & Open Spaces	Year 1-5
Understand how GI delivers climate resilience and adaptation and B&NES and partners understand their roles in delivering it	5.5	Share evidence, case studies, training etc to deliver agreed priorities and shared outcomes for climate resilience	Climate & Environment	Underway Year 1-5

	5.6	Support Green Prescriptions for Streets(GP4Streets) research project to develop tool kit for use by residents to use GI to adapt urban streets to be resilient to impacts of climate change	University of Bath University of West of England Climate & Environment	Underway Year 1-3
Landscape scale delivery and interventions - See also Appendix 1 Additional Information- Programmes				
Integrate existing partnership programmes into emerging place shaping programmes and ensure purpose and governance clearly set out to secure long-term finance for 10-year periods.	6.1	Bathscape (including Landscape City), WaterSpace, Chew Valley Reconnected, Somer Valley Rediscovered partnerships to maintain and review purpose delivery plans on regular basis. Ensure partners collaborate to develop and deliver proposals	Climate & Environment Sustainable Places & Regeneration	Underway Year 1
Develop process and practice to develop pipeline of GI projects and schemes incorporating GI, to be invested in.	6.2	Regional and Bath and North East Somerset partners to collaborate to identify pipeline projects to maximise benefits and secure funding to address issues and deliver on priorities including housing, regeneration schemes, and Local Nature Recovery Strategy (LNRS)	Climate & Environment Sustainable Places & Regeneration	Underway Year 1-5
As part of rural areas partnership programmes, develop and support Farm Clusters incl. Chew, Cam and Wellow, Radstock to engage farmers and landowners in identifying and delivering solutions to issues including water management, and biodiversity loss	6.3	Ensure interested parties (council services, NGOs, local groups etc) know how and when to engage with the landowners in the clusters to avoid conflicting requests to deliver multi-beneficial projects	Climate & Environment	Underway Year 1-5
Develop, enhance and manage strategic network of trails and routes developed in partnership	6.4	Review Rights of Way Improvement Plan to ensure strategic routes are managed and maintained in collaboration with partners and appropriate funding secured for routes including: Cotswold Way National Trail Circuit of Bath Bathscape Circular walks Bristol to Bath strategic corridor routes: Bristol Bath Railway Path/ Kennet and Avon Canal Path and River Avon Trail (potential to become a National River Trail) Limestone Link Path Two Rivers Way – connecting Keynsham and Chew Valley Lake	Climate & Environment Public Rights of Way	Year 2-5
	6.5	Produce network plan to better connect people to green and blue space and improve health and wellbeing. To be based on an assessment of PRoW connectivity, need to develop new and improved routes to connect people as part of strategic GI network and develop the Active Way model	Climate & Environment	Year 2-5
Support development of area wide public engagement to connect with natural environment and to assist management and maintenance of GI	6.6	Develop and secure funding to maintain established walking festivals in Bathscape and Somer Valley and develop new walking festival in Chew Valley	Climate & Environment Sustainable Places & Regeneration	Underway Year 1
Deliver on councils 30x30 ambition for 30% land managed for nature in Bath and North East Somerset - See also 2.2	6.7	Collaborate with partners and landowners to produce management plans for SNCIs on non-council land	Climate & Environment	Year 1-2

	6.8	Identify land to be brought into management to deliver 30x 30 target	Climate & Environment	Underway Year 1-2
Ensure new tree planting reaches maturity and contributes to the tree canopy targets	6.9	Identify resources required to ensure appropriate species of trees are planted, and undertake monitoring and maintenance of trees	Climate & Environment Development Management Planning & Conservation	Year 1
	6.10	Signpost to-tree species and tree planting guidance recommended by the council, to support delivery of the Ecological Emergency Action Plan and to be climate resilient	Planning and Conservation Parks & Open Spaces	Year 1-5
Research, training and green social prescribing as part of regional approach				
Develop a GI research programme to better inform decision making and project delivery and monitoring	7.1	Identify research opportunities with Bristol and Bath universities	Climate & Environment	Underway Year 1 - 5
	7.2	Undertake feasibility work to address intersectional barrier of dogs in parks	Your Park Bristol & Bath University of Bath Parks & Open Spaces	Underway Year 1
Develop opportunities for apprenticeships, internships and training in green skills and specialist disciplines	7.3	Support development of green skills training, placement opportunities and specialist courses for roles required to plan, deliver and manage GI assets including greenspaces.Focus on sustainable funding for volunteer management and pathways into careers	Business and Skills Natural History Consortium Your Park Bristol & Bath	Underway Year 1-5
Develop delivery of Green Social Prescribing (GSP) in in the region	7.4	Establish mixed funding models, including health system investment, to support sustainable nature-based health programmes and enhance GI in Bath and North East Somerset	West of England Nature Partnership 3SG	Underway Year 1-5
	7.5	Develop consistent monitoring of Green Social Prescribing (GSP) benefits in the region	West of England Nature Partnership 3SG	Underway Year 1-5
	7.6	Explore opportunities to introduce GSP activities to more urban parks across Bath	Your Park Bristol & Bath	Underway year 1-5
Support West of England Nature Partnership's (WENP) Nature and Health Group's regional health initiatives	7.7	Continue to map and promote nature and health providers to increase referral / engagement to them	West of England Nature Partnership Your Park Bristol & Bath	Underway Year 1-5
	7.8	Develop nature spaces and GSP at GP practices in Bath and North East Somerset as part of a greener GP practice regional network	West of England Nature Partnership	Underway Year 1- 5

Greener Places Investment and Delivery Plan 2025-2030

Appendix 1 Additional information – Programmes

Programme (listed according to B&NES led Place shaping)	WENP Priority	Key projects within programme	Expected outcomes	Contribution to WoE GI Outcomes	Lead partner (s)	Funding secured / required	Time scale
Place shaping - Bath							
Landscape City	30/30, UN, WF, GC	Bathscape (Phase 1) National Heritage Lottery Fund programme - Explore, Learn, Restore projects	20 mile (32kms) Circuit of Bath Walk 19 Self guided walking Trails Weekly Wellbeing Walks Annual Walking Festival (8) Events/Walks – 20,000+ participants	Nos 1&3	B&NES	Secured NHLF	2018-2026
			Podcasts (50+) Learning resources for schools Videos	Nos 1&3	B&NES	Secured	2018-2026
			180 hectares(Ha) advised on improved management of woodland, 200 Ha advised on better management of grasslands 5 Ha of seeded flower rich meadows 20 viewpoints assessed 12 archaeological sites surveyed	All	B&NES	Secured	2018-2026
	30/30, UN,WF,GC	Bathscape (Phase 2) <i>(was Landscape City Framework programme)</i>					
	30/30,UN	Entry Hill Greenspace	Masterplan for the site Governance and finance model that is a financially viable scheme to satisfy Corporate Landlord. Phased improvement of the site for nature recovery Assess value of ecosystem services – the tool to be agreed to align with regional approach Pilot an Eco hub option via Forest of Imagination 2025 event	All potentially	B&NES	Secured for masterplan Required for implementation	2026-2030
	30/30,UN	Odd Down Sports Ground	Nature trail -Engagement with community to manage the nature trail lead walks as part of social prescribing/wellbeing activity.	All except No 4	B&NES	Required	2026-2028
	30/30,UN	Foxhill Masterplan delivery (5 greenspaces)	Infrastructure improvements to access and play	All except No 4	B&NES (Parks)	Funding for Phase 1 secured for some elements of the work	2026 - 2027

Greener Places Investment and Delivery Plan 2025-2030

Programme (listed according to B&NES led Place shaping)	WENP Priority	Key projects within programme	Expected outcomes	Contribution to WoE GI Outcomes	Lead partner (s)	Funding secured / required	Time scale
			Hawthorn Grove – allotment provision Springfield Park – improved pathways and play area Backstones – conservation of grassland, tree planting and play features Springfield Quarry – provide better access, nature conservation improvements, learning (forest school type) Entry Hill open space – introduction of new play facilities and access improvements			Delivery not fully funded	
	30/30, UN,WF	Habitat management – grassland and woodland outcomes to be confirmed in 2026 to follow on from Bathscape Phase 1	Practical management on sites to take forward management plans	All except No 4	B&NES (GI&NR Team)	Secured	2026 - 2030
Also part of WaterSpace Programme	UN,30/30	Bath River Line – 10km linear park through heart of Bath					
		i) Bath River Line - <u>Phase 1</u> (West and Central)	Suite of key strategic interventions along the river in the west of Bath, to upgrade the linear park and enhance biodiversity. Including new signage, planting, cycle racks and seating areas. Public engagement programme to increase use of the route.	All except No 4	B&NES	Secured to March 2026	2021- 2030
		ii) Bath River Line - <u>Phase 2</u> (East and Central)	Public realm and biodiversity improvements eastern and central river line. Detailed scope TBD. Bathampton Meadows access and biodiversity enhancement	All except No 4	B&NES NT	 Required	Feasibility stage 2026-27 Delivery 2027-2030
		iii) Bath River Line - <u>Phase 3</u> (Central)	Public realm and biodiversity improvements linked to delivery of adjacent proposed projects central Bath – Bath Rugby and Radial Gate removal	All except No 4	B&NES	Required	TBD
Place shaping - Rural areas							
	30/30	Keynsham Memorial Park Masterplan	Enhanced management of the park for people and nature	All except No 4	B&NES	Required	2025 2027

Greener Places Investment and Delivery Plan 2025-2030

Programme (listed according to B&NES led Place shaping)	WENP Priority	Key projects within programme	Expected outcomes	Contribution to WoE GI Outcomes	Lead partner (s)	Funding secured / required	Time scale
Chew Valley Reconnected – Partnership - programme of partnership projects		<i>Note: Also part of Keynsham Place Shaping</i>	including; creation of new habitats and enhanced connectivity to other green space in Keynsham and Chew Valley via River Chew			Secured CIL funding Explore lottery bid	
		Keynsham Memorial Park (KMP) River and Weir improvements	River and weir improvements to enable fish passage and river/riparian restoration Creation of wetland habitat Reduced flooding risk Reduced maintenance costs	All except No 4	B&NES/ BART	Required	On going -2030 (subject to agreement on proposal and funding secured)
	30/30	Chew Valley Lake Recreational Trail (southern section)	Extension of northern section linking to communities Enhancement of nature Small scale interventions are being scoped in 25/26 with aim to deliver 2026-28.	All except No 4	B&NES	Required	Delivery subject to landowner agreement and securing funding – subject to FBC.
	30/30 WF	Lower Chew Forest	Creation of woodland located at Wick Farm a 422-acre site. 2 hectares of leaky dams and wetlands for natural flood management. 8km of species-rich native hedgerows.	All except No 4	ANT/ BART	Secured	2024-2026 development phase
	30/30, WF	Great Avon Wood	Woodland creation across 113 acres at Publow. Mosaic habitats Creation of waymarked woodland trail.	All except No 4	ANT	Secured	Establishment Sept 2022 - April 2027
	30/30	Landscape Recovery in the Lower Chew	Management for nature recovery of 2000 acres of land, between Hunstrete, Maes Knoll and Stanton Drew, including Great Avon Wood and Lower Chew Forest. Improved river health and natural flood management.	All except No 4	ANT	Secured/Required	development phase 1/4/24 – 31/12/25. Exact interventions co-designed over the development phase April 2024 to Dec 2025 Drawing up plans for the following 20-25 years.
	30/30	Chew Farm Cluster	Landowner engagement delivering nature based solutions to range of issues	All	BART	Secured/Required	Funded to March 2026. Funding required post 2026 to support facilitation of group.
	30/30, GC	Pollinator Pathway	Creation of pollinator habitats along the B-line between Browns Folly & Folly Farm	8	AWT	Secured	Funded to March 2026
	30/30, RR	Chew Valley Partnership-Delivery Programme	Development of a partnership programme at a catchment	All	CVRP	Water Industry National Environment	2025-2030

Greener Places Investment and Delivery Plan 2025-2030

Programme (listed according to B&NES led Place shaping)	WENP Priority	Key projects within programme	Expected outcomes	Contribution to WoE GI Outcomes	Lead partner (s)	Funding secured / required	Time scale
			scale. Use evidence base to co-design and co-develop with external partners an agreed programme of priority actions/ projects that will deliver long-term benefits for nature recovery, climate resilience and healthier communities.			Programme (WINEP) funding from Wessex Water and Bristol Water to be confirmed in 2025- Match funding required	Potential to secure funding for delivery for 2030-2035 subject to approval/support of development phase.
Place shaping- Somer Valley							
Somer Valley Rediscovered - Partnership - programme of partnership projects	30/30,GC	Greenspaces project (Phase 1)	Improved biodiversity (including 9.16 BNG units) Improved community wellbeing Improved access to green spaces	All except No 4	B&NES	Secured	Green Space Team currently funded 2022-2026
		Staddlestones Riverside Park	Improved park (2ha) for people and biodiversity	All except No 4	B&NES	Secured	2025 -2026 implementation
		Waterside Valley	Improved greenspace (13ha) for people and biodiversity	All except No 4	WPC	Secured	2025-2026
		Hayden Batch	Improved greenspace (8ha) for people and biodiversity	All except No 4	RTC	Secured	2025-2026
		Midsomer Norton Town Park	Improved park (8ha) for people and biodiversity	All except No 4	MSNTC	Secured	2025-2026
		Wellow Brook Walk	Improved greenspace (3ha) for people and biodiversity	All except No 4	MSNTC	Secured	2025-2026
	30/30,GC	Greenspaces project (Phase 2)	Improved greenspaces for people and biodiversity Habitat management Events/Walking festival/Ecowild courses Green Social prescribing programme	All except No 4	B&NES	Required	2026 - 2030
	30/30,GC	Norton Radstock Ecological Improvements (Foxhills and land adjacent to Colliers Way)	Nature recovery – grassland / scrub / hedgerow management. Management Plan	Nos 1, 2 & 8	B&NES	Secured (post secured for 1 year, funding for 20yrs management)	2025 – 2026 (post) 2025 onwards
	30/30,UN, RR	Somer Valley Rediscovered Partnership- Cam & Wellow Delivery Programme	Development of a partnership programme at a catchment scale. Use evidence base to co-design and co-develop with external partners an agreed programme of priority actions/ projects that will deliver long-term benefits for nature recovery, climate resilience and healthier communities.	All	SVRP (TBC)	Water Industry National Environment Programme (WINEP) funding to be confirmed by Wessex Water in 2025 Match funding required	2025-2030 Potential to secure funding for delivery for 2030-2035 subject to approval/support of development phase.
	Midsomer Norton – Town Centre Masterplan	30/30, RS, UN, RR	Hollies Gardens, River Somer and town centre greening.	Redesign of the Hollies Gardens, daylighting a further stretch of the River Somer on	All except 4	B&NES	Secured/ Required

Greener Places Investment and Delivery Plan 2025-2030

Programme (listed according to B&NES led Place shaping)	WENP Priority	Key projects within programme	Expected outcomes	Contribution to WoE GI Outcomes	Lead partner (s)	Funding secured / required	Time scale
Incorporating GI and nature enhancement work.			the High Street and greening of the town centre and car parks through planting and introduction of SUDs.				
B&NES/region wide							
Western Forest Regional approach involving 12 Local Planning Authorities and MCA, Forest of Avon and Great Western Community Forest	30/30, UN,WF WF	Development of Western Forest Plan	Regional plan Woodland opportunity mapping tool Guide for developers (All above TBC)	All potentially	WF	Secured £7.4m	2025- 2030
WaterSpace – programme of partnership projects in Avon Corridor (See also Landscape City - Bath River Line)	UN	WaterSpace Connected- Proposed bridge at Somerdale	New connection to River Avon Trail Improved strategic network	All except No's 4 & 5	B&NES	Required	Completion - subject to funding
	30/30	Somerdale Nature Park	New public wildlife site	All	B&NES/ Taylor Wimpey/NT	Required	Completion subject to funding
Limestone Link - ecological and recreational corridor partnership project	30/30 GC	Grassland restoration and creation	Improved biodiversity	All	WENP/ B&NES /MCA	Required	Project being scoped
	UN	Improved links to Limestone Link long distance walking route, from urban settlements, connecting Mendip Hills and Cotswolds National Landscapes	Better connected PRow Maintained and managed route		B&NES/CN L/MHNL	Required	

Key	WoE GI Outcomes
1	Create and maintain sustainable places
2	Create and maintain valued healthy landscapes
3	Health and wellbeing for all
4	Support sustainable and local food production
5	Greater resilience to climate change
6	Build a resilient economy
7	Sustainable water management
8	Improved and better connected ecological networks

WENP Major projects	
30/30	Local wildlife sites and 30 by 30
RS	Restoring species
TT	Tackling transport severance
UN	Urban Nature
RR	Restoring our rivers
SS	Severn Shoreline Levels and Moors
GC	Grassland connections
WF	Western Forest
SN	State of Nature reporting

Lead partners
AFP Avon Frome Partnership
ANT Avon Needs Trees
BART Bristol Avon Rivers Trust
BPT Bath Preservation Trust
C&RT Canal & River Trust
CVRP Chew Valley Reconnected Partnership
CNL Cotswold National Landscape
CVW Cotswold Volunteer Wardens
MCA Mayoral Combined Authority
MHNL Mendip Hills National Landscape
MSNTC Midsomer Norton Town Council
NT National Trust
RTC Radstock Town Council
SVRP Somer Valley Rediscovered Partnership
WENP West of England Nature Partnership
WPC Westfield Parish Council

This page is intentionally left blank

Equality Impact Assessment / Equality Analysis

(Version 4)

Item name	Details
Title of service or policy	Greener Places Plan for Bath and North East Somerset 2025-2035
Name of directorate and service	Sustainable Communities
Name and role of officers completing the EqlA	Sarah Jackson, Green Infrastructure and Climate Resilience Manager
Date of assessment	14.10.25

Equality Impact Assessment (or ‘Equality Analysis’) is a process of systematically analysing a new or existing policy or service to identify what impact or likely impact it will have on people and different groups within our community. The main aim is to identify any adverse impacts (i.e. discriminatory or negative consequences for a particular group or sector of the community, and to identify areas where equality can be better promoted). Equality impact Assessments (EqIAs) can be carried out in relation to services provided to customers and residents as well as employment policies/strategies that relate to staffing matters.

This toolkit has been developed to use as a framework when carrying out an Equality Impact Assessment (EqIA) or Equality Analysis. **Not all sections will be relevant – so mark N/A any that are not applicable.** It is intended that this is used as a working document throughout the process, and a final version will be published on the Council’s website following relevant service lead approval.

1.1 Identify the aims of the policy or service and how it is implemented

Key questions	Answers / notes
1.1 Briefly describe purpose of the service/policy e.g. <ul style="list-style-type: none"> • How the service/policy is delivered and by whom • If responsibility for its implementation is shared with other departments or organisations • Intended outcomes 	<p>The Greener Places Plan (GPP) purpose is to deliver its vision: <i>Green infrastructure will play a key role in ensuring Bath and North East Somerset has a more sustainable, nature rich and climate resilient future. It will be well maintained and valued, and will optimise the right social, economic, and environmental benefits in the right locations. There will be equitable access to high-quality and inclusive green infrastructure, ensuring that every member of the community benefits.</i></p> <p>In delivering this vision we want to ensure that all residents and communities can easily access high-quality green infrastructure. We recognise that within communities, there are groups that will have specific needs, and we aspire to ensure accessibility for all.</p> <p>It is to be implemented by council officers and members, delivery partners and developers, local town and parish councils and community organisations.</p> <p>Intended 8 outcomes listed in the GPP are:</p> <ul style="list-style-type: none"> • Create and maintain sustainable places • Create and maintain valued healthy landscapes • Health and wellbeing for all

	<ul style="list-style-type: none"> •Support sustainable and local food production •Greater resilience to climate change •Build a resilient economy •Sustainable water management •Improved and better-connected ecological networks
<p>1.2 Provide brief details of the scope of the policy or service being reviewed, for example:</p> <ul style="list-style-type: none"> • Is it a new service/policy or review of an existing one? • Is it a national requirement?). • How much room for review is there? 	<p>The GPP is update of the councils Green Infrastructure Strategy (2013) and Green Space Strategy (2015).</p> <p>The new Green Infrastructure (GI) standards are aligned with current national GI guidance that each local authority in England will have a GI Strategy. The National Planning Policy Framework refers to the national Standards or local standards if these have been produced by the individual authority.</p> <p>The review and alignment with current national policy and guidance to produce the GPP has been undertaken with an internal cross council working group and external stakeholders.</p> <p>The GPP will be reviewed every five years to ensure delivery is achieving targets and standards.</p>
1.3 Do the aims of this policy link to or conflict with any other policies of the Council?	<p>The GPP directly links with the council's Corporate Strategy overriding purpose – to improve people's lives and two core policies – tackling the Climate and Ecological Emergencies and giving people a bigger say.</p> <p>Key policy documents linking and supporting GPP delivery are the council's Economic Strategy, Health and Wellbeing Strategy, Climate and Nature Strategy (pending publication) and Local Plan.</p>

2. Consideration of available data, research and information

Key questions	Data, research and information that you can refer to
2.1 What equality focussed training have staff received to	Individual council services who are responsible for delivery of the GPP Investment & Delivery Plan actions will need to ensure that they have had the appropriate training. Parks & Open

enable them to understand the needs of our diverse community?	Spaces and Sustainable Places & Regeneration who engage directly with the public will be required to provide EqlA assessments as part of their project delivery. All B&NES officers receive mandatory Equality and Inclusion Training
2.2 What is the equality profile of service users?	<p>There will be different service users for the various actions in the GPP Investment & Delivery Plan actions. Where appropriate equality profiles will need to be undertaken for specific projects and plans. As set out in the GPP the council's commitment is to ensure that our parks and greenspaces are / can be used by all. The Investment & Delivery Plan includes undertaking an accessibility and quality audit engaging residents.</p> <p>People who live in, work in and visitors to BaNES can access the parks and greenspaces. We are unable to accurately identify the equalities profile of all users, however, we anticipate that all protected characteristics will need to be considered.</p>
2.3 Are there any recent customer satisfaction surveys to refer to? What were the results? Are there any gaps? Or differences in experience/outcomes?	<p>The GPP Investment & Delivery Plan includes an action (1.8) to undertake assessment of satisfaction with greenspace as part of place shaping community engagement. Also, actions are included relating to addressing quality, accessibility, inequalities and barriers to accessing greenspace.</p> <p>The 2024 Voicebox survey identified access to nature and greenspace as the most important factor in what makes a good place to live. However, when asked what needed improving most access to nature and greenspace scored relatively low suggesting that those responding are generally satisfied with access, but this may not reflect wider community and for specific groups within a particular area who face barriers to access. Thus, requires targeted surveys and community liaison.</p>
2.4 What engagement or consultation has been undertaken as part of this EIA and with whom? What were the results?	Due to the nature of the GPP (being a strategic plan with many programmes and projects being delivered by different partners) no specific equality consultation has been undertaken for this EqlA. However, the GPP recognises and states that wider consultation will be required at programme and project level in order to properly address the needs of relevant groups potentially impacted by specific project delivery.
2.5 If you are planning to undertake any consultation in the future regarding this service or policy, how will you include	<p>As previously mentioned in responses to 2.1 and 2.3 consultation will be undertaken in scoping and delivery of individual activities/ actions by those responsible for delivering projects arising from the GPP.</p> <p>Individual programme/project will undertake an EqlA as part of the process and consultation plans will include equality considerations.</p>

equality considerations within this?

3. Assessment of impact: 'Equality analysis'

Based upon any data you have considered, or the results of consultation or research, use the spaces below to demonstrate you have analysed how the service or policy:

- Meets any particular needs of equalities groups or could help promote equality in some way.
- Could have a negative or adverse impact for any of the equality groups

Key questions	Examples of what the service has done to promote equality	Examples of actual or potential negative or adverse impact and what steps have been or could be taken to address this
3.1 Issues relating to all groups and protected characteristics	<p>The GPP identifies the need to address inequalities and as stated in the vision aims to ensure through policy and practice provide <i>'equitable access to high-quality and inclusive green infrastructure, ensuring that every member of the community benefits.'</i></p> <p>Through a range of activities including green social prescribing, wellbeing walks, events and taster activities our current and future GI programmes seek to connect and engage with communities and individuals to improve their lives and by doing so involve them in the care and enjoyment of the natural environment</p> <p>We do know from the evidence that there are inequalities in provision and quality. New standards for access to greenspace are included in the GPP. Ensuring that spend is prioritised to where it will deliver most benefit to meet these needs is key and can only be delivered in partnership with communities.</p>	<p>There are no negative or adverse impacts of the GPP as it proposes improving quality and provision of greenspace.</p> <p>Meeting the GI Standards will be a challenge as funding and resources are limited.</p> <p>We recognise need to ensure working with residents reaches those less engaged or who will benefit most from the improvements in provision and quality of greener places.</p>

3.2 Sex – identify the impact/potential impact of the policy on women and men.	Parks & Open Spaces have worked with Making Space for Girls and is taking forward their learning in redesign of existing and new spaces.	There has been recognition that many parks and greenspaces have not considered use by women and girls, to make them feel safe or provide seating/play equipment. Our Parks team have worked with Your Park Bristol & Bath, and Making Space for Girls to address this at Brickfields Park, Bath (case study in the GPP) and at Staddlestones Riverside Park, Midsomer Norton.
3.3 Pregnancy and maternity	Proposing accessibility and quality assessment of parks and greenspaces to consider needs. This includes having sufficient seating/rest areas for pregnant people and to feed infants. Pathway design will be considerate of access for prams/pushchairs. At several Parks and greenspaces new and improved access has been provided including resurfacing of paths, wider gates.	Access to baby changing facilities may be restricted in parks greenspaces without toilet facilities. In designing greenspace or reviewing greenspaces will seek input from pregnancy and maternity groups, as well as local health organisations like the Royal United Hospital and Integrated Care Board, to make sure the consultation is inclusive and meets everyone's needs
3.4 Gender reassignment – identify the impact/potential	The GPP recognises need to ensure that everyone feels safe in outdoor spaces by increasing visibility and use through community engagement and care/ownership of the spaces. Benefits of being outdoors in greenspace improves mental health.	Risk of hate crime

impact of the policy on transgender people		
3.5 Disability – identify the impact/potential impact of the policy on disabled people (ensure consideration of physical, sensory and mental health needs/differences)	<p>Proposing accessibility and quality assessment of parks and greenspaces to consider needs in improving and creating accessible greenspaces.</p> <p>Play areas are upgraded with disability in mind and new pieces of accessible play equipment have been installed in several play areas across the area. New play areas like Sydney Gardens Play Area have an integrated design approach to improve the accessibility for disabled children and adults.</p> <p>At several Parks and greenspaces new and improved access has been provided including resurfacing of paths, wider gates.</p> <p>Projects such as Bathscape and Somer Valley Rediscovered have run continuous programmes of wellbeing walks, taster activities such as Nordic walking and yoga to encourage use of greenspace for mental and physical health and to reduce social isolation.</p> <p>Sydney Gardens Changing Places toilet: https://www.changing-places.org/</p> <p>On site signage and interpretation designed to meet accessibility standards</p>	<p>Risk of hate crime</p> <p>Restricted changing places toilets. Risk of misuse of these facilities.</p> <p>Risk that signage does not meet needs of blind/deaf community</p>
3.6 Age – identify the impact/potential impact of the policy on different age groups	<p>The Council is committed to deliver play space and youth play space standards.</p> <p>The need for benches and level and low gradient paths are required for wheelchair users and mobility issues. Older people may need additional access considerations for reduced mobility.</p> <p>At several Parks and greenspaces new and improved access has been provided including resurfacing of paths, wider gates.</p> <p>Projects such as Bathscape and Somer Valley Rediscovered have run continuous programmes of wellbeing walks, taster activities such as Nordic walking and yoga to encourage use of greenspace for mental and physical health and to reduce social isolation.</p>	<p>Trip hazards</p> <p>Fear of shared spaces with activities</p>
3.7 Race – identify the	Promoting and enabling access for all and having awareness of different cultures, mindful of differences and shared needs and wants	Risk of hate crime. Actions to improve overall safety of

impact/potential impact on across different ethnic groups	Creating safe spaces by applying principles and standards used by Space for girls and women, that making space for them it makes space safe for everyone.	greenspace users should contribute to mitigating this risk.
3.8 Sexual orientation – identify the impact/potential impact of the policy on lesbian, gay, bisexual, heterosexual, questioning people	<p>A study found that half of LGBTIQ+ people had experienced depression, and three in five had experienced anxiety</p> <p>Official data underscores this trend, as Home Office figures show hate crimes based on sexual orientation in England and Wales rose from 15,835 to 22,839 between the years 2019 to 2024</p> <p>The GPP promotes and seeks to provide accessible greenspace for all. Creating safe spaces by applying principles and standards used by Space for girls and women, that making space for them it makes space safe for everyone.</p>	Risk of hate crime. Actions to improve overall safety of greenspace users should contribute to mitigating this risk.
3.9 Marriage and civil partnership – does the policy/strategy treat married and civil partnered people equally?	The GPP promotes and seeks to provide accessible greenspace for all. There are currently no known barriers for this group.	No known impacts.
3.10 Religion/belief – identify the impact/potential impact of the policy on people	<ul style="list-style-type: none"> • Home Office statistics show that between March 2023 – March 2024, there were 10,484 hate crimes recorded by the police as linked to religion in England and Wales – a 25% increase compared to the prior 12-month period • Avon and Somerset Police data across a 3 month period 	Risk of hate crime. Actions to improve overall safety of greenspace users should contribute to mitigating this risk. Additional mitigation through maintaining

of different religious/faith groups and also upon those with no religion.	<p>in 2025 shows just over 6% of total hate crimes recorded were religion/belief hate crimes.</p> <p>In designing greenspace, there is recognition of the need to consider providing prayer spaces and opportunity to celebrate key events using outdoor space</p>	awareness of the impact on key dates and access for others.
<p>3.11 Socio-economically disadvantaged* – identify the impact on people who are disadvantaged due to factors like family background, educational attainment, neighbourhood, employment status can influence life chances (this is not a legal requirement, but is a local priority).</p>	<p>Our Green Infrastructure projects including Bathscape and Somer Valley Rediscovered have targeted work with communities in the areas deprived wards including Twerton and Midsomer Norton and Radstock. Events and training programmes have been free to attend and have been ‘marketed’ through groups based in those areas and working with GP practices.</p> <p>Access to spaces is free for all and supports the Health and Wellbeing Strategy: https://www.bathnes.gov.uk/sites/default/files/BandNES%20Health%20and%20Wellbeing%20Strategy.pdf Accessible greenspaces play a key role in supporting communities to live healthier lifestyles and preventing ill-health. They provide a solution to key health and wellbeing needs, including maintaining a healthy weight through sport and general physical activity, and good mental health as people can relax and make a positive contribution to their neighbourhood through volunteering.</p> <p>Free access for the first time to Parade gardens so B&NES are actively reducing barriers</p>	Raising expectations but not being able to deliver
<p>3.12 Rural communities* identify the impact /</p>	<p>The mapping of access to greenspace suggests those in rural areas have access to open countryside however work with communities suggest that due to poor access there is under provision of accessible greenspace and nature.</p>	<p>Barriers can be greater as no accessible green spaces and risks with no pavements. Lack of public transport</p>

potential impact on people living in rural communities	The Chew Valley Rediscovered has delivered a new accessible path at Chew Valley Lake that has improved access to the lake and a safer route for the community to access schools and other community facilities. Work is continuing to provide safer routes to link greenspaces including liaison with highways and transport.	
3.13 Armed Forces Community ** serving members; reservists; veterans and their families, including the bereaved. Public services are required by law to pay due regard to the Armed Forces Community when developing policy, procedures and making decisions, particularly in the areas of public housing, education and healthcare (to remove	The most recent census data shows 3.6% or 5,858 people in BaNES are Armed Forces Veterans. Greenspaces can support armed forces community to engage within community including through engaging in managing and maintaining spaces, that contributes to social cohesion. Accessible greenspaces play a key role in supporting good mental health as people can relax and make a positive contribution to their neighbourhood through volunteering.	We are aware of limitations in our knowledge of individuals within this broad group, and their location / distribution within the district, which impacts on our ability to consult effectively.

disadvantage and consider special provision).		
<p>3.14 Care Experienced ***</p> <p>This working definition is currently under review and therefore subject to change:</p> <p>In B&NES, you are 'care-experienced' if you spent any time in your childhood in Local Authority care, living away from your parent(s) for example, you were adopted, lived in residential, foster care, kinship care, or a special</p>	<p>Accessible greenspace is free to access and should be in walking distance of where people live and therefore affordability is not an issue but other barriers might be including confidence to use the spaces and feeling part of the community. community to engage within community including through engaging in managing and maintaining spaces, that contributes to social cohesion.</p> <p>Accessible greenspaces play a key role in supporting good mental and physical health as people can relax and or use for informal and formal activities.</p> <p>Ensuring provision of youth and gym equipment suited to Care leavers 18yrs.</p>	<p>Risk of lack of confidence to use greenspace</p>

guardianship arrangement.		
---------------------------	--	--

*There is no requirement within the public sector duty of the Equality Act to consider groups who may be disadvantaged due to socio economic status, or because of living in a rural area. However, these are significant issues within B&NES and have therefore been included here.

** The Equality Act does not cover armed forces community. However, the Armed Forces Bill (which came in on 22 Nov 2022) introduces a requirement to pay 'due regard' to make sure the Armed Forces Community are not disadvantaged when accessing public services.

***The Equality Act does not cover care experienced people. B&NES adopted this group as a protected characteristic in March 2024 alongside over 80 other Local Authorities. Although we have data for care leavers and children/young people who are currently in the care of B&NES we do not have wider data on disadvantage experienced through being in care.

4. Bath and North East Somerset Council Equality Impact Assessment Improvement Plan

Please list actions that you plan to take as a result of this assessment/analysis. These actions should be based upon the analysis of data and engagement, any gaps in the data you have identified, and any steps you will be taking to address any negative impacts or remove barriers. The actions need to be built into your service planning framework. Actions/targets should be measurable, achievable, realistic and time framed.

Issues identified	Actions required	Progress milestones	Officer responsible	By when
Initial assessment has been undertaken to map and identify deficits in provision of GI	Commission a capacity assessment of provision of greenspace per 1000 population (Investment & Delivery Plan action 1.8)	Assessment completed and used to prioritise investment where there is deficits in provision	Green Infrastructure & Climate Resilience Manager	Summer 2026

No quality audit of parks and greenspaces undertaken since 2015	Undertake quality audit of parks and greenspace	Audit completed and used to prioritise investment in our Parks and greenspaces	Parks & Green Infrastructure Programme Manager	Summer 2026
No current information on how accessible greenspaces are and if they meet the needs to local residents	Undertake accessibility audit	Audit completed	Parks & Green Infrastructure Programme Manager	Summer 2026
	Engage communities in place shaping plans to identify issues and needs	GI strategies incorporated as part of place shaping plans and masterplans for specific areas	Sustainable Place & Regeneration Manager	2026 - 2030

5. Sign off and publishing

Once you have completed this form, it needs to be 'approved' by your Divisional Director or their nominated officer. Following this sign off, send a copy to the Equality Team (equality@bathnes.gov.uk), who will publish it on the Council's website. Keep a copy for your own records.

Signed off by: Jackie Clayton
(senior officer)

(Divisional Director or nominated

Date: 4 November 2025

This page is intentionally left blank

Bath & North East Somerset Council			
MEETING	Cabinet		
MEETING DATE:	13th November 2025	EXECUTIVE FORWARD PLAN REFERENCE:	
			E3670
TITLE:	Annual Climate and Nature Progress Report 2025		
WARD:	All		
AN OPEN PUBLIC ITEM			
List of attachments to this report:			
Attachment1: Annual Climate and Nature Progress Report 2025			
Attachment 2: Action Plan Review 2025 (Annex A to the Annual Climate and Nature Progress Report)			
Attachment 3: Climate and Nature Resident Survey 2025 Summary Report			

1 THE ISSUE

- 1.1 This report updates Cabinet on the progress made in tackling the Climate and Ecological Emergencies in 2024-25, both as a Council and as a wider district.
- 1.2 This report notes that there is significant activity underway and planned within the Council and across the district to tackle both emergencies. It recognises that more action is needed if we are to meet our climate change targets and enable the district to become Net Zero by 2030, as set out in the Corporate Strategy 2023-27.

2 RECOMMENDATION

Cabinet is asked to:

- 2.1 Note the progress made in tackling the Climate and Ecological Emergencies during 2024-25, as set out in the Attachments.
- 2.2 Approve the Annual Climate & Nature Progress Report before presentation of the Report to Council on 20th November 2025.

3 THE REPORT

- 3.1 The Council's commitment to delivering against the Climate and Ecological Emergencies declared in 2019 and 2020 remains as strong as ever. Whilst the Climate and Ecological Emergencies are not the same, they are linked and share causes and solutions. The Council recognises it has an important role to play in tackling both emergencies, through a combination of its own delivery and enabling others to take action.
- 3.2 This year the Council continued to invest in tackling the Climate and Ecological Emergencies and is grateful for continued partnership working that enables it to reach further towards a low carbon, nature positive and climate resilient district. Tackling climate change will help support the recovery of nature and vice versa and we work where possible to deliver benefits for both emergencies together and the community, for example as we bring forward updated Local Plan proposals.
- 3.3 The Council has made progress reducing emissions on our own estate, reducing our Scope 1 and 2 Emissions by 44% since our baseline year of 2016-17. In February, we agreed to set aside the budget to electrify our waste fleet as vehicles become due for replacement, as well as to decarbonise more of our own buildings. We have continued to install upgrades, including solar PV at Bath Sports and Leisure Centre and have been successful in securing a further £312k from the Public Sector Decarbonisation Fund to upgrade Carrswood Adult Day Centre and the Civic Centre in Keynsham.
- 3.4 The most recent territorial emissions data, reported by the Department for Energy Security and Net Zero (DESNZ), shows the steady progress that is being made to reduce emissions across Bath and North East Somerset. Emissions per capita have decreased by 53% since 2005 to 3.4tCO₂e per person per year, ahead of England and South-West decreases.
- 3.5 Progress to reduce emissions sufficiently quickly towards Net Zero is challenging, however. Greenhouse gas emissions across BANES arise from all the services supporting civic life, the approximately 8,535 businesses, 79,250 homes, and the 3,250,000 km driven each day on our roads, as well as from agriculture. They are the result of many thousands of decisions by residents, visitors and businesses as well as national, regional and local government action and policies.
- 3.6 Between 2005 and 2023, greenhouse gas emissions for the district fell by 46%. The 2022 to 2023 drop of 46 ktCO₂e was driven by decreases in domestic emissions, public sector, industry and commercial sector emissions. While this annual decrease continues the downward trend in our area's emissions reduction, the district is not on track to achieve net zero by 2030, in common with other local authorities and the national pathway.
- 3.7 The Council is proud to have worked with regional partners to develop the first Local Nature Recovery Strategy in England and delighted to be part of a consortium of partners, led by the Forest of Avon, who were successful in securing funding to develop the first new national forest in 30 years. This new forest will span Bath and North East Somerset (BANES), North Somerset, Bristol, Wiltshire and Gloucestershire and aims to create at least 2500 hectares of new woodland and other tree habitats in its first five years.

- 3.8 We have also made significant progress on our ability to monitor the state of nature across the district. We have calculated the land being managed for nature across our own estate, and we have worked with WECA and neighbouring local authorities to establish a baseline for land managed for nature in BANES and to develop a regional 'wildlife index'.
- 3.9 We have progressed our own Green Infrastructure delivery programme, providing benefits for nature, health and climate resilience. We have developed new Green Infrastructure Standards and a revised Local Plan Green Infrastructure policy.
- 3.10 The approach to the Local Plan has been reset due to updates to national Planning Policy, and we are still ensuring it will be our most ambitious for nature recovery. We are exploring the option of requiring 20% Biodiversity Net Gain (BNG), rather than the mandatory 10%, and planned policies include a requirement for sustainable drainage systems and local targets for tree cover.
- 3.11 The Council's regional work has also expanded on climate. We are an active participant in regional energy planning project Mission Net Zero, a £5m initiative, funded by Innovate UK, to accelerate the West of England's transition to Net Zero. We are also contributing to work on regional climate resilience chaired by the West of England Mayoral Combined Authority (WECA). This complements a project running internally this year to understand how we need to adapt our services as the impacts of climate change are felt.
- 3.12 In Spring 2025, over 800 residents told us how they felt about the state of climate and nature, what they had been doing and why, as well as what the Council could support more of. The most important issues raised were around water, how we restore nature, the energy we use and how we travel. Next was concern about the waste we produce and how we prepare for the impacts of climate change.
- 3.13 Feedback as to how the Council could play a greater role included improving transport options, enabling more energy efficient housing upgrades, protecting and increasing green spaces as well as pursuing stronger policies, enforcement, leadership, and lobbying higher government.
- 3.14 This survey complements the Council's annual Voicebox survey that this year was answered by 1072 residents. This survey told us that access to nature and green spaces was the most important to them in making somewhere a good place to live, alongside affordable, decent housing and the level of crime & antisocial behaviour.
- 3.15 The detailed feedback shared is helping guide us as we update our Climate and Nature Strategy to focus council action, as well as prepare for more community conversations about the roles we all play.

4 STATUTORY CONSIDERATIONS

- 4.1 The Council's climate action plans are in keeping with the role identified for local government in the Climate Change Act 2008 and the regular reports of the UK's climate advisory body, the UK Climate Change Committee.

5 RESOURCE IMPLICATIONS (FINANCE, PROPERTY, PEOPLE)

- 5.1 The Annual Climate & Nature Progress Report outlines the next steps that are covered by existing budgets or notes where there are resource constraints associated with delivery. Business case development will be undertaken and opportunities to increase external funding will be sought.

6 RISK MANAGEMENT

- 6.1 This report recommends that Cabinet note the positive progress achieved over the past year across the priorities set out in the Climate Emergency Strategy and Ecological Emergency Action Plan. As such, a risk assessment has not been conducted in relation to this report.

7 EQUALITIES

- 7.1 An EIA has not been carried out as this is a report on progress, not new policy. It should be noted that actions to tackle the Climate and Ecological Emergencies have benefits that extend beyond just climate and nature. Home energy efficiency improvements and domestic retrofit can reduce household energy bills. Improved access to public transport and active travel can improve health outcomes and reduce social isolation. Access to nature and green social prescribing can have positive impacts for people experience limiting health conditions.

8 CLIMATE CHANGE

- 8.1 This Report provides a direct update on the Council's progress towards tackling the Climate and Ecological Emergencies, built on the Climate and Ecological Emergency Declarations in 2019 and 2020 respectively. It delivers on our commitment to report annually.
- 8.2 The Report presents the combined actions of services across the Council and where the Council has worked in partnership and sets out the next steps across the identified priority areas for climate (decarbonising buildings, decarbonising transport, increasing renewable energy generation and decarbonising council operations) and ecology (leadership and evidence, land and water management, nature-based solutions, access and engagement, evidence and monitoring, and working in partnership).

9 OTHER OPTIONS CONSIDERED

- 9.1 None – providing an annual progress report was a commitment set out in the Climate Emergency Strategy and Ecological Emergency Action Plan.

10 CONSULTATION

This report has been reviewed and cleared by the Executive Director of Sustainable Communities, the Head of Legal Service & Monitoring Officer, and the Council's S151 Officer.

Contact person	<p>Jackie Clayton, Head of Place Shaping</p> <p>jackie_clayton@bathnes.gov.uk</p>
Background papers	<p>Climate Emergency Strategy – available online - https://beta.bathnes.gov.uk/read-our-climate-strategy-and-action-plan</p> <p>Ecological Emergency Action Plan – available online - https://beta.bathnes.gov.uk/ecological-emergency-action-plan</p> <p>Corporate Strategy 2023-27</p>
<p>Please contact the report author if you need to access this report in an alternative format</p>	

This page is intentionally left blank



Bath & North East
Somerset Council

Improving People's Lives

Bath & North East Somerset Annual Climate and Nature Progress Report 2024-2025



TACKLING THE CLIMATE &
ECOLOGICAL EMERGENCY

Contents

Foreword	3
Working with Communities	4
Climate Emergency	7
Ecological Emergency	27
Sources, Abbreviations and Glossary	36
Annex A: Progress on Actions Summary (see also separate document)	40

Foreword

Our commitment to delivering against the Climate and Ecological Emergencies declared in 2019 and 2020 remains as strong as ever. I hope that the progress set out in this update helps convey this commitment, as well as encouraging everyone across our communities to act where they can.

Whilst the Climate and Ecological Emergencies are not the same, they are linked and share causes and solutions. The Council recognises it has an important role to play in tackling both emergencies, through a combination of its own delivery and enabling others to take action.

This year we have continued to invest in tackling the Climate and Ecological Emergencies, and we are grateful for continued partnership working that enables us to reach further towards a low carbon, nature positive and climate resilient district. Tackling climate change will help support the recovery of nature and vice versa and we work where possible to deliver benefits for both emergencies together and the community, for example as we bring forward updated Local Plan proposals.

We have made progress reducing emissions on our own estate. In February, we agreed to set aside the budget to electrify our waste fleet as vehicles become due for replacement, as well as to decarbonise more of our own buildings. We have continued to install upgrades, including solar PV at Bath Sports and Leisure Centre and have been successful in securing a further £312k from the Public Sector Decarbonisation Fund to upgrade Carrswood Adult Day Centre and the Civic Centre in Keynsham.

**Councillor Sarah Warren,
Deputy Council Leader and Cabinet
Member for Climate and Sustainable Travel**



We are proud to have worked with regional partners to develop the first Local Nature Recovery Strategy in England and delighted to be part of a consortium of partners, led by the Forest of Avon, who were successful in securing funding to develop the first new national forest in 30 years. This new forest will span Bath and North East Somerset (BANES), North Somerset, Bristol, Wiltshire and Gloucestershire and aims to create at least 2500 hectares of new woodland and other tree habitats in its first five years.

Our regional work has also expanded on climate. We are an active participant in regional energy planning project Mission Net Zero, a £5m initiative, funded by Innovate UK, to accelerate the West of England's transition to Net Zero. We are also contributing to work on regional climate resilience chaired by the West of England Mayoral Combined Authority (WECA). This complements a project running internally this year to understand how we need to adapt our services as the impacts of climate change are felt.

I would like to thank the over 800 residents who took the time to share feedback on what matters to them as part of our Spring 2025 climate and nature survey, as well as those who came to workshops in Midsomer Norton and Bathavon North. These views are helping us shape our new combined Climate and Nature Strategy that will consider additional topics such as the food we eat, the resources we use and the impacts we can have on our water and rivers. It is only by working together that we will deliver the needed work to become more resilient, reduce our emissions, adapt to the changing climate and restore nature.

Working with Communities – Community Feedback

Working with our local communities is an important part of delivering action for climate and nature. By encouraging individuals to share their views, take action and connect with local landscapes we can tackle the climate and ecological emergencies together. This section shares some of the highlights of our work with communities.

- In Spring 2025, over 800 residents told us how they felt about the state of climate and nature, what they had been doing and why, as well as what the Council could support more of.
- The most important issues raised were around water, how we restore nature, the energy we use and how we travel. Next was concern about the waste we produce and how we prepare for the impacts of climate change.
- Feedback as to how the Council could play a greater role included improving transport options, enabling more energy efficient housing upgrades, protecting and increasing green spaces as well as pursuing stronger policies, enforcement, leadership, and lobbying higher government.
- This survey complements the Council's annual Voicebox survey that this year was answered by 1072 residents. This survey told us that access to nature and green spaces was the most important to them in making somewhere a good place to live, alongside affordable, decent housing and the level of crime & antisocial behaviour.
- The detailed feedback shared is helping guide us as we update our Climate and Nature Strategy to focus council action, as well as prepare for more community conversations about the roles we all play.

CASE STUDY: Community Conversations

In Autumn 2024, we hosted two Community Conversation events to hear residents' views on climate and nature. Held in Batheaston and Midsomer Norton, the sessions welcomed a total of 58 attendees. Council representatives joined table discussions to help facilitate conversations on key themes of transport, waste & consumption, nature & wildlife, buildings & energy, and food.

Alongside these guided discussions, participants were free to explore the room and connect with local organisations who shared information on their work in the area. Organisations represented included Bath and West Community Energy, the Climate Hub, the Centre for Sustainable Energy, and Grow Batheaston.

The events highlighted a wide range of community-led actions already underway and active groups working across all discussion themes. They also sparked ideas for new initiatives and helped build connections between residents.



**Midsomer Norton
Community Conversation,
November 2024**

Working with Communities - Nature

- One of the key themes of our Bath River Line (BRL) project has been 'working with communities', particularly students and schoolchildren. The 'Life on Water' exhibition showcased powerful photographic stories exploring life along the River Avon created by photography students. Supported by the BRL team from January to June, students received mentoring, networking opportunities, and a behind-the-scenes visit to Avon Fire and Rescue.
- We ran a workshop for Year 5 and Year 6 students at Somerdale School looking at river biodiversity, natural flood management and water quality. The children engaged really well with the session and came away with a better understanding of the natural environment surrounding Somerdale.
- Our Neighbourhood Nature Areas scheme has enabled more local residents to improve the value of areas that we currently manage, such as road verges and small open spaces, for nature. We now have a total of 33 sites where residents are managing sites, with our most recent survey showing positive outcomes for people and nature.
- Our Landscape City Project has been working with local communities and 'friends of' groups to set up new volunteering opportunities, which will help bring more woodlands and species-rich grassland in Bath into positive management for nature. The Project has also engaged with local communities to inform plans to develop a new 'eco-hub' at Entry Hill Golf Course.

Page 131

CASE STUDY: Charlcombe Community Nature Reserve

Volunteers are transforming former grazing land at a Council-owned site in the Charlcombe Valley into a thriving community nature reserve.

Using funding received through our Biodiversity Net Gain (BNG) Policy, we have entered into a long-term partnership with the recently set-up Friends of Charlcombe Community Nature Reserve to improve the 6.5-hectare site for people and wildlife.

Local volunteers have already spent over 300 hours on making improvements to the site, with the Council's Parks Team cutting areas of the reserve to create conditions for wildflowers to thrive. This is happening alongside the development of a longer-term Land Management Plan for the site.

The Friends of Group have been engaging local 'citizen scientists' to record the wildlife that already calls the site home, including twenty species of butterfly! They have also been asking local residents to share their ideas for improving the site for nature.



**Charlcombe
Community Nature
Reserve**

Working with Communities

CASE STUDY: Developing a New Food Strategy

Bath and North East Somerset is developing a new food strategy with one of the key focuses being on the sustainability of our food and where it comes from.

The first in a series of workshops took place in May 2025, marking a successful start towards our aim of a community driven strategy. More than 60 stakeholders—from food producers and local businesses to representatives from education, health, and the voluntary sector—came together to shape our vision for more inclusive & sustainable food in B&NES.

Guided by the Sustainable Food Places framework, participants explored five core themes and engaged in lively discussions to identify priorities, challenges, and opportunities. With 100% positive feedback and lots of great insights, the workshop has been a great starting point for our community-led strategy.



Workshop 1 developing the new Food Strategy, May 2025

CASE STUDIES: Reducing Food Waste

Tackling food waste is a key objective of the Council's zero waste strategy. In 2025 and into 2026, we are focused on delivering a weekly food waste recycling service to residents in central Bath. This work will make sure all homes in B&NES can regularly recycle food waste. The waste team has also partnered with Curo this Autumn to run targeted engagement to increase awareness and use of the food and wider recycling services.

Electrical waste recycling workshops for schools

In Spring 2025, the Council's waste project team coordinated a programme of educational workshops to 12 local primary schools, reaching around 500 pupils. The workshops were held in the training room at Keynsham Recycling Hub where pupils were able to look out over the public recycling centre and rear operational yard. Sessions were also held within schools to ensure wider reach and accessibility.

The workshops were funded using a social value contribution from Valpak, the Council's electrical compliance contractor. The Council partnered with Sustainable Hive and Bath Share and Repair, to deliver the workshops for Year 5 and 6 pupils. The sessions focused on practical activities on how to identify and appropriately recycle electrical waste and wider learning on the recycling services provided in B&NES.



Climate Emergency

Tackling the Climate Emergency

Our 2019 Climate Emergency Strategy sets our ambition and priorities to tackle the Climate Emergency, with actions targeted across the Bath and North East Somerset area and our own operations. Our four priorities are to:

1. Decarbonise Buildings;
2. Decarbonise Transport;
3. Increase Renewable Energy Generation; and
4. Decarbonise the Council's own operations.

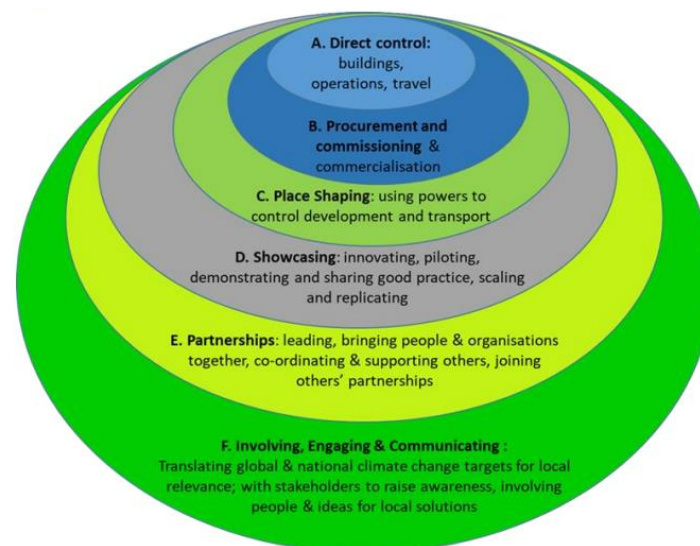
Our principles for delivery of these priorities include working in partnership, providing leadership, including in place shaping, and enabling community action.

In 2025, BANES was ranked 17th of UK local authorities by Climate Scorecards UK, which assesses action across seven categories: buildings & heating, transport, planning & land use, governance & finance, biodiversity, governance & finance, and waste reduction & food. This placed us 4th outside of London boroughs, 2 percentage points behind the cities of Bristol, Edinburgh and Glasgow^[1].

We were delighted to see our overall score increase due to improved action on sustainable transport, collaboration & engagement and waste reduction & food and are a 'top performing council' for planning & land use and buildings & heating. We continue to use the framework to inform our priorities.

In 2024, B&NES were once again awarded a B Score from the Carbon Disclosure Project (CDP), for our progress on tackling the climate emergency. Last year, nearly 100 states and regions around the world disclosed their climate data in this way.

How Local Authorities Control and Influence Emissions

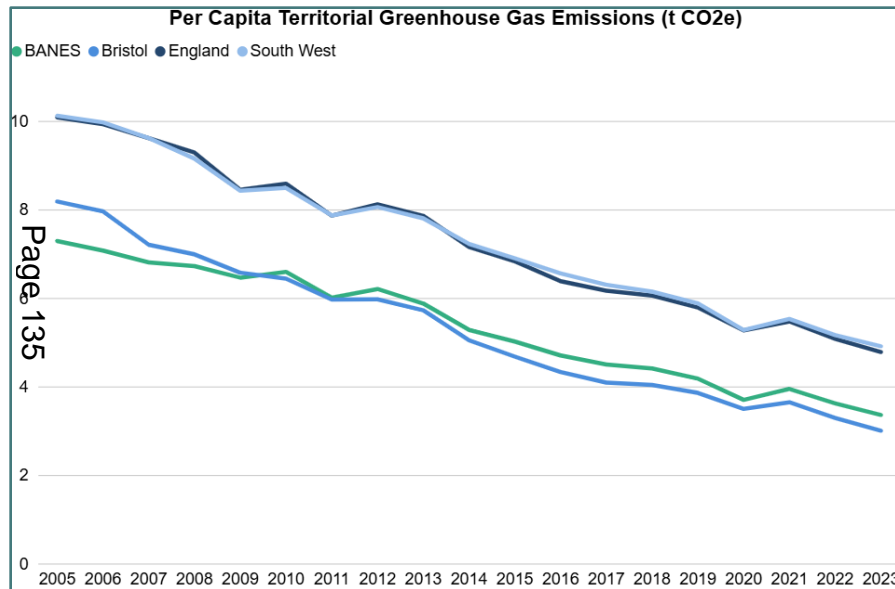


Source: Coxcoo, R. & Roberts, S. (2020) *Climate Action Planning Tool for Local Authorities*, Centre for Sustainable Energy. <https://www.cse.org.uk/news/view/2541>

The Climate Change Committee estimates that local authorities in the UK have power or influence over a third of emissions in their local areas^[2]. We therefore prioritise action where we can have the most impact and deliver for residents.

Tackling the Climate Emergency

The latest territorial emissions data, reported by the Department for Energy Security and Net Zero (DESNZ), shows the steady progress that is being made to reduce emissions across BANES. Emissions per capita have decreased by 53% since 2005 to 3.4tCO₂e per person per year, ahead of England and South-West decreases [\[3\]](#).



Progress to reduce emissions sufficiently quickly towards Net Zero is challenging, however. Greenhouse gas emissions across BANES arise from all the services supporting civic life, the approximately 8,535 businesses [\[4\]](#), 79,250 homes [\[5\]](#), and the 3,250,000 km driven each day on our roads [\[6\]](#), as well as from agriculture. They are the result of many thousands of decisions by residents, visitors and businesses as well as national, regional and local government action and policies.

As a council, emissions from our own operations (Scope 1 and 2) account for <1% of the total territorial emissions for the wider BANES area. In alignment with our principles, we see tackling our own operational emissions as important work to provide local leadership on the Climate Emergency.

This year, as set out in this progress update, we have secured investment to significantly reduce emissions in two of the highest emissions areas of our own estate – our fleet and more of our own buildings. However, further progress may be restricted as the Public Sector Decarbonisation Fund that we have relied on to fund buildings decarbonisation has now been closed by national government and we wait to hear what might replace it.

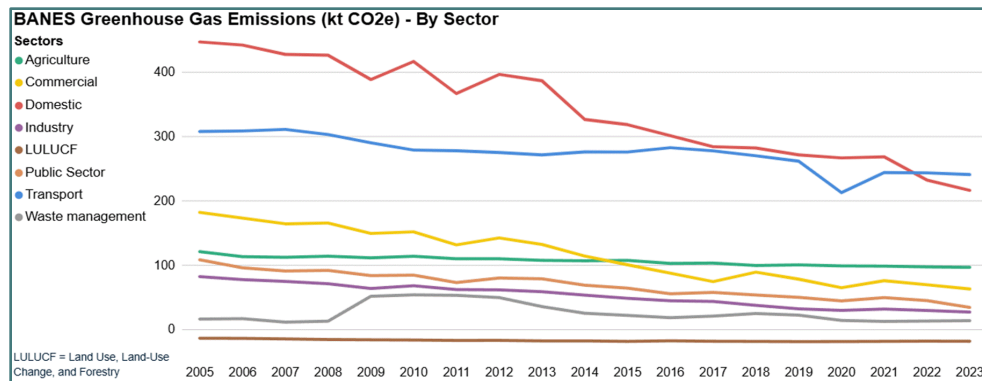
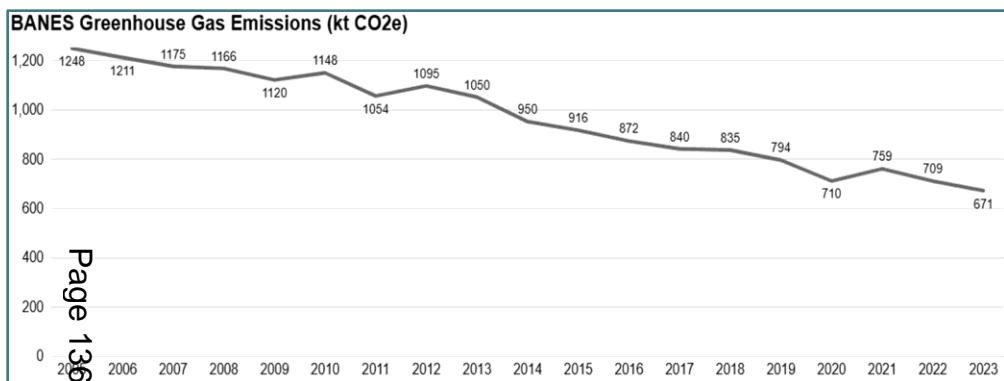
Alongside our own emissions reductions, we also work in partnership to support emissions reductions across the whole of the BANES area. This year we gained agreement from our Future Ambition Board to convene and work with civic partners more closely. We were also successful in a partnership bid from the National Lottery to establish a Community Energy Champions network to advise residents.

At regional level, are part of a new West of England Climate Resilience Working Group and contributed to work to assess risks across the region. At the same time, we progressed our own Green Infrastructure delivery programme, providing benefits for nature, health and climate resilience. We have developed new Green Infrastructure Standards and a revised Local Plan Green Infrastructure policy.

Where We Are Now – Decarbonising Bath and North East Somerset

The graphs below shows the territorial emissions for the Bath and North East Somerset district^[3].

Territorial emissions cover emissions that occur within the UK's borders and are used to track UK-wide progress towards international and domestic targets. Territorial emissions arise from use of gas, petrol and diesel (direct) and electricity (indirect), including from domestic, transport, public sector, commercial, industry, agriculture, land use, land use change and forestry, and waste management sources.



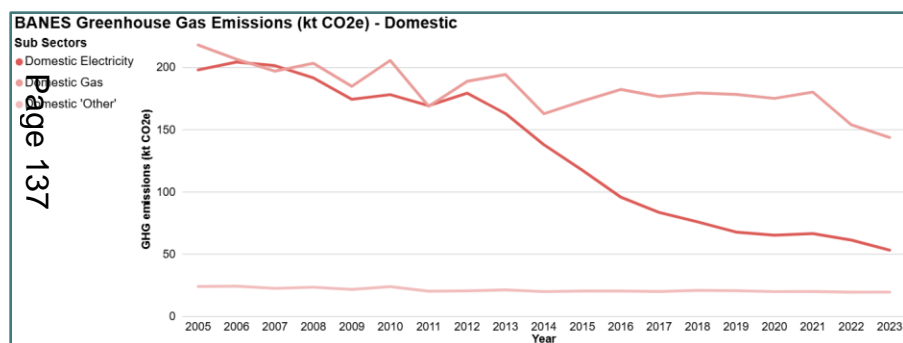
Between 2005 and 2023, greenhouse gas emissions for the district fell by 46%. The 2022 to 2023 drop of 46 ktCO₂e was driven by decreases in domestic emissions, public sector, industry and commercial sector emissions. While this annual decrease continues the downward trend in our area's emissions reduction, the district is not on track to achieve net zero by 2030, in common with other local authorities and the national pathway.

Transport (36%) and domestic (32%) emissions combined make up 68% of BANES territorial emissions. These sectors have been the two key sectors driving emissions since 2005 reporting began and have influenced the focus of the 2019 Climate Strategy reported on in this Progress Report. Commercial (9%), public sector (5%) and industry (4%) together contribute 18% of emissions and a proportion of these emissions will include energy use in buildings. Agriculture contributes 14% of territorial emissions and waste management 2%. Land Use, Land Use Change, and Forestry (LULUCF) contributes a positive 3%.

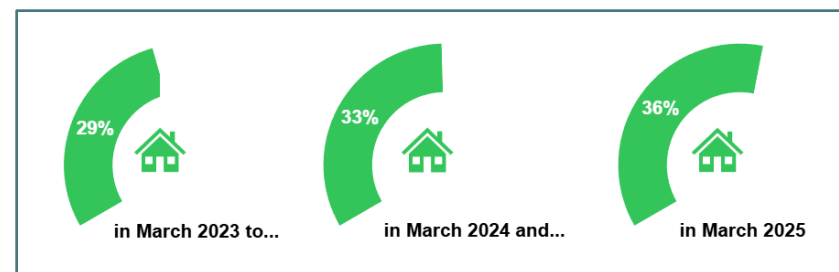
Within the highest emitting sectors are the following Top 5 sub-sectors: domestic gas (21%), travel on minor roads (17%), travel on A roads (16%), agriculture livestock (10%) and domestic electricity (8%). Thereafter, commercial emissions from electricity (5%) and gas (4%), as well as public sector gas (3%) contribute 12% of territorial emissions.

Highlights: Decarbonising Buildings

Approximately one third of emissions in BANES come from electricity and gas used in our domestic buildings. The key domestic emissions challenge as a district is to replace gas. To do so also requires energy efficiency improvements, especially in older buildings, so that heat pumps can operate effectively and affordably. As a result, the B&NES 2019 Climate Strategy set out that 65,000 properties would need some kind of home upgrade. The below chart sets out progress to date^[3].



- There were 162 heat pumps installed for domestic buildings in BANES in the 2024-25 financial year^[4]. In addition, 169 residents have completed a home assessment via Retrofit West, which provides a costed whole-house retrofit plan tailored to each home.
- EPCs are used to give broad efficiency ratings to buildings. The percentage of domestic homes in BANES with an EPC rating of A-C has increased from 29% in March 2023, to 36% in March 2025^[4].



- 22% of BANES privately owned homes have an EPC rating of C and above. 70% of social rented homes have reached that target. Social rented properties are reaching higher levels of energy efficiency as the government has previously set a mandatory target of EPC C by 2030 and has invested in this goal through the Social Housing Decarbonisation Fund and the new Warm Homes: Social Grant.
- Residents in BANES remain able to access Retrofit West's services, and we continue to work to encourage uptake of grant funding and free retrofit home upgrade advice to residents and local businesses. Calls from people in BANES to the Warm Homes Helpline make up 24% of total enquiries to CSE's programme across the region.
- The Council is developing a Retrofit Enabling Plan to supplement the current updating of its Climate and Nature Strategy which will help us to target our resources as we strive to increase the installation of energy saving upgrades to homes across the region and across all tenures. The Plan is currently an internal document to support action A1.1 'Develop Council's strategic approach to retrofit'.

Highlights: Decarbonising Buildings Continued

- The Council is also preparing to work in partnership with private landlords and Retrofit West's new Landlord Service to meet the requirements of the incoming Renters Rights Bill and extended Decent Homes Standard.
- We are developing policy options for the Council's Carbon Offset Fund in anticipation of receiving the first developer contributions to enable and support additional retrofit and renewable energy projects. This will benefit homes and communities within BANES, whilst saving emissions and reducing energy use and reliance on fossil fuels.
- The Council is part of a coalition with Bristol City Council, North Somerset and Bristol City Leap to deliver energy efficient upgrades to homeowners via the Warm Homes: Local scheme which launched in September 2025.
- Our Energy Transformation team has been working with colleagues from Housing and the Health and Well Being Board to understand the impact of homes that suffer from excess cold, heat or damp and mould and to direct residents to advice and assistance in making improvements.

CASE STUDY: Community Energy Network – Energy Champions

The Community Energy Network is a partnership project with B&NES Council, Bath & West Community Energy, University of Bath, Centre for Sustainable Energy (CSE) and, through the BANES Community Wellbeing Hub, Age UK and Citizens Advice. It is funded by the National Lottery.

Bath & West Community Energy are recruiting a volunteer team of Energy Champions. They will support residents to save energy at home and improve home energy efficiency, through providing support and signposting to relevant information. Through Energy Essentials training, provided by CSE, the Champions will learn new skills and gain the knowledge to actively engage with the wider community about energy efficiency.

A pilot group of [11 Energy Champions](#) has been recruited, this network will continue to grow.

Highlights: Decarbonising Buildings Continued

CASE STUDY: Green Heritage Homes

Partnership project with Bath & West Community Energy (BWCE), B&NES Council, Bath Preservation Trust, Centre for Sustainable Energy, People Powered Retrofit, and the South West Net Zero Hub.

Bath and North East Somerset is known to have one of the highest concentrations of listed buildings in the country. There are over 5,000 Grade I, II*, and II listed buildings in Bath, and the district has 663 Grade I listed buildings. Homeowners of listed buildings face particular challenges in implementing energy saving upgrades. Green Heritage Homes is providing tailored energy advice through home visits with a conservation officer and retrofit advisor.

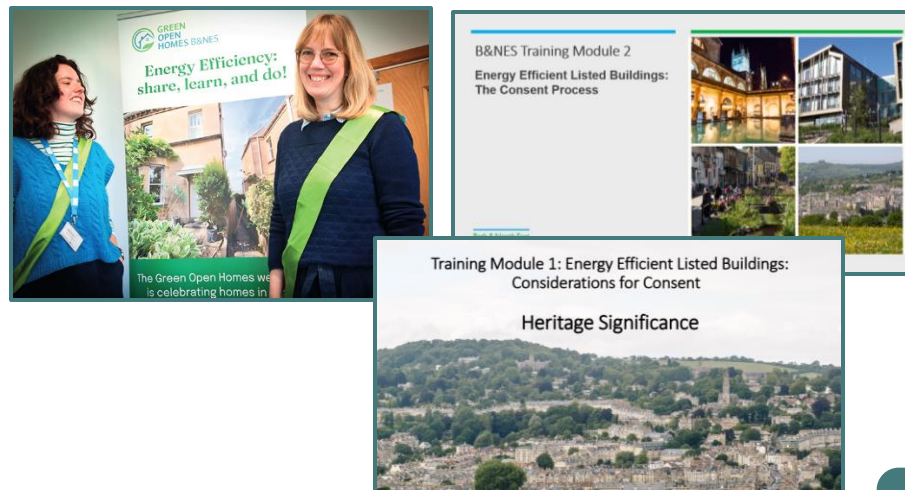
Phase I of the Green Heritage Homes project ended in March 2025, one of 36 Local Energy Advice Demonstrator (LEAD) projects funded by the Department of Energy Security and Net Zero (DESNZ) to promote the sensitive retrofitting of listed buildings.

69x pre-app surveys were completed, offering retrofit advice to listed building homeowners and 46% of homeowners surveyed indicated they are planning to undertake retrofit works following advice. Additional engagement included running 4x listed building surgeries, hosting free online module training, creation of listed building factsheets, creation of 'bitesize' retrofit videos - which have collectively received over 2,000 views - and engagement with other heritage and retrofit professionals through talks, webinars, and seminars.

As of April 2025, Green Heritage Homes has been renewed for 'Phase II' over three years, funded by Historic England, WECA, and Curo Group. B&NES will work with energy experts from BWCE.

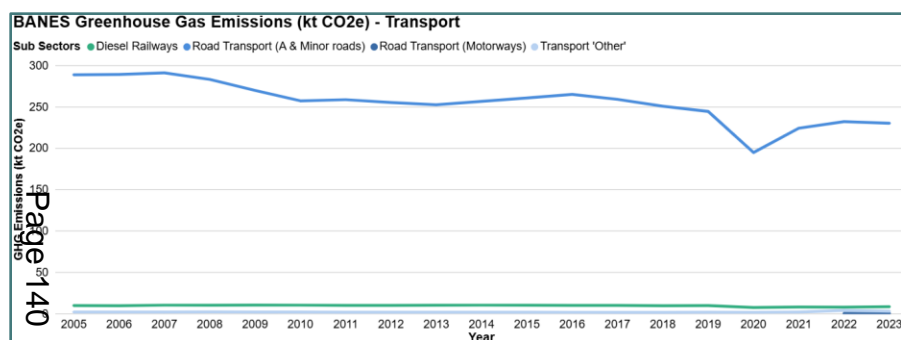
The project will deliver:

- Level 0 pre-app advice for retrofit of listed buildings.
- Joint energy/pre-app surveys with Bath and West Community Energy (BWCE), engaging with social housing suppliers such as Curo.
- Progression of Local Listed Building Consent Order (LLBCO) for solar panels in inner roof valleys within the Bath Conservation Area.
- Dissemination of learnings with other local authorities to motivate similar project work.



Highlights: Decarbonising Transport

Decarbonising transport remains one of our biggest challenges, in part due to the rural-urban nature of our district and the combination of changes needed to policy, behaviour and technology. We focus on creating an environment that makes it easier to travel by public transport or active travel, including walking, wheeling and cycling, as well as enabling the switch to electric vehicles.

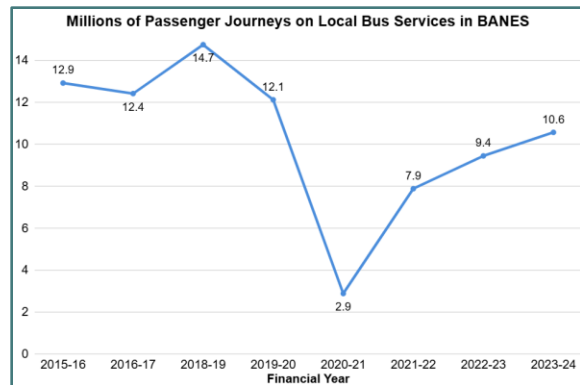


- Emissions from transport in the district is in line with the national picture. The most recent Carbon Budget from the Climate Change Committee noted '*Emissions in surface transport...have shown limited or no reductions overall*' [\[8\]](#).
- This is reflected in the small decrease in the number of kilometres travelled by all vehicles in the district of -3% (-4% for cars and taxis) vs the 2016 data, established as the baseline in the 2019 Climate Strategy [\[9\]](#). In the same period there has been an increase of 3% in kilometres travelled by all vehicles (with no change for cars and taxis) in England.
- In order to decarbonise transport, there needs to be a switch from fossil fuel vehicles to electric cars, vans, HGVs, buses, and motorcycles, supported by measures to reduce traffic growth, improve the efficiency of conventional vehicles, and decarbonise the rail network [\[8\]](#).

- In addition, enabling alternatives to driving, via public transport, walking, wheeling and cycling as well as developing communities that minimise travel demand, reduces emissions and delivers a range of additional benefits such as improving air quality, congestion and for our health & wellbeing [\[8\]](#).
- To date, 3.7% of privately registered vehicles in BANES are classed as Ultra Low Emissions Vehicles (ULEVs), with 2.3% of these battery electric. This is slightly ahead of the national average where ULEVs make up 3.2% of private vehicle registrations in July 2025 [\[10\]](#) [\[11\]](#).
- To enable the transition to electric vehicles, the Council is committed to expanding access to electric vehicle infrastructure, with plans to install an additional 200 chargers (400 charging sockets) by 2030. This is specifically aimed at supporting residents without access to off-street parking.
- BANES currently has 118 public chargers (60 chargers per 100,000 residents, vs the England average of 124) [\[12\]](#). Changes in procurement regulations had impacted rollout progress, but these are now resolved. Between August 2024, and July 2025, a total of 13,629 electric vehicle charging sessions were recorded across the district via the Revive Network.
- The target housing numbers set by national government in 2025 result in the need to increase housing in the district by almost 30,000 homes. As this has been translated into potential sites under the Local Plan during 2025, particular focus has been put on understanding likely emissions that will result for transport, seeking to minimise these as far as possible.

Highlights: Decarbonising Transport – Public Transport

- At the time of report publication, the Council will be consulting on a new Movement Strategy for the Bath area, in line with *Creating Sustainable Communities: Journey to Net Zero*, published in February 2025 and focused on Keynsham and Saltford, Hicks Gate, the Somer Valley, and Whitchurch Village. These strategies seek to create sustainable communities by providing more travel choices whilst investing in a transport network that meets current and future community needs.
- In order to encourage more journeys to be made by public transport, the Council continues to work with WECA to grow bus use and improve service quality. This is through initiatives such as the Bus Service Improvement Plan (BSIP), the Transport for City Regions fund (TCR) and the Enhanced Partnership between WECA, B&NES and bus operators that coordinates delivery and unlocks funding.
- The number of passenger journeys in BANES taking place on local bus services has increased from 9.4 million in 2022-23 to 10.6 million in 2023-24.

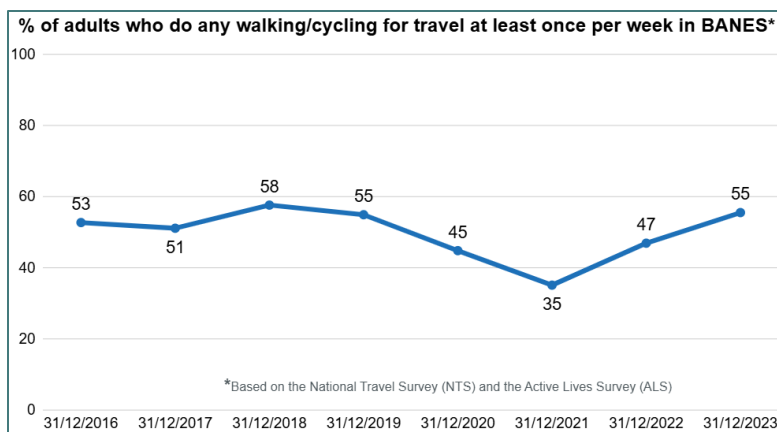


- Activities to increase bus use and improve service quality include fares and access, service support and infrastructure investment:

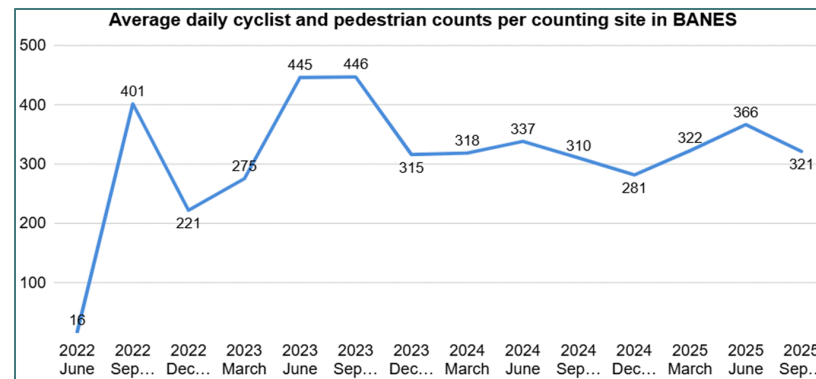
- National £3 adult single fare cap in place until March 2027 and £1 child fare cap for under-16s. WECA, with support from B&NES, is investing to keep most single journeys at £2.40 or less.
- Free travel offers including Birthday Bus, support for care leavers, and 'kids go free' during the summer holidays.
- Enhanced frequency on key routes including Park & Ride hours extension trial in summer 2025.
- WESTlink demand-responsive transport improving access in less well-served areas.
- Electrification of Weston Island depot to support zero-emission buses, one of four depots in the region being transformed. Charging infrastructure is being installed, making it a key hub for Bath's zero-emission fleet.
- CRSTS-funded improvements to Bath City Centre and the Bath to Bristol Strategic Corridor, including bus priority and stop upgrades.
- As part of the regional approach, B&NES is working towards having a fully electric bus fleet by 2030. Electric buses will be in operation in the district during 2026 as part of £90m regional funding throughout the region. Electric buses are planned to operate on 10 routes across Bath.
- Each electric bus saves around 75 tonnes of carbon dioxide annually. This is equivalent to removing 54 cars from the road.
- The numbers of rail passenger entries and exits (rail use) has increased at all BANES train stations between 2022-23 and 2023-24. At Bath Spa station there were an estimated 6,118,136 passenger entries and exits in 2023-24, compared to 5,468,466 in 2022-23.
- A feasibility study commissioned by WECA for reopening Saltford rail station has been completed, with report publication expected by the end of this year. B&NES, WECA, and Network Rail are developing a rail network timetabling study to identify infrastructure upgrades needed for regular services at a new station.

Highlights: Decarbonising Transport – Walking, Wheeling and Cycling

- The Council is committed to increasing walking and wheeling in the district. Activity during 2024/25 has been focused on delivering the Local Active Travel & Safety Programme and starting work on the Scholars Way project funded under the national CRSTS programme for sustainable transport corridors. Liveable Neighbourhoods trials and decisions about their permanent implementation have also been undertaken.
- In February 2025, the Council published an Active travel Masterplan. Currently, over a third of car trips across BANES are less than 5km. There is the need to make walking, wheeling and cycling, or 'active travel', the natural choice for a lot more of these shorter journeys. The Active Travel Masterplan is a comprehensive plan that sets out the existing and future network of active travel infrastructure required to enable and provide for sustainable and healthy forms of transport around the district.
- In 2023, 55% of adults reported walking or cycling for travel at least once per week in BANES, returning to pre-pandemic levels:[Note: update before publication once 2024 released]



- Our 25 active travel count sites have recorded an average of 366 cyclists and pedestrians daily in 2025, including weekends.



- Organisations, businesses and schools can help increase levels of walking, wheeling and cycling through creating travel plans that encourage and enable their employees and communities to try alternative ways of commuting and doing the school run.
- At the end of April 2025, 51% of schools in BANES were registered for the ModeSHIFT Stars scheme to create school travel plans and 15% of schools had an accredited plan ranging from 'approved' to 'outstanding'. Chew Stoke Church School was recognised as the England Primary School of the Year in 2024/25 by the scheme. New guidance from the Department of Education is that all schools should develop a Climate Action Plan during 2025 and ModeSHIFT Stars will be a way to understand and work on sustainable travel as part of this.
- Since TIER/Dott took over the e-Bike/Scooter trials in September 2023, 863,000 kilometres have been clocked in BANES. There's been more than 18,000 trips taking place across BANES. The service runs 24/7 as of October 2025.

Highlights: Decarbonising Transport

CASE STUDY: New Bus Initiatives

Starting in April 2025, BANES introduced new measures to make public transport more affordable and accessible, supporting sustainable travel across the region. Funded by WECA and North Somerset Council, the initiative represented a £1.3 million investment aimed at improving travel choices and reducing reliance on private vehicles.

The package included a cap on most children's bus fares at £1, preventing an increase to £1.30 and saving families up to £60 per child per school year. It also extended free 24/7 bus travel for Disabled Person's travelcard holders, removing previous time restrictions, and continued free bus travel for care leavers for another year. Additionally, the cost of multi-operator day bus tickets was capped at £7, preventing a rise to £8, ensuring affordability across 11 different bus companies. In summer 2025, kids went free on the region's buses.

These improvements have created a more sustainable, accessible, and efficient transport network, encouraging greater use of public transport and reducing carbon emissions. The package runs until March 2026, supporting long-term climate goals through enhanced mobility options.



CASE STUDY: Bath Cycle Hangars

Bath has expanded its cycle hangar programme with the installation of 20 new hangars, supporting the Council's commitment to active travel and sustainable transport. This brings the total to 41 hangars across BANES. Each hangar provides secure, weather-protected storage for up to six bicycles, occupying half the space of a standard car parking bay.

Since their introduction in 2023, cycle hangars have seen high demand, with occupancy reaching 94% in April 2025. In Bath, existing hangars have been at capacity for nearly a year, highlighting the need for additional secure cycle storage. The expansion aims to encourage more people to choose cycling for everyday journeys, improving travel options, health, and wellbeing.

The initiative is funded through the Government's Active Travel Fund and delivered in partnership with WECA, which is investing in over 80 new cycle hangars across the region. Future funding opportunities will be explored to further expand cycle storage and promote sustainable transport.



Highlights: Increasing Renewable Energy Generation

Increasing renewable energy generation across the district helps to decarbonise the electricity grid, improve energy security and reduce the emissions associated with our energy use. We work in close partnership with local energy organisations to identify and develop renewable energy projects that benefit local people. Significant growth in installed capacity is expected but further work is still needed to identify enough suitable sites to meet our 300MW target by 2030.

- The Council continues to work closely with Bath & West Community Energy (BWCE). This year our partnership secured £1.5m lottery funding to develop the BANES Community Energy Network. Please see case study on next page.
- We are supporting Keynsham Community Energy with feasibility assessment for a solar project on Keynsham leisure centre.
- The Council is a partner to the £5m Mission Net Zero project led by Bristol City Council. The project will publish a Regional Climate Investment Plan for the West of England region in 2025.
- We are continuing our work with partners across WECA to identify where we could use heat from the abandoned and flooded mines, working across the region to provide lower cost, low carbon heating to buildings. We will have outputs from these studies later this year.
- We are carrying out a study as part of the Mission Net Zero project, to understand if we can develop a heat network to

supply low carbon heat to the city centre. We are engaging with some of Bath's biggest commercial off takers as well as our own internal stakeholders to understand how this could help to decarbonise buildings within the World Heritage Site and provide a future 'plug-in-and play' low carbon solution to enterprises who want to relocate to Bath.

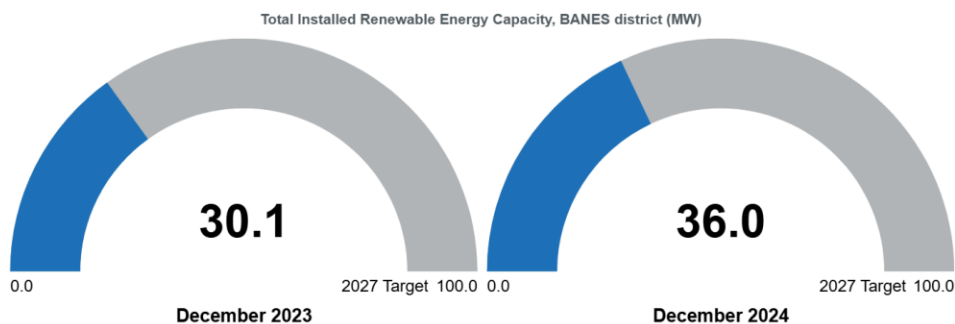
- We are working to ensure that our planning policies align with the potential requirements coming from the implementation of Heat Network Zoning by central government in 2026.



Highlights: Increasing Renewable Energy Generation Continued

- There were 593 domestic solar PV installations in the 2024-25 financial year.
- The district pipeline is growing, which is important towards delivering our interim district target of 100 MW by 2027. The Marksbury Plain commercial solar farm has been constructed, providing 20 megawatts (MW) of capacity. A site has been approved in Paulton for 9 megawatts (MW) of solar and 49.5 MWp battery storage. A 2 MW community-owned solar farm in Compton Dando received planning consent in December 2024. A 9.5MW solar farm near Nempnett Thrubwell was consented in 2022 and there is currently an application pending to extend this by 10 MW. A planning application for 49.5 MW at Stowey Road Solar Farm has been submitted.

Installed renewable energy capacity has increased from 30 MW in 2023, to 36 MW in 2024. This data is from DESNZ and does not yet reflect the Marksbury installation which was completed in 2025:



CASE STUDY: Community Energy Network: Energy in your Community

Through the Lottery funding Community Energy Network, B&NES Council, Bath & West Community Energy and the Centre for Sustainable Energy are working in partnership to empower communities to explore and build their own renewable energy projects.

This means that not only would the communities make decisions collectively on the projects, but they would also receive financial benefits that would go directly back into the community.

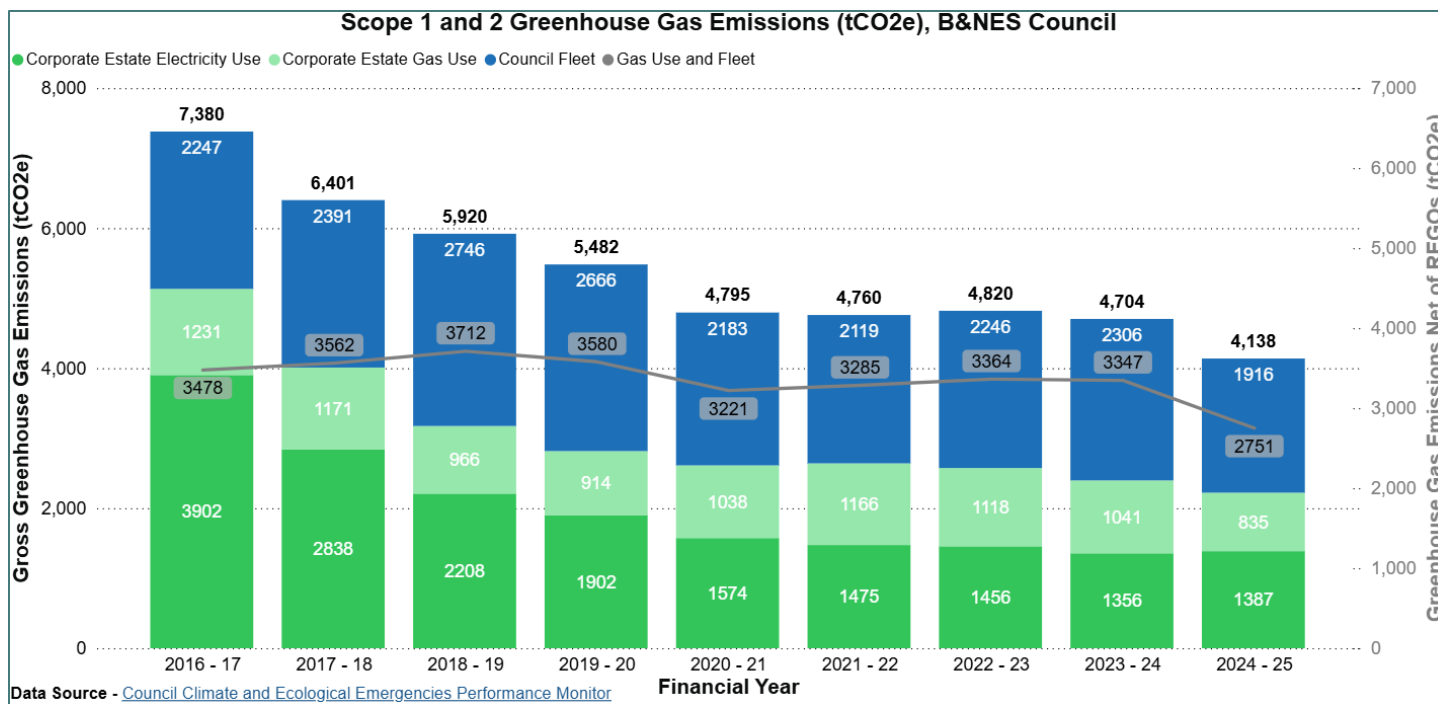
Three areas are being continued from a piloted in 2022; Peasedown and Wellow, Stowey Sutton and East Harptree and West Harptree, Temple Cloud and Hinton Blewett. Three new areas have been selected after registering their interest- St Catherines and Batheaston, Twerton and Whiteway, and Radstock and Westfield.

<https://www.bathnes.gov.uk/energy-your-community>



Where We Are Now: Decarbonising Council Operations

The graph below focuses emissions for the Council's own operations, known as scope 1 and 2 emissions. This includes emissions from gas and electricity used in buildings under our control, and our own vehicle fleet. The Council's emissions make up less than 1% of territorial emissions for the Bath and North East Somerset area.



Between 2016-17 and 2024-25*, we have successfully reduced our emissions by 44%. Fleet emissions decreased by 17% compared with 2023-24 due to ongoing replacement of the fleet with electric alternatives.

As we set out on the next slides, we have progressed our commitment to becoming Net Zero for our own operations by 2030 by securing substantial grant and budget provision. This means we can phase investment to decarbonise our key buildings and waste fleet. We have purchased REGOs** for our electricity on contract until end 2027. We will review the next contract in line with the agreed strategy at this point. Purchasing REGOs guarantees electricity purchased from renewable sources in the UK and therefore we can report our net emissions from electricity as zero, but we continue to report gross emissions for completeness.

Note:** electricity and gas consumption values for the latter half of 2023-24 are based on conservative estimates due to ongoing billing issues. These values may be subject to change in subsequent reporting cycles. *Renewable Energy Guarantees of Origin**

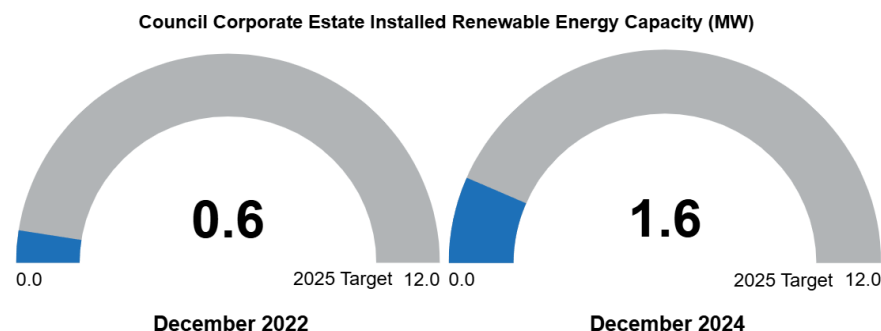
Highlights: Decarbonising Council Operations

Decarbonising our own operations is crucial to lead action on climate change in the region. We are making practical progress on decarbonising our estate.

- Net Zero Council budget provision of £14m has been made, focused on decarbonising our waste fleet and buildings.
- Within this, £4million has been earmarked between 2025/26 and 2029/30 to decarbonise the buildings of the Council's Corporate Estate. This includes feasibility work for a hydroelectric power scheme at Pulteney Gate in central Bath that could provide electricity for heat pumps at Council buildings in the City Centre including the Guildhall, the Roman Baths and Pump Rooms. If found to be feasible, the hydro scheme would reduce carbon dioxide emissions while maintaining river levels; improving fish migration and reducing electricity bills and therefore costs to the Council.
- Both of this year's funding applications for Public Sector Decarbonisation Scheme grant for air source heat pumps were successful and will include installation of heat pumps at Carrswood Adult Day Care Centre and Keynsham Civic Centre. Keynsham Civic Centre heat pumps will partially utilise the existing solar PV array and a new solar PV array is planned for Carrswood to do the same. The combined effect of these measures will be to reduce carbon dioxide emissions and operating costs of the two buildings.
- The new PSDS grant funding will result in estimated annual carbon savings of approximately 74 tonnes CO₂, around 3% of the Council's corporate estate emissions.
- This year, we installed solar PV on the Bath Leisure Centre building – please see slide 26 for this as a case study.

B&NES Council owns and leases the leisure centre building, and therefore this building falls under the Council's commercial estate, as opposed to its Corporate Estate for which our renewables target below is set. This is an example of the Council prioritising the securing of grant awards to fund renewables where these are available.

- Renewable energy capacity on the Council's corporate estate remained 1.6 MW to December 2024. Over the past year, business and feasibility work has been undertaken on multiple sites to further increase renewable energy capacity on the corporate estate. Our current identified pipeline achieves 2.5 MW of rooftop solar, leaving a considerable gap in our generation target. If the target cannot be met using existing Council assets, alternative options currently being explored include investment in local community energy projects and power purchase from renewables sites within BANES.



Highlights: Decarbonising Council Operations Continued

CASE STUDY: Electrifying our waste fleet

Decarbonising the fleet will make a significant contribution to reducing emissions from the Council's own operations. The vehicles currently in use account for almost half of the Council's carbon footprint, with Heavy Good Vehicles (HGVs) accounting for 70% of emissions, despite only making up 28% of the fleet. The waste and cleansing operations operated by the local authority are already supported by 12 electric vehicles.

Capital provision has been made to replace 12 refuse collection vehicles and 30 recycling trucks with electric vehicles over the next two years and will also bring savings on maintenance and fuel. Potential replacement vehicles are being trialled with a view to starting replacement between 2026 and 2028.



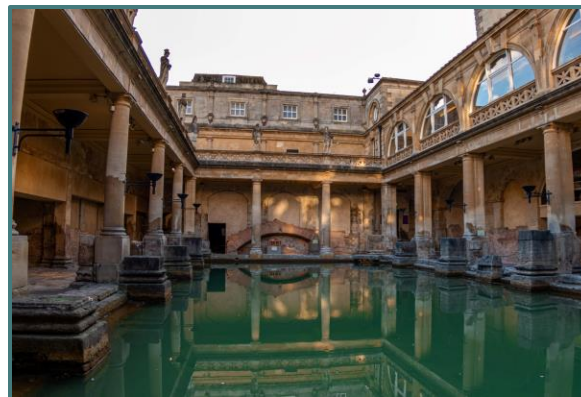
Example electrified waste vehicle

CASE STUDY: Heritage Services

Heritage Services is an essential part of B&NES; responsible for stewarding the public facing heritage assets in the Council's care. The key cultural assets managed are: The Roman Baths, Victoria Art Gallery, The World Heritage Centre, Clore Learning Centre, Bath Record Office and The Fashion Museum which is currently under redevelopment. As an independent business unit, the service is unique amongst UK local authorities in operating at no cost to the local taxpayer but instead returning an agreed profit each year.

Current Impact

Since the baseline year of 2019/20, Heritage Services carbon footprint has reduced from 2,912 tCO₂e to 2,437 tCO₂e in the latest reporting year of 2023/24. Scope 1 & 2 emissions have dropped significantly due to heat pump installation in 2022, and grid decarbonisation. Scope 3 emissions remain high and are largely estimated using spend-based data. Visitor travel emissions, though not formally included within our carbon boundary yet, are continuously monitored and will be included when the data and appointment methodology is more reliable.



Highlights: Decarbonising Council Operations Continued

Heritage Services Environmental Action Plan

In 2024/25 the service created a 3-year environmental action plan which aims to accelerate progress towards becoming Net Zero, whilst also preserving the ancient monuments, listed buildings and world-renowned collections in our care and continuing to deliver a financial return to the Council. The plan is structured around three pillars: People, Place and Heritage.

Place:

- Reduce Scope 1 & 2 emissions by 52%
- Ensure zero waste to landfill and improve visitor led recycling
- Improve Scope 3 emissions data accuracy

People:

- 100% of FTE staff to be certified Carbon Literate
- Engage with suppliers to set their own Net Zero targets
- Improve sustainability communications with visitors

Heritage:

- Lead by example in climate adaptation
- Share best practices and collaborate with sector peers
- Address climate-related risks to historic assets

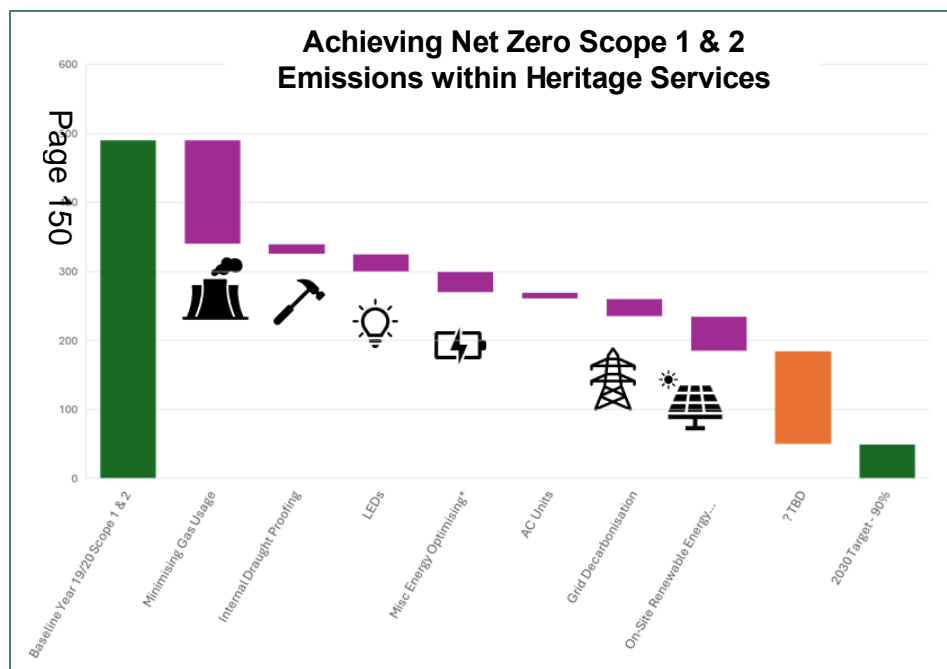
Key Progress in 2024/25

- **Supplier Engagement:** we are engaged with 35 of our top suppliers, providing support through online webinars, workshops, and guidance packs to aid their own carbon footprinting and reduction.
- **Climate Risk & Adaptation Planning:** we have undertaken a climate risk assessment of the Roman Baths identifying 17 risks from the 4 main hazards to the area as identified by the Met Office – Heavy Rainfall & Flooding, Overheating, Drought and Storms & High Winds. An adaptation plan is now underway.
- **Sustainable Sourcing:** our catering supplier Searcys have doubled down on their local supplier base, prioritising provenance and positive environmental impact. Key ingredient suppliers are actively farming regeneratively.
- **Sustainable Tourism:** we co-hosted a sustainable tourism workshop with Visit West and Buro Happold. Over 60 cross-sector attendees explored how tourism can support heritage, climate action, and community well-being—resulting in clear next steps focused on data, partnerships, and authenticity.
- **Reduced Waste:** our operations are now zero waste to landfill, and we have taken steps to improve visitor led recycling on site.
- **Industry Recognition:** the Victoria Art Gallery is now an active member of the Gallery Climate Coalition, demonstrating commitment to environmental sustainability within the visual arts sector.

Highlights: Decarbonising Council Operations Continued

Heritage Services Environmental Action Plan Governance:

Progress against the 3-year action plan is overseen by the Heritage Services Senior Leadership Team and Advisory Board, with alignment to council-wide strategies. Actions, and climate-related risks, are tracked through KPIs and reviewed quarterly. More details on the Heritage Services action plan, KPIs and emission reduction goals can be found in their action plan. [Note: add hyperlink once available].



Scope 3 Emissions

Scope 3 emissions are those that are produced indirectly by activities outside an organisation's own operations. For the Council, this includes emissions associated with our procurement of goods and services, outsourced contracts, the buildings we own but do not occupy, and our corporate travel.

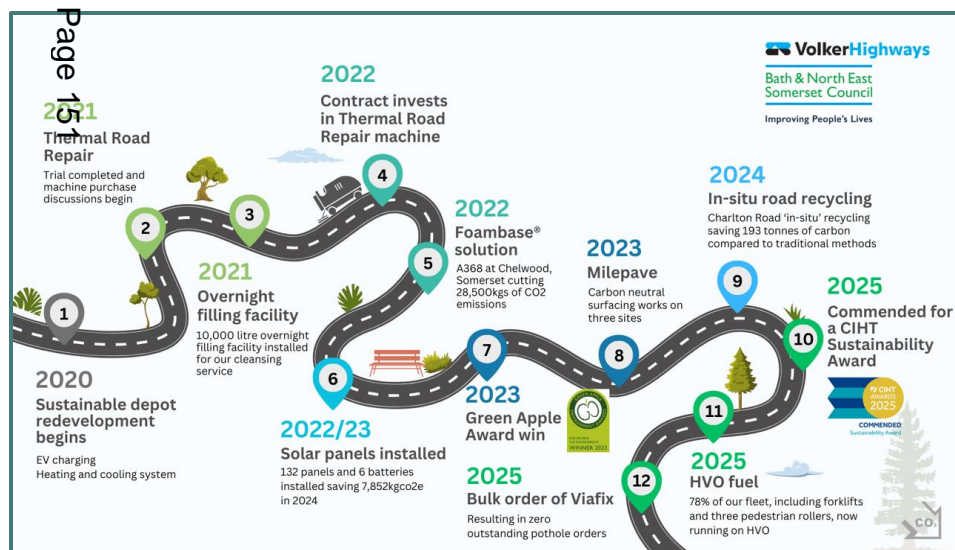
Scope 3 emissions are more difficult to measure and reduce as they fall outside our direct control. As a council we are making progress in identifying our Scope 3 emissions sources and what actions we can take to reduce them.

- The Council recognises that the way in which it purchases goods and services can significantly alter the climate and nature impacts that these have. In November 2024, B&NES published its updated [Procurement Strategy](#) and is now working to implement it. Embedding sustainability and climate action into all procurement activity is one of six priority themes in the strategy.
- The Council outsources a number of its services. In 2025, our Clutton depot, managed as part of the highway maintenance contract with Volker Highways, was named a finalist for a CIHT (Chartered Institution of Highways and Transportation) Sustainability Award. The shortlisting highlights Volker Highways' and the Council's commitment to building a future-proofed highway depot that supports greener infrastructure, reduces operational carbon and improves energy efficiency. It is one aspect of a roadmap of sustainability-focused improvements being managed between the Council and Volker Highways.

Highlights: Decarbonising Council Operations – Scope 3 Emissions

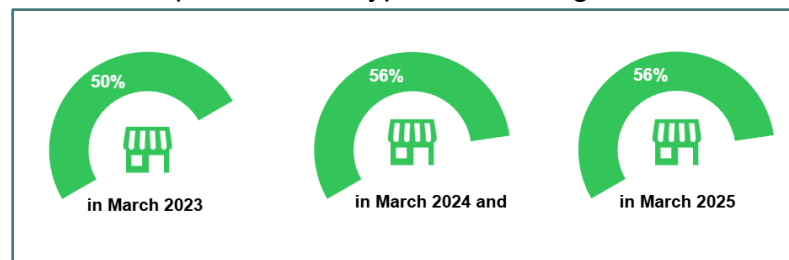


Credit Volker Highways: Clutton Depot pre and post redevelopment



B&NES and Volker Highways Roadmap

- The buildings that the Council owns and leases fall within its Scope 3 emissions. The percentage of council-owned commercial units with an EPC of A-C increased from 50% in March 2023 to 56% in March 2024 but had not changed by the end of March 2025. Higher EPCs mean that buildings that are leased from us will be more energy efficient and have lower emissions associated with them. It remains challenging to finance emissions-focused upgrades to our commercial estate because the Public Sector Decarbonisation Scheme has not been open to these types of buildings.



- The Council's Commercial Estate team have drafted the following measures for inclusion within the Corporate Estate Strategy that, subject to adoption, will have beneficial impacts on the Council's Net Zero commitment:
 - Continuing the programme to ensure commercial estate assets are Minimum Energy Efficiency Standards (MEES) compliant*; by assessing properties and where necessary commissioning works to ensure they can achieve an appropriate MEES compliance EPC rating assessment.
 - Engaging with the tenants when considering applications for Landlord's consent to carrying out works and encouraging them to adopt energy efficient options.
 - To work closely with the maintenance teams, especially at the design, scoping and specifying of works associated with the Commercial Capital Planned Programme of void refurbishments and other works of repair and maintenance, to ensure they incorporate sustainable measures.

* Current requirement for an E rated EPC, rising to C by 2030

Highlights: Decarbonising Council Operations – Scope 3 Emissions

CASE STUDY: Bath Sports & Leisure Centre Rooftop Bath Sports & Leisure Centre Rooftop Solar PV

B&NES Council owns the leisure centre building, and it is operated by GLL.

Rooftop solar PV with a maximum generation capacity of 90 kWp was installed in early 2025 using the Swimming Pool Support Fund grant administered by Sport England, that was won in 2024.

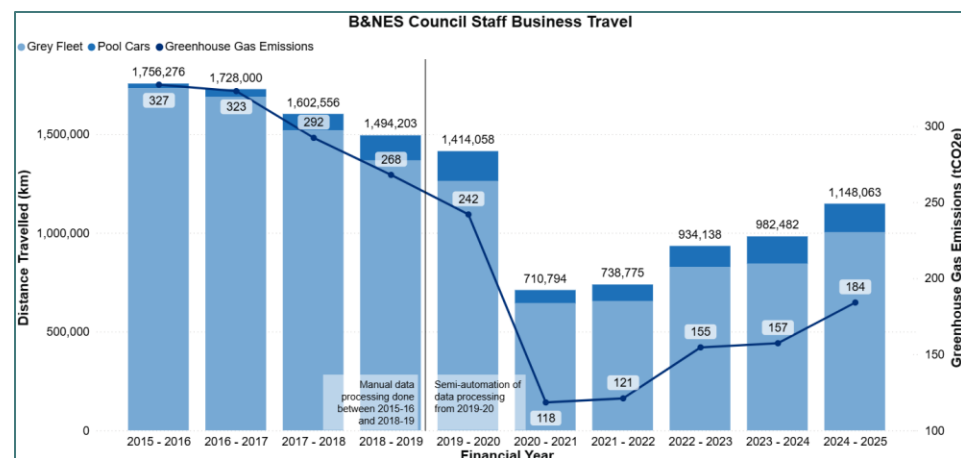
The project was delivered on time and in budget with an immediate effect of reducing electricity bills and carbon dioxide emissions for the sports and leisure centre complex. The solar PV array is laid out in an east and west configuration in order that the generation is spread more evenly across the day to account for electricity use in the morning and afternoon peaks.



Solar panels on the roof of the Bath Sports and Leisure Centre

Corporate Travel

- The majority of the emissions from corporate travel come from our grey fleet, which is when staff use their own vehicles for corporate travel. Remaining emissions come from the use of the Council's pool car fleet, leased through Co-Wheels. B&NES pool car fleet is either non-plug-in hybrid or electric vehicle.
- Though emissions associated with business travel were 44% lower in 2023-24 compared to 2015-16, they increased by 17% between 2023-24 and 2024-25. This is because this year, we report increased mileage visibility, and therefore emissions, associated with in-sourcing adult social-care services.
- The Corporate Travel Policy aims to encourage all employees to plan their journeys in such a way as to limit travelling to the lowest possible level, whilst maintaining the efficient and safe performance of their duties.



Ecological Emergency

Tackling the Ecological Emergency

Our Ecological Emergency Action Plan sets our priorities and the actions we are taking to tackle the ecological emergency. Our three priorities are to:

1. Increase the extent of land and waterways managed positively for nature;
2. Increase the abundance and distribution of key species; and
3. Enable more people to access and engage with nature.

We are not able to tackle the Ecological Emergency alone, but we recognise that we have an important role to play in tackling the Ecological Emergency, both through our own delivery and policy-making, and through supporting others to take action.

Much of our work on nature recovery so far is being delivered through our Strategic Green Infrastructure Projects, which have led place-based partnerships to benefit nature and people. We are now looking to step up our ambition by better integrating nature recovery across the Council, in areas such as planning, regeneration, management of our estate, and day-to-day operations. We recognise the importance of nature based solutions to adapting and building resilience to climate change.

This report provides an update on our progress in tackling the ecological emergency and summarises the work we have done as a council so far.

We look forward to continuing our work to help restore nature across the district and to bring people closer to the natural environment.



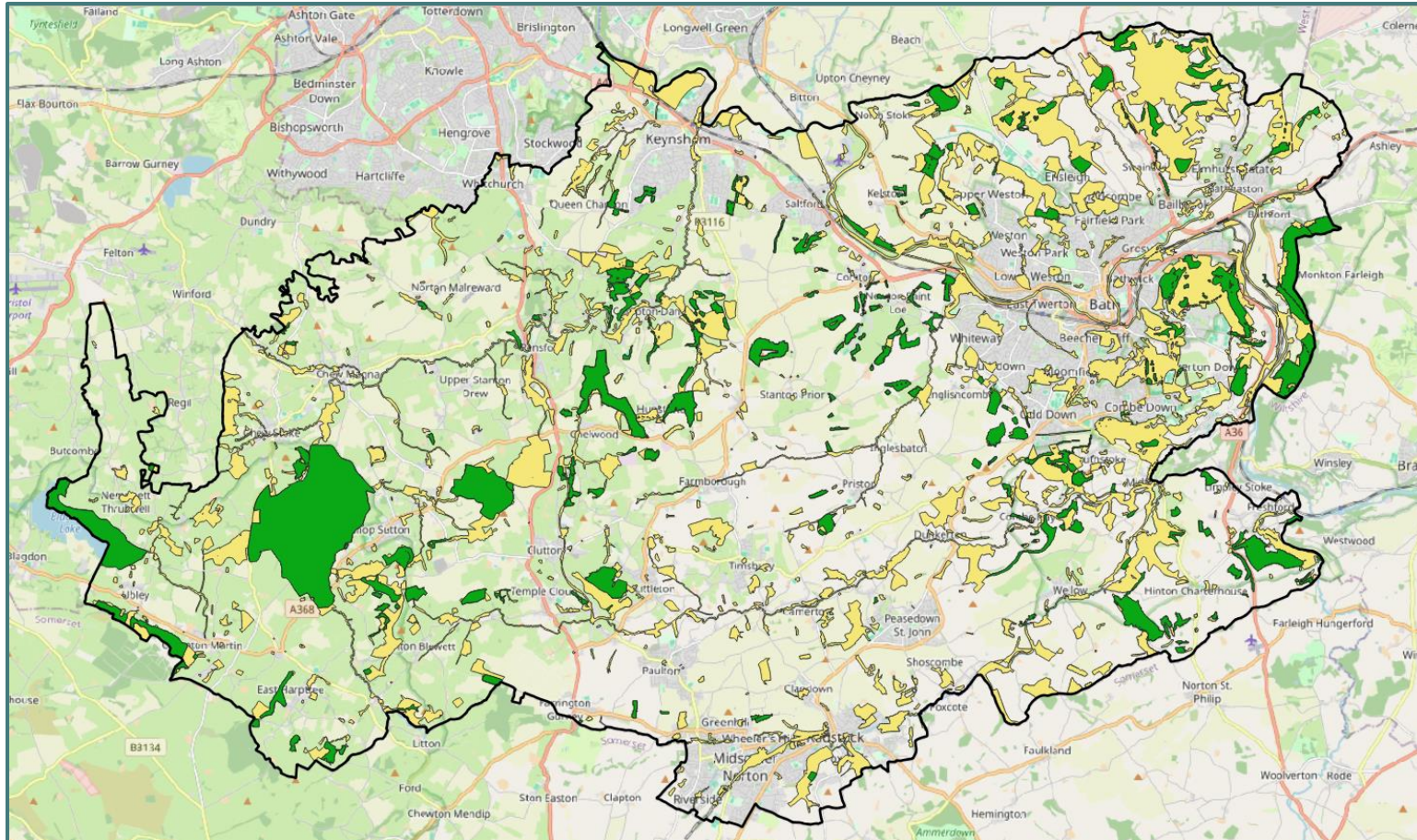
Councillor David Harding, Councillor Anna Box, Deputy Leader Sarah Warren, Green Infrastructure Project Manager Meg Collin, and Chew Valley Reconnected Partnership Chair Phil Heath visiting Chew Valley Lake.



A volunteer helping to lay a footpath through the wildflower meadow in Midsomer Norton Town park

Ecological Emergency: Where We Are Now – Bath & North East Somerset Council

This section of the Annual Report looks at the amount of land managed for nature across the district.



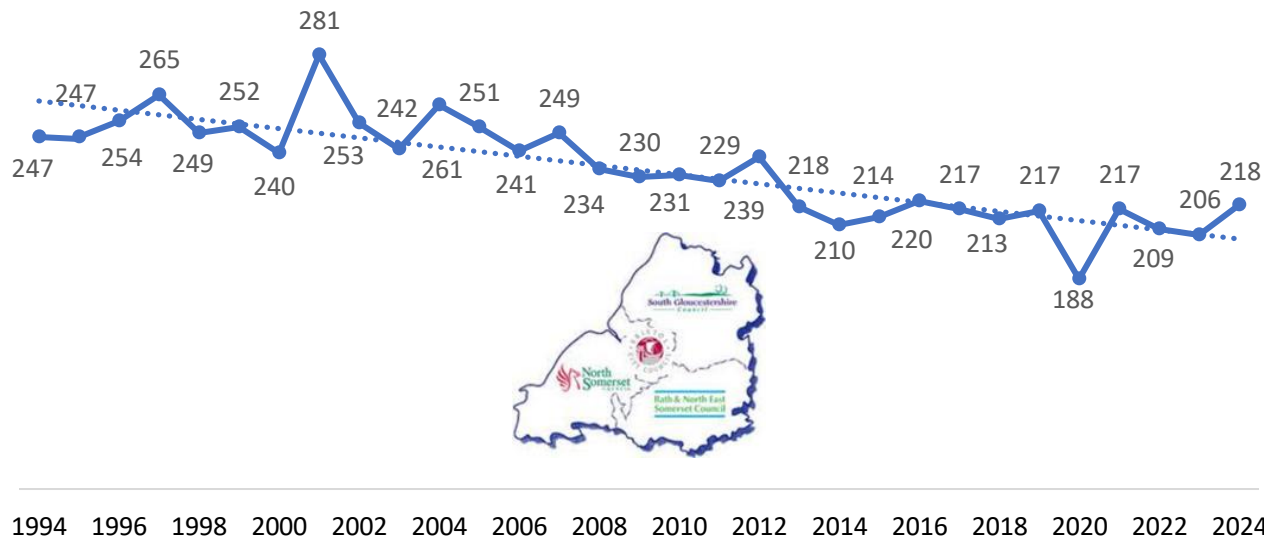
The West of England Nature Partnership has mapped the land managed for nature across the region. The map above shows the land that we are confident is already managed for nature in BANES in green, and land that may be being managed for nature in yellow. We are confident that 6.17% of land in BANES is currently managed for nature, with an additional 14.15% of land potentially being managed for nature. This compares with the ambition to have 30% of land managed for nature by 2030.

Ecological Emergency: Where We Are Now – Bath and North East Somerset District

Biodiversity - Increase the abundance and distribution of key species

The best data we have on wildlife populations is derived from the British Trust for Ornithology's annual Breeding Bird Survey. This data is only currently available for the whole of the West of England, but we expect the declines in BANES will mirror these changes.

Total bird records per km² square surveyed in the West of England



Between 1994 and 2024, bird populations across the West of England (Avon) fell by approximately 12%. Although these records only go back to 1994, from UK records we can be confident that populations would have fallen significantly before the mid-1990s. The overall decline also masks more drastic decline in certain species, particularly 'specialist' species and insect-eating birds. For example, the swift count in the region fell by 87%, and the cuckoo count by 95%.

As the decline in wildlife is associated with land use change, agricultural intensification, and pollution across the district (as well as climate change), B&NES council does not have direct control over the majority of actions that are needed to reverse the decline in wildlife. That is why we are committed to showing leadership and working in partnership to enable action across the district.

Highlights: Leadership and Evidence

Having declared an Ecological Emergency in 2020, it is crucial that B&NES council shows leadership in responding to the crisis facing nature. This year, we played a key part in developing the country's first Local Nature Recovery Strategy, and we have made good progress on monitoring the state of nature locally.

- Our leading approach to Biodiversity Net Gain (BNG) (B&NES was one of the first councils in England to adopt a BNG Policy) has enabled the ongoing establishment of seven offsite habitat banks in BANES, which will result in the creation of over two hundred hectares of habitats including species-rich grassland across the district. It has also meant we have seen early delivery of BNG by developments.
- The approach to the Local Plan has been reset due to updates to national Planning Policy, and we are still ensuring it will be our most ambitious for nature recovery. We are exploring the option of requiring 20% BNG, rather than the mandatory 10%, and planned policies include a requirement for sustainable drainage systems including 'SuDS', requirements for developments to have more and better 'green infrastructure', and local targets for tree cover.
- We have developed new Green Infrastructure(GI) Standards, aligning with national standards, to ensure new developments include required GI to ensure healthy places to live that are climate resilient and support nature recovery. The Standards will support increase in tree canopy cover, Local Nature Reserves, permeable surfaces, provision of local food growing space and play space.

- We have made significant progress on our ability to monitor the state of nature across the district. We have calculated the land being managed for nature across our own estate, and we have worked with WECA and neighbouring local authorities to establish a baseline for land managed for nature in BANES and to develop a regional 'wildlife index'.

CASE STUDY: Local Nature Recovery Strategy

Our Nature Recovery Manager led the development of the West of England Local Nature Recovery Strategy, which was the first in the country to be published in November 2024.

The LNRS sets priorities and 'focus areas' for nature recovery across the region, enabling us to better target our resources and ensuring planning decisions take account of opportunities for nature recovery.



The LNRS is launched at the West of England Nature Partnership (WENP) Conference

Highlights: Land and Investment

Managing more of our land for nature is one of the key ways the Council can directly contribute to nature recovery. This year, we have been diversifying the funding we use to manage more of our land for nature.

- Our Biodiversity Net Gain (BNG) Pathfinder project is enabling us to fund nature recovery on council-owned sites through the sale of BNG 'Units'. At Charlcombe Meadows, we are working with the Friends of Charlcombe Community Nature Reserve to enhance the 6.5 hectare site for biodiversity, and we are now developing similar plans for other sites.
- Page 158 Our Landscape City project is developing plans to improve the management of Council-owned sites in Bath for nature and people. This includes a masterplan for the former golf course at Entry Hill, improving the management of our woodlands, and developing proposals for an 'Ecology Hub' in the City.
- We are working on securing long-term Countryside Stewardship funding to further enhance the value of our parks and green spaces for nature by, for example, improving the species-richness of grass we are managing for wildlife.
- We are developing management plans for Council-owned land at Fox Hill and Nelson Ward Drive in Radstock to enhance their value for nature and have secured £250k of funding to deliver improvements.
- The [Bathscape Landscape Partnership](#) has continued its work improving the value of the landscape surrounding Bath

for nature. This year, work on enhancing Carr's Wood and Pennyquick Park has neared completion (see case study), and we have recruited a land management advisor to increase our capacity to survey nature-rich sites and to advise landowners on managing land for nature.

CASE STUDY: Enhancing Carr's Wood and Pennyquick Park

We are coming to the end of our works enhancing Carr's Wood and Pennyquick Park in Twerton for nature. Through Network Rail funding, our partners and teams of volunteers have spent the last few years planting trees, sowing wildflowers, running events and generally making the site more wildlife friendly.

The last of the works are now underway with our contractors to improve the condition of Carr's wood for wildlife, including replanting trees and shrubs where ash has been felled.

Almost 1000 trees have been planted, and grassland seeding should see wildflowers steadily increasing in the coming years.



Tree planting at Pennyquick Park

Highlights: Access and Engagement

Alongside restoring nature, one of our key commitments is increasing residents' access to and engagement with nature. We have a variety of projects that are engaging and empowering people to take action for nature locally, especially where this helps to tackle inequalities in access to greenspaces.

- The Bath River Line project has begun work to create a 10km linear park alongside the River Avon in Bath. This year we have delivered new seating, improved access to the river path and pollinator-friendly planting along the river path, as well as lots of engagement with residents and visitors (see case study).
- Page 159 The Somer Valley Rediscovered Greenspaces project has continued to engage thousands of local people through a variety of events including forest bathing, park yoga, and nature walks. It has achieved over 3,000 volunteering hours to help deliver nature recovery and access improvements at 5 public parks in Radstock and Midsomer Norton. This year has also seen the creation of a wild meadow footpath at Midsomer Norton Town park, accompanied by a new audio trail.
- Bathscape continues to engage thousands of people in and around Bath in the city's landscape through hundreds of wellbeing and tree walks, the September Walking Festival, bug hunting with local children, our monthly Footprints podcast, and much more. This year, we have also published a Wildlife Safari Bath guidebook and have run training sessions for volunteers on site surveying and tree care.

CASE STUDY: Festival of Nature

As part of the 2025 Festival of Nature, the Bath River Line project hosted a vibrant programme of events and activities designed to connect people with the River Avon and its surrounding green spaces.

Activities included an outdoor film screening, creative exhibitions, paddleboarding taster sessions, family-friendly craft day, and interactive displays. These events reached a diverse audience, offering accessible, engaging ways to experience nature in the heart of the city.

Each event encouraged reflection on river health, wildlife, and conservation, while promoting enjoyment and stewardship of the river.

Highlights included the “River in the Sky” installation at SouthGate (estimated to have been experienced by 9 million visitors) willow fish workshops with local schools, and the “Life on Water” photography exhibition.



Outdoor film screening as part of the Festival of Nature

Highlights: Working in Partnership

We are not able to reverse nature's decline alone, and we are fortunate to have lots of ambitious organisations taking action for nature in the district.

This year has seen more ambitious projects being developed, funded and delivered that we have either led or supported in partnership, including nationally significant programmes for trees and woodlands, and for calcareous grassland habitats.

- Together with the Forest of Avon Trust, we led a successful bid for the Western Forest to be chosen as England's second National Forest, with £7.5 million of funding for more trees and woodland across the West of England, Wiltshire and Gloucestershire (see case study).
- Last year, we supported Bristol Avon Rivers Trust in a successful bid to the West of England Green Recovery Fund to develop a farm cluster covering the Chew Valley and Cam & Wellow catchments. The cluster is now active and grants are being distributed to farmers and landowners to deliver interventions that enhance nature and improve water quality; we are represented on the Steering Group that oversees distribution of these grants.
- The West of England Nature Partnership (WENP), of which we are a funding member, has published nine '[Priority Programmes](#)' that represent partners' shared priorities (informed by the Local Nature Recovery Strategy) and show how we plan to target investment to bring nature back across the West of England. The Programmes were launched at the WENP Conference in November 2024, with speakers including politicians, environmental leaders, and prominent funders and investors such as Triodos Bank.

- The Big Chalk Partnership, on whose Board we sit, comprises more than 150 organisations with a common and ambitious vision of creating thriving chalk and limestone landscapes across southern England. Having only been established in 2023, the Partnership has gone from strength to strength in the past year, recently securing core funding for project staff and £750k for a new capital grants fund. Work is ongoing to develop a much more ambitious funding proposal.
- We have again supported the [Bristol Avon Catchment Partnership Fund](#), which provides seed-funding and small grants to enable partnership projects to carry out vital scoping, feasibility and community engagement work, as well as funding smaller community projects. The funding can be used for activities that improve the health of rivers and waterways across the catchment, and that improve people's enjoyment of and connection with the water environment.
- We have continued to take a leading role in the WaterSpace Partnership (covering the Avon corridor between Bristol and Bath), the Somer Valley Rediscovered Partnership, the Bathscape Partnership, and the Chew Valley Reconnected Partnership. The Chew Valley Reconnected Partnership has recently appointed its first independent Chair and is now developing partnership proposals to deliver nature recovery and climate resilient benefits across the catchment.
- We have contributed funding to Your Park Bristol & Bath to restore 15.6 hectares of habitats across 19 parks in Bristol and Bath, including meadows, ponds and woodland edges.

Highlights: Working in Partnership Continued

CASE STUDY: Western Forest

We have been successfully working in partnership towards our ambition to double woodland cover across BANES, and this year we have gone a huge step further by helping to secure £7.5 million of funding for a new National Forest.

We played a key role in the development of the successful bid to establish the 'Western Forest' as only the second National Forest in the country, together with partners including the Forest of Avon Trust and the Natural History Consortium.

The Western Forest covers the West of England, Gloucestershire and parts of Wiltshire, and will result in the creation of at least 2,500 hectares of new woodland and other tree habitats (such as agroforestry and orchards) in the first five years.

As well as creating new woodland habitat, The £7.5 million of funding will be used to enable farmers to integrate trees into their farm businesses in a way that is profitable, sustainable and benefits food production. A people and nature programme will include cutting-edge communications and will pilot innovative programmes around volunteering, health, education and access.

The Western Forest will accelerate the increase in tree and woodland cover across Bath and North East Somerset, building on successful projects including the 100-acre Great Avon Wood and the 422-acre Lower Chew Forest at Wick Farm.



Sources

- [1] **Council Climate Action Score Cards**. (2025). 2025 Action Scorecards. Available at: <https://councilclimatescorecards.uk/>
- [2] **The Climate Change Committee. (2020). Local Authorities and the Sixth Carbon Budget**. Available at: <https://www.theccc.org.uk/publication/local-authorities-and-the-sixth-carbon-budget/>
- [3] Department for Energy Security and Net Zero. (2025). **UK local authority and regional greenhouse gas emissions statistics**, 2005 to 2023. Available at: <https://www.gov.uk/government/collections/uk-local-authority-and-regional-greenhouse-gas-emissions-statistics>
- [4] Bath and North East Somerset Council. (2023). **Business Demography: Number of Enterprises, Economy, Strategic Evidence Base**. Available at: <https://www.bathnes.gov.uk/strategic-evidence-base-summary-and-topic-reports>
- [5] Bath and North East Somerset Council. (2025). **Housing Summary 1, Housing, Strategic Evidence Base**. Available at: <https://www.bathnes.gov.uk/strategic-evidence-base-summary-and-topic-reports>
- [6] Department for Transport. (2025). **Road traffic estimates (TRA), TRA8905: Motor vehicle traffic (vehicle kilometres) by local authority and selected vehicle type in Great Britain**. Available at: <https://www.gov.uk/government/statistical-data-sets/road-traffic-statistics-tra>
- [7] B&NES Climate & Ecological Emergency Performance Monitor (2025) **Strategic Climate Emergency Buildings and Renewable Energy Indicators**
- [8] Climate Change Committee. (2025). **The Seventh Carbon Budget**. Available at: <https://www.theccc.org.uk/publication/the-seventh-carbon-budget/>
- [9] Bath and North East Somerset Council. (2021). **Bath & North East Somerset Climate Emergency Strategy 2019-2030**. Available at: <https://www.bathnes.gov.uk/policy-and-documents-library/bath-north-east-somerset-climate-emergency-strategy>
- [10] Department for Transport. (2025) **VEH0132: Licensed ultra low emission vehicles (ULEVs) at the end of the quarter by fuel type, keepership (private and company) and upper and lower tier local authority: United Kingdom**. Available at: <https://www.gov.uk/government/statistical-data-sets/vehicle-licensing-statistics-data-tables>
- [11] Department for Transport. (2025). **VEH0105 Licensed vehicles at the end of the quarter by body type, fuel type, keepership (private and company) and upper and lower tier local authority: Great Britain and United Kingdom**. Available at: <https://www.gov.uk/government/statistical-data-sets/vehicle-licensing-statistics-data-tables>
- [12] Department for Transport. (2025) **Electric Vehicles Public Charging Infrastructure Statistics: July 2025**. Available at: <https://www.gov.uk/government/statistics/electric-vehicle-public-charging-infrastructure-statistics-july-2025>

Abbreviations

ABBE	Awarding Body of the Built Environment	CVRP	Chew Valley Reconnected Partnership
B&NES	Bath and North East Somerset Council	DESNZ	Department of Energy Security and Net Zero
BANES	Bath and North East Somerset District/Area	DFES	Distribution Future Energy Scenarios
BART	Bath Avon River Trust	DNO/DSO	Distribution Network Operator/ Distribution System Operator
BE	Battery Electric	EOI	Expression of Interest
BEV	Battery Electric Vehicle	EPC	Energy Performance Certificate
BNG	Biodiversity Net Gain	EVI	Electric Vehicle Infrastructure
BRL	Bath River Line	FTE	Full time equivalent
BSIP	Bus Service Improvement Plan	FWAG SW	Farming and Wildlife Advisory Group South West
BWCE	Bath & West Community Energy	FWD	Future Work and Design
CDP	Carbon Disclosure Project	GHH	Green Heritage Homes
CIHT	Chartered Institution of Highways and Transportation	GI	Green Infrastructure
CMPs	Carbon Management Plans	GLL	Greenwich Leisure Limited
CPD	Continuing Professional Development	GRF	Green Recovery Fund
CRSTS	City Region Sustainable Transport Settlements	HE/FE	Higher Education/Further Education
CSE	Centre for Sustainable Energy	HGV	Heavy Goods Vehicles

Abbreviations - Continued

HUG	Home Upgrade Grant	OZEV	Office for Zero Emission Vehicles
ICEV	Internal Combustion Engine Vehicles	PID	Project Initiation Document
KPI	Key Performance Indicators	RCV	Refuse Collection Vehicles
KRV	Kerbside Recycling Vehicles	REGO	Renewable Energy Guarantees of Origin
kWp	Kilowatt peak	RERAS	Renewable Energy Resource Assessment
LAEP+	Local Area Energy Plan	RESP	Regional Energy System Plans
LEAD	Local Energy Advice Demonstrator	SME	Small and Medium-Sized Enterprise
LEVI	Local Electric Vehicle Infrastructure	SNCI	Sites of Nature Conservation Interest
LGA	Local Government Association	SuDS	Sustainable Urban Drainage Systems
LLBCO	Local Listed Building Consent Order	SVR	Somer Valley Rediscovered
LNRS	Local Nature Recovery Strategy	TCR	Transport for City Regions
MEES	Minimum Energy Efficiency Standards	TIER	TIER Mobility Company
MW	Megawatts	UKSPF	UK Shared Prosperity Fund
NAP	Nature Action Plan	ULEV	Ultra Low Emissions Vehicle
NGED	National Grid Electricity Distribution	WECA	West of England Combined Authority (also known as the MCA)
NPPF	National Planning Policy Framework	WENP	West of England Nature Partnership

Glossary of Climate Emissions Terms

Scope 1 – Emissions are released as a direct result of an activity. For a local authority this will largely comprise combustible fuel for heating boilers and fuel burned in owned fleet vehicles.

Scope 2 – Emissions released as an indirect consumption of an energy commodity. For a local authority this will be the purchased grid electricity used in its operations (buildings, street lighting and for charging Electric Vehicles (EV)).

Scope 3 – Scope 3 emissions are all other indirect emissions produced by activities outside an organisation's own operations. For the Council, this includes emissions associated with our procurement of goods and services, outsourced contracts, the buildings we own but do not occupy, and our corporate travel. The Local Government Association (LGA) estimated that scope 3 emissions usually represent 70-80% of a local authority's total emissions.

CO₂e – Carbon Dioxide Equivalent is a standard unit for measuring carbon footprints. CO₂e expresses the impact of seven different greenhouse gas in terms of the amount of CO₂ that would create the same amount of warming.

Territorial Emissions - Territorial emissions cover emissions that occur within the UK's borders and are used to track UK-wide progress towards international and domestic targets. Territorial emissions arise from the direct (gas, petrol, diesel) and indirect (electricity) use of energy, including domestic, transport, public sector, commercial, industry, agriculture, land use, land use change and forestry and waste management. These are broken down by local authority boundary in Department of Energy Security and Net Zero (DESNZ) data.

Consumption Emissions - This accounts for all GHG emissions through the supply chain of goods and services consumed in the UK, wherever they are produced in the world. This includes emissions from UK imports of goods and services and excludes emissions arising from UK-produced goods that are exported.

Annex A: Progress on Actions

Progress on Actions – Climate and Ecological Emergency Action Plans

Annex A provides an update on our key actions contained within both our Climate Action Plan and Ecological Emergency Action Plan. Alongside each action, progress update and next steps, there is a numbered progress rating. The ratings correspond to the below:

- 1 = Action/strategy still in formation
- 2 = Action/strategy in place, but with no current outputs
- 3 = Action/strategy well underway with current outputs
- 4 = Action/strategy mature, with plans for redevelopment or additions
- 5 = Bespoke action/strategy now complete and considered finished

The Ecological Emergency Action Plan reporting remains the same for the 2024-25 year, but an updated Climate Action Plan has been included because new actions were added last year to those set in the Climate Strategy.

In this main report we provide a high-level overview of progress. Please see full Annex A for further detail of individual actions.

Progress on Actions – Summary of Progress – Climate Emergency

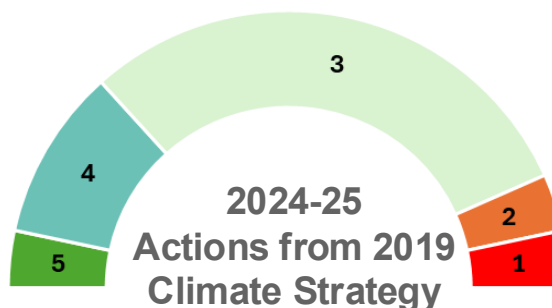
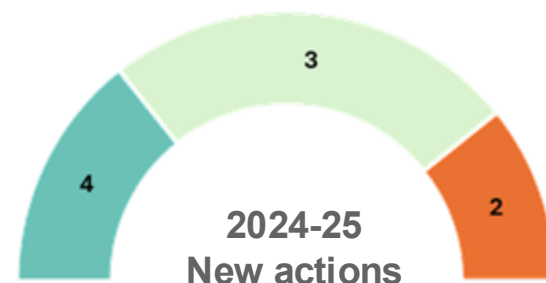
Summary:

- 29 actions are tracked, split between the 2019 Strategy (15 actions) and new actions set in 2023-24 (14 actions). The 14 new actions set in 2023-24, are reported on for first time in 2024-25.

Page 168

- 26 actions have either progressed their score or remained as ongoing work since 2023-24.
- Of the original 2019 Strategy actions, 10 actions score 3 and 4 and are ongoing works this year where progression to the next score is not yet expected.

Climate Emergency – Progress on Actions
Size of wedge indicates number of actions at each score
Number in each wedge is the score represented



Key to scores

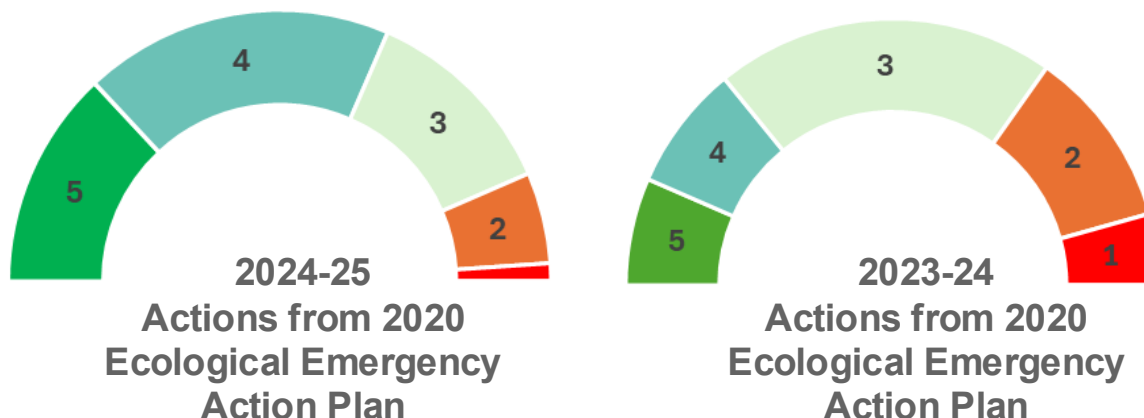
- 1** = Action/strategy still in formation
- 2** = Action/strategy in place, but with no current outputs
- 3** = Action/strategy well underway with current outputs
- 4** = Action/strategy mature, with plans for redevelopment or additions
- 5** = Bespoke action/strategy now complete and considered finished

Progress on Actions – Summary of Progress – Ecological Emergency

Summary

- 46 actions tracked
 - Progress made on 26 actions since 2023-24
 - 6 actions completed since 2023-24 update
- 87% of total actions in 2024-25 are well underway ('3') or more

Ecological Emergency – Progress on Actions
Size of wedge indicates number of actions at each score
Number in each wedge is the score represented



Key to scores

- 1** = Action/strategy still in formation
- 2** = Action/strategy in place, but with no current outputs
- 3** = Action/strategy well underway with current outputs
- 4** = Action/strategy mature, with plans for redevelopment or additions
- 5** = Bespoke action/strategy now complete and considered finished

This page is intentionally left blank



Bath & North East
Somerset Council

Improving People's Lives

Bath & North East Somerset
Annual Climate and Nature Progress Report 2024-2025
Annex A: Progress on Actions



TACKLING THE CLIMATE &
ECOLOGICAL EMERGENCY

Progress on Actions – Climate and Ecological Emergency Action Plans

The following pages provide an update on our key actions contained within both our Climate Action Plan and Ecological Emergency Action Plan. Alongside each action, progress update and next steps, there is a numbered progress rating. The ratings correspond to the below:

- 1 = Action/strategy still in formation
- 2 = Action/strategy in place, but with no current outputs
- 3 = Action/strategy well underway with current outputs
- 4 = Action/strategy mature, with plans for redevelopment or additions
- 5 = Bespoke action/strategy now complete and considered finished

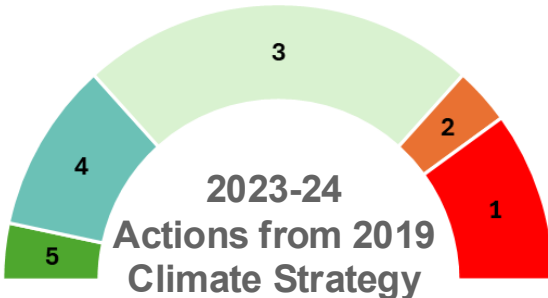
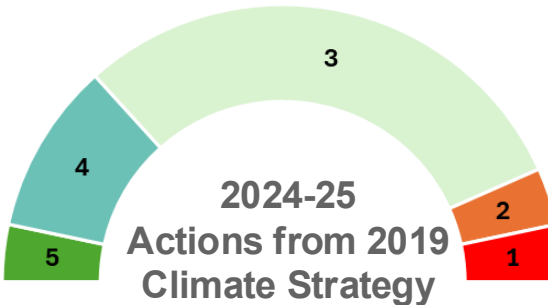
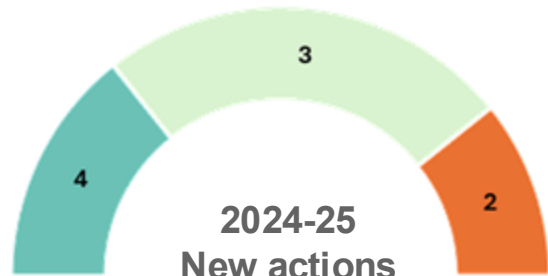
The Ecological Emergency Action Plan will remain the same for the 2024-25 year, but an updated Climate Action Plan has been included because new actions were added last year to those in the 2019 Climate Strategy.

Progress on Actions – Summary of Progress – Climate Emergency

Summary:

- 29 actions are tracked, split between the 2019 Strategy (15 actions) and new actions set in 2023-24 (14 actions). The 14 new actions set in 2023-24, are reported on for first time in 2024-25.
- 26 actions have either progressed their score or remained as ongoing work since 2023-24.
- Of the original 2019 Strategy actions, 10 actions score 3 and 4 and are ongoing works this year where progression to the next score is not yet expected.

Climate Emergency – Progress on Actions
Size of wedge indicates number of actions at each score
Number in each wedge is the score represented



Key to scores

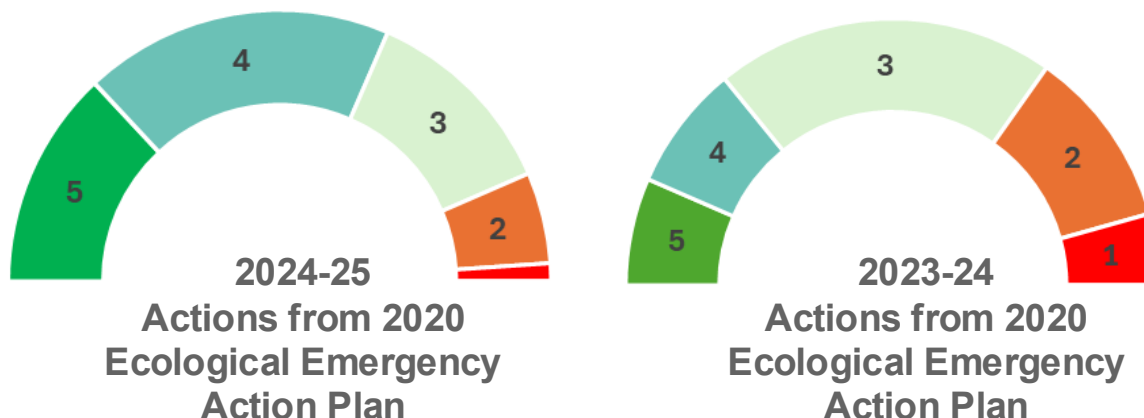
- 1** = Action/strategy still in formation
- 2** = Action/strategy in place, but with no current outputs
- 3** = Action/strategy well underway with current outputs
- 4** = Action/strategy mature, with plans for redevelopment or additions
- 5** = Bespoke action/strategy now complete and considered finished

Progress on Actions – Summary of Progress – Ecological Emergency

Summary

- 46 actions tracked
- Progress made on 26 actions since 2023-24
- 6 actions completed since 2023-24 update
- 87% of total actions in 2024-25 are well underway ('3') or more

Ecological Emergency – Progress on Actions
Size of wedge indicates number of actions at each score
Number in each wedge is the score represented



Key to scores

- 1** = Action/strategy still in formation
- 2** = Action/strategy in place, but with no current outputs
- 3** = Action/strategy well underway with current outputs
- 4** = Action/strategy mature, with plans for redevelopment or additions
- 5** = Bespoke action/strategy now complete and considered finished

Progress on Actions – Climate Emergency – Decarbonising Buildings

No.	Action	Progress Update	Next Steps	Progress Rating
A1.1	Development of strategic approach to home energy efficiency retrofit and decarbonisation of heat.	A cross organisation retrofit working group has been established which brings together partners and providers across Bath and North East Somerset to understand, promote and support local advice and delivery services.	Finalising Council's Retrofit Enabling Plan for domestic properties, to supplement the new Climate and Ecological Emergency Strategy. This will be an ongoing group which will help us to understand where there may be local gaps in knowledge, understanding and delivery and identify ways in which we can offer further support.	3
		<p>Preliminary outputs which identify above and below ground opportunities for using waste heat from the abandoned coal mines are being explored with a working group from WECA.</p> <p>Working group convened to discuss wider heat network opportunities with Future Ambition Board Anchor Institutions to understand how B&NES can support wide development.</p>	<p>Pin-point single location for drilling exploratory boreholes to compare real world results with desktop studies. Final selection of site to take forward to this stage will be made from 5 sites identified across Bristol, South Glos, and BANES, with 2 of those five sites being in BANES.</p> <p>Work is due to start on a shortlist of homes from August 2025 onwards, based on those who had signed up for HUGS funding.</p>	
A1.2	Energy profiling of the housing stock in BANES and analyse cost effective interventions.	Completed		5

Progress on Actions – Climate Emergency – Decarbonising Buildings 2

No.	Action	Progress Update	Next Steps	Progress Rating
A1.3	Promote government grant schemes including for low-income households, to maximise uptake locally. Explore options to increase direct support for low-income households.	As part of a consortium with Bristol and North Somerset, BANES will be benefitting from a share of £11m in Warm Homes: Local Grant.	<p>Work is due to start on a shortlist of homes from August 2025 onwards, based on those who had signed up for HUGS funding.</p> <p>Continue to raise awareness and use of current support offers, for example, through the Energy at Home website.</p>	3
A1.4	Develop communication strategies to drive public interest and access to information about retrofit and domestic renewables.	<p>Funding received for specialist communications skills to help tailor messages, amplify the work of partner organisations and improve customer journeys to encourage uptake of retrofit advice.</p> <p>Communications are ongoing across the Combined Authority area to raise the profile of the Retrofit West Programme.</p>	<p>Promote uptake of retrofit and domestic renewables with trained volunteers working as part of the Community Energy Network.</p> <p>Further develop communications approach to amplify support available for retrofit and renewables, e.g. via Green Heritage Homes, Green Open Homes and Solar Together projects.</p> <p>Take part in activities with local community energy groups, including with civic partners to understand retrofit needs.</p>	3

Progress on Actions – Climate Emergency – Decarbonising Buildings 3

No.	Action	Progress Update	Next Steps	Progress Rating
A1.5	Develop planning policies and guidance to enable energy efficiency improvement of buildings.	<p>B&NES has the following policies in place which support the energy efficiency improvement of buildings:</p> <ul style="list-style-type: none"> • Policy SCR6: New Build Residential Development • Policy SCR7: New Build Non-residential Development • Policy SCR8: Embodied Carbon • Policy SCR5: Water Efficiency <p>As a result of changes to National Planning Policy and the government's proposed revised housing figure, the Local Plan is being reset. This doesn't mean starting again – the work done already to consult on these policies is still very relevant, as are the responses we received to our consultation in 2024, which we have been considering carefully.</p>	A second options document will be going to public consultation in the autumn, consulting only on new policy areas or policy options where required as a result of changes in circumstances, including a climate adaptation and resilience policy and a retrofit-first policy.	3

Progress on Actions – Climate Emergency – Decarbonising Buildings 4

No.	Action	Progress Update	Next Steps	Progress Rating
A1.6	Maximise benefits to BANES residents from WECA Retrofit Accelerator Hub.	<p>Continue to identify opportunities to maximise benefits to BANES residents from Accelerator as a whole, including ongoing engagement with the Combined Authority retrofit steering group.</p> <p>Funding received from WECA for 2 days/week of comms professional to help tailor messaging and promote the Retrofit West service to more BANES residents.</p> <p>Work with partners including Bath College to provide business support and skills training to grow the retrofit supply chain locally.</p>	<p>Continue to attend regular activity and events with Retrofit West to ensure all messaging, updates offers etc are reflected to homeowners and businesses across the region.</p> <p>Carry out audit of existing comms channels and Energy @ Home website to make sure the customer journey is simplified and rewarding.</p> <p>Continue collaborations with retrofit projects and business and skills to share knowledge and collaborate effectively..</p> <p>Look for opportunities to collaborate with community groups to work with sectors which require encouragement to carry out more retrofit work (e.g. Private Sector landlords)</p>	3

Progress on Actions – Climate Emergency – Decarbonising Transport

No.	Action	Progress Update (2023-4 activity)	Next Steps (planned 2024-5 activity to Autumn 2025)	Progress Rating
A2.1	Development of a suite of capital programmes to contribute to a reduction in car use by 25% in BANES.	<p>Progression of design development and delivery of the following CRSTS projects that enable a shift towards more sustainable modes of transport and lower transport emissions:</p> <ul style="list-style-type: none"> • Bristol to Bath Strategic Corridor • Somer Valley Links • Bath City Centre • Liveable Neighbourhoods • Bath Walking, Wheeling & Cycling Links • Bath Quays Links • Scholars Way 	<p>Bath Quays Links and Scholars Way - commence construction</p> <p>Bristol to Bath Strategic Corridor – undertake the final stage of public consultation</p> <p>Remainder of projects – continue to develop the business cases</p>	3
A2.2	Increasing ability to estimate whole-life carbon emissions of transport impact from development projects.	We produced Carbon Management Plans (CMPs) and carried out Greenhouse Gas assessments as part of the economic appraisal for CRSTS projects.	Continue to produce CMPs and quantify carbon reduction as part of business case development of CRSTS projects.	3

Progress on Actions – Climate Emergency – Decarbonising Transport 2

No.	Action	Progress Update	Next Steps	Progress Rating
A2.3	Work with NGED as DNO/DSO to increase grid capacity in BANES to allow for faster rollout of EV fast chargers.	Delivery of EVI is being discussed frequently with NGED at a high level and in more detail with local Network Planners. Required connections for OZEV LEVI EV chargers are likely to have a small capacity requirement and NGED do not envisage any issues with providing connections.	Continue DNO operational meetings, focusing on supporting significant EVI work packages of WECA Green Recovery Fund (GRF) and OZEV Local Electric Vehicle Infrastructure (LEVI) fund. Once the operator for the LEVI fund has been appointed, they will be introduced to NGED as they will be responsible for connections.	3

Progress on Actions – Climate Emergency – Increasing Local Renewable Energy Generation

No.	Action	Progress Update	Next Steps	Progress Rating
A3.1	Develop an evidence base to inform new Local Plan and future workstreams regarding potential deployment of renewable energy in BANES.	<p>The evidence base, the Renewable Energy Resource Assessment (RERAS, technical resource assessment) was published in 2022.</p> <p>A project funded via Bristol City Council, Mission Net Zero, has given the Council access to a new Local Area Energy Planning tool that can inform spatial planning and identification of new projects.</p> <p>The Options consultation for the new Local Plan includes potential safeguarding of renewables sites identified in the RERAS</p>	Complete new Local Plan, reviewing consultation response and updating policies accordingly	4
A3.2	Develop communication and engagement strategies to drive public interest / access to information and expertise about renewable energy.	[Action combined with #1.4]		n/a

Progress on Actions – Climate Emergency – Increasing Local Renewable Energy Generation

No.	Action	Progress Update	Next Steps	Progress Rating
A3.3	Development of Energy Strategy to provide strategic framework and outline of short and longer-term actions.	Energy actions for the Council will be captured in Climate & Ecological Emergency Strategy due 2026, rather than publishing a standalone Energy Strategy. More detail will be set out in a Net Zero Council action plan (for Council's own estate and assets); a Retrofit Enabling Plan; and the outputs of the Mission Net Zero Regional Climate Investment Plan	Working with external stakeholders to translate the outputs from the Mission Net Zero Regional Climate Investment Plan into an action plan for the district	1

Progress on Actions – Climate Emergency – Decarbonising Council Operations

No.	Action	Progress Update	Next Steps	Progress Rating
A4.1	Develop pipeline of Council renewables projects in line with 2030 target for 12MW installed capacity.	[Replaced with action 4.3 in new actions for 2025]		3
A4.2	Put in place the framework and policies for measuring and reducing the council's Scope 3 emissions.	Limited progress on Scope 3 emissions. Analysis is available on where our Scope 3 emissions are coming from and we have continued to learn from partners about best practice in this area. We seek understanding of other neighbouring authority and regional approaches. Specific work continues for our heritage estate scope 3.	Support the implementation of the Council's November 2024 Procurement Strategy. Develop and pilot approaches to measurement with key teams and suppliers. Set out approach as part of updated Climate Emergency Strategy.	2
A4.3	Waste Services action to reduce operational carbon emissions.	The Keynsham Recycling Hub site is completed and opened to the public. The site includes a 780 KWP solar array, EV charging, waste-water recycling for vehicle washing and >10% biodiversity net gain. The Council is progressing its plans to relocate its Bath Recycling Centre. This places the Climate and Ecological Emergency policy at the fore. It aims to reuse existing infrastructure wherever possible so that the overall carbon footprint of the development is minimised.	Continue planning and testing for the electrification of waste fleet, more detail under action 4.5. The Bath Recycling Centre is due to open in 2026.	4
A4.4	Property Services projects to reduce carbon emissions from the Council's corporate estate.	[Action combined with #4.1]		n/a

Progress on Actions – Climate Emergency – Decarbonising Council Operations 2

No.	Action	Progress Update 2024/25	Next Steps 2025/26	Progress Rating
A4.5	<p>Decarbonising Council fleet programme.</p> <p>With most of the fleet due for renewal in the short term, B&NES has the opportunity to decarbonise a significant proportion of it, ahead of the 2030 net zero target.</p> <p>Based on assessment of the fleet, and available zero-emission technologies, battery electric (BE) will be the most suitable alternative in most cases to replace current internal combustion engine vehicles (ICEVs).</p> <p>Of those ICEVs which will be replaced, 65% (112) of the fleet are directly suited for replacement with BEVs. 33% (57) would need more clarification.</p>	<p>Budget provision has been secured to replace recycling and refuse trucks as they become due for replacement.</p> <p>Identification, feasibility and trialling of both kerbside recycling vehicles (KRVs) (April 2025) and refuse collection vehicles (RCVs) (June 2025).</p> <p>RCV trials concluded that Mercedes eEconic demonstrated and was technically suitable but questions about size as they do not build a narrow chassis. Proposed to purchase 6 eEconic's of the 12 vehicles required to ensure they are suitable for all routes. Consideration will then be made at a later date between the new Dennis eCollect (when available) and the eEconic for the remaining 6 vehicles.</p> <p>Romaquip (KRV) trials were positive and proved it was fit for purpose for replacing the 30 end of life vehicles. Further trials are arranged for December 2025 to test the vehicle in colder weather.</p>	<p>Progressing mid size replacements with EV for vehicles in Community Equipment, Waste, refuse collection, at Haycombe Crematorium and Parks. 2024/25 Purchases include:</p> <ul style="list-style-type: none"> 3x Electric Motorcycles (Parking Services) 6x Electric Vans (Various Council Teams) 3x Electric Carts (City Centre Cleaning) 2x Electric Ride on mowers (Haycombe Crematorium) 1x Electric utility vehicle (Cleansing) <p>Work through costings where trials and assessments are demonstrating EVs are suitable. Confirm purchase of 6 RCV eEconic's for 2025/26.</p> <p>Carry out December 2025 testing of Romaquip KRVs. KRV purchase would be in 2027/28.</p> <p>Fleet Transition Plan is being developed for review by Council, alongside buildings decarbonisation plans.</p>	3

Progress on Actions – Climate Emergency – Decarbonising Council Operations 3

No.	Action	Progress Update	Next Steps	Progress Rating
A4.6	Aligning council policies and plans.	<p>Climate and Nature Strategy update work started to bring together Climate and Ecological strategy and plans at the mid-point to 2030, to evidence how the Council will deliver the Corporate Strategy Core Priority of Tackling the Climate and Ecological Emergencies</p> <p>Local Plan development continues to support strong environmental policies. Please see action 1.5</p> <p>Work started to define and build the business case for managing more of our land for nature</p>	<p>Work with the BANES community through a variety of ways to test and develop strategy areas. This will include working with civic partners through the Future Ambition Board to start transition planning respective contributions.</p> <p>Continued consultation for Local Plan reset. Please see action 1.5</p> <p>Gain agreement for the principles that underpin being a Nature Positive Council</p>	4

Progress on Actions – Climate Emergency new actions for 2024-25 - Buildings

No.	Action	Progress Update	Next Steps	Progress Rating
Buildings				
B1.1	<p>a) Deliver 30x Level 0 pre-apps and sign up 50x Listed Building Energy Champions</p> <p>b) Progress 10x retrofit planning applications/full pre-apps</p> <p>c) Develop online guidance pages for Green Heritage Homes project</p> <p>d) Delivery of homeowner engagement via webinars, surgeries, and wider promotion of services</p> <p>e) Engage planners in GHH training modules to enable more planning approvals for retrofit of listed buildings</p>	<p>a) Total 26x Level 0 pre-apps and 43x Listed Building Energy Champions completed</p> <p>b) 83x planning applications/pre-apps completed and monitoring process set up for retrofit apps/pre-apps issued</p> <p>c) Creation of resources including listed building factsheets and bitesize retrofit videos, made available on B&NES website</p> <p>d) Hosting 4x listed building surgeries, 2x online webinar modules on heritage significance and the consent process and presentation of project at external meetings, webinars, and seminars</p> <p>e) Funding of ABBE Level 3 qualification for project officers and CPD sessions for officers, including Green Register training and vacuum glazing CPD session (also attended by Historic England)</p>	<p>Progress and deliver Green Heritage Homes Phase II from April 2025 for a three-year fixed term period.</p> <p>Key actions:</p> <ul style="list-style-type: none"> - Continue delivery of Level 0 pre-app and retrofit casework - Progress LLBCO for solar panels in the conservation area - Ongoing enablement of retrofit – working with social housing provider - Addressing the supply chain 	4

Progress on Actions – Climate Emergency new actions for 2024-25 – Buildings 2 and Transport

No.	Action	Progress Update	Next Steps	Progress Rating
Buildings				
B1.2	Support the programme of Green Open Homes events with Bath and West Community Energy	Held a Green Open Homes weekend in Autumn 2024, delivered in partnership with BWCE, Bath Preservation Trust, Buro Happold and Transition Bath.	Work with partners to agree next steps for the Open Homes Programme, including Green Heritage Homes Champions.	4
B1.3 Page 187	Work with West of England Mayoral Combined Authority and local delivery partners to promote Retrofit West advice and support to B&NES residents ensuring uptake is proportional to other Unitary Authority areas	Regular working with Retrofit West and WECA. All comms officers involved to evaluate progress and agree next steps.	Carry out audit of retrofit comms and update digital and print materials in order to maximise impact.	3
B1.4	Support town and parish Councils and community groups to access funding and expertise to retrofit Community Buildings	Convened a retrofit working group	Understand whole picture of community retrofit activity in the area and identify any gaps	2

Progress on Actions – Climate Emergency new actions for 2024-25 – Buildings 2 and Transport

No.	Action	Progress Update	Next Steps	Progress Rating
Buildings				
B1.5	Promote WECA Green Business Grants to support rollout of rooftop solar and heat pumps to commercial buildings	<p>This year to date the council has helped the following with carbon-reduction installations: clothing (Westfield Industrial Estate), food and drink (High Street, Keynsham), food and drink (The Maltings, Bath), tourism (High Street, Bath).</p> <p>Monthly outreach is undertaken by the council's Business Engagement Officer, with team colleagues from the West of England Mayoral Combined Authority. Both B2B and B2C are approached. All major B&NES industrial estates have been visited.</p> <p>The West of England Mayoral Combined Authority is running a LinkedIn Lead generation campaign from July – September 2025</p>	There are ongoing expressions of interest (EOI) raised at businesses such as: environmental (Brassmill Enterprise Centre, Bath), precision engineering (The Maltings, Bath), precision engineering (Midsomer Norton), food and drink (High Street, Midsomer Norton) and hospitality (High Street, Bath).	3
2. Transport - Detailed plans for transport are set out in the Journey to Net Zero plans for Bath and for North East Somerset				

Progress on Actions – Climate Emergency new actions for 2024-25 - Renewables

No.	Action	Progress Update	Next Steps	Progress Rating
Renewables				
B3.1	Ensure the Local Plan provides a supportive policy environment to reach the target of 300MW of in-district generation by 2030 with updated policy re enabling wind development in line with new central government policy.	Local Plan policy on wind generation is being reviewed as part of Local Plan Update, in line with revised NPPF	Complete Local plan options consultation and policy review	3
B3.2	Develop a Local Area Energy Plan for Bath & North East Somerset through the regional Mission Net Zero project (completion date November 2025).	The Mission Net Zero project was funded by Bristol City Council via an Innovate UK grant. One project within the programme was creation of a Regional Climate Investment Plan and Pipeline. The project has given all councils in the region access to the LAEP+ tool, an energy planning tool that supports spatial planning. The project is at a regional level and therefore the outputs do not include a detailed Local Area Energy Plan for BANES. The LAEP+ tool can be used to inform local energy planning within the Council, with stakeholders, and to feed data into Regional Energy System Plans (transitional plans due 2026, full RESP due 2027) that will inform the next period of network investment in 2028-2033.	Secure additional resource beyond November 2025 to enable the use of the LAEP+ tool to be embedded in Council processes, and to engage local stakeholders in energy planning. Continue to support the development of Regional Energy System Plans via the new RESP South West office.	3

Progress on Actions – Climate Emergency new actions for 2024-25 – Renewables 2

No.	Action	Progress Update	Next Steps	Progress Rating
B3.3	Develop a business case for Council to co-invest in renewables sites for local Community Energy projects via a Joint Venture	Council is reviewing options for investment in local projects based on updated modelling provided by consultants. This includes a variety of options including loans, power purchase agreements, and a Joint Venture. The government's Local Power Plan is intended to provide support for Local Authority and Community Energy partnerships and could unlock opportunities to co-develop projects; detail of the support available is due to be published by the end of 2025.	Finalise options for investment once details of Local Power Plan published (2025) and take a strategic decision on options to pursue	3
B3.4	Support development of local Community Energy groups through Cooperation Agreements, exploring opportunities for joint projects to accelerate delivery (including solar project with Keynsham Community Energy on Keynsham Leisure Centre)	<p>The Council has continued throughout 2025 to pursue the rooftop solar project with Keynsham Community Energy for Keynsham Leisure Centre. Significant officer time has been contributed to the project in-kind and it is hoped installation can take place in 2025.</p> <p>A grant of £71k capital funding was awarded by Bath and West Community Energy to the Fairy Hill solar farm in Compton Dando, via the UKSPF Rural fund.</p>	<p>Complete Keynsham solar project</p> <p>Continue to support development of new Community Energy projects via Cooperation Agreements</p>	4

Progress on Actions – Climate Emergency new actions for 2024-25 – Renewables 3

No.	Action	Progress Update	Next Steps	Progress Rating
B3.5	Work with Distribution Systems Operator and new Regional Energy System Planner to understand grid opportunities and constraints locally, and unlock new investment to meet future demand	The Council responded to information requests from NGED and the newly formed Regional Energy System Planner (RESP) to inform network planning for the new price control period 2028-2033. Quarterly strategic meetings take place with NGED stakeholder manager and local grid engineers	<p>Continue to engage in RESP process as new regional governance is implemented</p> <p>Secure additional resource to implement use of the LAEP+ tool within the Council to inform spatial energy planning in collaboration with the WECA.</p>	4

Progress on Actions – Climate Emergency new actions for 2024-25 – Council Operations

No.	Action	Progress Update	Next Steps	Progress Rating
Council Operations				
B4.1	Develop an implementation plan for decarbonisation of the council's own vehicle fleet	[See 4.5 above for update]		
B4.2	Develop a full plan for heat decarbonisation of Corporate Estate by 2030 including costed Heat Decarbonisation Plans for each significant building	Following a budget allocation of £4m over 5 years, a £250k decarbonisation programme has been approved for 25/26 that includes feasibility studies, technical support, Pulteney Hydro Scheme feasibility and building intelligence data project.	Completion of Stage 2 of Hydro feasibility work; commencement of 2 heat decarbonisation projects using PSDS award; further Energy Assessments and Heat Decarbonisation Plans for the corporate estate.	3
B4.3	Develop pipeline and costing for 12MW Council owned renewable generation by 2030 (including a minimum 2MW of wind), and deliver an additional 230KW installed capacity in 2024-25	Completion of the Bath Sports and Leisure Centre rooftop solar project (90kWp) and approval for rooftop solar projects including Carrswood Day Centre; Pump Room; and Odd Down Sports Ground. Business case and PIDs in progress for other sites.	Completion of Carrswood; Odd Down Sports Ground and Pump Room rooftop solar PV. Completion of business cases for solar canopies at car parks. PID approval for Parkside solar and St Keyna grant funded rooftop solar.	3
B4.4	Develop and pilot approaches to measure and reduce Council Scope 3 emissions. Set out approach as part of updated Climate & Nature Strategy.	Used LGA tools to set Scope 3 boundary Reviewed sustainable procurement models at West of England local authorities and at West of England Mayoral Combined Authority to seek common approach Heritage Services pilot work with Roman Baths shop suppliers	Review spend based analysis Scope 3 work from 2021 vs LGA boundary to report more fully in 2026 Agree resource to manage development of approach to Sustainable Procurement to support implementation of the 2024 Procurement Strategy Set Scope 3 target	2

Progress on Actions – Climate Emergency new actions for 2024-25

No.	Action	Progress Update	Next Steps	Progress Rating
Other				
B5.1	As part of the development of the new Climate & Nature Strategy, set out our approach to climate change adaptation and resilience, including identifying priority actions.	Our new Strategy for Climate & Nature adds climate resilience to the overarching outcomes we are working towards: Net Zero, Nature Positive and Climate Resilient. As a result, climate adaptation and resilience is being embedded as a cross-cutting theme in the Strategy, with new priority actions being identified alongside recognising existing actions that deliver for nature recovery and net zero and help our communities and places prepare and build resilience to the impacts of climate change.	Development of a programme of work to mitigate risk to delivery of council Services. More specific place-based climate risk assessments and adaptation action planning with partners, to be planned and delivered and feed into the Climate and Nature Strategy	2

Progress on Actions – Ecological Emergency – Leadership and Evidence

No.	Action	Progress Update	Next Steps	Progress Rating
C1.1	Integrate the ecological emergency into the strategic framework that will be set out in the next Corporate Strategy (2024-)	Corporate Strategy published in 2023, including references to the Ecological Emergency. Action Completed.		5
C1.2	Roll-out and embed a Council-wide decision support tool to ensure potential impacts on nature inform all major decisions and projects across the Council, mitigating impacts where necessary.	The decision support wheel has been used to evaluate the impact of projects on biodiversity, land, water, soil (among other things).	Use learnings from the initial rollout of the wheel to ensure it is being used in a way that properly captures the impact of projects on the environment and, where necessary, balances these against social impacts.	4
C1.3	Ensure the Council's Commercial Strategy supports the vision of being Nature Positive by 2030 and helps tackle the ecological emergency. This should include a framework for using the West of England Nature Recovery Network and, when published, the West of England Local Nature Recovery Strategy, to inform land acquisition, management and disposal.	We have informed decisions on potential asset disposal and management this year and will continue to be involved in these decisions.	Identify options for improved management for nature for sites that we have requested are retained for their value to nature, and how this can be funded.	4

Progress on Actions – Ecological Emergency – Leadership and Evidence 2

No.	Action	Progress Update	Next Steps	Progress Rating
C1.4	Produce and deliver an ecological emergency literacy training programme for Council employees and members.	<p>The West of England Mayoral Combined Authority is working on a nature literacy package, which we will support and utilise.</p> <p>We updated our internal online training on climate and nature in 2024.</p>	Support the Combined Authority in the development of a nature literacy package.	3
C1.5 Page 195	Produce a guidance note for renewable energy projects, including solar and wind developments, to embed management for nature into their schemes.	We have identified an existing guidance note that has been included in the pre-application process for solar developments.	Monitor how the guidance note is being used in the pre-application process	5
C1.6	Ensure policies and guidance in the new Local Plan address the ecological emergency and improve access to nature, and consider adopting Building with Nature standards.	<p>The previous Local Plan Options Document included a number of options that would help address the ecological emergency.</p> <p>We are in the process of revising the Options Document as part of the Local Plan Reset, and it will be published later this year.</p>	We will finalise the revised Local Plan Options Document, which will again include options for a number of policies that will help tackle the ecological emergency and improve people's access to nature.	4

Progress on Actions – Ecological Emergency – Leadership and Evidence 3

No.	Action	Progress Update	Next Steps	Progress Rating
C1.7	Evaluate the feasibility of setting a higher requirement for biodiversity net gain, above the mandatory figure of 10%.	Mandatory biodiversity net gain (BNG) has been in force since January 2023, over a year ahead of the national deadline.	Evaluate responses to the Options Document to inform next steps regarding a 20% BNG Policy.	3
		The previous Local Plan Options Document included options to require 20% biodiversity net gain, which will be included in the revised Options document.	Ascertain the BNG requirements for the site allocations in the Local Plan and consider how these will be delivered.	
		We have drafted a paper setting out the need for 20% Net Gain to support this Option.		
C1.8	Review and update the Council's approach to food to integrate opportunities to reduce the impact of food production on nature.	The Food Strategy is currently in development, with drafting expected to be completed by the end of 2025.	Continue work to develop the Food Strategy in partnership.	4
C1.9	Incorporate standards related to nature recovery in the council's minimum standards for procurement.	The B&NES Procurement Strategy was published in 2024, with an ambition to 'embed sustainability and climate action in to all procurement activity'.	Seek resource to implement a model for sustainable procurement with suppliers (for both climate and nature).	3

Progress on Actions – Ecological Emergency – Land and Water Management

No.	Action	Progress Update	Next Steps	Progress Rating
C2.1	Identify and deliver opportunities for nature recovery and biodiversity net gain on the following sites as a priority: Entry Hill, Odd Down Sports Ground, The Approach Golf Course and Lansdown, and then on B&NES Council's wider estate.	<p>We have completed a biodiversity net gain (BNG) assessment for Entry Hill, identifying the potential to generate 62 Biodiversity Units from improvements to the Site. The possibility of an Ecology Centre is being explored through the Landscape City project.</p> <p>Two options for landscape improvements at Odd Down are being consulted on as part of plans to refurbish facilities there; both will improve the site's value to nature, although one is more focused on biodiversity. A planning application will be submitted later this year.</p> <p>A BNG assessment has been completed for Approach Golf Course to identify potential future opportunities for habitat creation.</p> <p>We have also produced plans for habitat creation at Primrose Hill as part of our BNG Pathfinder project, following the success of this approach at Charlcombe Way.</p>	<p>Develop a collaborative masterplan for Entry Hill with partners and identify funding to deliver the Masterplan, including potential sale of BNG units. Explore the possibility of partners managing Entry Hill to deliver agreed aspirations.</p> <p>Complete consultation on Odd Down and submit planning application.</p> <p>Continue to identify opportunities to sell biodiversity units generated through BNG Pathfinder Project.</p> <p>Continue to generate opportunities for nature recovery on other Council sites across our estate.</p>	4

Progress on Actions – Ecological Emergency – Land and Water Management 2

No.	Action	Progress Update	Next Steps	Progress Rating
C2.2	Package together and fund already-identified opportunities for improving the management of our parks and green spaces for nature.	<p>We are working on an application for Countryside Stewardship funding for managing areas of grassland within our parks and green spaces for nature, which will provide a regular income source and enable us to do more for nature.</p> <p>We are also exploring options to secure internal or external funding for equipment needed to manage more of our grassland as species-rich meadows.</p>	<p>We will finalise our plans for grassland management and submit an application when the window for applications opens later this year.</p> <p>Through Landscape City we are developing management plans for woodlands in Bath, which we plan to progress to stewardship applications.</p>	4
C2.3	Design, fund and deliver a training programme for operational staff on how to better manage parks and green spaces for nature.	Parks and Green Spaces staff have completed training on managing grassland for nature. The CPRE Hedgerow Heroes project has also provided training on hedgerow laying and management	Continue to monitor potential funding sources that could enable us to deliver any additional training.	5
C2.4	Adjust cutting regimes of highways verges where there is scope for improved management for nature.	Initial discussions on equipment needed to enable more urban verges to be better managed for nature.	<p>Progress funding applications for equipment that would enable more urban verges to be managed for nature.</p> <p>Explore innovative solutions to manage more rural verges for nature.</p>	2

Progress on Actions – Ecological Emergency – Land and Water Management 3

No.	Action	Progress Update	Next Steps	Progress Rating
C2.5	Produce a B&NES Tree and Woodland Strategy for 2023-30, including plans for increasing tree and woodland cover, and improving woodland management on our own estate.	A first draft of an Action Plan for council-owned woodlands was produced in early 2024, which we are working to. We have recruited a Tree and Woodland Manager to produce a district-wide Strategy	Produce Tree and Woodland Strategy for the district, and formally publish our Action Plan for Council-owned woodlands	4
C2.6	Create an improved 45-hectare nature park at Somerdale, Keynsham as part of WaterSpace Connected and in partnership with Taylor Wimpey.	We've continued to explore options to deliver the nature park, but a lack of funding has slowed progress.	Continue to explore options for funding for the nature park.	3
C2.7	Extend the Bathscape Partnership Scheme to 2025 and develop the project through to 2030.	The project was successfully extended through to 2026, and funding was secured for the Landscape City Project, which focuses on improving management of Council-owned sites within the Bathscape.	Identify a source of funding and develop a proposal for the next phase of Bathscape.	3

Progress on Actions – Ecological Emergency – Land and Water Management 4

No.	Action	Progress Update	Next Steps	Progress Rating
C2.8	Deliver 34 hectares of improved, nature-rich green space in and around Midsomer Norton, Westfield and Radstock as part of Somer Valley Rediscovered.	This is being delivered through Somer Valley Rediscovered. See the Somer Valley Rediscovered website for further detail.	Continued delivery through Somer Valley Rediscovered; completion planned for early 2026.	4
C2.9	Establish the Chew Valley Reconnected Partnership (CVRP) to coordinate activity among stakeholders and communities to enhance the natural environment of the Chew Valley.	<p>Partnership established in 2023, and is ongoing through the Chew Valley Reconnected project.</p> <p>The Partnership is looking to develop joint project and funding proposals to deliver coordinated nature recovery across the catchment.</p>	Continue to support and coordinate the Chew Valley Reconnected Partnership (CVRP).	5

Progress on Actions – Ecological Emergency – Nature-Based Solutions

No.	Action	Progress Update	Next Steps	Progress Rating
C3.1	Identify priority areas for nature-based solutions to localised flooding and runoff of pollutants from the road network and developments; and facilitate partners, including Bristol Avon Rivers Trust and FWAG SW, delivering targeted solutions with landowners.	Further progress has not yet been possible.	Evaluate learnings from the South Gloucestershire Council and BART Green Recovery Fund-funded project on this subject and ascertain how they can be applied to BANES.	1
C3.2	As part of the development of the Local Plan 2025, require developments to deliver Sustainable Urban Drainage Systems (SuDS) that meet adoptable standards and benefit wildlife.	Included as an Option in the previous Local Plan Consultation; planned to be included as an Option in the revised Options document.	Consult on this Option and review responses. This will inform the policy approach taken forward in the Draft Plan, which is due to be completed by Summer 2026. Ensure any policy reflects best practice and opportunities, and links with Green Infrastructure policy and standards.	4

Progress on Actions – Ecological Emergency – Nature-Based Solutions 2

No.	Action	Progress Update	Next Steps	Progress Rating
C3.3	Work with Bristol Avon Rivers Trust to restore the River Chew. This will involve identifying, costing and evaluating options for removal or retrofitting of weirs and other barriers to fish passage within the Chew catchment, river habitat restoration, and accessing funding for priority projects.	We have continued our work with BART and other partners to explore options for the future of Keynsham Memorial Park weir to improve the river for wildlife in line with national and regional nature recovery strategies.	Secure funding to enable the Council to lead a partnership project focussing on River and Weir Improvements in the Park, starting with feasibility and development work.	3
		The Chew, Cam and Wellow farmer cluster is providing funding for projects that restore the health of the catchment and improve biodiversity.	Continue to engage with BART and farm cluster on delivery of the Action Plan.	
C3.4	Pilot bat-friendly lighting to reduce the impact on light pollution on wildlife along the Avon River corridor (as part of WaterSpace) and use this to inform our approach to street lighting.	No progress made this year.	Review the suggested partnership approach with the University to developing bat-friendly lighting solutions on the Bristol Bath Railway Path, along the River Avon corridor, and other active travel routes.	2

Progress on Actions – Ecological Emergency – Nature-Based Solutions 3

No.	Action	Progress Update	Next Steps	Progress Rating
C3.5	Produce a toolkit of ecological interventions for highways, infrastructure and regeneration projects that are easy to deliver at low cost and that can contribute to delivery of biodiversity net gain.	<p>We have produced a guidance note for integrating nature positive design into transport infrastructure and are producing a guidance note for wildlife-friendly building design.</p> <p>The GI Strategy also includes standards for Green Infrastructure in development.</p>	<p>Finalise guidance note for wildlife-friendly building design.</p> <p>Finalise and publish GI Strategy.</p>	4
Page 203 C3.6	Scope out opportunities for the use of nature-based solutions for climate change mitigation (carbon sequestration) and adaptation across the district, and options for funding/financing these.	B&NES is part of a West of England Climate Resilience Working Group set up to progress work to adapt to climate change at the regional level, including the potential for nature-based solutions.	Continue to work with the West of England Working Group, including to co-develop a regional adaptation strategy, identifying opportunities for nature-based solutions and how these might be funded.	3
			Work with / support carbon off-setting policy requirements.	
C3.7	Use the Invest in B&NES website, as well as other established channels of communication, to better communicate the opportunities to invest in nature for businesses.	We have continued to support regional nature business engagement through the Combined Authority, including the launch of a nature business toolkit in 2024.	Update of regional toolkit planned for November 2025. Additional engagement and resources planned to coincide with Wild Summit (September) and Social Value Regional Plan (January).	4

Progress on Actions – Ecological Emergency – Access and Engagement

No.	Action	Progress Update	Next Steps	Progress Rating
C4.1	Seek funding for a dedicated post (or posts) for the Neighbourhood Nature Areas scheme, supporting communities in active management of their local green and blue spaces for nature.	<p>The UK SPF for a 'Nextdoor Nature' project in the Somer Valley has now been completed, which delivered these objectives in that area and was run by Avon Wildlife Trust.</p> <p>We have continued to run the Neighbourhood Nature Areas scheme.</p>	<p>Explore opportunities to fund an extension of the 'Nextdoor Nature' project in the Somer Valley.</p> <p>Monitor opportunities for funding posts in other areas or across the whole of BANES.</p>	3
Page 204 C4.2	Create a dedicated Council webpage on the ecological emergency, and use this as a hub to communicate the work we are doing to address the ecological emergency and how residents can contribute towards nature recovery.	<p>Action completed.</p> <p>A number of webpages were published in 2023, providing residents with more accessible information on the ecological emergency.</p>	<p>Maintain and add to webpages as required to ensure information on how we are tackling the ecological emergency is kept up-to-date.</p>	5
C4.3	Embed tackling the ecological emergency within the Bath World Heritage Site Management Plan, explore opportunities for celebrating our natural environment as heritage, and better integrate the ecological emergency within communications related to heritage.	<p>The Bath World Heritage Site Management Plan was published in June 2025, with nature recovery recognised as a key priority and having accompanying actions.</p>	<p>Progress actions for nature recovery included in the Management Plan.</p>	5

Progress on Actions – Ecological Emergency – Access and Engagement 2

No.	Action	Progress Update	Next Steps	Progress Rating
C4.4	Work with partners to establish a social prescribing network within B&NES and make available grants for providers of nature-based activities to build their capacity.	<p>A BANES Social Prescribing Framework is being drafted, which will inform an Action Plan and investment case to support delivery of the shared vision and approach.</p> <p>The Somer Valley Rediscovered (SVR) wellbeing offer has provided a programme of green social prescribing activities in the Somer Valley.</p>	<p>Publish BANES Social Prescribing Framework, and progress identified actions.</p> <p>Identify funding to continue and expand the green social prescribing offer in the Somer Valley.</p>	4
C4.5	Incorporate actions to improve people's access to nature within the developing Joint Health and Wellbeing Strategy for Bath and North East Somerset.	Joint Health and Wellbeing Strategy published in 2023.	Explore opportunities resulting from the Strategy to improve people's access to nature.	5
C4.6	Create apprenticeships, work placements and/or other opportunities for work within the GI & Nature Recovery team, land management and/or ecologists within B&NES.	We explored a number of opportunities to create apprenticeships this year, but a lack of resources has meant this has not been possible.	Explore opportunities with universities for student placements or projects, which would be less resource intensive.	2

Progress on Actions – Ecological Emergency – Evidence and Monitoring

No.	Action	Progress Update	Next Steps	Progress Rating
C5.1	Produce a ‘State of Nature’ framework for B&NES, including an ‘ecological baseline’ and wildlife index for B&NES to measure progress against, and targets for nature recovery.	<p>We have baselined land managed for nature both across the district and on our Estate.</p> <p>We are working in partnership through the West of England Environmental Data Group to develop a regional wildlife index, which could be refined for B&NES, and to develop a regional monitoring framework for nature recovery.</p>	<p>Continue to update our monitoring with new data as it becomes available.</p> <p>Continue to work with the West of England Environmental Data Group to create a Wildlife Index by the end of this year.</p>	4
C5.2	Trial repeatable techniques for monitoring wildlife populations (such as insect traps or standardised bird counts) on sites owned or managed by B&NES Council, to help evaluate of the effectiveness of interventions for nature.	No progress in this year.	Explore opportunities for trialling novel monitoring solution such as acoustic monitors, perhaps through the council's pathfinder sites in conjunction with community groups.	2

Progress on Actions – Ecological Emergency – Evidence and Monitoring 2

No.	Action	Progress Update	Next Steps	Progress Rating
C5.3	Continue to monitor change in tree canopy cover across BANES, updating the figure at least every three years based on a baseline of 16.5% in 2020.	Baseline for BANES district established and published.	Continue to use agreed West of England approach to monitor tree cover in BANES.	5
C5.4	Survey the condition of Sites of Nature Conservation Interest (SNCIs) within BANES to identify those that lack management plans or are in unfavourable condition and use this evidence to prioritise improvements in management, with an initial focus on SNCIs under B&NES Council ownership.	<p>Woodland and grassland surveys are being done through Landscape City project. Further surveys of Council-owned SNCIs managed by tenants are being done by Land Management Advisor.</p> <p>Funding being secured at the West of England level for surveys of priority SNCIs (i.e. not just council-owned).</p>	<p>Complete remaining surveys of B&NES Council-owned SNCIs and bring them into good management.</p> <p>Work with Combined Authority to survey priority SNCIs within BANES</p>	4
C5.5	Combine access to green space mapping with data on multiple deprivation to identify priority areas for improving access to green space.	The developing Greener Places Strategy has mapped access to green space across the district and using this information alongside data on multiple deprivation to identify priority areas.	Publication of Greener Places Strategy, which is expected later this year.	5

Progress on Actions – Ecological Emergency – Evidence and Monitoring 3

No.	Action	Progress Update	Next Steps	Progress Rating
C5.6	Include questions in the Council's Voicebox survey from 2023 onwards that monitor people's interest in and engagement with nature.	Questions regarding people's engagement with nature and green spaces include (Question 5) and concerns about the ecological emergency (Question 33) included in Voicebox 2024. The findings from this report can be found online.	Voicebox being discontinued in 2025. Planned to use a dedicated climate and nature survey in its place.	5
C5.7 Page 208	Develop and implement a single corporate reporting approach that aligns reporting to government on the implementation of the enhanced NERC duty on Local Authorities with internal reporting on delivery of the Ecological Emergency Action Plan.	Working with neighbouring local authorities to develop templates for reporting and ensure comprehensive reports.	Complete report for the first reporting period by April 2026.	3

Progress on Actions – Ecological Emergency – Working in Partnership

No.	Action	Progress Update	Next Steps	Progress Rating
C6.1	Produce guidance and a template to support parish and town councils in producing Local Nature Action Plans, and ensure these are linked with Avon Wildlife Trust's Wildlife Champion Network.	<p>A number of Parish and Town Councils are working on Nature Action Plans (NAPs).</p> <p>Bristol Climate and Nature Partnership has secured funding to extend a model for Community Climate and Nature action into BANES, which we are supporting.</p>	<p>Continue to support Parish and Town Councils in producing NAPs as required.</p> <p>Support identification of communities and development of approach for Community Climate and Nature action.</p>	5
C6.2 page 209	Support the Forest of Avon Trust and Avon Needs Trees in delivering the 'Great Avon Wood' within BANES, providing a new woodland for nature and people, and in their work to establish more trees and woodlands across BANES.	<p>Planting at Great Avon Wood completed.</p> <p>Work on the nearby, larger 'Lower Chew Forest' at Wick Farm is ongoing, led by Avon Needs Trees.</p>	Provide support to Forest of Avon Trust and Avon Needs Trees as required.	5
C6.3	Engage with the Beaver Management Group to identify opportunities for restoring biodiversity, re-naturalising waterways and delivering nature-based solutions to flooding, as well as potential challenges, related to the beaver population in BANES.	Avon Wildlife Trust has now secured funding to reestablish the Beaver Management and Advisory Group, which we will be represented on, and to offer on-the-ground advice to farmers, landowners & communities. We have also joined the National Beaver Infrastructure Group to share best practice and learning etc in terms of risks and opportunities for infrastructure.	Relevant members of staff to Receive training from Avon Wildlife Trust on beaver-related subjects.	3

Progress on Actions – Ecological Emergency – Working in Partnership 2

No.	Action	Progress Update	Next Steps	Progress Rating
Page 10 C6.4	With partners, agree and implement robust measures to sustain and enhance the bat populations of our European-designated sites, including securing a long-term plan for Combe Down Stone Mine and finalising the bat SAC guidance for B&NES.	No progress made this year.	Secure funding to update and publish guidance as part of the emerging Local Plan	2
	C6.5 Work with National Trust and local residents to establish a nature-rich, accessible wildlife corridor from Bath to Bathampton Meadows.	National Trust has conducted community engagement to develop plans for the site, including creating wildflower meadows and wetland habitats. Some habitat improvements have begun, including hedge laying.	Continue to support and engage with National Trust in improving management for nature and improving access to Bathampton Meadows for residents.	4
	C6.6 With partners, ascertain the need and capacity for a sustainable strategy for long-term restoration and management of key grassland sites across BANES or the wider West of England region.	<p>The West of England Local Nature Recovery Strategy (LNRS) has identified priority areas for grassland restoration.</p> <p>We are now working with other Local Authorities to develop sustainable approaches for managing grasslands for nature.</p>	<p>Continue work with Local Authorities and trial new/improved approaches, potentially including grazing and cut and collect.</p> <p>Work with WENP to develop the Grassland Connections Priority Programme and secure investment.</p>	3

Progress on Actions – Ecological Emergency – Working in Partnership 3

No.	Action	Progress Update	Next Steps	Progress Rating
C6.7	Enable and support partners in engaging farmers and landholders on managing land for nature in strategic locations and directing them to funding to do so, focusing initially on the Somer Valley and the River Avon corridor.	The West of England Local Nature Recovery Strategy (LNRS) has now been published, which provides farmers and landholders with a tool to ascertain how they can best help nature in strategic locations, and links to funding and guidance.	Continue to develop and improve LNRS resources for farmers and landowners.	4
		Avon Wildlife Trust's pollinator pathway projects is engaging farmers in the Somer Valley (and elsewhere) on grassland creation and management.	Scope out engagement in Avon Corridor with BART and Natural England through Waterspace Connected. Develop funding case for next phase of Somer Valley Rediscovered, which could include working with farmers and landowners.	
C6.8	Support farmers in creating farmer clusters within BANES, enabling us to engage with farmers and landholders at a landscape scale; and work with the Duchy of Cornwall, FWAG SW and other partners to spread good practice from exemplar farms.	The Chew, Cam and Wellow Farmer Cluster has been set up, with 56 farmers already signed up. Grants are being awarded for projects to improve the water environment and biodiversity. We have recruited a land management advisor, which will provide us with internal capacity to engage with farmers and landowners on land management for nature.	Continue engagement with Chew, Cam and Wellow Farmer Cluster; and support creation of any other clusters in the district. Secure longer-term funding for land management advisor.	4

Progress on Actions – Economic Strategy – Greener Economy

No.	Action	Progress Update	Next Steps	Progress Rating
Build local energy generation capacity and demand for energy saving measures.				
D1.1	Promote the Energy@Home service to residents on low incomes to increase take up of grant support and advice.	Carried out an audit of existing website with a view to simplify and improve the user journey and co-ordinate with the Community Energy Network project	Go live with new Community Energy Network offer and materials	2
D1.2	Work with Bath and West Community Energy to increase awareness of their renewable energy projects and support.	The new Community Energy Network is a grant funded partnership between the Council and Bath and West Community Energy alongside other partners, and is exploring opportunities for new generation projects working with communities in BANES who would like to host and receive benefits from renewables.	Identify 3-6 sites to take forward as part of Community Energy Network project with a target total capacity of 5MW by 2030.	3
D1.3	Scope community green bonds to help local residents to invest in local projects across our city, town and rural centres.	<p>Scoping exercise undertaken to confirm other Local Authority use of community green bonds and its suitability in BANES.</p> <p>Good examples of engaging with communities to raise funds for renewable energy projects, however in BANES, we have well-established community energy organisations and a commitment to support these via co-operation agreements.</p>	Via Climate and Nature Strategy development, identify different opportunities to develop a community green bond scheme.	4

Progress on Actions – Economic Strategy – Greener Economy 2

No.	Action	Progress Update	Next Steps	Progress Rating
Build local energy generation capacity and demand for energy saving measures.				
D1.4	Explore the development of a Local Area Energy Plan, working with sector and regional partners, to ensure our electricity grid supports electrification and decarbonisation	As a partner to the Mission Net Zero project led by Bristol City Council, we have participated in the creation of a Regional Climate Investment Plan and Pipeline which fulfils some elements of Local Area Energy Planning at a regional level. Have collated and submitted information to the DFES process and the newly formed Regional Energy System Planner to inform strategic investment in networks.	Translate the outputs for the Regional Climate Investment Plan and pipeline into an actionable plan for BANES to accelerate the clean energy transition. Secure additional resource to embed LAEP+ tool into Council processes and engage stakeholders to inform local energy planning	3

Progress on Actions – Economic Strategy – Greener Economy 3

No.	Action	Progress Update	Next Steps	Progress Rating
Support businesses to deliver net zero and nature positive in Bath and North East Somerset.				
D2.1	Promote WECA's free carbon surveys for SMEs and Green Business grants to help businesses invest in improving the energy efficiency of their premises.	In 2025 council officers have supported 5 additional local SMEs to access Green Business Grants, with a further 7 outstanding enquiries prior to the grant programme closing in October. Over £2m has been funded since the programme commenced in 2019.	While Green Business Grants are set to finish in October 2025, Low Carbon Surveys will continue. B&NES Council's Carbon Reduction Accelerator scheme remains live, and officers will work with WECA on new green grant schemes for businesses.	4
Page 214 D2.2	Develop and promote BANES as a location for leading sustainable businesses (e.g. with B Corp status).	<p>Two funded bootcamps supported B&NES SME's on their journey to achieve BCorp accreditation, with 5 in a position to apply following the programme.</p> <p>A separate series of workshops were funded to support pre-start and early stage social enterprises in B&NES.</p>	<p>Continuation of social enterprise support programme.</p> <p>Re-evaluation of BCorp bootcamps to identify demand for further cohorts in 2026.</p>	3

Progress on Actions – Economic Strategy – Greener Economy 3

No.	Action	Progress Update	Next Steps	Progress Rating
Create opportunities for residents to train and upskill for future green economy jobs.				
D3.1	Work with WECA's Retrofit Academy to help local people access training for careers in retrofit.	<p>WECA hold trainer days locally that we have helped to promote for local tradespeople.</p> <p>Business and Skills Engage and Support form an employability point, connecting through our We Work for Everyone team as part of our Skills Connect Project</p>	<p>Continue to promote quality training for installers.</p> <p>Wider and more consistent engagement with WECA Green Skills Lead, looking at pathways from existing and upcoming construction/green skills projects into retrofit, promoting and supporting the academy</p>	2
D3.2	Develop an apprenticeship programme for routes into nature and environment jobs	<p>Action intention is to develop an internal B&NES Council pathway into Green Jobs within the Council.</p> <p>Working group established and options developed. Review included broader options than apprenticeships.</p>	Identify budget and preferred pathways for delivery.	2

Progress on Actions – Economic Strategy – Greener Economy

No.	Action	Progress Update	Next Steps	Progress Rating
Create opportunities for residents to train and upskill for future green economy jobs cont.				
D3.3	Work with our education providers – including schools, Bath College, independent training Providers and universities’ - to promote awareness of green jobs and green skills to the current and future workforce (such as through the FWD project).	<p>FWD delivered activities focused on planned development and delivery of modules where sustainability and net zero are fundamentally integrated into teaching, short course/skills offerings, innovation schemes and business/employer-led projects.</p> <p>FWD delivered sustainability short course modules and integrated sustainability themes into Innovation and Research business support programmes.</p> <p>As well as this a Makerspace Lab was created at the University of Bath Innovation Centre, providing access to 3D printing and prototyping for sustainable product development.</p>	<p>Utilising learnings from FWD to continue to develop Green Skills Provision over 25/26 including:</p> <p>Utilise Hubs and Community Outreach, as well as partnerships to build awareness of Green Skills in B&NES including employment pathways</p> <p>Identify opportunities for entry level green skills training to support residents to access the higher technical qualifications/modules offered by HE/FE (a barrier identified from FWD)</p> <p>Build opportunities to get Innovation and Talent into the same space, with a focus on green skills, sustainability and innovative green technologies</p> <p>Greater engagement with WECA Green Skills Lead</p>	2

Progress on Actions – Economic Strategy – Greener Economy

No.	Action	Progress Update	Next Steps	Progress Rating
Develop Bath and North East Somerset to be a broad green economy.				
D4.1	Continue the role out of the council's climate literacy training, and develop ecological literacy modules, to increase understanding of climate and nature issues.	<p>All new employees continue to undertake a climate literacy module as a part of their initial induction training.</p> <p>A half day climate and nature training course is available for all teams to access.</p> <p>Development of ecological literacy modules being taken forward at regional level</p>	Support the Combined Authority in the development of a nature literacy package and roll this out within the Council.	2
D4.2	Work with WECA and regional partners to capitalise on the opportunities of the regional green economy.	B&NES Council is working in partnership with the WECA to develop a Local Growth Plan. This plan will develop sectoral and geographical areas of focus. One of the sectors of focus for this strategy will be Clean Energy Industries.	Development of the Strategy with the WECA. One published promote internally and externally. Work with the WECA on the detailed implementation plan.	2
D4.3	Support the work of Retrofit West in developing the business supply chain for retrofit within the district.	Retrofit West are being promoted through Invest in B&NES team via website and engagement.	Support the market for retrofit by encouraging uptake of retrofit and access of retrofit west support as is available.	2

This page is intentionally left blank

Climate & Nature Survey Report

Bath & North East Somerset Council

Summer 2025

Bath & North East
Somerset Council

Improving People's Lives

Executive Summary

The Climate & Environment Team at B&NES council conducted a survey to understand residents' views on climate and nature. Here's what residents told us:

- ▶ **Top Priorities:** Water and rivers, restoring nature, the way we travel and the energy we use.
- ▶ **Most common actions taken:** Carrying reusable items, planting pollinator-friendly plants, and repairing broken goods.
- ▶ **Strongest motivation:** To help nature.
- ▶ **Actions residents want to take but can't or don't:** Making energy efficiency improvements at home, installing water-saving measures, and taking no action
- ▶ **Biggest barrier:** It's too expensive
- ▶ **Most common perception of the council's climate and nature efforts:** Residents don't know what B&NES council is doing or think B&NES council is doing too little.
- ▶ **Top suggestions for council action:** Improving public transport, protecting and enhancing green spaces, and supporting renewable energy and energy efficiency.
- ▶ **Observed local changes:** Experiencing hotter, drier days and fewer insects.
- ▶ **Trusted sources of information:** Environmental charities and groups were most trusted, while social media influencers were the least trusted.
- ▶ **Key themes from free text comments at the end of the survey:** The way we travel, how the council works, and how we restore nature.
- ▶ **Next steps:** The council needs to engage those not represented in the survey responses. There is also a need to improve communication around existing council work relating to climate and nature and to help our communities take action.

Introduction

Background and objectives

Tackling the Climate and Ecological Emergencies is a core priority for Bath & North East Somerset (B&NES) Council. We are at the mid-point of our 10-year plans for climate and nature and are currently reviewing them to bring them together into a single strategy and action plan.

From May to June 2025, B&NES council ran a survey open to all residents in Bath and North East Somerset (BANES). The purpose of the survey was to better understand public views on climate change and nature-related issues, and to use these insights to help inform current work.

Approach

The survey was made available online via the council's consultation webpage. Paper copies were also distributed at all three B&NES libraries and the Climate Hub.

To ensure broad participation, the survey was promoted through multiple channels:

- ▶ The council's social media platforms
- ▶ The e-connect newsletter
- ▶ Direct outreach to community groups for wider dissemination
- ▶ Email communications
- ▶ Promoted within Libraries with paper copies available to complete
- ▶ Flyers at events and various locations

As an incentive, all participants were offered the opportunity to enter a prize draw for a £50 voucher, for a supermarket or local vendor of their choice. The draw took place on 18 June 2025, and winners were contacted via email to arrange their prize.

Survey Design

Page 222

This survey was designed and run by members of the Climate & Environment team at B&NES council. Input and guidance were provided by several other teams, including Equalities, Communications, Web, Community Engagement, and Business Intelligence.

The survey used simple language and kept the responses broad to be accessible for all. We are not calculating emissions based on these responses.

As the survey aims to help shape the new climate & nature strategy many of the questions were based off the emerging themes of the strategy. The aim of the 'individual action' questions were to understand what actions people are taking, what motivates them and what the barriers are to individual action.

In addition to questions focused on individual action, the survey asks for residents' views on what the council is or should be doing to address climate change & nature loss. The aim of these questions is to gauge public perception of the work the council is doing and identify gaps where the public would like to see more action.

Who We Heard From: Age

- ▶ Overall, we heard from 833 respondents.
- ▶ Over half of respondents (56%) were aged 55 and over (see Figure 1). In contrast, we heard relatively little from residents aged under 25, despite this being the largest age group in B&NES¹.

Page 223

¹ [ONS Estimates of the population for England and Wales](#)

[Strategic Evidence Base for Bath and North East Somerset](#): The large population of residents under 25 is largely driven by the high number of university students attending the two campus-based universities in the area.

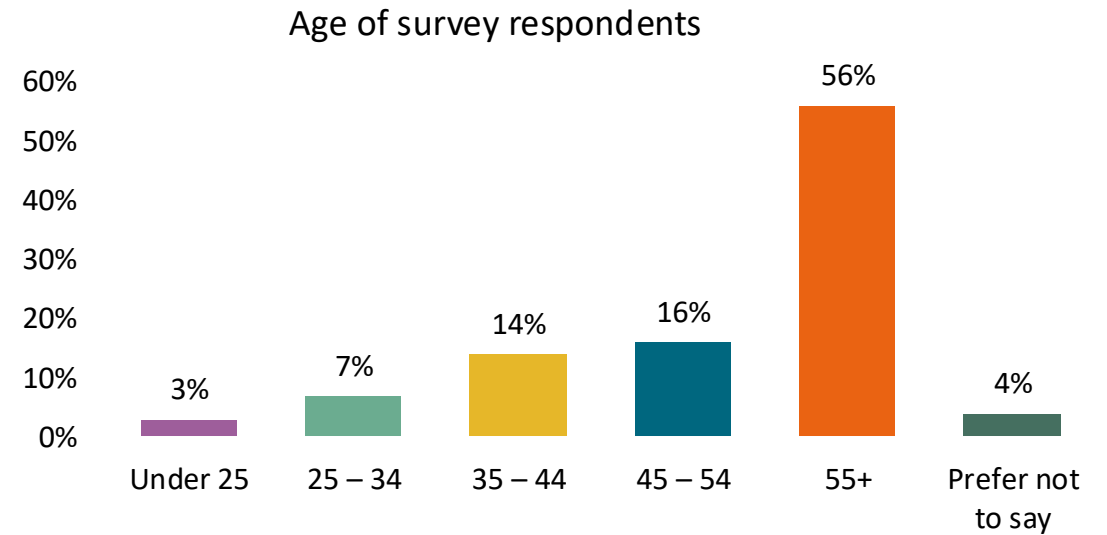


Figure 1 – Table showing the age of respondents to the Climate and Nature survey 2025

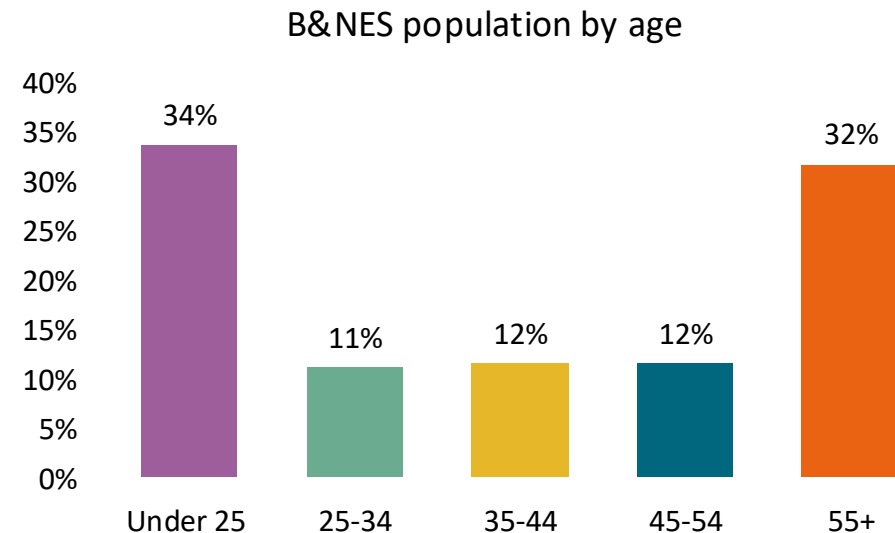


Figure 2 – Bar chart of BANES population by age from 2019 census data

Who we heard from: Living Situation

- ▶ A significant majority of respondents (86%) identified as homeowners (see Figure 2). ONS data shows that 65% of households in BANES own their house meaning that while they make up a large proportion of the population, they are overrepresented in this survey ².
- ▶ In contrast, private and student renters accounted for just 7% of responses, despite making up 19.3% of B&NES households². Social housing tenants were similarly underrepresented, comprising only 2% of survey participants compared to 14.3% of the population².
- ▶ These differences will guide our next steps to speak to groups underrepresented in responses.

Page 224

² [ONS Data. Household characteristics by tenure, England and Wales: Census 2021.](#)

Which of these best describes your living situation?

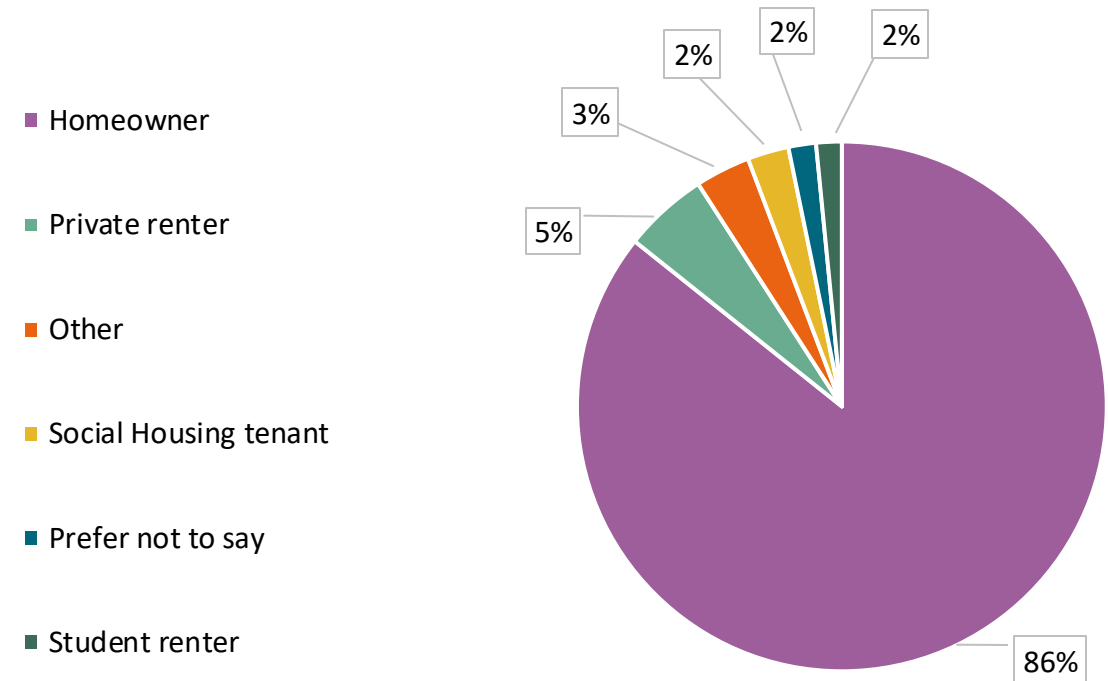
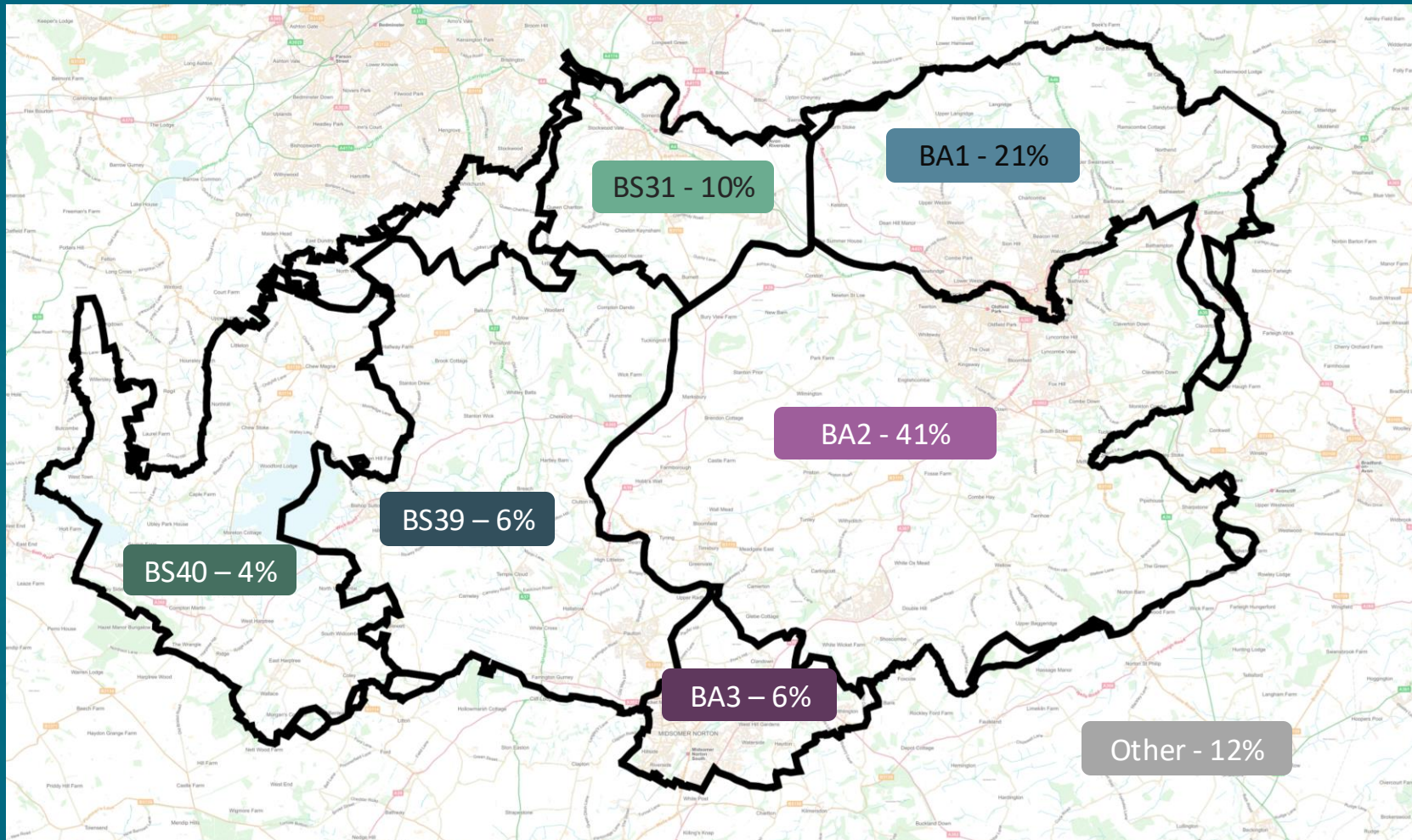


Figure 3 – Pie chart of living situations for respondents to the Climate and Nature survey 2025

Map of Respondents by Postcode



- ▶ Geographic Spread: While responses were received from across B&NES, the majority (62%) came from the BA1 and BA2 postcodes, which cover Bath and its surrounding areas. This is expected given that 56% of residents live in Bath and Bathavon ³.
- ▶ 12% of responses consist of those who selected 'prefer not to say', responses with typographical errors and postcodes outside the B&NES area. While these responses are excluded from the map, all answers to other questions have been included in the overall analysis.

³ B&NES Strategic Evidence Base

Figure 4 – Map of B&NES postcodes and percentages of respondents to the survey

Key Priorities

- ▶ The first question of the survey asked respondents to select up to three themes they considered most important from a list aligned with the key areas of the Climate and Nature Strategy. Figure 5 shows the percentage of respondents who selected each option [\[Footnote 1\]](#).
- ▶ 'Water and rivers' and 'how we restore nature' were the most popular responses demonstrating the importance of nature to people in B&NES. This was followed by 'the way we travel' and 'the energy we use' which are two of the highest sources of carbon in B&NES. 'The right jobs and skills' was the lowest scoring.
- ▶ Respondents had the opportunity to answer 'Other' to this question. Themes emerging from this included transport, specifying the need for low carbon alternatives and more access for cycling, local planning, and biodiversity.
- ▶ Several responses in 'Other' also highlighted the interconnectedness of all these options, while others shared frustration at the council spending time on Climate Change.

Page 226

Thinking about climate change and nature loss, which of the following are most important. Select up to 3.

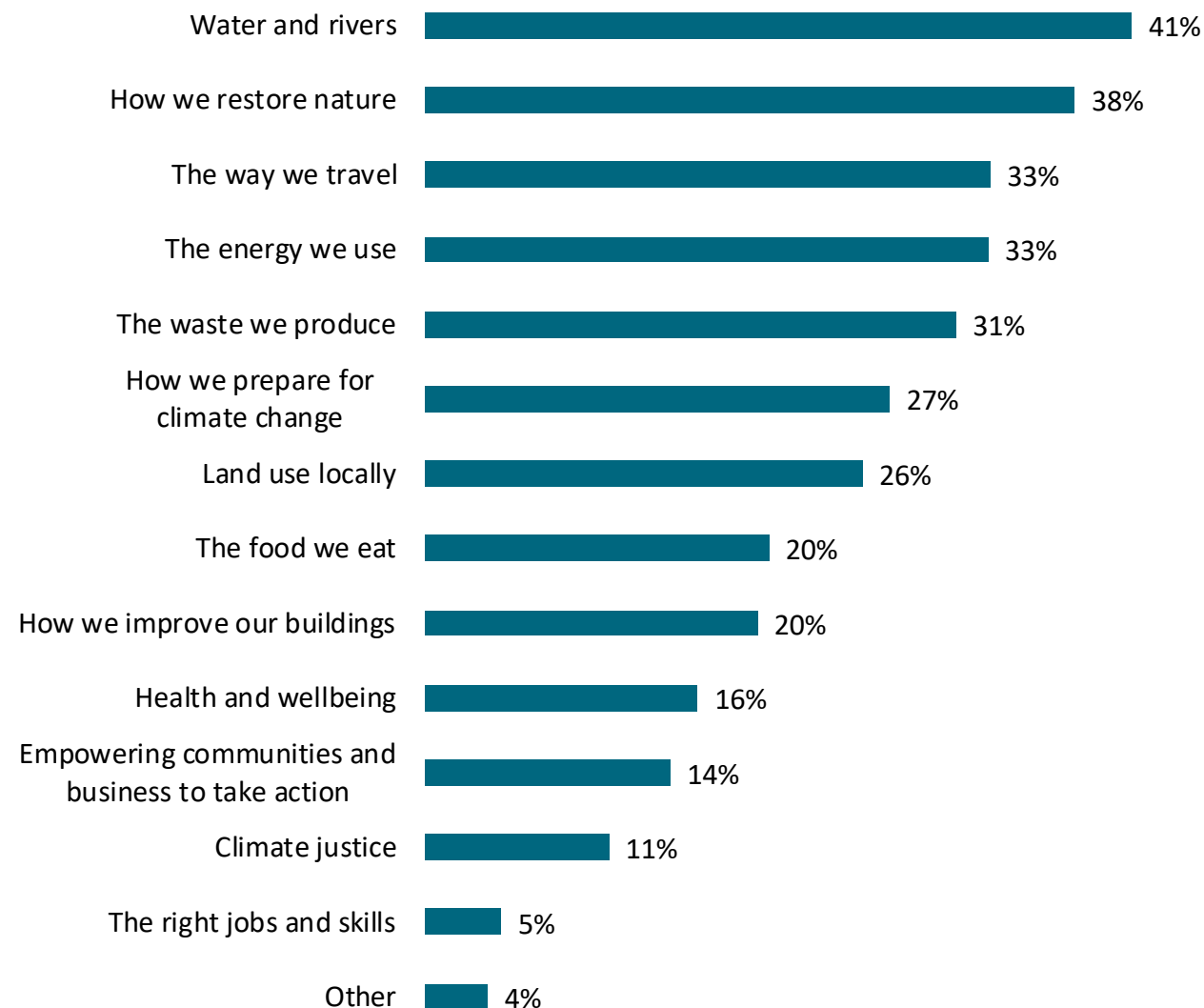


Figure 5 – Bar chart showing respondents priorities relating to key themes

Resident Actions by Theme

- ▶ The survey asked residents about actions they have taken in the past 5 years, their motivations and barriers. The next five slides set out these responses.
- ▶ Figure 6 on this slide shows the actions grouped into themes.
- ▶ The data shows that residents are most engaged in actions related to nature and waste & resource management. In contrast, there is less activity around water use, personal finance and resilience.

Page 227

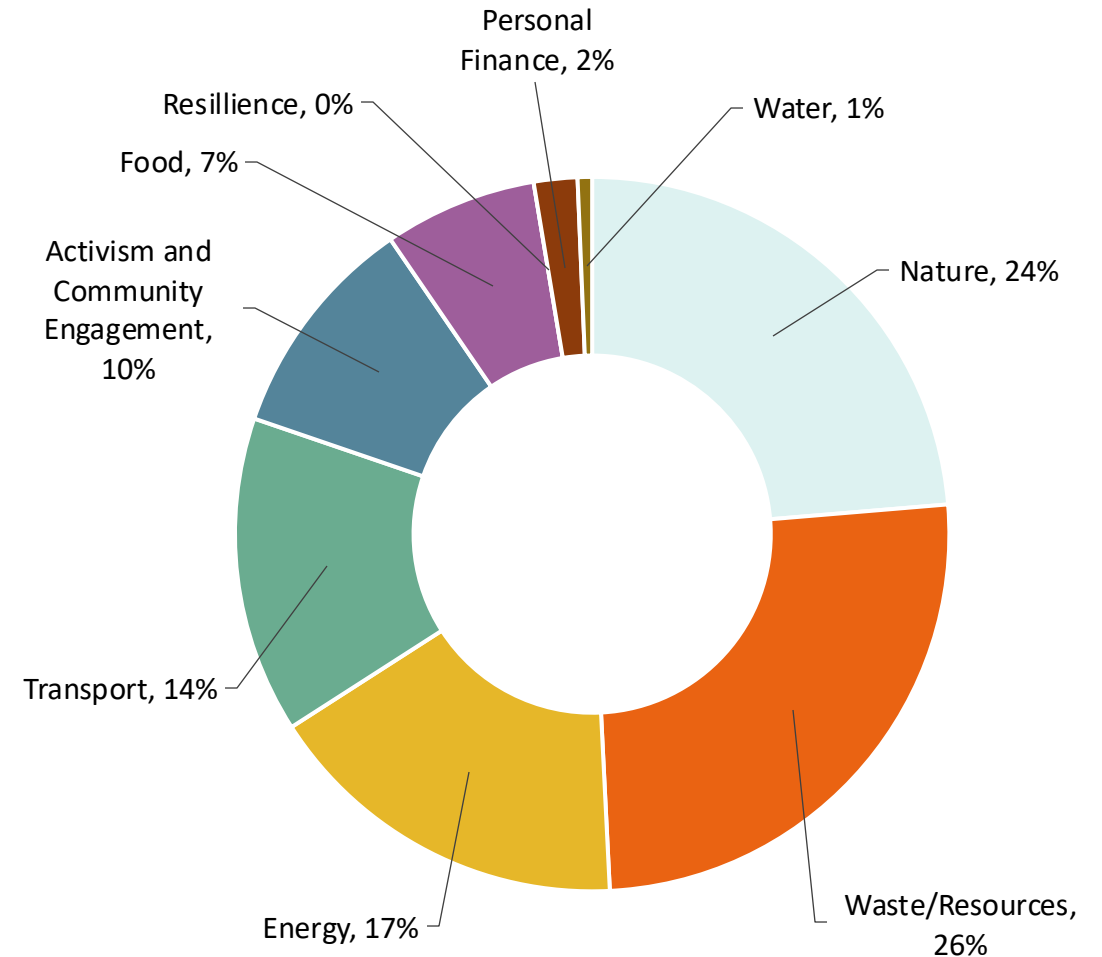


Figure 6 – Pie Chart showing residents actions that have been done in the last 5 years by theme in percentages

Actions Residents Have Taken

► The survey asked BANES residents to select from a list the actions they had taken over the last 5 years. The most popular responses were linked to reducing waste, for example carrying reusables, repairing broken items and shopping second hand as well as nature-related such as planting pollinator friendly plants and making space for nature (see figure 7).

Page 228

► Of the 8% of responses under “Other” the most common themes were practical sustainability actions such as switching to an EV, community engagement, and advocacy.

Top 10 actions done in the last 5 years

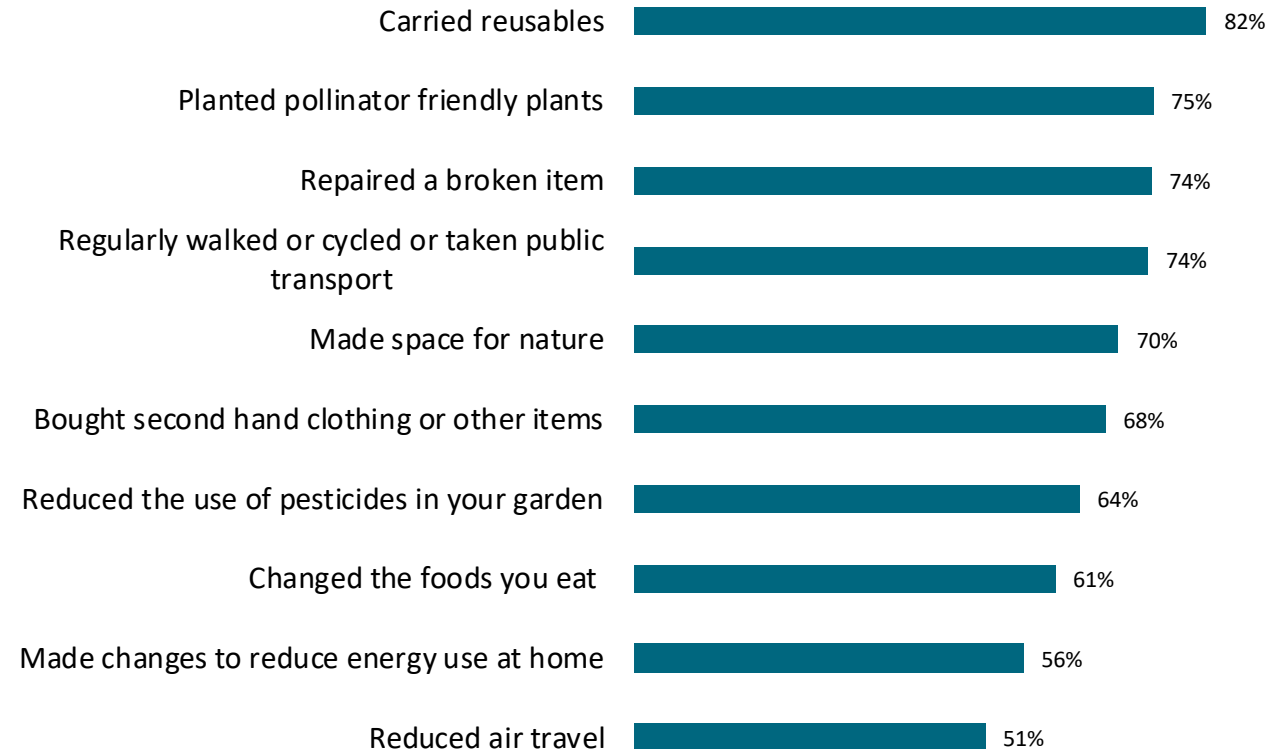


Figure 7 – Graph showing top 10 actions residents have taken relating to climate and nature in the last 5 years

Motivations for Action

- ▶ We analysed the links between actions taken and motivations selected. The most common motivation across many actions is to help nature, with actions like planting pollinator-friendly plants, reducing pesticide use, and making space for nature identified.
- ▶ Health and wellbeing is a strong motivator, especially for actions like walking or cycling and changing food habits.
- ▶ Actions like making energy efficiency improvements and switching to renewable electricity are frequently linked to saving money and reducing emissions.
- ▶ Many actions are driven by both concern ('I am worried about climate change and nature loss') and optimism ('I am hopeful and want to contribute to positive change'). Air quality is a less common but still notable motivator in relation to reducing air travel and walking/cycling.
- ▶ Responses under 'other' highlight personal values, habit, or a sense of responsibility as a motivation to take action. Several participants also mentioned a desire to act in the interest of future generations.

What motivated you to take the actions in the previous question?

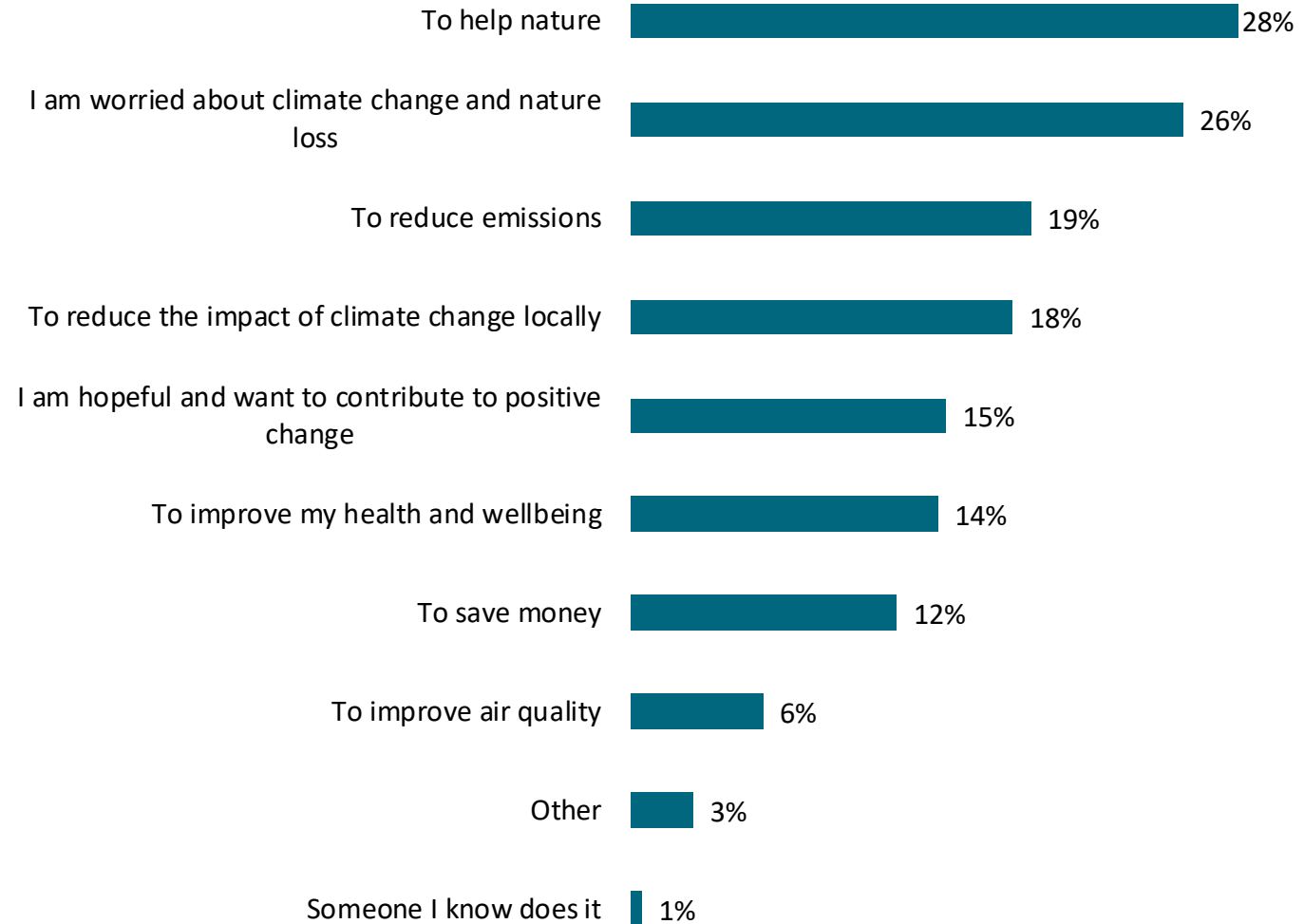


Figure 8 – Graph showing which motivations were the main drivers for actions taken relating to climate and nature in the last 5 years

Actions Residents Would Like To Do

- ▶ The survey then asked residents whether there were any actions they would like to take but currently cannot or do not. The most common responses related to making improvements around the home, such as installing energy and water efficiency measures, fitting shutters or reflective blinds, and making changes to reduce energy consumption. A significant number of respondents responded 'none' to this question.
- ▶ Of the 6% of respondents who answered 'other', the most frequent responses focused on specific energy-related actions, such as installing solar panels and heat pumps.

Top 10 actions residents would like to take but currently cannot or do not

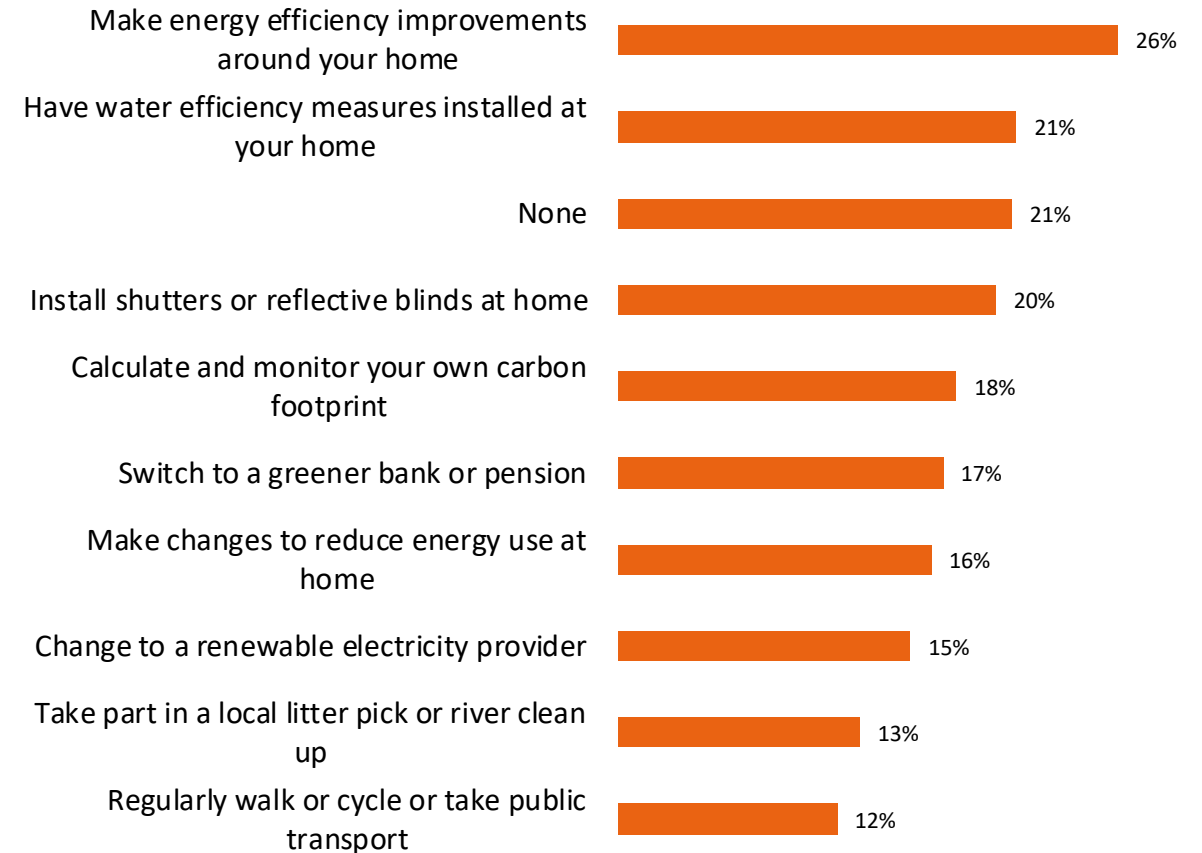


Figure 9 – Bar chart showing top 10 actions residents would like to take but currently can't do

Barriers to Action

- ▶ The most common barriers to all actions were 'It's too expensive' followed by, 'I don't have the right information'. These barriers were most strongly associated with making changes at home such and improving energy and water efficiency, and installing shutters or reflective blinds. This highlights an opportunity for the council to better communicate relevant information and to better promote available funding.
 - ▶ Responses under 'Other' frequently highlighted planning restrictions, especially in relation to listed buildings, as a significant barrier.
- Another recurring theme was the lack of adequate public transport and active travel infrastructure, which make sustainable travel options unsafe, time-consuming, or not possible. A smaller number of respondents cited health conditions and disabilities as limiting factors, while a few indicated a lack of interest or willingness to take action.

What has stopped you taking the actions that you would like to?

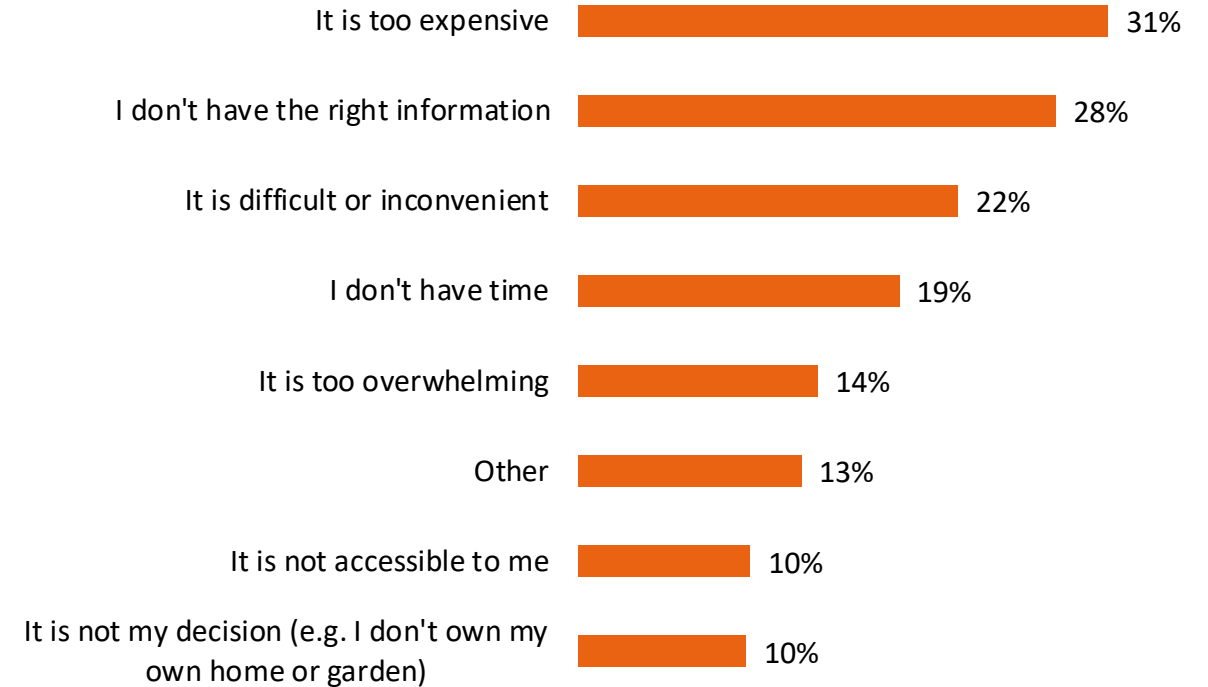


Figure 10 – Bar chart showing which barriers stopped respondents from taking the actions that they would like to take for climate and nature

Comparison of Actions

- ▶ Figure 11 shows a comparison of the percentage of respondents who have taken specific actions in the past five years, alongside those they have not taken but would like to.
- ▶ There is a link between some of the actions least done in the past 5 years and ones that people would like to do such as installing shutters. Understanding and addressing gaps and barriers is essential for the council to enable more residents to take action.

Page 232

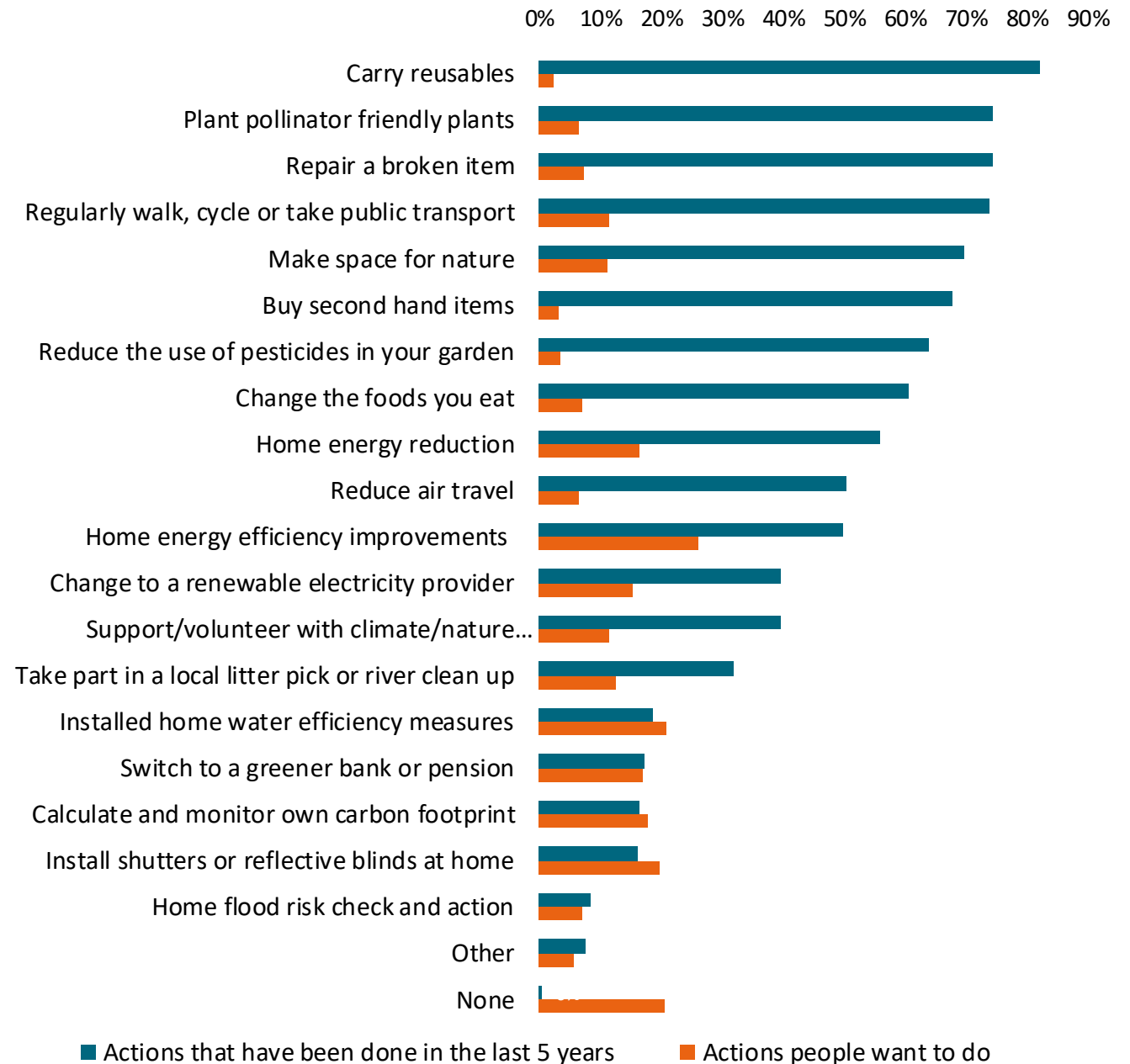


Figure 11 – Bar chart comparing actions taken in the last 5 years and the actions people would like to do.

Local Changes

- ▶ When asked about changes in their local area related to climate change or nature loss, 73% of residents reported experiencing 'Hotter, drier days', while 65% reported seeing 'Fewer insects'. These responses highlight the visible local impacts of climate change on both weather patterns and biodiversity.
- ▶ Common themes emerging from the text responses provided under 'Other' included concerns about environmental degradation due to property development, a decline in local wildlife and biodiversity, deteriorating river health caused by pollution and sewage, unpredictable weather patterns, and the emotional impact of these changes, such as increased stress and anxiety among residents.

What changes, if any, have you seen in your local area relating to climate change or nature loss

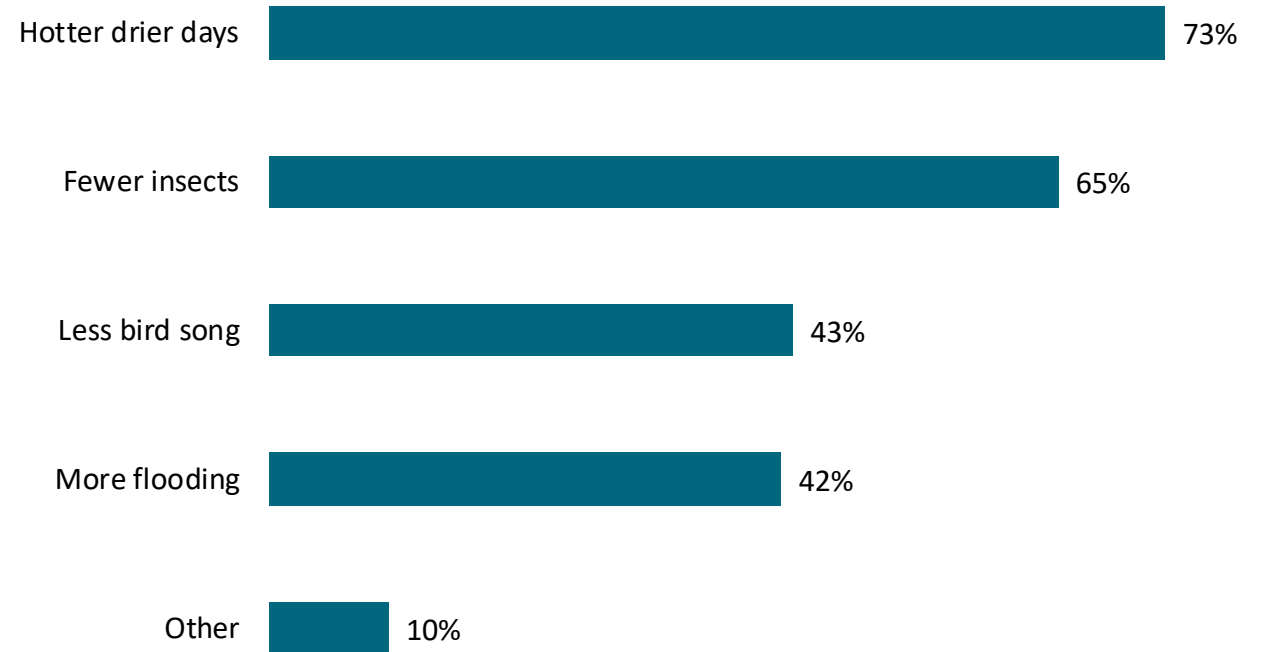


Figure 12 – Graph showing responses to what local changes to nature and climate they had noticed locally.

Views on B&NES Council's Action

- ▶ When asked their views on how much B&NES council is doing to combat climate change and nature loss the most common response was 'I don't know what B&NES is doing' (41%), followed by 'Too little' (38%). This presents an opportunity for the council to promote its work on climate and nature and engage more with residents on this topic to deliver and enable action.

Page 234

In your opinion, how much is B&NES Council doing to combat climate change and nature loss?

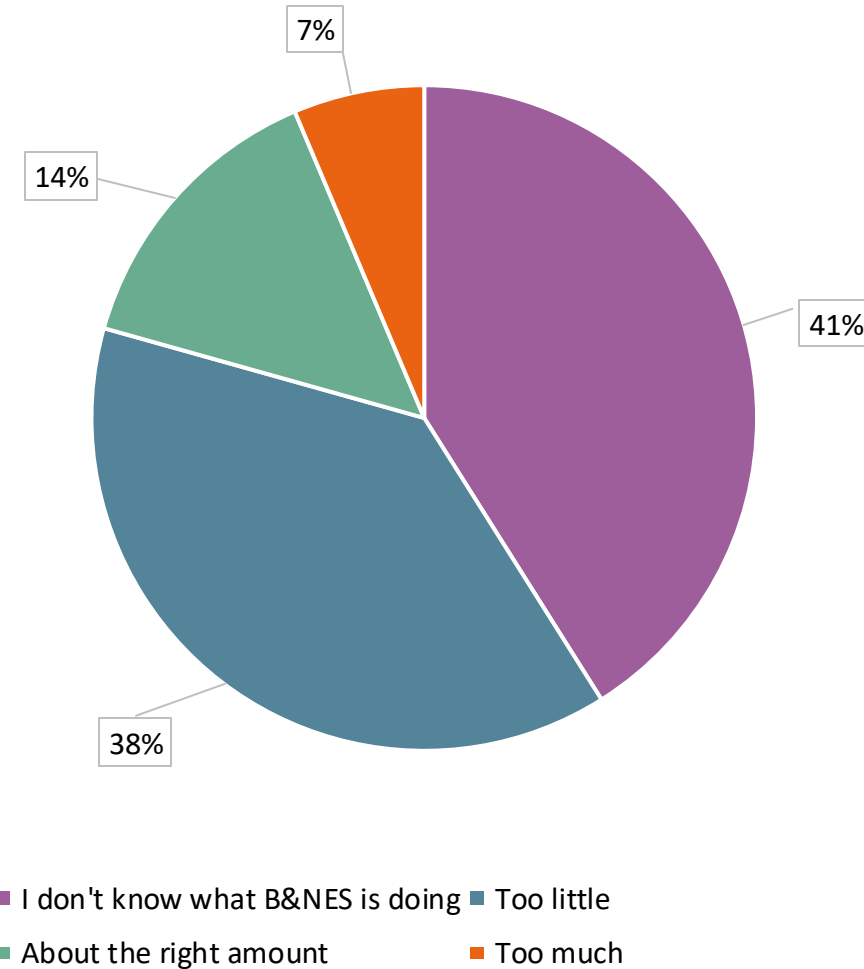


Figure 13 – Pie chart showing respondents views on B&NES council's actions on climate change and nature loss

What More Could B&NES Council Do?

When asked what more B&NES Council should do overall respondents want the council to be more ambitious, visible, and practical in its actions. In order of most frequently mentioned, key themes highlighted were :

- ▶ **The way we travel** - requests for better public transport, promoting more active travel including safer walking and cycling routes as well as measures to reduce car use and congestion.
- ▶ **How to improve our buildings** - Requests for sustainable housing, restrictions on building on greenfield/greenbelt, better planning policies including faster decision making, and energy-efficient homes.
- ▶ **How we restore nature** - Emphasis on protecting and increasing green spaces, tree planting, restoring habitats, and wildlife corridors.
- ▶ **Policy and governance** - Suggestions for stronger policies, enforcement, leadership, and lobbying higher government.
- ▶ **The energy we use** - Support for solar panels in particular on public buildings, heat pumps, energy efficiency, and local renewable projects.
- ▶ **Water and rivers** - Concerns about river pollution, flood prevention, and water management.
- ▶ **Empowering Communities** - More public education, awareness campaigns, engagement with residents and support for local initiatives
- ▶ **The waste we produce** - Improvements to recycling, composting, and reducing waste.

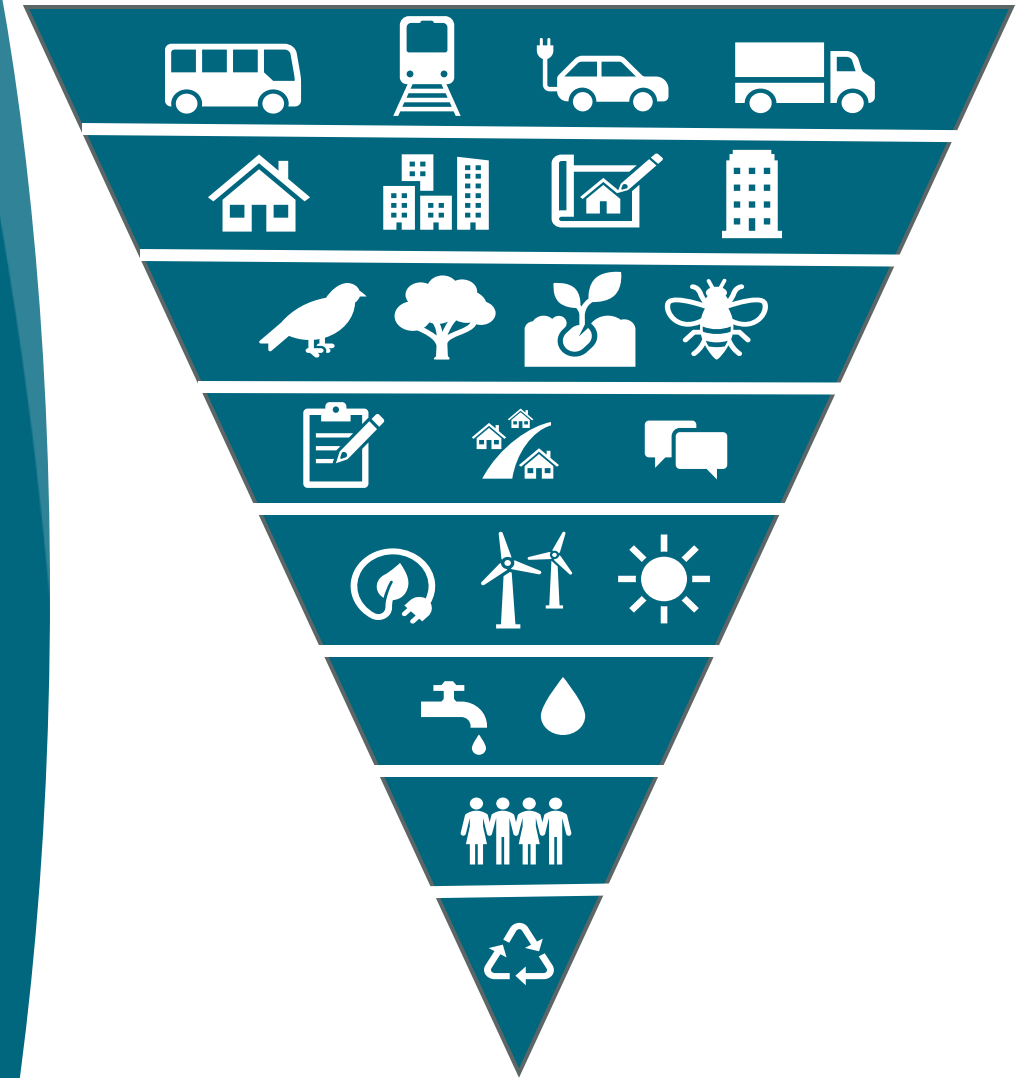


Figure 14 – Infographic showing the frequency of which different themes were mentioned in the responses to 'what more could the council do?'

Trusted Sources

- ▶ The most trusted sources that were noted were 'Environmental charities' at 66% and 'Environmental groups' at 64%, followed by 'Universities or colleges' at 53%. This suggests that the council could explore opportunities to collaborate with the most trusted sources when communicating with residents on climate & nature.
- ▶ Social Media Influencers' are the least trusted at 4%, which in part could be due to the age range of respondents. A next step for the council is to engage further with younger audiences.
- ▶ For those who responded 'Other' themes included academic journals, personal and professional networks.
- ▶ Several responses in 'Other' also demonstrated scepticism or mistrust of many sources for example "I use all sources - carefully" and "I don't trust any, they all just give facts that suit their agendas."

Which of these sources do you trust to provide information and advice about climate change & nature loss?

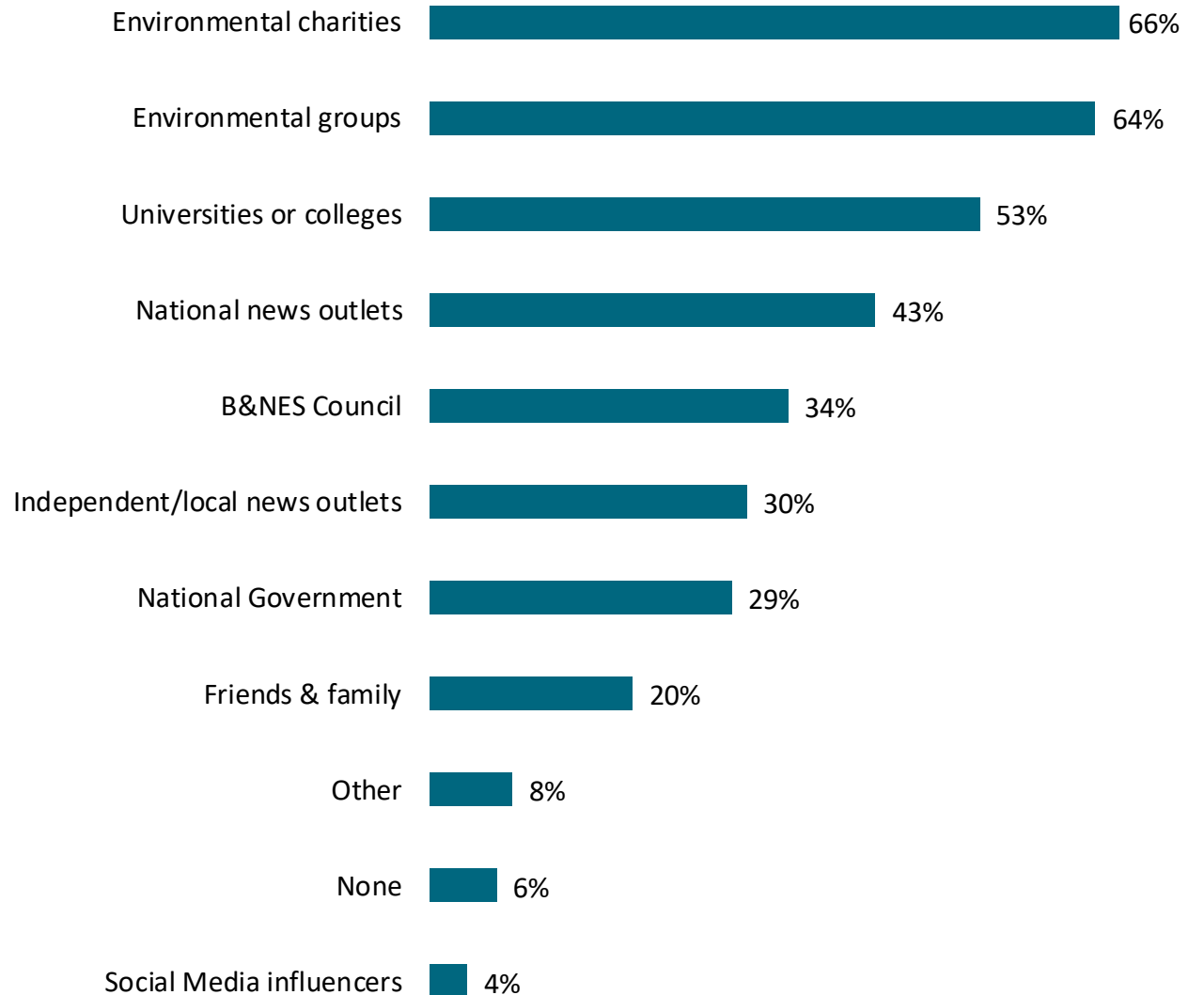


Figure 16 – Bar chart to show which were respondents preferred trusted sources

Additional Comments Provided by Respondents: Key Themes

The final survey question gave the opportunity to provide any additional feedback or comments. Here is a summary of the key themes which emerged from the 343 responses we received, listed in order based on how frequently they were mentioned:

The way we travel - Many respondents highlight the need for better public transport, safer cycling and walking routes, reduced car use, and concerns about congestion and road safety.

How the council works - Calls for stronger leadership, clearer policies, more effective consultation, and greater transparency from the council. Some express frustration with perceived lack of action or follow-through.

How we restore nature - Emphasis on protecting and enhancing green spaces, planting more trees, supporting wildlife, and maintaining biodiversity. Concerns about loss of green areas due to development.

How to improve our buildings - Requests for sustainable housing, better planning to avoid building on greenbelt land, and more support for energy-efficient homes. Some mention issues with listed buildings and planning restrictions.

The waste we produce - Suggestions for improving recycling, reducing litter, and providing better waste services. Some want more education on waste reduction and tackling consumerism.

Water and rivers - Concerns about river pollution, sewage, and the need for better flood prevention and water management.

Empowering Communities - There's a desire for the council to enable and support local groups and residents to take action themselves. Calls for more public education, awareness campaigns, and community involvement, especially in schools and local groups.

The energy we use - Support for solar panels, heat pumps, insulation, and other renewable energy initiatives. Some want more council support for home energy improvements.

Additional Comments Provided by Respondents: Feedback to the Council

Many respondents want to see more tangible action and less consultation. There are also calls for more integrated approaches across departments. Several responses also expressed that local action is limited without stronger national policy, but still want the council to lead by example.

Some respondents express distrust in the council or call for more openness about decisions and actions, while some show pride in local leadership but warn against complacency.

In addition to comments relating to recommendations or suggestions for the Council, a significant portion are personal reflections or responses or general views on the topics of climate and nature, in particular comments reflecting broader anxieties or existential concerns (e.g., about global threats).

There were also positive mentions of specific services and community groups and action including:

- ▶ “Just to give praise where due—I think B&NES does a brilliant job with its kerb side recycling collections.”
- ▶ “I think Somer valley rediscovered is doing a good job.”
- ▶ “I think the Climate Hub is great and hope it thrives.”

Final Note and Next Steps

Thank you to everyone who responded to our Climate & Nature Survey. The purpose of the survey was to better understand residents' views on climate change and nature-related issues, and to use these insights to inform our current work. We are grateful to the 833 people who took part.

The survey has provided valuable insights that will help shape the upcoming refresh of our Climate and Nature Strategy and Action Plan. Residents identified travel, buildings, and nature as key areas where they would like to see more action from the Council and these priorities will be built in.

The results also highlighted a need for clearer communication from the council, both about what we're doing, and about the actions residents can take themselves, along with the support available to help make those changes easier. One example is planning restrictions, especially for listed buildings, which were frequently mentioned as a barrier to action. This underlines the importance of promoting our Green Heritage Homes project, which supports the retrofit of listed buildings.

A next step is the need to engage those we did not hear from in this survey. In

particular, young adults and non-homeowners.

Finally thank you to those who have taken action to tackle climate change & nature loss, however big or small that may be. The council has a big role to play but our collective response alongside communities and businesses will have greater impact when tackling these issues. There's so much great work happening already across the district which we hope continues to grow. If you have anything you would like to share with us, please do get in touch.

Thank You and Contact Information

- ▶ If you would like to keep in touch about our Climate and Nature work you can get in touch via email at Sustainability@bathnes.gov.uk and follow us on social media via:
 - ▶ Instagram: [@Greenbathnes](https://www.instagram.com/Greenbathnes)
 - ▶ Twitter [@Greenbathnes](https://twitter.com/Greenbathnes)
- ▶ If you would like to stay up to date with weekly news & information from B&NES Council, sign up to the newsletter here: [B&NES Council E-Connect](#)

References & Footnotes

References

Page 242

¹ ONS Data. Estimates of the population for England and Wales:
<https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/datasets/estimatesofthepopulationforenglandandwales>

² ONS Data. Household characteristics by tenure, England and Wales: Census 2021:
<https://www.ons.gov.uk/peoplepopulationandcommunity/housing/datasets/householdcharacteristicsbytenureenglandandwalescensus2021>

³ B&NES Strategic Evidence Base: <https://www.bathnes.gov.uk/strategic-evidence/document-library/population>

Footnotes

[1] The first 85 responses for this question were removed in order to account for the fact that 'The way we travel' and 'How we restore nature' were added after the launch of the survey due to them being missed off the list due to human error.

These were added as they are important themes, that had not been intended to be missed off.

Note on branding guidelines

Within corporate guidelines, BANES is used to refer to the district and B&NES council is used for the council as an organisation.

Bath & North East Somerset Council			
MEETING	Cabinet		
MEETING DATE:	13th November 2025	EXECUTIVE FORWARD PLAN REFERENCE:	
		E	3647
TITLE:	Establish a Limited Liability Partnership for the Regeneration of the Bath Quays Residential Development Plots		
WARD:	All		
AN OPEN PUBLIC ITEM with exempt attachment			
List of attachments to this report:			
Attachment 1: LLP Members Agreement			
Attachment 2 (Exempt): Business Case for the Aequus Regeneration Bath Quays LLP			
Exempt by virtue of Local Government Act 1972 as amended, Schedule 12 A Part 1 Para 3 Information relating to the financial or business affairs of any particular person (including the authority holding that information) and Para 5 Information in respect of which a claim for legal professional privilege could be maintained in legal proceedings.			
Attachment 3: Equalities Impact Assessment			

1 THE ISSUE

- 1.1 The Council wholly owns Aequis Group Holding Ltd (**Aequis**). In turn, Aequis Construction Limited (**ACL**) and Aequis Developments Limited (**ADL**) are 100% subsidiaries of Aequis, (together, the **Group**).
- 1.2 The Council uses the Group to deliver housing developments. ACL's principal activity is that of housing development and construction, while ADL provides management services to ACL, e.g. through the provision of employees.
- 1.3 As part of the Council's regeneration activity the Council intends to deploy the Group to deliver housing led regeneration development on brownfield sites. Over the next five years there are plans to deliver circa 1,000 homes, with projects becoming larger and more complex in nature as the Company matures and grows.
- 1.4 Bath Quays is the Council's flagship regeneration project. The Council has intervened to address a market failure in the supply of Grade A office accommodation in the city through its promotion of Bath Quays. Action has delivered the commercial development on Bath Quays South and secured a planning permission for the comprehensive development of Bath Quays North.

- 1.5 The Council had contracted delivery of Bath Quays North with Legal & General but due to market changes post Covid, L&G withdrew from the Agreement at the Long-stop date. Since their departure the Council has re-phased development to now focus on progressing housing as the next phase of delivery on development Plots 2 (south) and 6-7(north) (collectively referred to as the Site) while it re-establishes a new delivery partnership for the wider site.
- 1.6 This report proposes a Limited Liability Partnership delivery vehicle for the delivery of housing development on the Site to further the Bath Quays regeneration.

2 RECOMMENDATION

The Cabinet is asked to;

- 2.1 Agree to the establishment of a Limited Liability Partnership (LLP) between the Council and the Group.
- 2.2 Approve the proposed membership agreement of the LLP at Attachment 1.
- 2.3 Delegate to the Director of Capital & Housing Delivery the authority to take all steps necessary to form the Limited Liability Partnership for the regeneration of the Bath Quays North plots 6 & 7 and Bath Quays south (collectively referred subsequently as the Site) in the proportions provided for in attachment 1.
- 2.4 Agree to loan the LLP the Site development costs.
- 2.5 Agree in principle to the use of the existing Aequus Development Loan Facility and the Aequus Working Capital Facility by the LLP.
- 2.6 Delegate to the Director of Capital & Housing Delivery in consultation with the Leader, Cabinet Member for Resources and S151 Officer authority to transfer the Site to the LLP.
- 2.7 Delegate to the Director of Finance (S.151 Officer) in consultation with the Executive Director of Sustainable Communities, the power to approve the Full Business Case to develop the Site and, enter into a loan agreement with and take security for the loan from the LLP.

3 THE REPORT

- 3.1 The Council has been promoting and delivering Bath Quays to create a new business district for the city through a comprehensive approach to development since 2015.
- 3.2 Through the development of Bath Quays south the Council has delivered its economic objective for employment space and has enabled a residential development plot (plot 2) which has the benefit of an extant planning permission for approximately 65 dwellings.
- 3.3 The regeneration of Bath Quays North (Avon St) was being progressed through Council Decision E3122 via a Development Agreement with Legal & General. Comprehensive development proposals received Planning Permission (18/00058/ERE03) for a mixed-use development comprising B1, C1, C3, A1, A3, A4, D1 and D2 uses, with total combined floorspace of up to 38,000sqm (GIA, above ground), infrastructure (including basement car park) and associated development.

- 3.4 To secure a comprehensive regeneration the Council appropriated land for planning and regeneration purposes under E3122 as an Officer Delegated Decision. Following the withdrawal of Legal and General in 2023, the Council has re-phased development to now prioritise the delivery of the residential (plots 6 & 7) to develop and deliver these while it establishes a new delivery partner for the wider project.
- 3.5 The next phase of regeneration will comprise 3 residential Plots, Plot 2 (Bath Quays South) and Plots 6 & 7 (Bath Quays North). A delivery vehicle structured as a Limited Liability Partnership between the Council & ACL provides an efficient regeneration vehicle to deliver these plots. The LLP will be “Teckal” compliant and will comply with the Procurement Act 2023 requirements as a public authority pursuant to section 2 (2) & (10) of that Act in the award of any subcontracts by it.
- 3.6 The LLP would be a commercial entity and capable of taking risks that the Council might not. The LLP sits outside of the Council and does not carry balance sheet risks for it. Additionally, the LLP would be created solely for the redevelopment of the Site. Should this LLP model prove successful other regeneration projects could follow the model with a separate LLP for each individual project that would require Cabinet approval before it could proceed.
- 3.7 Creating an individual LLP for each regeneration project will ringfence the risk to that site and not impact the viability of the Group or adversely impact the Council's finances.
- 3.8 The Council and the Group have been provided with accountant advice from Bishop Fleming that concluded that the most efficient model is for the Council and ACL to incorporate a limited liability partnership (**LLP**).
- 3.9 The main reason for this model being financially efficiency, being that:
- (1) The LLP can recycle any profit to support the Council's regeneration and housing duties
 - (2) As the LLP itself is not subject to corporation tax (unlike a company limited by shares), any profit of the LLP is taxed in the hands of the members. As the Council is exempt from corporation tax, the Council's share of the profits would be exempt (the Groups share of profits would be subject to corporation tax in the hands of ACL).
- 3.10 Any profit created by the regeneration of the Site which is subsequently received by the Council could be used to further regeneration activity in the Council area and provide subsidy for social housing on those future sites.

4 STATUTORY CONSIDERATIONS

- 4.1 The Council's general power of competence (section 1 of the Localism Act 2011) would, be relied on to form an LLP. In broad terms, the general power enables a local authority to do anything, subject to various limitations, which an individual may do.
- 4.2 The relevant limitation on the use of the general power is that if a council exercises/uses it for a 'commercial purpose', then it must do so through a company. An LLP is not a company.

4.3 The Council's primary purpose in forming the proposed LLP is to:

- regenerate the Site which has stalled following the collapse of its development agreement with L&G;
- increase housing supply; and
- to promote the development of energy efficient homes.

4.4 The Council's primary purpose therefore relates to its strategic and socio-economic responsibilities, and it is not becoming a member of the LLP for primarily a 'commercial purpose'. While this report details the potential financial efficiencies of an LLP, these should be seen as incidental to broader drivers of efficiency which would help with overall achievement of the above purposes.

5 RESOURCE IMPLICATIONS (FINANCE, PROPERTY, PEOPLE)

5.1 Section 3 of the Business Case for the incorporation of Aequus Regeneration Bath Quays LLP sets out the financial comparison of the schemes being delivered through an LLP against the usual ACL model. The LLP approach is expected to deliver additional financial benefits supporting the Council in achieving its regeneration ambitions while generating measurable financial and social value.

5.2 The existing Aequus Development Loan Facility and the Aequus Working Capital Facility are proposed to be used to support the funding requirement for the LLP.

6 RISK MANAGEMENT

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

7 EQUALITIES

7.1 An EQIA has been completed.

8. CLIMATE CHANGE

8.1. The schemes that are included in the LLP, Bath Quays North (plots 6 & 7) & Bath Quays South (plot 2), must address the relevant B&NES planning sustainability policies as set out in the SPD and SCR6. This includes:

8.1.1. A Fabric First approach to design to create low energy losses from the building fabric, MHRV systems with a very low air permeability for the fabric of the building.

8.1.2. Selection of materials that avoid substantial liberation of carbon to the atmosphere and consideration should be given to materials that capture carbon.

8.1.3. An all-electric approach to building systems with the adoption of 'renewable energy' systems and no fossil fuels consumed on site.

8.1.4. On site micro generation of electricity using photovoltaic panels and the solar heating for domestic hot water.

8.1.5. Substantial provision of facilities for cyclists, including extensive, secure and easily accessible cycle storage and for the charging of electric bicycles as per Planning Policy

8.1.6. Provision for EV charging in the car part for BQS, however there is no parking provision on BQN.

9 OTHER OPTIONS CONSIDERED

9.1 None

10 CONSULTATION

10.1 The Shareholder Advisory Group, Council Monitoring Officer and S.151 Officer have been consulted in the preparation of this report.

Contact person	Simon Martin, Director of Capital & Housing Delivery simon_martin@bathnes.gov.uk
Background papers	<i>E3122 Bath Quays North, Appointment of Development Partner</i> https://democracy.bathnes.gov.uk/ieDecisionDetails.aspx?ID=1204 <i>Officer delegated decision Appropriate and Dispose of Land at Bath Quays North</i> https://democracy.bathnes.gov.uk/ieDecisionDetails.aspx?ID=1541
Please contact the report author if you need to access this report in an alternative format	

This page is intentionally left blank

Appendix 1b



dated

2025

Bath & North East Somerset Council

and

Aequus Construction Limited

and

[*Aequus Regeneration Bath Quays*] LLP

Limited Liability Partnership Agreement

in relation to [*Aequus Regeneration*] LLP

Trowers & Hamlin LLP
One Snowhill
Snow Hill Queensway
Birmingham
B4 6GB
t +44 (0)121 214 8800
f +44 (0)121 214 8801
www.trowers.com

— **trowers.com**

Contents

1	Definitions and interpretation.....	1
2	Incorporation	4
3	Application of the SHA	4
4	Commencement, Business and duration	4
5	Name and Registered Office	4
6	Decision -Making.....	5
7	Place of Business	6
8	LLP property	6
9	Banking	6
10	Accounts, Auditors and audit.....	6
11	Capital	7
12	Profits and losses	8
13	Drawings	9
14	Designated Members	9
15	The Members' Group	9
16	Management of the LLP and LLP Operational Board Meetings	10
17	LLP Operational Board meetings and Resolutions.....	12
18	Meetings of the Members	15
19	Termination.....	16
20	Entire agreement.....	16
21	Notices	17
22	Costs.....	17
23	Waiver and Remedies	17
24	Severance	17
25	Third Parties	18
26	Variation	18
27	Counterparts.....	18
28	Governing law and jurisdiction	18
	Schedule 1 - Capital contributions and treatment of profits and losses	19
	Part 1 - Capital contributions and division of capital profits and losses	19
	Part 2 - Division of profits and losses	19
	Schedule 2 – Reserved matters	20
	Schedule 3 – Business Plan.....	22

Deed

dated 2025

Parties

- (1) **Bath & North East Somerset Council** of The Guildhall, High Street, Bath BA1 5AW (**Council**);
- (2) **Aequus Construction Limited** a company incorporated and registered in England and Wales with company number 10832066 whose registered office is at Cambridge House, Henry Street, Bath, England BA1 1BT (**ACL**); and
- (3) **[Aequus Regeneration Bath Quays] LLP** a limited liability partnership incorporated and registered in England and Wales with registration number [*] whose registered office is at [Cambridge House, Henry Street, Bath, England BA1 1BT] **TBC (LLP)**.

Introduction

- (A) The Members are the persons who have signed their names on the incorporation document which has led to the incorporation of the LLP under the Act. The LLP was incorporated on [*].
- (B) The Members and ADL entered into the SHA.
- (C) The Members have agreed to enter into this Agreement with the LLP to set out the basis on which the LLP is to be organised and the rights and obligations of the Members of the LLP.

Agreed terms

1 Definitions and interpretation

- 1.1 In this Agreement the following terms have the following meanings unless inconsistent with the context:

Accounting Period means in relation to the first Accounting Period, the period commencing on the date of incorporation of the LLP and ending on 31 March 2027 and, in relation to any other Accounting Period, a period of 12 calendar months ending on the Accounting Reference Date in each year of this Agreement;

Accounting Reference Date means 31 March or such other date as determined in accordance with this Agreement;

Act means the Limited Liability Partnerships Act 2000 and any amendments to that Act;

ADL means Aequus Developments Limited (CRN: 10060817) whose registered office is at Cambridge House, Henry Street, Bath, England BA1 1BT;

[Aequus Business Plan] means the business plan of the Aequus Group Companies as approved by the board of AGHL; *[please confirm or amend as appropriate]*

Aequus Group Companies mean AGHL, ACL and ADL;

AGHL means Aequus Group Holdings Limited (CRN:14025216) whose registered office is at Cambridge House, Henry Street, Bath, England BA1 1BT;

Auditors means such auditors as appointed by AGHL in accordance with this Agreement;

Bank means the bankers from time to time of the LLP;

Business means the business of development and regeneration of housing projects in accordance with, to the extent applicable, the Business Plan or any such other business determined in accordance with this Agreement;

Business Day means a day other than a Saturday, Sunday or public holiday in England when banks in London are open for business;

Business Plan means the Business Plan as agreed by the Members in accordance with the provisions of this Agreement and as the same may be varied or updated from time to time in accordance with the provisions of this Agreement;

Capital Account means the account established for each Member by the LLP in accordance with this Agreement to which its capital contribution to the LLP is credited;

Chair means one of the Representatives elected to be chair by their fellow Representatives;

Companies Act means the relevant provisions of the Companies Act 2006 (as amended), as are applied to LLPs in accordance with regulations made under the Act;

Current Account means the account established for each Member by the LLP in accordance with this Agreement to which all Profits payable to the Members by the LLP are credited or against which drawings and any Losses attributable to the Members are debited;

Designated Members means all the Members or such of the Members as are designated in accordance with this Agreement;

Insolvency Act 1986 means the relevant provisions of the Insolvency Act 1986 (as amended), as are applied to LLPs in accordance with regulations made under the Act;

Interest means the totality of a Member's contractual and/or statutory rights, title, interest and obligations attaching to its membership of the LLP, including without limitation all and any rights and obligations under contracts of any kind between that Member and the LLP;

LLP Operational Board means the board of persons appointed in accordance with clause 16.2;

Loss means in relation to any Accounting Period, the net amount of any losses of the LLP for that Accounting Period, as calculated in accordance with the accounting practices and policies of the LLP from time to time;

Members means a person having an Interest and as at the date of incorporation of the LLP mean the Council and ACL;

Members' Group means the group of Members' Representatives established in accordance with clause 15;

Name means [Aequus Regeneration] LLP, or such other name of the LLP as may be agreed between the Members and registered at Companies House from time to time

Profits means the profits of the LLP for an Accounting Period as shown in the annual accounts of the LLP after all expenditure and provisions including the payment of all interest, if any, accrued and payable on moneys borrowed by the LLP and any salaries paid or payable by the LLP;

Registered Office means Cambridge House, Henry Street, Bath, England BA1 1BT;

Relevant Percentage means in relation to a Member, such proportion of the capital contributions advanced by such Member to the LLP, expressed as a percentage of the total amount of the capital contributions advanced by the Members to the LLP at the relevant time as set out in Schedule 1Part 1

Representatives mean the persons appointed to represent the Members that will comprise a Council Representative and the ACL Representative as set out in clause 15.2;

Reserved Matters mean the matters specified in Schedule 2; and

SHA means the shareholders agreement signed in 2018 between (1) Council (2) ADL and (3) ACL;

- 1.2 Terms defined in the SHA shall have the same meanings in this Agreement, unless indicated to the contrary.
- 1.3 Clause and Schedule headings shall not affect the interpretation of this Agreement.
- 1.4 A **person** includes a natural person, corporate or unincorporated body (whether or not having separate legal personality).
- 1.5 The Schedules form part of this Agreement and shall have effect as if set out in full in the body of this Agreement. Any reference to this Agreement includes the Schedules.
- 1.6 Unless the context otherwise requires, words in the singular shall include the plural and in the plural shall include the singular.
- 1.7 Unless the context otherwise requires, a reference to one gender shall include a reference to the other genders.
- 1.8 This Agreement shall be binding on, and enure to the benefit of, the parties to this Agreement and their respective personal representatives, successors and permitted assigns, and references to any party shall include that party's personal representatives, successors and permitted assigns.
- 1.9 A reference to a statute or statutory provision is a reference to it as amended, extended or re-enacted from time to time.
- 1.10 A reference to **writing** or **written** includes email unless otherwise stated in this Agreement.

- 1.11 Any obligation on a party not to do something includes an obligation not to allow that thing to be done.
- 1.12 References to clauses and Schedules are to the clauses and Schedules of this Agreement and references to paragraphs are to paragraphs of the relevant Schedule.
- 1.13 Any words following the terms **including, include, in particular, for example** or any similar expression shall be construed as illustrative and shall not limit the sense of the words, description, definition, phrase or term preceding those terms.

Any reference to a document being **in the agreed form** means a document in a form agreed by the parties.

- 1.14 Any reference to the death of any Member, in the case of any Member being a body corporate, includes reference to the winding up, dissolution or striking off the register of that Member.

2 **Incorporation**

- 2.1 The LLP was incorporated on [*].
- 2.2 The LLP shall keep the certificate of registration of the LLP to be issued by the Registrar of Companies at the Registered Office.

3 **Application of the SHA**

- 3.1 The parties agree that:

3.1.1 except where:

- (a) there are express provisions in this Agreement relating to a matter for which there are also provisions in the SHA, which would otherwise apply to the LLP; and
- (b) varied or contradicted by the other provisions of this Agreement, the provisions of the SHA shall apply to the LLP;

3.1.2 in the event of a conflict between the provisions of the SHA and this Agreement, the terms of this Agreement shall prevail.

4 **Commencement, Business and duration**

- 4.1 This Agreement shall be deemed to have commenced on incorporation of the LLP.
- 4.2 The LLP carries on the Business.

5 **Name and Registered Office**

- 5.1 The LLP is incorporated with the Name and Registered Office.
- 5.2 The Designated Members may change the Name and the Registered Office at any time in accordance with clause 18.

5.3 The Designated Members shall notify any change in the Name or the Registered Office to the Registrar of Companies in accordance with the Act.

6 **Decision -Making**

6.1 Except as set out in clause 6.2, insofar as a matter relating to LLP is a Reserved Matter, the Members' Group nor the LLP Operational Board as the case may be shall not make any decision in relation to, or undertake, that Reserved Matter except with the prior approval of the Council or the LLP Operational Board (where applicable) as set out in Schedule 2.

6.2 Clause 6.1 shall not apply in connection with any decision or action relating to a Reserved Matter:

6.2.1 approved in a Business Plan then in force; or

6.2.2 which has been properly delegated in accordance with this Agreement to the LLP Operational Board or relevant ACL officer or employee or any other person; or

6.2.3 to the extent the same decision has been taken by the Council in accordance with an agreement between the Council and the LLP.

6.3 For the avoidance of doubt, the LLP Operational Board may make any decision in relation to, or undertake, any matter which is not a Reserved Matter where that matter is outside the terms of the LLP's Business Plan (as part of the Aequus Business Plan) provided that the matter is only outside the terms of the Business Plan by reason of potential additional expenditure which itself does not exceed any threshold in the Reserved Matters.

6.4 Any variation to the list of Reserved Matters must be approved by the Council in writing. The Reserved Matters may be varied and/or replaced in part or entirely by the Council at its absolute discretion. Upon the Council giving notice in writing to the LLP that such a variation or replacement has occurred, this Agreement and Schedule 2 shall be deemed modified from the date specified in the varied or replacement schedule.

6.5 If any agreement between the Council and the LLP is validly varied in accordance with its terms, the relevant sections of its Business Plan shall be deemed amended on and with effect from the date of the variation of the agreement to the extent (but only to the extent) such amendment is necessary to ensure that the Business Plan is fully consistent, and does not conflict, with the terms of that agreement.

6.6 Except as set out above in this clause 6, the LLP Operational Board shall have full and complete authority, power and discretion to direct, manage and control LLP and the Business, affairs and properties of the LLP, to make all decisions regarding those matters and to perform any and all other acts or activities customary or incidental to the management of the Business.

6.7 The LLP agrees that it shall, in a proper and efficient manner:

6.7.1 carry on and conduct its Business and affairs in accordance with:

(a) this Agreement;

(b) its Business Plan then in force;

- (c) all laws relating to companies as amended from time to time;
- (d) sound governance and good business practice; and
- (e) use all reasonable endeavours to obtain and, if necessary, maintain in full force and effect all licences (including statutory licences), consents and authorities necessary to own and operate its assets and to carry on its Business properly and effectively and in accordance with the Business Plan then in force.

7 **Place of Business**

The LLP shall carry on the Business at the Registered Office or such other additional or alternative place(s) of business as the Members may determine in accordance with this Agreement.

8 **LLP property**

All property held or created by the LLP for the purposes of carrying on the Business and which has been paid for by the LLP or contributed to the LLP by any Member or has otherwise accrued to the LLP, is owned by the LLP absolutely and the Members have no individual rights in that property other than by their entitlement to such capital distributions as may be due to them under this Agreement or following liquidation of the LLP.

9 **Banking**

- 9.1 The Members may resolve upon which bank to open the LLP's accounts in accordance with clause 18 and the Reserved Matters.
- 9.2 All money belonging to the LLP shall be paid promptly into the LLP's account at the Bank for the credit of the LLP.

10 **Accounts, Auditors and audit**

- 10.1 The LLP shall ensure that proper books of account giving a true and fair view of the Business, the state of affairs and Profit or Loss of the LLP are properly kept and preserved and are open to inspection by the Members at all times.
- 10.2 The LLP's books of account shall be kept at the Registered Office or at such other place as the Members determine in accordance with the Reserved Matters.
- 10.3 The LLP's accounting reference period ends on the Accounting Reference Date or such other date as the Members may determine in accordance with the Reserved Matters.
- 10.4 The Designated Members shall notify any change in the Accounting Reference Date to the Registrar of Companies in accordance with the Companies Act.
- 10.5 Save as otherwise agreed ACL shall for so long as ACL is a Member of the LLP take reasonable endeavours to procure that the LLP's accounts are prepared using the same accounting processes and auditing arrangements currently established for all Aequis Group Companies and:
 - 10.5.1 provide each Member:

- (a) within 30 Business Days of the end of each calendar month, with unaudited management accounts of the LLP for such month in a form acceptable to the Members;
- (b) within 30 Business Days of the end of the calendar month, monthly VAT reporting; and
- (c) within 30 Business Days of the end of each three-month period, an updated revenue and cash flow forecast for the LLP;

10.5.2 ensure the LLP's statutory accounts for each Accounting Period:

- (a) are, save in respect of the first Accounting Period, for a period of 12 calendar months ending on the Accounting Reference Date;
- (b) are prepared on an historical cost basis in accordance with all applicable laws and those accounting policies as are from time to time generally accepted in the United Kingdom;
- (c) are audited as soon as practicable and in any event not later than four months after the end of the relevant Accounting Period; and
- (d) are in accordance with the Companies Acts;

10.6 Unless the LLP is exempt from audit under the Companies Act, the LLP annual accounts shall be audited and settled each year by the Auditors as at the Accounting Reference Date.

10.7 The LLP annual accounts together with a report by the Auditors (if applicable) shall be:

- 10.7.1 laid before a meeting of the Members for consideration and if thought fit approved, in accordance with clause 18, subject only to any approved variation;
- 10.7.2 distributed to all Members as required by the Companies Act; and
- 10.7.3 distributed to the Members at the same time as the annual accounts are distributed to the Members.

10.8 The Designated Members shall sign the annual accounts of the LLP and file them with the Registrar of Companies in accordance with the Companies Act.

11 **Capital**

11.1 The Members have contributed the total sum of capital in the proportions specified in Part 1 of Schedule 1 on incorporation of the LLP as shall be credited to each Member's Capital Account.

11.2 At incorporation of the LLP, each of the Members acquired an economic share in the LLP in accordance with the amount or value of their capital contribution to the LLP on incorporation, being for the avoidance of doubt:

11.2.1 ACL: 1%; and

11.2.2 Council: 99%.

11.3 Neither of the Members nor the LLP Operational Board may call for the Members to contribute any further capital (in addition to the amount specified in Part 1 of Schedule 1) to the LLP without the unanimous consent of the Members in accordance with clause 17, whether on the insolvency of the LLP or otherwise.

11.4 No Member is entitled to receive interest on the amount of its proportion of the capital contributions to the LLP.

12 Profits and losses

12.1 There will be established for each Member on the books and records of the LLP, a Capital Account, a capital contribution account (**Capital Contribution Account**), a Current Account and a loan account (**Loan Account**) which shall be operated as follows:

12.1.1 the capital contributions of a Member shall be credited to its Capital Contribution Account;

12.1.2 any Profit for any Accounting Period allocated to a Member in accordance with clause 12.4 shall be credited to its Income Account and any Loss for any Accounting Period so allocated shall be debited to that account;

12.1.3 Member's loans (if any) and any repayment and the re-advance of the same shall be credited and debited to its Loan Account (as appropriate).

12.2 Any Profit or Loss in relation to any Accounting Period shall be allocated between the Members on an annual basis in their Relevant Percentages.

12.3 Subject to clause 12.4 the Profits of the LLP shall be apportioned between the Members in their Relevant Percentages.

12.4 The LLP Board shall recommend (having taken advice of the Auditors, if appropriate) not later than 20 Business Days before the beginning of each Accounting Period what amount (if any) of the Net Profits shall be retained by the LLP in respect of:

12.4.1 reserves for general working capital purposes of the LLP for the following Accounting Period; or

12.4.2 reinvestment back into the LLP in accordance with the Business Plan.

and each Member's share of the Net Profits (after deducting any retentions pursuant to clauses 12.4.1 and 12.4.2) for any Accounting Period shall be paid to that Member or (depending on the cash flow position of the LLP (recommended by the LLP Board, if appropriate, having taken the advice of the Auditors)) allocated to the credit of the relevant Member's Income Account within 30 days after the signing of the annual accounts of the LLP for that Accounting Period.

12.5 Subject to clause 12.6, if it is apparent that there has been over-payment of Net Profit to a Member, the amount of such over-payment shall either be carried forward as a debit on such Member's Income Account or, where the LLP so determines, be repaid on demand by the relevant Member in whole or in part (if in part and there has been over-payments of Net Profits of more than one Member, each such Member shall be liable to contribute such

proportion of the repayment to be made pursuant to this clause 12.5 as is equal to the proportion of the total overpayment received by it).

12.6 The LLP shall not make any Net Profit distribution under this clause 12.6:

12.6.1 unless there is sufficient cash available;

12.6.2 in circumstances where the same would render the LLP insolvent;

12.6.3 in circumstances where, in the reasonable opinion of the LLP, the same would or might leave the LLP with insufficient funds to meet any future contemplated obligations or contingencies;

12.6.4 in circumstances where, and to the extent that, a Member requests that the LLP withholds its share of Net Profit until after it requests payment of such amount (in whole or in part) provided that the withheld share of Net Profit shall continue to accrue to the ledger of the Member's Income Account of the relevant Member and shall not delay or otherwise affect distributions to a Member that has not requested any such withholding of their share of Net Profit. Upon a request for payment of a withheld amount by the relevant Member, the LLP shall distribute the requested amount as soon as reasonably practicable (and in any event within ten Business Days of the request).

13 Drawings

No Member may draw from its Current Account without the prior consent of the LLP Board.

14 Designated Members

14.1 The Designated Members shall be responsible for ensuring compliance with all registration and other requirements of the Act and other applicable legislation, including:

14.1.1 notifying any change to the Members or their personal details or to the Accounting Reference Date to the Registrar of Companies;

14.1.2 notifying any change in the Name or Registered Office to the Registrar of Companies;

14.1.3 signing the annual accounts of the LLP and filing them with the Registrar of Companies in accordance with the Companies Act;

14.1.4 preparing, signing and filing the annual return with the Registrar of Companies; and

14.1.5 when appropriate, appointing, re-appointing, fixing the remuneration of and removing the LLP auditors.

15 The Members' Group

15.1 Overall Supervision

15.1.1 Subject to the provisions of the LLP Act, overall supervision of the Business shall be the responsibility of the Members' Group, which shall have authority to act on

behalf of the LLP and the Members in all matters in connection with the Business including delegating its powers to the LLP Operational Board.

15.1.2 The Member's Representatives shall be entitled to act in accordance with any instructions provided by the Member that appointed them.

15.1.3 Save where otherwise expressly provided in this Agreement, the Members through the Members' Group hereby delegate the day to day management and control of the Business to the LLP Operational Board, who shall manage the LLP and its Business in accordance with this Agreement.

15.2 **Composition of the Members' Group**

The Members' Group shall consist of two Representatives, one for each Member as follows:

15.2.1 Managing Director of AGHL or in their absence the Executive Director of Operations of [AGHL] shall be the ACL Representative; and

15.2.2 Director of Capital & Housing of the Council or in their absence the Head of Housing of the Council shall be the Council Representative.

15.2.3 The initial Representatives may appoint any Alternate pursuant to clause 16.5.

15.3 **Appointment and Removal of Member's Representatives**

15.3.1 Any appointment or removal of a Member's Representative shall be effected by notice in writing to the LLP signed by or on behalf of the Member that appointed such Member's Representative and shall take effect, subject to any contrary intention expressed in the notice, when the notice is delivered to the LLP or, if later, the time and date stated in such notice.

15.3.2 If a Member ceases to be a Member for any reason then such Member shall be deemed to have served notice pursuant to clause 15.3.1 to remove from office any Member's Representatives appointed by it/them and shall not be entitled to appoint any persons as Member's Representatives in their place.

15.3.3 The Member removing a Member's Representative shall indemnify the LLP against any claims arising in connection with that Member's Representative's removal from office.

15.3.4 No Representative shall be entitled to remuneration for his or her services by virtue of being a member of the Members' Group.

16 **Management of the LLP and LLP Operational Board Meetings**

16.1 The decisions of the LLP Operational Board shall be made in accordance with this clause 16.

16.2 **LLP Operational Board**

16.2.1 The initial LLP Operational Board shall comprise the following:

16.2.1.1 Sally Kay Higham;

- 16.2.1.2 Michelle Louise Hyde;
- 16.2.1.3 Andrew David Johnston;
- 16.2.1.4 Victor O'Brien;
- 16.2.1.5 Elizabeth Pickering;
- 16.2.1.6 Timothy Richens;
- 16.2.1.7 Tessa Rollings;
- 16.2.1.8 Professor Alexander William Wright; and
- 16.2.1.9 Simon Martin

- 16.2.2 The initial LLP Operational Board are also members of the ACL Board of Directors and where a member of the LLP Operational Board is removed from or appointed to the Board of Directors of ACL such person is deemed to be appointed or removed (as applicable) as a member of the LLP Operational Board.
- 16.2.3 [Any appointment or removal of the Council Board Member shall be effected by notice in writing to the LLP signed by or on behalf of the Council and shall take effect, subject to any contrary intention expressed in the notice, when the notice is delivered to the LLP or, if later, the time and date stated in such notice] **TBC**.
- 16.2.4 The Members and the LLP agree to maintain the LLP Operational Board for the duration of the LLP and agree to use their respective reasonable endeavours to procure that the LLP Operational Board shall operate in accordance with the provisions of this Agreement and the Reserved Matters.

16.3 **Delegation by the LLP Operational Board**

- 16.3.1 Subject to this Agreement, the LLP Operational Board may delegate any of its powers which are conferred on it under this Agreement:
 - (a) to such person (whether a Representative or not) or committee or ACL officer or employee;
 - (b) by such means (including by power of attorney);
 - (c) to such an extent;
 - (d) in relation to such matters or territories; and
 - (e) on such terms and conditions,

as it thinks fit. If the LLP Operational Board so specifies, any such delegation may authorise further delegation of its powers by any person to whom they are delegated. Subject to the terms of any contractual obligations entered into by the LLP, the LLP Board may revoke any delegation in whole or part, or alter its terms and conditions.

- 16.3.2 The provisions of this Agreement applicable to meetings and resolutions of the LLP Board shall apply equally to meetings and proceedings of any committee appointed pursuant to clause 16.3.1.

16.4 Resolution of ambiguity, uncertainty or inconsistency

Where there is any ambiguity, uncertainty or inconsistency in relation to any delegated authority and/or who is to take any decision to be made by or on behalf of the LLP, the matter shall be referred by any Board Member (as defined below) in the first instance to the Members' Group for determination. However, the Chair shall notify all Representatives of such referral forthwith on it being made and the Representatives shall then have five (5) Business Days from, but not including, the date of receipt of such notice in which to give notice in writing to the LLP referring the matter to the LLP for determination instead.

16.5 Alternates

- 16.5.1 A Representative may appoint any other individual (whether or not a Representative) as his alternate for the purposes of one or more meetings of the LLP Board, provided always that a member of the LLP Board must personally attend at least two out of every three consecutive meetings of the LLP Board.
- 16.5.2 Any notice appointing an alternate shall be in writing and shall take effect upon delivery to the LLP's registered office or production at the first such meeting of the LLP Board at which the alternate attends.
- 16.5.3 An alternate may represent more than one Representative and a Representative may represent another Representative.

16.6 Duties of Representatives; no entitlement to remuneration or expenses

- 16.6.1 A Representative shall owe a duty to the LLP to act in the way he considers, in good faith, would be most likely to promote the success of the LLP for the benefit of the Members as a whole and in furtherance of the Business Plan and this Agreement.
- 16.6.2 [No Representative (or alternate) shall receive any remuneration or expenses reimbursement from the LLP.

17 LLP Operational Board meetings and Resolutions

17.1 Location of LLP Operational Board meetings

Unless the LLP Operational Board otherwise agrees, meetings shall be held at the LLP's registered office. An LLP Operational Board Member (**Board Member**) shall be taken to be present at a LLP Operational Board meeting if linked by telephone or by means of a video conferencing facility to the other Board Members also present at the meeting through which he or she can hear and be heard by the other Board Members.

17.2 Notice of LLP Operational Board meetings

- 17.2.1 The Chair:
- (a) may at any time; and

- (b) if requested by at least one Board Member, shall within five (5) Business Days of receiving such a request,

call a LLP Operational Board meeting.

17.2.2 A notice of a LLP Operational Board meeting shall:

- (a) specify the time and place of the meeting;
- (b) be accompanied by an agenda of the business to be transacted at the meeting, together with a copy of all documents to be circulated or presented to the meeting; and
- (c) be given to Board Members at least ten (10) Business Days before the meeting.

17.2.3 A shorter period of notice may be given with the written approval of the Board Members.

17.3 **Quorum**

17.3.1 A meeting of the LLP Operational Board shall not transact any business unless a quorum is present at the start of the meeting. The quorum for any meeting of the LLP Operational Board shall be two Board Members one of whom must be the Council Board Member.

17.3.2 If a quorum is not present within 30 (thirty) minutes from the start time of the meeting or if a quorum subsequently ceases to be present at any time during which business is being conducted at the meeting, the meeting shall be adjourned to be reconvened at the same place and time five (5) clear Business Days later (or such other period as the Board Members may unanimously decide).

17.3.3 If at such adjourned meeting the Board Members necessary to form a quorum pursuant to clause 17.3.1 are not present within half an hour from the time appointed for the adjourned meeting, the adjourned meeting shall proceed provided the Board Member representing the Council is present.

17.4 **Conduct of business and voting**

17.4.1 The LLP Operational Board shall not decide any matter at a meeting which does not appear in the agenda for that meeting unless otherwise agreed by the Board Members.

17.4.2 The Chair shall have a second or casting vote.

17.4.3 At any quorate meeting of the LLP Operational Board:

- (a) each Board Member (or his alternate) is entitled to cast one vote on a resolution put to the LLP Operational Board; and
- (b) if a Board Member appointed by a particular Member is absent, the Board Member appointed by that Member who is present in person or by an

alternate may cast the vote of the absent Board Member appointed by that Member provided that the maximum number of votes able to be cast by the Board Member present in person or by an alternate shall not exceed the number of Board Members which that Member may at that time appoint (whether or not that Member has appointed all such Board Member).

- 17.4.4 A resolution of the LLP Operational Board shall be passed by a majority vote in favour of the resolution and, with the exception of a written resolution effected in accordance with clause 17.5, shall only be valid where taken at a quorate meeting of the LLP Operational Board called, convened and held in accordance with this clause 17.

17.5 **Written resolutions**

A written resolution (which may be in counterparts) signed by all Board Members entitled to receive notice of and vote at a LLP Operational Board meeting at which the resolution would have been proposed, or to which each Board Member has otherwise indicated its agreement in writing, shall be as valid as if it had been passed at a LLP Operational Board meeting duly convened and held.

17.6 **Minutes**

- 17.6.1 The Representatives present at a LLP Operational Board meeting may regulate the taking of minutes at that meeting.
- 17.6.2 Draft minutes of a LLP Operational Board meeting shall be:
- (a) prepared and sent to each Board Member within five (5) Business Days after the meeting to which they relate; and
 - (b) if thought fit, approved at the next LLP Operational Board meeting.
- 17.6.3 Approved minutes shall be sent to each Board Member within five (5) Business Days after the meeting of the LLP Operational Board at which they are approved.
- 17.6.4 For the avoidance of doubt, written resolutions of the LLP Operational Board passed pursuant to clause 17.5 shall not be subject to the foregoing provisions of this clause 17.6.

17.7 **Delegations**

- 17.7.1 The Board Members will be equally represented on any committees or steering groups; meetings and decisions of those committees or steering groups will be taken in a manner similar to that of the LLP Operational Board.
- 17.7.2 Where a committee or steering group, by reason of equal votes for or against a resolution, cannot agree on a course of action, the matter will be escalated to the LLP Operational Board.

18 Meetings of the Members

- 18.1 Meetings of the Members shall be held if one of the Members requests in writing by serving notice on the LLP. Such meeting shall take place at a date to be agreed between the Members but not less than 14 (fourteen) Business Days following the date of such notice, unless all the members of the LLP entitled to attend such meeting agree in writing or otherwise by their attendance at such meeting.
- 18.2 Each notice convening a meeting of the Members shall specify the date, time and place of the meeting (the date and time to be convenient to all members), and unless otherwise agreed by all of the Members, the meeting shall be held at a location to be agreed in advance by such Members and shall be accompanied by an agenda identifying in reasonable detail the issues to be considered at such meeting and copies of any relevant papers to be discussed at the meeting.
- 18.3 A Member (being a body corporate) may by resolution of its directors or other governing body authorise persons to act as its representative at a meeting and any person so authorised shall be entitled to exercise the same powers on behalf of the body corporate which he or she represents as that body corporate could exercise if it were an individual Member.
- 18.4 The quorum for the transaction of business at any meeting of the Members shall two Representatives.
- 18.5 If the quorum necessary for a meeting of the Members is not present within 30 (thirty) minutes from the time for which such meeting was called, or ceases to be present thereafter, the meeting (the **first meeting**) shall be automatically adjourned to a date not less than three (3) Business Days following the first meeting, and no business may be transacted at the first meeting other than to agree the time and date of the adjourned meeting. The LLP shall give notice in writing to each Member requiring them to attend the adjourned meeting. If at the adjourned meeting a quorum is not present within 30 (thirty) minutes from the time appointed for the adjourned meeting, the adjourned meeting shall continue provided the Council Representative is present.
- 18.6 Meetings of the Members may be conducted by electronic means by which the Members can communicate simultaneously. Members (by corporate representative) participating in a Members' meeting by electronic means shall be deemed to be present in person at the meetings and shall be entitled to be counted in the quorum and to vote. All business transacted at such a meeting shall be deemed to be validly transacted, notwithstanding that a quorum is not physically present in the same place. Such a meeting shall be deemed to take place in the location where the Member who is geographically closest to the registered office of the LLP is located.
- 18.7 Minutes shall be prepared of all meetings of the Members and shall be approved and signed by at least one Representative as evidence of the proceedings.
- 18.8 A resolution (which may be in counterparts) in writing (which includes email or other electronic format) signed by at least one Representative (which, in respect of electronic resolutions shall be by way of electronic signature or confirmation by email), and setting out the terms of the resolution, shall be as valid as if it had been passed at a members' meeting duly convened.

19 Termination

- 19.1 Subject to clause 19.2 this Agreement may be terminated by the Council serving no less than six months' written notice on all other Members.
- 19.2 The Council may terminate this Agreement immediately where required in accordance with any law.
- 19.3 Insofar as any of the rights and powers of any party provided for in this Agreement shall or may be exercised or exercisable after the termination or expiry of this Agreement the provisions of this Agreement conferring such rights and powers shall survive and remain in full force and effect notwithstanding such termination or expiry.
- 19.4 Insofar as any of the obligations of any party provided for in this Agreement remain to be discharged after the termination or expiry of this Agreement the provisions of this Agreement imposing such obligations shall survive and remain in full force and effect notwithstanding such termination or expiry.
- 19.5 Where the LLP is to be wound up and its assets distributed, the Members shall endeavour to ensure that:
- 19.5.1 all existing contracts are performed to the extent that there are sufficient resources;
 - 19.5.2 the LLP shall not enter into any new contractual obligations;
 - 19.5.3 the LLP is dissolved and its assets are distributed as soon as practical in accordance with clauses 19.5.4; and
 - 19.5.4 any other proprietary information or intellectual property rights belonging to or originating from a Member shall be returned to it by the other Member or the LLP and all such proprietary information or intellectual property rights shall be erased from the computer systems (to the extent possible) of the LLP and the Member who is/are returning it.
 - 19.5.5 In the event of the LLP being wound up, the assets of the LLP remaining after payment of all debts and liabilities and of all costs, charges and expenses of winding up the same, shall be distributed amongst the current Members of the LLP.

20 Entire agreement

- 20.1 This Agreement together with all documents referred to in or contemplated by it (including the SHA) contains the entire agreement between the parties in relation to the LLP and supersedes any arrangements, understanding or previous agreements between any of the parties in relation to such matters.
- 20.2 Each party acknowledges that in entering into this Agreement, and any documents referred to in it, it does not rely on, and shall have no remedy in respect of, any statement, representation, assurance or warranty of any person other than as expressly set out in this Agreement or in these documents.
- 20.3 Nothing in this clause operates to limit or exclude any liability for fraud.

21 Notices

- 21.1 Each party may give any notice or other communication under or in connection with this Agreement by letter, email, or other electronic means that provides proof of delivery, addressed to the other party. The address for service of each party shall be the address set out in the recitals or such other address within the United Kingdom for service as the addressee may from time to time notify to the other party for the purposes of this clause.
- 21.2 Any such communication will be deemed to be served:
- 21.2.1 if personally delivered, at the time of delivery and, in proving service, it shall be sufficient to produce a receipt for the notice signed by or on behalf of the addressee;
 - 21.2.2 if by letter, at noon on the Business Day after such letter was posted (or, in the case of airmail, five (5) Business Days after such letter was posted) and, in proving service, it shall be sufficient to prove that the letter was properly stamped first class (or airmail), addressed and delivered to the postal authorities; and
 - 21.2.3 if by electronic mail, at noon on the Business Day after such message was sent and, in proving service, it shall be sufficient to produce a delivery receipt or other electronic confirmation that the message was delivered to the recipient's electronic mail address.

22 Costs

- 22.1 Except as otherwise expressly provided in this Agreement, each party shall bear its own costs and expenses incurred by it (including legal fees and VAT) exclusively in connection with the negotiation, preparation, execution and implementation by it of this Agreement.
- 22.2 All reasonable costs, fees and expenses (including without limitation the fees of all professional advisers, agents and introducers together with any VAT thereon) incurred in connection with the ordinary course of business shall be borne by the LLP.

23 Waiver and Remedies

- 23.1 No failure or delay to exercise, or other relaxation or indulgence granted in relation to, any power, right or remedy under this Agreement shall operate as a waiver of it or impair or prejudice it nor shall any single or partial exercise or waiver of any power, right or remedy preclude its further exercise or the exercise of any other power, right or remedy.
- 23.2 All rights of any person contained in this Agreement are in addition to all rights vested or to be vested in it pursuant to common law or statute.

24 Severance

- 24.1 Each of the provisions of this Agreement is distinct and severable from the others and if at any time one or more of such provisions is or becomes invalid, unlawful or unenforceable (whether wholly or to any extent), the validity, lawfulness and enforceability of the remaining provisions (or the same provision to any other extent) of this Agreement shall not in any way be affected or impaired.

24.2 If, at any time, any provision of this Agreement is or becomes invalid, illegal or unenforceable in any respect under any law but would be or become valid, legal or enforceable if some part of the provision were deleted or amended, the provision in question shall remain in force with such deletion or amendment as may be necessary to make the provision valid, legal and enforceable.

25 **Third Parties**

Each Member shall be able to rely upon or enforce any term of this Agreement which benefits it pursuant to the Contracts (Rights of Third Parties) Act 1999. The consent of all Members shall be required for any variation of or modification to this Agreement, except where such variation or modification does not materially affect the rights of the Members.

26 **Variation**

The provisions of this agreement may only be varied at any time by the agreement of the Designated Members provided that any such variation shall be recorded in writing, signed on behalf of the Members and appended hereto.

27 **Counterparts**

This Agreement may be executed in any number of counterparts, each of which shall be deemed an original and which shall together constitute one and the same document.

28 **Governing law and jurisdiction**

28.1 This Agreement, and all disputes or claims arising out of or in connection with it, shall be governed by and construed in accordance with English law.

28.2 The parties irrevocably and unconditionally agree that the courts in England shall have exclusive jurisdiction over all disputes or claims arising out of or in connection with this Agreement.

This Agreement has been executed as a deed and is delivered and takes effect on the date stated at the beginning of it.

Schedule 1 - Capital contributions and treatment of profits and losses

Part 1 - Capital contributions and division of capital profits and losses

Member	Capital Contribution (£)	Interest (%)	Relevant Percentage
ACL:	£[1]	1%	1%
Council:	£[99]	99%	99%

Part 2 - Division of profits and losses

ACL:	1%
Council:	99%

Schedule 2 – Reserved matters

Version: 01
Date in force: Date of this Agreement

No	Special Reserved Matters to be approved by Council
	Members and Officers of the LLP
1.	Admitting any further members to the LLP or agreeing any rights or restrictions attaching to any memberships allocated to such new members as applicable
	Future direction and development of the LLP
2.	Amalgamating or merging with any other business undertaking
3.	Passing any resolution for its winding up or presenting any petition for its administration (unless it has become insolvent).

No	Normal Reserved Matters to be approved by Members' Group
	Constitution of the LLP
1.	Varying in any respect this Agreement or the rights attaching to the membership in the LLP
	Members and Officers of the LLP
2.	Appointing and Removing any Representative other than a Council appointed Representative and approving the terms of appointment (including any remuneration terms)
	Future direction and development of the LLP
3.	Forming any subsidiary or acquiring shares in any other company or participating in any partnership or incorporated joint venture vehicle
4.	Selling or disposing of any part of the business of the LLP
5.	Appoint any agent (not being a subcontractor) to conduct the whole or any part of the business of the LLP.
6.	Adopting or amending the Business Plan of the LLP (as part of the Aequus Business Plan) and any in-year changes impacting the LLP.
	Management of the business of the LLP
7.	Changing the name of the LLP
8.	Creating or agreeing to create a charge, security or Encumbrance over the LLP's assets, shares or income

No	Normal Reserved Matters to be approved by Members' Group
9.	Granting rights (by licence or otherwise) in or over any intellectual property owned or used by the LLP
10.	Making any borrowing
12.	Agreeing to make or making any loan (otherwise than by way of a deposit with a bank or other institution, the normal business of which includes the acceptance of deposits or in the ordinary course of business) or granting any credit (other than in the normal course of trading or the granting of trade credit to an associated entity which has been approved under the Business Plan) or giving any guarantee or indemnity (other than in the normal course of trading).
13.	Declaring or paying any end of year Profit of the LLP (where applicable)

Schedule 3 – Business Plan

The Common Seal of **Bath & North East**)
Somerset Council)
Was hereunto fixed in the presence of)
) Authorised Signatory

Executed as a deed by)
ACL)
acting by , a director)
in the presence of:) Director

witness signature:
name:
address:
occupation:

Executed as a deed by)
[Name] LLP)
acting by)
 , a member of)
[Name] LLP in the presence of:)
) Print Name:
) Position/Title:

witness signature:
name:
address:
occupation:

This page is intentionally left blank

Access to Information Arrangements

Exclusion of access by the public to Council meetings

Information Compliance Ref: LGA- 2604382
Meeting / Decision: Cabinet
Date: 13 th November 2025
Author: Simon Martin, Director of Capital & Housing Delivery
Report Title: Establish a Limited Liability Partnership for the Regeneration of the Bath Quays Residential Development Plots
Appendix Title: Appendix 1 - LLP Members Agreement Exempt appendix 2 - Business Case for the Aequus Regeneration Bath Quays LLP

The exempt appendix contains exempt information, according to the categories set out in the Local Government Act 1972 (amended Schedule 12A). The relevant exemption is set out below.

Stating the exemptions:

- 3. Information relating to the financial or business affairs of any particular person (including the authority holding that information).*
- 5. Information in respect of which a claim to legal professional privilege could be maintained in legal proceedings.*

The public interest test has been applied, and it is concluded that the public interest in maintaining the exemption outweighs the public interest in disclosure at this time. It is therefore recommended that the exempt appendix be withheld from publication on the Council website. The paragraphs below set out the relevant public interest issues in this case.

PUBLIC INTEREST TEST

If the Cabinet wishes to consider a matter with press and public excluded, they must be satisfied on two matters.

Firstly, they must be satisfied that the information likely to be disclosed falls within one of the accepted categories of exempt information under the Local Government Act 1972. Paragraph 3 of the revised Schedule 12A of the 1972 Act exempts information which relates to the financial or business affairs of the organisations which is commercially sensitive to the organisations. Paragraph 5 exempts Information in respect of which a claim to legal professional privilege could be maintained in legal proceedings. The officer responsible for this item believes that this information falls within the

exemption under paragraph 3 & 5 and this has been confirmed by the Council's Information Compliance Manager.

The following exemptions are engaged in respect to this report:

3. Information relating to the financial or business affairs of any particular person (including the authority holding that information)
5. Information in respect of which a claim to legal professional privilege could be maintained in legal proceedings.

It is necessary to weigh up the arguments for and against disclosure on public interest grounds. It is considered that there is a public interest in information about proposed schemes being disclosed into the public domain. Other factors in favour of disclosure include:

- furthering public understanding of the issues involved;
- furthering public participation in the public debate of issues, in that disclosure would allow a more informed debate;
- promoting accountability and transparency by the Council for the decisions it takes;

Weighed against this is the fact that the exempt appendix contains strategic and financial information which could prejudice the commercial interests of the parties if disclosed at this time. It would not be in the public interest if advisors and officers could not express in confidence opinions which are in good faith and on the basis of the best information available. It is important for public authorities to have some measure of 'private thinking space', and that they are able to share important information with Elected Members tasked with representing the local community. It is in the public interest that the Council is able to deliver cost-effective solutions. This depends partly on the Council being able to protect its commercial position while the detailed terms of relevant schemes are agreed.

Additionally, the exempt appendix contains legal advice subject to Legal professional privilege. The principle of ensuring access to full and frank legal advice is fundamental to the administration of justice. We consider that the safeguarding of openness in all communications between the client and lawyer overrides the public interest in disclosure.

The Council considers that the public interest has been served by the fact that a significant amount of information regarding the report has been made available – by way of the main report. Therefore, it is recommended that exemptions set out above apply. The Council considers that the public interest is in favour of not holding this matter in open session at this time and that any reporting on the meeting is prevented in accordance with Section 100A(5A).

By virtue of paragraph(s) 3, 5 of Part 1 of Schedule 12A
of the Local Government Act 1972.

Document is Restricted

This page is intentionally left blank

Equality Impact Assessment / Equality Analysis

(Version 4)

Item name	Details
Title of service or policy	SMD Report E3647 – Establishing the Aequus Regeneration Bath Quays LLP
Name of directorate and service	Housing Services
Name and role of officers completing the EqlA	Susan Hayter – Housing Manager
Date of assessment	6 th October 2025

Equality Impact Assessment (or 'Equality Analysis') is a process of systematically analysing a new or existing policy or service to identify what impact or likely impact it will have on people and different groups within our community. The main aim is to identify any adverse impacts (i.e. discriminatory or negative consequences for a particular group or sector of the community, and to identify areas where equality can be better promoted). Equality impact Assessments (EqIAs) can be carried out in relation to services provided to customers and residents as well as employment policies/strategies that relate to staffing matters.

This toolkit has been developed to use as a framework when carrying out an Equality Impact Assessment (EqIA) or Equality Analysis. **Not all sections will be relevant – so mark N/A any that are not applicable.** It is intended that this is used as a working document throughout the process, and a final version will be published on the Council's website following relevant service lead approval.

1.1 Identify the aims of the policy or service and how it is implemented

Key questions	Answers / notes
1.1 Briefly describe purpose of the service/policy e.g. <ul style="list-style-type: none"> How the service/policy is delivered and by whom If responsibility for its implementation is shared with other departments or organisations Intended outcomes 	<p>This SMD report deals with the formation of a Limited Liability Partnership as a special purpose vehicle to help drive the regeneration of Bath Quays by the council's wholly owned company Aequus.</p> <p>Therefore, this report and the decisions which result do not have any known specific adverse impact upon individuals with protected characteristics.</p> <p>Equalities impact will be subject to equality impact assessments at each developments business case approval point.</p>
1.2 Provide brief details of the scope of the policy or service being reviewed, for example: <ul style="list-style-type: none"> Is it a new service/policy or review of an existing one? Is it a national requirement?). How much room for review is there? 	<p>The report proposes establishing an LLP which would be a commercial entity and capable of taking risks that the Council might not. The LLP sits outside of the Council and does not carry balance sheet risks for it.</p> <p>Additionally, the LLP would be created solely for the redevelopment of the Site. Should this LLP model prove successful other regeneration projects could follow the model with a separate LLP for each individual project that would require Cabinet approval before it could proceed.</p>

1.3 Do the aims of this policy link to or conflict with any other policies of the Council?	The objective of the LLP is to create regeneration benefits including separation of risk and the recirculation of profits. Any profit created by the LLP regeneration scheme which is subsequently received by the Council could be used in further regeneration projects in the Council area and provide subsidy for social housing on those sites. This directly links to the ambition to improve people's lives.
--	---

2. Consideration of available data, research and information

Key questions	Data, research and information that you can refer to
2.1 What equality focussed training have staff received to enable them to understand the needs of our diverse community?	It is mandatory for all Council Officers to undertake Equalities training.
2.2 What is the equality profile of service users?	N/A specifically to this technical SMD Report.
2.3 Are there any recent customer satisfaction surveys to refer to? What were the results? Are there any gaps? Or differences in experience/outcomes?	N/A specifically to this technical SMD Report.
2.4 What engagement or consultation has been undertaken as part of this EIA and with whom? What were the results?	N/A specifically to this technical SMD Report.
2.5 If you are planning to undertake any consultation in the future regarding this service or policy, how will you include equality considerations within this?	N/A specifically to this technical SMD Report.

3. Assessment of impact: 'Equality analysis'

Based upon any data you have considered, or the results of consultation or research, use the spaces below to demonstrate you have analysed how the service or policy:

- Meets any particular needs of equalities groups or could help promote equality in some way.
- Could have a negative or adverse impact for any of the equality groups

Key questions	Examples of what the service has done to promote equality	Examples of actual or potential negative or adverse impact and what steps have been or could be taken to address this
3.1 Issues relating to all groups and protected characteristics	No known impacts specifically related to this technical SMD Report Equalities impact will be subject to equality impact assessments at each developments business case approval point.	No known impacts specifically related to this technical SMD Report. Equalities impact will be subject to equality impact assessments at each developments business case approval point. However, it is important to note that the site aims to deliver housing, including affordable housing for local residents. Affordable housing has a positive impact on equality. It provides housing for those residents would are unable to cope or compete on the open-market and may otherwise be forced to remain living in unaffordable or substandard housing.

*There is no requirement within the public sector duty of the Equality Act to consider groups who may be disadvantaged due to socio economic status, or because of living in a rural area. However, these are significant issues within B&NES and have therefore been included here.

** The Equality Act does not cover armed forces community. However, the Armed Forces Bill (which came in on 22 Nov 2022) introduces a requirement to pay 'due regard' to make sure the Armed Forces Community are not disadvantaged when accessing public services.

***The Equality Act does not cover care experienced people. B&NES adopted this group as a protected characteristic in March 2024 alongside over 80 other Local Authorities. Although we have data for care leavers and children/young people who are currently in the care of B&NES we do not have wider data on disadvantage experienced through being in care.

4. Bath and North East Somerset Council Equality Impact Assessment Improvement Plan

Please list actions that you plan to take as a result of this assessment/analysis. These actions should be based upon the analysis of data and engagement, any gaps in the data you have identified, and any steps you will be taking to address any negative impacts or remove barriers. The actions need to be built into your service planning framework. Actions/targets should be measurable, achievable, realistic and time framed.

Issues identified	Actions required	Progress milestones	Officer responsible	By when
None				

5. Sign off and publishing

Once you have completed this form, it needs to be 'approved' by your Divisional Director or their nominated officer. Following this sign off, send a copy to the Equality Team (equality@bathnes.gov.uk), who will publish it on the Council's website. Keep a copy for your own records.

Signed off by:
Date: 13.10.2025



(Divisional Director or nominated senior officer)

Bath & North East Somerset Council		
MEETING/ DECISION MAKER:	Cabinet	
MEETING/ DECISION DATE:	13 th November 2025	EXECUTIVE FORWARD PLAN REFERENCE:
		E3656
TITLE:	Care Quality Commission (CQC) Local Authority Assessment – ASC Improvement Plan Progress Update	
WARD:	All	
AN OPEN PUBLIC ITEM		
List of attachments to this report:		
Attachment 1: Adult Social Care Improvement Plan Update		

1 THE ISSUE

- 1.1 The Adult Social Care Improvement Plan outlines progress already made and the steps that are being taken to further enhance services. It reflects our own assessment of priority areas for improvement, alongside the key findings and areas for improvement against quality statement scores from the Care Quality Commission (CQC) Local Authority Assessment Report for B&NES (January 2025). By aligning our efforts with national expectations and local needs, we are driving forward a shared vision for a more responsive, effective, and sustainable Adult Social Care service which delivers better outcomes for the B&NES population who drawn upon adult social care support.
- 1.2 Due to the Requires Improvement CQC rating, B&NES has been assigned a Care and Health Improvement Advisor (CHIA) from Partners in Care & Health (Southwest Region) who partner with the Local Government Association and Association of Directors of Adult Social Services.
- 1.3 This report will outline the progress that has been made towards the ASC Improvement Plan alongside key activity that the ASC Leadership Team undertake to enable sustainable improvement since the publication of B&NES CQC inspection report in January 2025.

2 RECOMMENDATION

The Cabinet is asked to:

- 2.1 Note the summary of progress towards the Adult Social Care Improvement Plan which highlights the main themes and action for achieving a Good CQC rating.

- 2.2 Agree that a further update report on the progress against the ASC Improvement Plan is submitted to Cabinet in May 2026.

3 THE REPORT

- 3.1 The ASC Improvement Plan is aligned to specific CQC feedback and structured according to the CQC Local Authority Assessment themes, ensuring a clear and systematic approach to addressing identified improvement priorities. There are 9 improvement priorities across the four CQC themes which are outlined in the table below. There are 15 projects/action plans to deliver the 9 improvement priorities.

Theme & Reference	Priority Areas of improvement	
Theme 1. How the Local Authority Works with People	1.1	Improve public access to information, advice, guidance, and enhance our prevention services.
	1.2	Reduce waiting times for all services areas ensuring that people are prioritised according to risk
	1.3	Enhance the quality offered by Social Care staff by implementing a new practice model. Establish a Practice Development Group focused on legal compliance, outcome-oriented practice, and enhanced recording and data output.
Theme 2: Providing Support	2.1	Work collaboratively with practitioners and partners to ensure we commission services that meet the needs of our population and ensure diversity and sufficiency in the local market
	2.2	Introduce innovative ways of supporting people, staff & stakeholders, through the use of technology and digital solutions
	2.3	Giving residents a bigger say in local services and develop how we gather feedback on people's experience of Adult Social Care
Theme 3: How the Local Authority Ensures Safety Within the System	3.1	Ensure our governance and risk management processes are used consistently to ensure safeguarding procedures are followed in accordance with making safeguarding personal principles
	3.2	Refresh and implement a new Preparing for Adulthood Pathway
Theme 4: Leadership	4.1	Improve the quality of our data to ensure better oversight of individuals journeys through the use of performance BI dashboard

- 3.2 The ASC Improvement Board commenced in April 2025 and has been chaired by the Director Adult Social Care. As of December 2025, the board will be chaired by the new Executive Director Operations. The board is held monthly to review progress made against the 9 priorities set out in the ASC Improvement Plan. Bath and North East Somerset Council's approach to improving Adult Social Care is structured around the CQC themes and quality statements. The terms of reference for the Improvement Board includes oversight that our improvements are aligned with national standards and best practices, providing a clear framework for delivering high-quality and person-centred care.

- 3.3 The governance arrangements for the ASC Improvement Plan are designed to foster comprehensive engagement beyond the ASC directorate, thereby establishing a robust framework for oversight and constructive challenge. The board, has had strong attendance since April and is attended by representatives from various departments within the council, including finance, legal, communications and marketing and public health. This broad participation facilitates the dissemination of information on a wide scale, enables the incorporation of diverse perspectives from across the organisation, and promotes effective collaboration in addressing challenges, assessing and mitigating risks. Such a collaborative approach ensures a holistic delivery of new initiatives, minimises the potential for implementation issues, and proactively reduces the likelihood of negative outcomes associated with the improvement plan.

- 3.4 The ASC Improvement Plan is making steady progress. Significant advancements have been achieved, with actions tracked through the monthly

Improvement Board meetings and project oversight through robust highlight reporting including RAG rating on overall progress. The August 2025 Improvement Board was attended by the Lead Member. This approach ensures rigorous oversight, constructive challenge, and shared responsibility for required actions to achieve the desired outcomes. A detailed overview of Adult Social Care Improvement Plan Update (May-September) can be reviewed in Attachment 1.

- 3.5 The Improvement Plan and associated board have already delivered notable progress. Improvement priority 2.1, which addresses waiting lists across all services, has yielded positive results. In January 2025 201 individuals were waiting for allocation for a Care Act Assessment; at the time of writing this report 65 people were waiting for allocation for a Care Act Assessment. The waiting time figures are reported in the context of adult social care receiving on average 255 requests for care assessments/reassessments per month. The number of people awaiting a Deprivation of Liberty (DoLs) authorisation has also decreased with a reduction from 509 in January 2025 to 469 at the time of writing this report and this is within the context of receiving 25% increase in requests for authorisations than the previous year. The Occupational Therapy (OT) waiting list has similarly reduced, supported by the opening of a new OT Assessment Centre on 29 July 2025, which enables immediate provision of equipment and advice and by the engagement of agency staff to eliminate backlogs. As a result, the OT waiting list fell from 229 in January 2025 to 41 in October 2025.
- 3.6 Ongoing collaboration with frontline staff is driving the development of our Social Care Practice Model, revised Practice Standards and Audit Framework. These new documents that support our practice were launched alongside the new structure for Adult Social Care operational teams which went live on 6th October 2025. In addition, the Strategic Commissioning Hub has established a professional feedback form which enables practitioners to formally share service insights and practitioners are closely involved in co-production initiatives to help shape commissioned services. Feedback received last quarter is informing conversations with providers to ensure services promote and enable independence and uphold good standards of communication and quality.
- 3.7 To enhance governance and risk management, a risk and RAG rating tool was implemented in Liquidlogic Adult Social Care System (LAS) in early July, all staff have been trained on the use of the tool. The new safeguarding pathway was collaboratively designed with staff in three sessions and launched mid-July. Regular staff briefings continue, with shared learning from Safeguarding Adult Reviews (SARS) and ombudsman rulings to support ongoing professional development. Assurance is provided on learning from SARS to the B&NES Community Safety and Safeguarding Partnership (BCSSP).
- 3.8 ASC are currently using a case audit tool which quality assures the work of our frontline operational teams. Part of this process includes seeking feedback from the individual receiving services, or in some cases their representative, regarding the experience of their contact with ASC. Of the 21 responses received so far (6th October 2025), 90% rated their experience as positive. Areas of good practice from the feedback include people feeling listened to, supported and undergoing a positive review experience. All themes from the audits, both positive and where areas of improvement have been identified, will be discussed and fed back to teams for reflection and learning to drive service and practice improvement. The Communication and Marketing Officer began in post in

September with a focus on keeping residents updated about the improvements in ASC. The Service User Engagement Lead commenced in post early October 2025 with a remit to continuous improvement in this area.

- 3.9 To date there have been four submissions (February, April, July & October) to the Department Health and Social Care (DHSC) via the Care and Health Improvement Advisor (CHIA). The next submission is scheduled for January 2026. Feedback on our reports from the CHIA is positive regarding the level of robustness and assurance of the progress made against improvement priorities
- 3.10 To ensure there is an independent assessment of improvement the Social Care Centre of Excellence (SCIE) has offered a review of co-production in B&NES. This includes a tailored review and assessment of current co-production practices, and support in building a robust co-production offer. The goal is to ensure that co-production is effectively integrated at all levels, leading to improved services and better results for those who draw on care and support. A planning meeting was held on 30th September, to be followed by a core group meeting on 14th October for the review to be undertaken from late October 2025.
- 3.11 Similarly, Partners in Care & Health (PCH) have been invited to conduct a Peer Review (planned for January/February 2026) of the safeguarding pathway to increase understanding and implementation of Making Safeguarding Personal, with evidence that feedback is being considered and enhance awareness of learning from audits and Safeguarding Adult Review (SAR) as shown by changes in practice and develop approaches to assist individuals experiencing safeguarding risks who are at the boundary of needing care and support. The Peer Review will have 4 areas of focus:
- 1.Ensuring the data is being used to best effect
 - 2.Ensure Making Safeguarding Personal is better understood and delivered, and we can evidence that we are listening and learning from what people tell us
 - 3.Improve visibility of learning from audits and SARs demonstrated through improvements in practice
 - 4.Improve approach to supporting people experiencing safeguarding risks who are on the “edge of care and support”

4 STATUTORY

- 4.1 The Health and Care Act 2022 gave Care Quality Commission (CQC) new powers to assess how Local Authorities meet their duties under Part 1 of the Care Act 2014. CQC Local Authority Assessment Framework assesses the performance of Local Authorities to assure CQC and the Department of Health and Social Care about the quality of care in the area and consider any improvements that are required. CQC published their report for B&NES on 30th January 2025, assigning a rating of Requires Improvement.
- 4.2 As referenced in section 1.2, B&NES has been assigned a Care and Health Improvement Advisor (CHIA) which is mandated for all Local Authorities that are either Requires Improvement or Inadequate. The Director for Adult Social Care meets with the CHIA from Partners in Care & Health (PCH) allocated to B&NES on a monthly basis to monitor and give assurance on progress against the ASC

Improvement Plan and prepare for submissions to Department of Health and Social Care (DHSC) as referenced in section 3.9 of the report.

5 RESOURCE IMPLICATIONS (FINANCE, PROPERTY, PEOPLE)

- 5.1 To resource the improvement journey ASC have committed an investment of £1.179m over a 2-year period (2025-2027) for the delivery of the ASC Improvement Plan which is being funded from the ASC reserve.
- 5.2 The resourcing of the ASC Improvement Plan covers activity to build capacity through a range of agency and fixed term posts alongside contracts to target reduction in assessment backlog and financial assessment waiting lists. Transformative resource has also seen investment in the areas of fixed terms posts to lead on communication, engagement, policy and procedure, Business Intelligence Data, Information Governance, Social Care Practice Framework and Partners in Care & Health Peer Review.

6 RISK MANAGEMENT

- 6.1 A risk assessment related to the issues and recommendations has been undertaken, in compliance with the Council's decision making risk management guidance.
- 6.2 The ASC Risk Register has an entry for 'risk of capacity to deliver CQC Improvement Plan following September 2024 onsite inspection' which was entered on the Corporate Risk Register in December 2024. The ASC Risk Register was reviewed for escalation to the Corporate Risk Register in July 2025 and last reviewed in October 2025.
- 6.3 Progress against ASC Improvement Plan milestones continue to be RAG rated for each project on a monthly basis and reported to the Improvement Board which commenced in April 2025.
- 6.4 The ASC Assurance Lead oversees the Improvement Plan Risk Register and this is reported at the monthly Improvement Board. The table below outlines key risks and mitigation activity. The last review of the risk register took place on 16th October 2025 by the ASC Leadership Team and ASC Assurance Lead.

Risk	Mitigation
Care Quality Commission (CQC) new inspection methodology and timescale is unknown	The ASC Assurance Lead attends regular Directors of Adult Social Services (ADASS) South West Assurance Leads forums and DASS holds regular meetings with Partners in Care & Health (PCH) Care and Health Improvement Adviser (CHIA) ensuring regular sector updates from CQC. The ASC Assurance Lead monitors all known aspects of the CQC inspection process, enabling the Directorate to be as prepared as possible for future inspections. Key aspects of the CQC Inspection process such as Data Returns, Evidence Library, Self-Assessment and Case Tracking all have oversight from the ASC Assurance Lead.
Impact of enacting the Improvement Plan without achieving a 'good' CQC rating	The ASC Improvement Board launched in April 2025 with 15 projects focused on 9 priorities, tracked by RAG highlight reports. A clear governance framework ensures progress reporting to DHSC, PCH, and Care and Health Improvement Adviser (CHIA), as well as regular updates to CMT, Lead Member, Scrutiny Panel and Cabinet. A robust communication and engagement plan is in place to cover both internal and external stakeholders.
Capacity of corporate resource teams to deliver on specific activity for delivery of	Corporate Teams continue to engage through the Improvement Board to communicate Improvement Priorities and identify early how delivering the Improvement Plan may impact corporate teams. This process enables cross-council collaboration on improvement actions and the use of allocated improvement funding to meet resource needs.

improvement at pace	
Optimisation of the ASC Reserve to fund additional resource to deliver improvement priorities	Funding has been allocated for two years, with the impact of the funding monitored by the ASC Improvement Board, DASS, and the Senior Finance Manager. Progress and use of ASC Reserves is reported to CMT for S151 officer oversight. The funding will be optimised to achieve intended benefits and may be repurposed as priorities change during the improvement process.
If a Communication and Engagement Plan is not implemented, stakeholders may not receive updates on our progress and improvements	The Assurance Lead for ASC is responsible for the communication and engagement plan for both internal and external stakeholders, in coordination with the ASC Communications and Marketing Officer. Updates for the ASC Operations Team are provided through fortnightly team meetings. Progress is regularly reported to the Corporate Management Team (CMT), with monthly updates to the Lead Member and periodic reports to Scrutiny Panel. System partners receive updates from the DASS, Assurance Lead and Assistant Directors via various external meetings, including those with ICB, ICA, 3SG, Healthwatch and the B&NES Community Safety and Safeguarding Partnership Executive Board. The Department of Health & Social Care (DHSC) receives updates at three-month intervals through progress submissions from Partners Care & Health and the Care & Health Improvement Advisor.
Operational staff capacity to engage and deliver on Improvement Plan, whilst managing increased demand on services and complexity of work	Oversight is maintained by the Assistant Director (AD) for Operations and Safeguarding, in conjunction with the ASC Improvement Board, through the review of project highlight reports which include RAG ratings and identify any potential impacts on operational teams. The effective utilisation of allocated improvement funding to address critical resource requirements is subject to rigorous monitoring by the AD for Operations and Safeguarding, the Director of Adult Social Services (DASS), the Senior Finance Manager and the ASC Improvement Board. The agreed funding allocation for improvement is optimised to enhance operational team capacity, enabling the management of service demand and completion of actions necessary to achieve the improvement priorities. The sequencing and prioritisation of activities for operational teams are regularly reviewed to ensure that efforts are focused on achieving maximum impact, whilst ensuring that statutory obligations continue to be fulfilled.
Leadership capacity to manage the multiple projects delivering the improvement priorities	The ASC Improvement Board attendees use the Improvement Board and Board Highlight Reports to raise capacity requirements of the ASC leadership and management team, ensuring projects are prioritised and sequenced.

6.5 The Director Level Service Plan includes ASC Improvement journey to CQC Good as a key priority for 2025/26.

7 EQUALITIES

7.1 ASC are committed to evidencing how we 'pay due regard' to equality duties and will undertake equality analysis throughout the implementation of identified actions within the Improvement Plan.

7.2 The aim for the ASC Improvement Plan is to improve outcomes for people who draw on care and support, which aligns with the local authorities' core purpose of 'improving people's lives'.

7.3 An Equalities Impact Assessment (EQIA) has been undertaken for the ASC Improvement Plan, ensuring due regard in line with the public sector equality duty (2011), to outline the approach for delivering the plan. Following feedback from Children's and Adults Health and Wellbeing Policy Development Scrutiny

Panel held in September 2025 the EQIA will continue to be reviewed and updated.

7.4 The Corporate Equalities and Diversity Officer commenced attending the ASC Improvement Board as of September 2025 to ensure an equality focus is embedded into the improvement journey and equalities implications are at the forefront of improvement planning and processes. Ongoing review and updating of this EQIA will reflect learning throughout the improvement journey.

7.5 The ASC Improvement Plan is underpinned by 4 overarching principles. Principle 3 is to embed consideration of equality, diversity, and inclusion into all activities, ensuring that these values are integral to our operations and enhance the opportunities available to everyone.

7.6 The ASC Improvement Plan EQIA to be published.

8 CLIMATE CHANGE

8.1 No negative impacts are expected from the proposed new delivery models on climate change. The proposed service delivery arrangements will be comparable to the existing provision for Adult Social Care.

9 OTHER OPTIONS CONSIDERED

9.1 As part of our annual quality assurance process the Self Assessment is in the process of being updated to reflect the outcome of the CQC inspection report published in January 2025 and reflect progress towards the ASC Improvement Plan. The Self Assessment report will therefore outline the progress made by ASC from September 2024 (CQC on site inspection) to September 2025. Once finalised the Self Assessment 2024/25 will be published.

10 CONSULTATION

10.1 The ASC workforce, wider council staff and system partners continue to be updated on the ASC Improvement Plan as per the communication and engagement plan which is reviewed as part of the ASC Improvement Board. A dedicated communications lead has been appointed to support the ASC Improvement Plan and commenced post September 2025.

10.2 ASC staff continue to receive regular briefings in relation to the ASC Improvement Plan through team meetings with Assistant Directors and staff briefings led by the DASS, Assistant Directors and Quality Assurance Lead.

10.3 The ASC Leadership Team have provided regular updates on progress against the ASC Improvement Plan to the following external stakeholders; Healthwatch, B&NES Community Safety and Safeguarding Partnership Executive Board, Integrated Care Board, Integrated Care Alliance and 3SG. The ASC Leadership Team will continue to provide assurance and oversight of progress throughout the improvement journey.

Contact person	Suzanne Westhead, Director Adult Social Care
Background papers	The full CQC report with an overview of the rating and scoring can be accessed at https://www.cqc.org.uk/care-services/local-authority-assessment-reports/bathandnortheastsomerset-0125
Please contact the report author if you need to access this report in an alternative format	

Adult Social Care Improvement Plan Update

Cabinet

13th November 2025

Page 313

Bath & North East
Somerset Council

Improving People's Lives



Improvement Priority 1.1:

Improve public access to information, advice, guidance, and enhance our prevention services.

CQC Theme 1: How the Local Authority works with people Improvement Priority 1.1: Improve public access to information, advice, guidance, and enhance our prevention services.	<p>Conduct a thorough diagnostic assessment to ascertain our current provision of Information, Advice, and Guidance (IAG), as well as the methodologies employed by our partners.</p> <p>Identify existing gaps, evaluate the scope and urgency of the required work, and subsequently formulate a comprehensive project plan that outlines necessary actions to achieve the desired outcomes.</p> <p>Highlight areas of work where co-production and co-design would benefit service users and the council.</p>	<p>A full diagnostic report will outline where there are shortfalls and make recommendations on how to remedy them. The recommendations will be drawn up into a Project and the work will be managed through the project. Evidence of the impact of the work might be evidenced through customer satisfaction surveys, website analytics and feedback, call logs, social media engagement</p>
Progress update	<p>In May 2025 Adult Social Care (ASC) set out to complete a diagnostic assessment of its Information, Advice, and Guidance provision. The Local Government Association diagnostic tool was used to structure the work needed. Consultations were held with several key teams, including the Web Team, Directory Team, Customer Service Team, and Operational Staff. Simultaneously, engagement with external partners, such as Third Sector organisations and Social Prescribers, has also taken place through the use of questionnaires and a resident questionnaire was undertaken in collaboration with Healthwatch.</p> <p>The diagnostic assessment of the adult social care information and advice offer is now complete. This has produced a scoring matrix and identified specific core areas for development. Four recommendations have been made to the management team, following the diagnostic. A plan of work will be developed by Corporate Colleagues with ASC and Healthwatch input, this is part of the council's transformation programme, which will begin in 2026.</p>	

Improvement Priority 1.2:

Reduce waiting times for all services areas ensuring that people are prioritised according to risk

<p>CQC Theme 1: How the Local Authority works with people</p> <p>Improvement Priority 1.2: Reduce waiting times for all services areas ensuring that people are prioritised according to risk</p>	<p>A single triage and prioritisation system will be in place, so people are allocated based on the level of risk. A training program is underway to broaden the Best Interests Assessors (BIA) staff resource, enabling the wider staff group to become BIAs. Establishing a shared manager rota to approve BIA assessments to reduce wait times for Deprivation of Liberty Team waiting lists. Conducting an OT diagnostic exercise over a 3-month period to identify potential new processes. Implementing a waiting list backlog project while simultaneously developing a new OT clinic for in-person consultations.</p>	<p>The impact of this work will be measured using Power BI, specifically tracking the reduction in waiting lists in operational team and in the length of time from referral to assessment. Feedback from individuals who underwent an assessment indicated that it was conducted in a timely manner, as identified through audits. Applying interventions will give us assurance of active risk management and will see Risk Registers amended as our interventions take effect.</p>
<p>Progress update</p>	<p>Care Act Assessments In January 2025 201 individuals were waiting for allocation for a Care Act Assessment. In September 2025 this has reduced to 65 people waiting for allocation for a Care Act Assessment. Action plans on those with longest waits are discussed at the fortnightly operational performance meetings. People waiting for an assessment are supported to access information, advice and guidance at the point of contact to ASC. All referrals are given a priority rating based on the level of risk and each team has a 'duty worker' to respond to any questions or concerns. All referrals awaiting allocation are monitored daily.</p> <p>Mental Capacity Act/ Deprivation on Liberty Safeguards The number of people awaiting a Deprivation of Liberty (DoLs) authorisation has also decreased with a reduction from 509 in January 2025 to 445 in September 2025.</p> <p>Occupational Therapy The Occupational Therapy (OT) waiting list has reduced from 229 in January 2025 to 45 in September 2025. Add in the external agency and assessment centre</p> <p>Reviews In January 2025 71% of people who require an annual review, have had their review within the <u>1 year</u> timescale. In September 2025 this has increased to 74%.</p> <p>Financial Assessments</p> <ul style="list-style-type: none"> • 124 assessments in process • Of which 121 are still awaiting returned information and 3 have information returned and in the process of being reviewed. • 41 cases exceeding 28 days • 7 cases exceeding 84 days, of which 3 are deputyship applications. • 3 cases exceeding 6 months all are deputyship applications underway. 	

Improvement Priority 1.3:

Implement a practice model that will support our staff to deliver an equitable and legally compliant offer to people who are in contact with adult social care

<p>CQC Theme 1: How the Local Authority works with people</p> <p>Improvement Priority 1.3: Implement a practice model that will support our staff to deliver an equitable and legally compliant offer to people who are in contact with adult social care</p>	<p>Implement our Practice Standards and evaluate. Establishing a Practice Development Group to coproduce a practice model with our staff and partners. Staff collaboration with the Principal Adult Social Worker to identify training needs, share insights from audits and complaints, and promote best practices in outcome-focused work and documentation.</p>	<p>The work of the Practice Development group will be documented through minutes of the discussions and a summary of the actions to be carried out. Application of the Care Act and equity in access to services will be identified through audits and the Practice Forum. An increase in the uptake of training is expected and will be evidenced by the Learning and Development Team. Although our current Direct Payment uptake is low compared to national figures, it is part of our core offer, and corresponding policies and procedures will evidence the progress made to make Direct Payments accessible.</p>
<p>Progress update</p>	<p>Since the Principal Adult Social Worker (PSW) was appointed, the new Practice Framework and Practice Standards have been co-produced with practitioners. The Practice Framework and Standards provide a structured approach for guiding professional practice, ensuring quality, and promoting continuous improvement. The PSW will launch the Practice Framework and Standards now the Adult Social Care Restructure is complete.</p> <p>The PSW has also established a Practice Development Group that meets on a bimonthly basis. Set up in April 2025, attendance at the Practice Development Group is good and these continue to run with the next one scheduled for early November.</p> <p>The PSW has collaborated with the Organisational Development Team to assess the training opportunities available from Research in Practice for Adults- an organisation that supports professionals in health and social care, through developing evidence-informed resources and learning opportunities. This is to focus on increasing knowledge of Care Act 2014 eligibility</p> <p>The process for the recruitment of a new Direct Payment (DP) Lead was carried out and the DP Lead commenced working for ASC in September 2025. Now in post, the DP Lead has begun assessing our current offer, reviewing policies/ procedures and formulating a work plan.</p> <p>Since being in post, a 'Direct Payment Café' has been set up and is scheduled to be held weekly. The Café is an open forum for staff to get information, advice and guidance when working with individuals with an existing Direct Payment or considering using a Direct Payment to meet assessed eligible needs. The first session took place on 22nd October with six attendees.</p>	

Improvement Priority 2.1

Work collaboratively with practitioners and partners to ensure we commission services that meet the needs of our population to ensure diversity and sufficiency in the local market

Theme 2: Providing Support Improvement Priority 2.1 Work collaboratively with practitioners and partners to ensure we commission services that meet the needs of our population to ensure diversity and sufficiency in the local market	The Strategic Commissioning Hub's Quality Assurance Team will be responsible for reviewing the Commissioning Quality Assurance Framework and amending as necessary to ensure we capture information about how we support providers to maintain or increase the CQC rating. This will also include sharing of information and learning in Provider Forums. Alongside this, we will work with the Practice Development group to determine the best way of engaging with staff to understand the needs of the people they work with to develop the <u>market accordingly</u> , enabling us to support more people in B&NES.	Evidence of our work with providers will be through the completion of Quality Assurance visits and corresponding documentation; however, where a provider's CQC rating changes, this will be outside the council's control. Minutes from meetings with frontline practitioners will evidence engagement and discussion about the needs of the local population and will pave the way for new market initiatives that the Commissioning Team will take forward. Feedback from providers will demonstrate the support we offer them, and they will be knowledgeable about the local Forum's they can attend for support.
Progress update	<p>A new Quality Assurance Review Document has been developed and was piloted during September. Following the pilot, this is being reviewed again to incorporate services for children, enabling an all-age approach to quality assurance.</p> <p>Fortnightly feedback and collaboration conversations between commissioners and practitioners, have been implemented, enabling a mix of thematic and open conversations. The new Professional Feedback Form launched in June 2025, continues to be used by practitioners, enabling information sharing and good communication between services.</p> <p>The Communication strategy for the Community Support procurement has been updated, providing good dialogue with providers through Provider Forums. Alongside this, our Commissioning Equality Diversity and Inclusion requirements for service providers is being updated and aligned to the review of the Health Inequalities work and development of the Neighbourhood Health approach.</p> <p>All the work completed over the last five months has enhanced the visibility of channels for collaboration and communication for Commissioning, among providers, service users, and professionals can facilitate new avenues for access beyond a single process, resulting in more resilient and robust support structures.</p>	

Improvement Priority 2.2

Introduce more innovative ways of supporting people, staff and stakeholders, through the use technology and digital solutions.

<p>Theme 2: Providing Support</p> <p>Improvement Priority 2.2 Introduce more innovative ways of supporting people, staff and stakeholders, through the use technology and digital solutions.</p>	<p>The Technology Enabled Care Strategy has been developed over the last 12 months. Significant work has been done to understand different models and assess readiness for innovative ways of working. The strategy is now ready to be turned into a Programme of work, clearly defining the necessary tasks and involving the right staff and stakeholders to develop a service that meets the needs of the population. The B&NES Safeguarding Adults Portal went live in November 2023, and there are plans to expand online portals to promote equity in experience.</p>	<p>Once the Technology Enabled Care (TEC) and Digital programme is complete and delivered into business as usual, it will enable reports on the number of people receiving TEC or digital solutions to meet their needs. This will include the impact on local services, such as smaller homecare packages required, and the impact on individuals achieving outcomes important to them. People's feedback and the consideration of TEC or digital solutions will be evidenced through practice audits and discussions at Practice Forum. Additionally, people who use a digital platform to access an assessment will be asked about their experience via an online feedback form.</p>
<p>Progress update</p>	<p>Magic Notes has been fully implemented across Social Care operational teams, with 160 staff now trained and using the tool. In addition to this, a trial is being conducted in the Commissioning Quality Assurance team.</p> <p>Engagement is underway with residents and staff for the development of the digital and tech strategy. B&NES has partnered with Healthwatch to gather feedback from residents, with a particular focus on engaging marginalised communities. ASC Commissioning are leading on workshops with staff groups including managers and frontline workers across the directorate. All information will be written into a final strategy and activity plan.</p> <p>Due to the volume and pace of change happening across the directorate currently, ASC has been prioritising tactical aspects of the digital programme, based on these aspects having the biggest impact on staff and residents and lead to better outcomes more immediately. Examples of this include the roll out of Co-Pilot and Magic Notes, as well as supporting the analogue to digital switch over and resident surveys. ASC will further improve the more strategic TEC offer as this progresses.</p> <p>There is now a dedicated Adults Systems Expert & Service Lead responsible for coordinating LAS system developments to support practitioners. Over the last four months, the Adults Systems Expert and Service Lead has developed new Liquidlogic Adult's system processes and referral routes via the Adult Social Care Portal. Documentation has been built to prepare for the implementation of the ASC Operational Team Restructure. The system restructure has been tested and approved, and staff have received training on this.</p> <p>Additional forms on the adult social care portal include professional access team referral form, public access team referral form, OT professional referral form and public OT referral form. This benefits individuals due to centralized access to information, streamlined process, ability to self-serve, easier accessibility and faster support.</p>	

Improvement Priority 2.3

Giving residents a bigger say in local services and develop how we gather feedback on people's experience of Adult Social Care

Theme 2: Providing Support Improvement Priority 2.3 Giving residents a bigger say in local services and develop how we gather feedback on people's experience of Adult Social Care	<p>We will develop and implement a system that allows all individuals to provide feedback in a manner that meets their access needs.</p> <p>Determine the most appropriate ways to communicate to staff and individuals how the learning from the feedback has been implemented.</p> <p>Create more opportunities for residents to participate in the planning and development of local services through collaborative design, planning, and evaluation.</p>	<p>We will use various methods to gather feedback, including written guidance from the Principal Adult Social Worker and minutes from resident groups. Our aim is to show that we adapt services based on individual needs. Feedback will measure our performance and highlight areas for improvement.</p>
Progress update	<p>A Co-Production Plan for 2025-26 has been agreed and is embedded across the directorate. The Co-Production Community of Practice meetings have continued to take place monthly since February 2024, with good attendance. Examples of how we are promoting co-production include:</p> <ul style="list-style-type: none">• Involving people in strategic reviews, such as the family's involvement in reviewing B&NES's respite offer• Carers have also been involved in the specification and question setting process for our carers support service tender, and form part of the tender evaluation panel <p>Further to this, the ASC Partners in Care and Health Improvement Advisor has facilitated a meeting with the Social Care Institute for Excellence (SCIE), to discuss how they can support ASC to review the current co production offer, activity and practice. A Planning meeting will be held with SCIE in early October to scope the approach to this work with a view to starting this in November.</p> <p>As part of the ASC Restructure, a new post of 'Service User Development and Engagement Lead' was created and will start in October. The focus will be on developing and implementing a system that allows all individuals to provide feedback and how this is shared with staff within the directorate.</p> <p>The Principal Adult Social Worker (PSW) developed and implemented a new audit tool in February 2025. From 21 responses received so far, 90.4% rated their experience as positive. The PSW and Director of Adult Social Services (DASS) also meet regularly to carry out practice audits. Feedback on people's experiences of ASC is shared at the Quality Assurance and Performance Board, which meets quarterly.</p>	

Improvement Priority 3.1:

Ensure our governance and risk management processes are used consistently to ensure safeguarding procedures are followed in accordance with making safeguarding personal principles

<p>Theme 3: How the Local Authority ensures safety within the system</p> <p>Improvement Priority 3.1: Ensure our governance and risk management processes are used consistently to ensure safeguarding procedures are followed in accordance with making safeguarding personal principles</p>	<p>A safeguarding action plan is established to manage risk, detailing required steps. Some actions are currently in progress, while others will commence shortly based on urgency. The LAS and Controcc Development Group holds monthly meetings and has initiated discussions on a risk assessment tool. These efforts are ongoing and incorporated into the LAS Development Lead's Workplan.]</p>	<p>Progress in this area will be indicated by various reporting methods. Compliance with MSP principles will be verified through the BCSSP annual audit and safeguarding audits, with data recorded on LAS and reported via the BI dashboard. Risk assessment creation on LAS and monitoring through governance structures like supervision and Practice Forum will demonstrate our advancement. Supervision notes and team meeting minutes will provide evidence of staff support in learning how to evaluate, reduce, and manage risk.</p>
<p>Progress update</p>	<p>ASC has made significant amendments to the documentation used to record safeguarding enquiry outcomes. These changes enable us to record whether the principles of Making Safeguarding Personal (MSP) have been adhered to and also allow for performance reporting on this. This is a big step forward in ensuring our safeguarding practices are both effective and transparent.</p> <p>In collaboration with Bath University, ASC has been conducting research to gain insights into the MSP experience of adults with a Learning Disability (LD) throughout their safeguarding journey. This research also gathers experiences from practitioners delivering safeguarding services, identifying any barriers or successes in MSP. The findings from this research will be invaluable in informing our future support offerings. The research has already been approved by both the university and council ethics boards, with staff sessions initiated in July and sessions for adults with LD launched in September.</p> <p>Additionally, we have developed a new Safeguarding Pathway in preparation for the ASC Operational restructure set for October 2025. To enhance our risk management capabilities, a new risk screening tool and RAG rating system have been developed within LAS (the system used to record ASC activity). This new system provides greater visibility for managers, serving as an effective reporting mechanism.</p> <p>In our continuous effort to learn and improve, we are now sharing learning outcomes from events such as Safeguarding Adult Reviews and Ombudsman rulings at fortnightly staff briefings. This ensures that we can collectively take forward these lessons into our practice. ASC has also reviewed the mandatory training requirements for staff working with safeguarding, which will be available both internally and through the B&NES Community Safety and Safeguarding Partnership (BCSSP).</p> <p>We are currently exploring ways to introduce TEC through pilots, in order to get TEC back onto the anticipated trajectory, however this work needs to be done in the context of the rest of the changes being bought about by the Improvement Plan, embedding a new Operational Restructure, a SCIE review into our Co-production offer and the scheduled PCH Safeguarding Peer Review.</p>	

Improvement Priority 3.2:

Refresh and implement a new pathway for people transitioning from children's services to adult services.

<p>Theme 3: How the Local Authority ensures safety within the system</p> <p>Improvement Priority 3.2: Refresh and implement a new pathway for people transitioning from children's services to adult services.</p>	<p>A public and professional portal will be developed for referrals for any young person or young carer with an appearance of care and support needs to be referred to ASC. Regular meetings will take place with ASC and the parent carer forum. Live well B&NES and the public facing website will be updated to reflect the ASC transitions offer. A dedicated ASC transitions team will be recruited.</p> <p>ASC will form part of the multi-agency PFA group. There will be PFA strategy developed this will include clarity of the agency roles and responsibilities. This will link to work commenced on PFA pathways and transition policy which has been started but not concluded.</p>	<p>Referrals for young people are received and prioritised for ASC assessments. Parents and carers can access advice and information on ASC in various formats. Referrals and waiting times will be built into our new BI dashboards. This will include looking at the timeliness of referrals, the offer to young people and the experience of people on the pathway.</p>
<p>Progress update</p>	<p>The new Transitions Portal, which enables parent carers, young people and professionals to refer to ASC was launched in November 2024.</p> <p>The Preparing for Adulthood offer is a joint programme with Children's, Education and Adults. The Project is progressing, and workshops have been held to map current systems, processes and the different interactions between teams, the young people accessing the service and their families.</p>	

Improvement Priority 4.1:

Improve the quality of our data to ensure better oversight of individuals journeys through the use of the performance BI dashboard

<p>Theme 4: Leadership</p> <p>Improvement Priority 4.1: Improve the quality of our data to ensure better oversight of individuals journeys through the use of the performance BI dashboard</p>	<p>We are committed to enhancing staff training to ensure accurate and timely information processing on LAS. We aim to clearly outline the current data and performance information we capture, as well as our future data and performance information requirements.</p> <p>We will conduct a diagnostic assessment to understand staff's current level of understanding regarding the data we collect and the reasons behind it.</p> <p>Our goal is to identify and address staff training needs to ensure effective use of BI Dashboards for performance understanding and improvement.</p> <p>We will ensure that the data resulting from LAS changes is prominently featured on the BI dashboard.</p>	<p>To measure the impact of these actions, we will implement several key evaluation methods. The Quality Assurance Board will us the BI Dashboards to provide a clear indication of how we are performing against our key performance indicators both national and local.</p> <p>Our case audit process will demonstrate areas of good recording practice and areas for improvement. Staff representatives are involved in LAS system and workflow changes from testing to implementation.</p> <p>Reports to the Quality Assurance Board that highlight trends in waiting lists and productivity will serve as another crucial metric. These reports will help us understand the broader organisational impact of our initiatives.</p>
<p>Progress update</p>	<p>The Adults Systems Expert & Service Lead has held 3 Data Quality Workshops with managers across the directorate, focusing on the use of the Business Intelligence dashboards, to ensure understanding of the benefits of using data available as part of the management of caseloads and demand.</p> <p>ASC has been working collaboratively with the Business Intelligence (BI) Team to define a comprehensive suite of data reporting requirements. In addition to this, both teams have been working to define data needed to meet the new Department of Health and Social Care Client Level Data Set Requirements.</p> <p>Two additional dedicated Business Intelligence Officers were recruited into post in May specifically for ASC, to focus resource on developing the new Business Intelligence Dashboards that are aligned to the KPIs in the Improvement Plan.</p> <p>ASC Continue to work with the BI Team to ensure that once the operational restructure is in place, the necessary data reporting can be extracted from Liquid Logic, to provide data on waiting lists and times, and to review quality and performance.</p>	

Bath & North East Somerset Council		
MEETING:	Cabinet	
MEETING DATE:	13 November 2025	EXECUTIVE FORWARD PLAN REFERENCE:
		E 3665
TITLE:	Adoption West Contract	
WARD:	All	
AN OPEN PUBLIC ITEM		
List of attachments to this report:		
Appendix 1 - Equalities Impact Assessment		

1 THE ISSUE

- 1.1 To consider options for the delivery of adoption services beyond the expiry of the current arrangements with Adoption West which expires 28 February 2027. This is a Teckal Company, wholly owned by the participating Local Authorities.

2 RECOMMENDATION

The Cabinet is asked to:

- 2.1 Agree, in principle, to continue with adoption west as the council's preferred option for their regional adoption agency (RAA), beyond February 2027.
- 2.2 Delegate to the Director of Children's Services, in consultation with the Cabinet Member for Children's Services, to work with key stakeholders and partners (including adoptive family representatives) to further develop adoption west, taking account of the matters set out in paragraph 11.1 of this report.
- 2.3 Bring a further report to a future Cabinet meeting once this work is completed setting out revised proposals for adoption west beyond February 2027.

3. Proposal

3.1 Adoption West is a Teckal company wholly owned and limited by guarantee of the six local authorities, established in March 2019 to deliver specified statutory adoption services on their behalf.

3.2 The current arrangements end in February 2027. The partners recently commissioned an external review of the progress to date, alongside a consideration of alternative RAA models to assist in determining the best approach to service provision, beyond the expiry of the current arrangements. The review concluded that the further development of Adoption West, consolidating and building upon the progress to date, represents the best option for service provision beyond February 2027, providing opportunities to innovate, as well as addressing the pressures and challenges that are evident in the adoption system both regionally and nationally.

3.3 Subject to initial agreement by the six local authority partners to Adoption West's continuation, work would commence to refine the operating model, with the intention of bringing back detailed proposals later in 2026 for final approval. Ensuring a continuity of service and minimising the impact for children, families and staff will be integral to the development process. The details of the contract would be agreed by: Jean Kelly, (DCS) Joanne Parker, Service Manager, Ian Tomlinson, Commissioning Manager and Cllr May

4. Background

4.1 Adoption has been an integral feature of statutory arrangements for children's services for over 100 yrs. Over that time its function and prominence within service provision has been subject to considerable change, reflecting the profound social and political changes in wider society. There is a considerable body of evidence that adoption can be a highly effective permanence option for children who are looked after. Successive governments have placed an emphasis on the importance of adoption, with this unlikely to change in the immediate future. It is the most profound form of state intervention in a child's life, underscored by profound ethical considerations, requiring the highest standards of practice and management oversight.

4.2 In June 2015, the Department for Education (DfE) published 'Regionalising Adoption' which set out proposals for local authorities to deliver adoption services through Regional Adoption Agencies (hereafter referred to as 'RAAs'). The stated aims were to speed up the process of matching (children and adoptive families) and markedly improve the life chances of neglected children, improve adopter recruitment and support, while also reducing costs. Subsequently, 'Adoption: A Vision for Change (March 2016) further developed the proposals, with the Education and Adoption Act 2016 containing a reserve power to require local authorities to transfer their adoption services into regional arrangements.

4.3 In 2015, the DfE agreed an expression of interest from a collaboration of South West local authorities and funded the process to establish a partnership, to be called the Adoption West Regional Adoption Agency. The law firm Bevan Brittan were appointed in early 2016 to support the mobilisation process and, after due consideration of a range of delivery options, it was decided to establish Adoption West as a company wholly owned and limited by guarantee of the six local authorities (below), to deliver specified statutory adoption services on their behalf:

- Bath and North East Somerset Council (BANES)
- City Council of Bristol
- Gloucestershire County Council
- North Somerset Council
- South Gloucestershire Council
- Wiltshire Council

4.4 Adoption West (hereafter referred to as 'AW') commenced on 1 March 2019, initially for three years, with the option for a further five-year extension. The option to extend was activated in 2022 and runs until the end of February 2027. While there is a broad consensus amongst the participating local authority lead officers that Adoption West provides the optimal solution for the continuation of adoption service provision beyond March 2027, it was acknowledged that any final decision must be evidence led, including the consideration of alternative delivery models for adoption services within a regionalised delivery framework. Based on the experience gained in establishing AW, it was also recognised that the review process would need to commence during 2025 to allow sufficient time for any significant change. This change could include a new delivery model or the further development of AW, to be completed ahead of the February 2027 deadline, while minimising disruption for families, children and staff.

4.5 To assist with the process, the AW partners commissioned an independent author to undertake a comprehensive overview of Adoption West's progress and development since its commencement in March 2019, alongside an analysis of alternative models for the delivery of adoption services based on publicly available material. The latter would include RAAs' published material, national performance data, thematic and regulatory inspection reports, along with relevant research material. The author was previously the Director of Partnerships and Strategy for Gloucestershire County Council: Children's Services from August 2018 to July 2024, and Deputy Chair (2019-2020) and Chair (2020 – 2023) of the Adoption West Board, and the responsible individual for Adoption West during the Ofsted inspection in January 2022. The author also had prior experience of a local authority hosted adoption partnership (between Warrington, Wigan and St Helens) when Director of Children's Services for St Helens between 2011 and 2016.

4.6 A two stage change process was adopted. The first stage would involve completing a comprehensive options appraisal and review to determine whether AW or an alternative RAA model would provide the best option for adoption services, with the aim of completing this stage during quarter 3 of 2025/26. The second stage would involve the development and mobilisation of a new delivery model if selected or the further development of AW to ensure it remains fit for purpose beyond March 2027. An 'in principle' commitment would be obtained by each LA at stage 1 allowing for the maximum period for development and mobilisation in stage 2, with a final decision to be brought back to each LA in Q3 2026/27 when the details of the new delivery model or refined AW arrangements had been finalised.

4.7 Over the period since the commencement of AW in 2019 there has been considerable turnover in the political and senior officer leadership of children's services amongst the six participating local authorities, and their representatives on the AW Board. Consequently, many of the key stakeholders may lack a detailed appreciation of AW's journey and the wider policy context for children's services, including the role of adoption within that trajectory. Consequently, the resulting report takes a more descriptive and contextualised approach than would otherwise be necessary for an entirely specialist audience. This ensures that all parties can approach decision making on a secure and informed basis. The Options Appraisal and Overview Report (attached

at Appendix 1) was completed and presented to the AW lead officers in September 2025, who have accepted its findings and recommendations.

4.8 The Options Appraisal and Overview Report concluded, on balance, that the further development of Adoption West represented the best option for the provision of adoption services by the participating authorities beyond February 2027. The underlying rationale and wider set of contextual factors leading to this recommendation are covered in detail within sections 5.0 – 8.0 of the report. In summary these include:

- Adoption West (AW) is currently judged to be good in all respects by Ofsted having had two regulatory inspections, in 2022 and 2024, and has contributed positively to several children's services inspections involving the participating local authorities since 2019. (Overview Report Section 4.5)
- AW's performance compares well with peers and service user feedback is overwhelmingly positive, with the most recent Adoption Barometer (2024) and annual service user survey¹ showing many indicators performing as good if not better than national averages. Since commencement, AW has delivered over five hundred adoptions and continues to be responsible for adoption support to around 2,000 adoptive families.
- Two reviews by Ofsted and the DfE, alongside published performance data and inspection reports provide an insight into the extent to which RAAs, in their various forms, have delivered against the core regionalisation aims – increasing adopter recruitment, reducing unnecessary delay, enhancing adoption support, and delivering cost efficiencies. Neither comes to a definitive view as to which form of RAA and/or organisation of resources therein has proven most effective. Consequently, the evidence for changing from AW to a hosted model for example based on improved outcomes is not compelling. Moreover, the salient features of an effective RAA highlighted by the studies, including local partner commitment, a shared vision and values, and effective governance and oversight, are evident within the AW model.
- A commissioned or collaborative model, with services delivered by a Voluntary Adoption Agency (VAA – a voluntary sector organisation regulated by Ofsted to provide adoption services) was ruled out by the AW partners in 2016, due to the incipient nature of the provider market at that time. The closure and downsizing of several VAA providers over recent years suggests the market is potentially less stable than was the case previously. A market test exercise would be needed in coming to a definitive view however this would be challenging to complete within the time available while leaving sufficient time to complete a commissioning exercise.
- The creation of Adoption West was a considerable undertaking, supported by central government funding and external expertise. A decision to move away from the current model towards some form of hosted model or the commissioning a third party, would require significant commissioning, legal, procurement and human resources, alongside social care leaders/practitioners with permanence and adoption expertise. There will inevitably be disruption and anxiety associated with such a substantive transformation process no matter

how professionally managed, impacting on Adoption West staff and service users. Moreover, the central government funding provided through the previous regionalisation programme is unlikely to be available to support this.

- A change to a hosted arrangement for example could be considered a retrograde step from an entity that has forged a distinct identity, which provides for shared ownership and accountability for the participating local authorities, with a demonstrable record of effectiveness.

4.9 The aim in commissioning the Overview and Options Appraisal was to thoroughly evaluate and challenge initial thinking acknowledging the significant financial value, complexity and profound sensitivity of the service in question. Taking account of the above, alongside the wider set of contextual factors set out in detail within the Overview and Options Appraisal, the most practicable option for future service delivery beyond February 2027 is to develop the current model. Building upon the solid progress made by Adoption West not only provides an opportunity to innovate but also a secure base from which to tackle emerging pressures and challenges including leadership succession, the ongoing financial uncertainty relating to the Adoption and Special Guardianship Support Fund, and the sufficiency gap (the shortfall in adopters compared to the numbers of children with a plan for adoption).

4.10 Having a timely decision to continue the base model provides a greater opportunity to consider those aspects of the company's current arrangements that could be enhanced, alongside any additional areas of practice, such as life story work, that might benefit from the efficiencies of scale and consistency of practice the AW model provides. Consequently, the greater focus can be placed on the more pertinent issue of service development rather than issues of specification, TUPE, pensions and contractual detail that would inevitably arise with a move to a hosted, commissioned or collaborative delivery model.

5. Options

5.1 The Education and Adoption Act 2016 contains a reserve power to require local authorities to transfer their adoption services into a regional arrangement. Moreover, recent communication with central government sets out an expectation for pan-regional working between RAAs. Consequently, the options for LAs are limited to what form of RAA they work within rather than a return to the previous position of delivering adoption services on a single local authority basis. The options for AW partners are limited to the continuation and development of AW, a hosted model - with one or either LA providing a lead, or a commissioned/collaborative with a VAA. It is important to note that to date none of the participating local authorities has expressed a desire to host the service.

5.2 The challenge of delivering substantial change within the time available, the absence of external funding in support of change and the absence of unambiguous evidence that other forms of RAA would provide for better outcomes, are material factors when contemplating change for a service with profound ethical considerations for those involved. In the prevailing circumstances, building on a model that is succeeding is the only practicable option.

5. Financial implications

5.1 There are no direct financial implications arising from this decision and funding for the current year is sufficient to meet service needs. The current agreement runs until the end of February 2027, with an annual value £4.66 M (2025/2026), shared across the 6 participating local authorities on a proportionate basis. Annual Fee for Banes is currently £372,083 and is calculated pro rata on amount of use.

6. Climate Change and Ecological implications

6.1 There are no direct climate change implications arising from this decision. Adoption West has identified areas such as greenhouse gasses and air pollution as impacts from staff travel and transport emissions, when commuting to work and for site visits. AW has adopted the following to help reduce climate impacts.

Opting for suppliers who exhibit sustainable practises when procuring related services.

Supporting staff and users (where applicable) to walk, cycle, car share or use public transport instead of private vehicle use.

Staff and service users are encouraged to adopt energy saving practises such as turning off equipment when not in use, turning off taps etc.

Items are only purchased, if necessary, e.g. if existing items cannot be repaired and are no longer fit for purpose. Hiring of items is preferred to purchase and single use goods should not be purchased unless necessary to prevent waste.

7. Equality implications

7.1 An Equalities Impact Assessment (EqIA) has been completed.

7.2 Integral to the delivery of adoption services is the requirement to ensure they are fair and non-discriminatory. Within the context of children's social care service delivery, adoption can be characterised as a high intensity, low frequency activity, underscored by profound ethical considerations, requiring the highest standards of practice and management oversight. Particular attention is paid to those children that evidence shows are harder to match with adoptive families who can meet their needs – these include children from BAME, older children, sibling groups and children with disabilities. Adopter sufficiency (the gap between the numbers of adopters and children with a plan for adoption) while a factor for all children is particularly acute for these children.

7.3 Adoption West's development planning places considerable emphasis on ensuring that adoption sufficiency and adoption support meets the needs of all children with a plan for adoption and those children requiring support post adoption. Adoption West presented its Recruitment Strategy 2024-2027 to the AW Board at its meeting on 21 March 2025, setting out a range of actions to improve adopter recruitment, with progress tracked through regular reporting by the AW Director. In common with most RAAs, AW has a sufficiency gap however this is lower than the national position.

Performance reporting profiles the ethnicity and characteristics of adopters and children, alongside timescales for adoption to detect whether delay is occurring and take appropriate action at child or practice level, as necessary.

8 Data Protection Impact Assessment (DPIA) implications

8.1 There are no direct Data Protection Impact Assessment implications arising from this decision.

9 Social value implications

9.1 There is a considerable body of evidence that adoption can be a highly effective permanence option for children who are looked after. Adoption requires to be progressed only when all other permanence options, including placement with birth family relatives, have been exhausted with the child's wellbeing being the paramount concern throughout. Contemporary practice pays particular attention to the maintenance of birth family links when beneficial for the child and preserving their cultural identity and heritage.

10 Consultation feedback

10.1 At this early-stage consultation has been limited to the AW Directors – the Directors of Children's Services for each LA, due to the potential anxiety and unease the possibility of profound change might engender amongst adoptive families currently being supported and those prospective adopters within recruitment process. As indicated via the Adoption Barometer 2024, user feedback is overwhelmingly positive. The independent author met with the AW Joint Scrutiny Panel (comprised of a scrutiny member from each LA) at their request on 29 July 2025. The Panel have requested to be kept informed of developments and to have sight of any relevant reports as matters progress.

11. Officer recommendations

11.1 It is recommended that Cabinet agree to continue with Adoption West as their preferred option for their Regional Adoption Agency (RAA), beyond February 2027, giving a delegation to the DCS and Cabinet Member for Children's Safeguarding and Care to work with key stakeholders and partners (including adoptive family representatives) to further develop Adoption West, taking account of:

- the direction of national policy as it relates to adoption, adoption support and other forms of permanence, and opportunities to expand or enhance Adoption West's remit accordingly.
- the operational experience gained since March 2019.
- a comprehensive review of resourcing, structures and oversight to ensure Adoption West operates on a sustainable basis, providing value for money for the participating LAs and good outcomes for children and adoptive families.
- local government reform proposals; and,
- bring a further report to a future Cabinet meeting when this work is completed setting out revised proposals for Adoption West beyond February 2027.

12. Performance management/follow-up

- 12.1 There is a comprehensive range of performance indicators in place to evidence the impact, or otherwise, of the services provided by Adoption West. These include the numbers and characteristics of children and adopters, timescales for each stage of the adoption process and overall, the number of adoptions completed, adopter sufficiency, adoption breakdowns etc. Local performance is compared with peer and national comparators when this is available.
- 12.2 Performance is scrutinised by the Adoption West Board on a quarterly basis and via regular update to the AW Joint Scrutiny Panel. Adoption West is performing well against key performance metrics when compared to regional, statistical, and national comparators.

13. Statutory considerations

- 13.1 It is a statutory requirement to be part of a Regional Adoption Agency.

14. RESOURCE IMPLICATIONS

- 14.1 The Annual Fee for Banes is currently £372,083 and is calculated pro rata on amount of use.

15. Risk management

Risk: the AW partners cannot agree on the direction of development. mitigation: working through aw board of directors, partners have shown an ability to progress change on a consensus basis. moving forward, changes will be agreed on an incremental basis with the default position being a return to the status quo if agreement cannot be reached.

Risk: the direction of development does not align with national policy. mitigation: aw senior leadership are highly engaged at national and regional levels, including leading on adoption support practice for example. this will continue to inform service development to ensure there is alignment.

Risk: AW partners are insufficiently engaged in the change process. mitigation: following an initial decision, the independent author will continue in the role of project co-ordinator collaborating closely with la commissioners' group, aw leadership, adopters' representatives and lead officers. regular updates will be provided by the project co-ordinator.

16. Climate change

- 16.1 Participation in a RAA can indirectly contribute to tackling climate change by creating a more efficient, collaborative system that reduces duplication of effort, streamlines processes, and makes better use of shared resources. by pooling expertise, services, and administrative functions across a wider footprint, RAA's cut down on unnecessary travel, paperwork, and fragmented commissioning, which lowers carbon emissions. In addition, joint working enables smarter use of digital tools and regional placement sufficiency, reducing the need for children and families to travel long distances for support. these efficiencies not

only improve outcomes for children and families but also align with public sector commitments to sustainability and carbon reduction.

17. Consultation

- Section 151 officer has been consulted.
- Legal and Democratic Services have been consulted

Contact person	Ian Tomlinson, Commissioning Manager – Start Well
Background papers	None
Please contact the report author if you need to access this report in an alternative format	

Appendix One

Equality Impact Assessment / Equality Analysis

Item name	Details
Title of service or policy	Commissioning/Contracts
Name of directorate and service	Commissioning – Start Well
Name and role of officers completing the EIA	Ian Tomlinson
Date of assessment	24 th September 2025

Equality Impact Assessment (or ‘Equality Analysis’) is a process of systematically analysing a new or existing policy or service to identify what impact or likely impact it will have on different groups within the community. The main aim is to identify any discriminatory or negative consequences for a particular group or sector of the community, and also to identify areas where equality can be better promoted. Equality impact Assessments (EIAs) can be carried out in relation to services provided to customers and residents as well as employment policies/strategies that relate to staffing matters.

This toolkit has been developed to use as a framework when carrying out an Equality Impact Assessment (EIA) or Equality Analysis. **Not all sections will be relevant – so leave blank any that are not applicable.** It is intended that this is used as a working document throughout the process, and a final version will be published on the Council’s website.

1.1 Identify the aims of the policy or service and how it is implemented

Key questions	Answers / notes
<p>1.1 Briefly describe purpose of the service/policy e.g.</p> <ul style="list-style-type: none"> How the service/policy is delivered and by whom If responsibility for its implementation is shared with other departments or organisations Intended outcomes 	<p>Adoption West is a company wholly owned and limited by guarantee of the six local authorities, established in March 2019 to deliver specified statutory adoption services on their behalf.</p> <p>The current arrangements come to an end in February 2027. The partners recently commissioned an external review of the progress to date, alongside a consideration of alternative RAA models to assist in determining the best approach to service provision, beyond the expiry of the current arrangements. The review concluded that the further development of Adoption West, consolidating and building upon the progress to date, represents the best option for service provision beyond February 2027, providing opportunities to innovate, as well as</p>

	<p>addressing the pressures and challenges that are evident in the adoption system both regionally and nationally.</p> <p>.</p>
<p>1.2 Provide brief details of the scope of the policy or service being reviewed, for example:</p> <ul style="list-style-type: none"> ● Is it a new service/policy or review of an existing one? ● Is it a national requirement?). ● How much room for review is there? 	<p>Background</p> <p>Adoption has been an integral feature of statutory arrangements for children’s services for over 100 yrs¹. Over that time its function and prominence within service provision has been subject to considerable change, reflecting the profound social and political changes in wider society. There is a considerable body of evidence that adoption can be a highly effective permanence option for children who are looked after. Successive governments have placed an emphasis on the importance of adoption, with this unlikely to change in the immediate future. It is arguably the most profound form of state intervention in a child’s life, underscored by profound ethical considerations, requiring the highest standards of practice and management oversight.</p> <p>In June 2015, the Department for Education (DfE) published ‘Regionalising Adoption’ which set out proposals for local authorities to deliver adoption services through Regional Adoption Agencies (hereafter referred to as ‘RAAs’)². The stated aims were to speed up the process of matching (children and adoptive families) and markedly improve the life chances of neglected children, improve adopter recruitment and support, while also reducing costs. Subsequently, ‘Adoption: A Vision for Change (March 2016) further developed the proposals, with the Education and</p>

² Regionalising Adoption DfE (June 2015)

Adoption Act 2016 containing a reserve power to require local authorities to transfer their adoption services into regional arrangements.

In 2015, the DfE agreed an expression of interest from a collaboration of South West local authorities and funded the process to establish a partnership, to be called the Adoption West Regional Adoption Agency. The law firm Bevan Brittan were appointed in early 2016 to support the mobilisation process and, after due consideration of a range of delivery options, it was decided to establish Adoption West as a company wholly owned and limited by guarantee of the six local authorities (below), to deliver specified statutory adoption services on their behalf:

- Bath and North East Somerset Council (BANES)
- City Council of Bristol
- Gloucestershire County Council
- North Somerset Council
- South Gloucestershire Council
- Wiltshire Council

Adoption West (hereafter referred to as 'AW') commenced on 1 March 2019, initially for three years, with the option for a further five-year extension. The option to extend was activated in 2022 and runs until the end of February 2027. While there is a broad consensus amongst the participating local authority lead officers that Adoption West provides the optimal solution for the continuation of adoption service provision beyond March 2027, it was acknowledged that any final decision must be evidence led, including the consideration of alternative delivery models for adoption services within a regionalised delivery framework.

	Based on the experience gained in establishing AW, it was also recognised that the review process would need to commence during 2025 to allow sufficient time for any significant change. This change could include a new delivery model or the further development of AW, to be completed ahead of the February 2027 deadline, while minimising disruption for families, children and staff.
1.3 Do the aims of this policy link to or conflict with any other policies of the Council?	No

2. Consideration of available data, research and information

Page 37	Key questions	Data, research and information that you can refer to
	2.1 What equalities training have staff received to enable them to understand the needs of our diverse community?	All staff have completed the equalities training via the Learning Pool. Social work qualifications also include elements of equalities training. Sari run bespoke training within B&NES.
	2.2 What is the equalities profile of service users?	The equalities profile of Children Looked After in Bath and North East Somerset reflects national and regional trends. Key aspects include: 1. Demographics: The majority of adopted in B&NES are white British, aligning with the overall population profile of the area. However, children from minority ethnic backgrounds are proportionally overrepresented, as seen across England.

	<p>2. Gender: There is a higher number of boys in care compared to girls, a trend consistent with national statistics.</p> <p>3. Age Distribution: Most children being adopted are aged under 4.</p>
<p>2.3 Are there any recent customer satisfaction surveys to refer to? What were the results? Are there any gaps? Or differences in experience/outcomes?</p>	No
<p>2.4 What engagement or consultation has been undertaken as part of this EIA and with whom? What were the results?</p>	N/A as above
<p>2.5 If you are planning to undertake any consultation in the future regarding this service or policy, how will you include equalities considerations within this?</p>	N/A

3. Assessment of impact: 'Equality analysis'

Based upon any data you have considered, or the results of consultation or research, use the spaces below to demonstrate you have analysed how the service or policy:

- Meets any particular needs of equalities groups or could help promote equality in some way.
- Could have a negative or adverse impact for any of the equality's groups

Key questions	Examples of what the service has done to promote equality	Examples of actual or potential negative or adverse impact and what steps have been or could be taken to address this
3.1 Issues relating to all groups and protected characteristics Page 339	<p>Adoption West promotes equality for groups with protected characteristics by ensuring services are inclusive, accessible, and responsive to diverse needs.</p> <p>This includes conducting Equality Impact Assessments, designing culturally appropriate and tailored services, and removing barriers to access.</p> <p>The team monitors outcomes to address disparities, supports providers to promote equality and inclusion.</p>	<ul style="list-style-type: none">• Embed equality, diversity, and inclusion objectives in RAA commissioning and workforce plans.• Collect and analyse data on adopter and child characteristics to identify and address disproportionality.• Establish an Equality Champion or advisory group within the RAA to monitor progress.• Include lived experience voices (adopters and adoptees) from diverse backgrounds in service design and review.

	By embedding equality at every stage of the adoption process, AW ensures that children from all backgrounds receive high-quality, equitable support.	
3.2 Sex – identify the impact/potential impact of the policy on women and men.	In relation to sex, AW promotes equality by ensuring that services are designed to meet the specific needs of both boys and girls while addressing any disparities in outcomes.	Mitigation / Positive Actions: <ul style="list-style-type: none"> • Include diverse case studies showing a range of family types. • Train staff on bias and inclusive practice in family assessment. • Ensure equality of opportunity in access to preparation courses and support groups.
3.3 Pregnancy and maternity	<p>In relation to pregnancy and maternity, the AW promotes equality by ensuring services support services do not affect mothers who are pregnant.</p> <p>Services are designed to reduce stigma, ensure equitable access to resources, and provide safe accommodation where needed.</p>	Mitigation / Positive Actions: <ul style="list-style-type: none"> • Offer flexibility around timing of assessments and matching processes. • Ensure maternity or paternity status does not negatively affect eligibility or prioritisation.

<p>3.4 Gender reassignment – identify the impact/potential impact of the policy on transgender people</p>	<p>In relation to gender reassignment, AW promotes equality by ensuring services are inclusive, supportive, and responsive to the needs of transgender and non-binary young people.</p>	<ul style="list-style-type: none"> • Use inclusive language in all forms and communications. • Review assessment procedures to remove unnecessary gendered assumptions. • Provide guidance for staff on supporting trans and non-binary adopters sensitively and legally.
<p>3.5 Disability – identify the impact/potential impact of the policy on disabled people (ensure consideration of physical, sensory and mental health needs/differences)</p>	<p>In relation to disability, AW promotes equality by ensuring that services are accessible, inclusive, and tailored to meet the diverse needs of disabled children and young people.</p> <p>In addition, there is commissioned services for short breaks for disabled children, residential and in the community.</p> <p>Parents/carers have access to free independent support and advice through SENDIAS: https://livewell.bathnes.gov.uk/special-educational-need-or-disability-send/sendias-bathnes</p>	<ul style="list-style-type: none"> • Ensure recruitment materials and websites meet accessibility standards. • Offer flexible assessment processes (e.g. home visits, accessible venues, or online options). • Strengthen links with health, education, and SEND services for post-adoption support. • Promote adoption by disabled people by highlighting inclusive role models and case studies.

<p>3.6 Age – identify the impact/potential impact of the policy on different age groups</p>	<p>In relation to age, AW promotes equality by ensuring that services are tailored to meet the developmental and emotional needs of children and young people across all age groups. However, the age of most children being adopted is under four.</p> <p>Engaging with children and young people of different ages ensures their specific needs and voices inform service design and delivery.</p>	<p>Mitigation / Positive Actions:</p> <ul style="list-style-type: none"> • Train staff to challenge age-based stereotypes in assessment and matching. • Emphasise experience, resilience, and support networks over age in suitability assessments. • Offer flexible post-adoption support packages regardless of adopter age.
<p>3.7 Race – identify the impact/potential impact on across different ethnic groups</p>	<p>In relation to race, AW promotes equality by ensuring services are culturally sensitive and address the specific needs of children and young people from all racial and ethnic backgrounds.</p> <p>Collaboration with culturally competent providers and community organisations ensures children feel valued and supported in their heritage, while also combating discrimination or bias within service delivery.</p>	<p>Mitigation / Positive Actions:</p> <ul style="list-style-type: none"> • Targeted recruitment campaigns to attract adopters from underrepresented ethnic communities. • Partnerships with community and faith organisations to build trust and awareness. • Cultural competence training for all staff involved in assessment and matching.

		<ul style="list-style-type: none"> Guidance to ensure cultural identity and heritage are prioritised in matching decisions and ongoing support.
<p>3.8 Sexual orientation – identify the impact/potential impact of the policy on lesbian, gay, bisexual, heterosexual, questioning people</p> <p>Page 343</p>	<p>In relation to sexual orientation, AW promotes equality by ensuring services are inclusive and affirming for children and young people of all sexual orientations.</p> <p>Services are designed to address challenges such as discrimination, stigma, or mental health concerns that may disproportionately affect LGBTQ+ children.</p>	<ul style="list-style-type: none"> Partner with LGBTQ+ adoption networks (e.g. New Family Social). Ensure policies, imagery, and language in materials are explicitly inclusive. Provide staff training on LGBTQ+ awareness and unconscious bias. Monitor adopter diversity data to ensure equitable outcomes.
<p>3.9 Marriage and civil partnership – does the policy/strategy treat married and civil partnered people equally?</p>	<p>In relation to marriage and civil partnerships, the children's commissioning team promotes equality by ensuring that services are inclusive and sensitive to the diverse family structures and legal partnerships that children and young people may encounter. This includes recognising the role of married or civilly partnered carers, such as foster carers or adoptive parents,</p>	<p>Mitigation / Positive Actions:</p> <ul style="list-style-type: none"> Review matching policies to ensure they are relationship-status neutral. Communicate clearly that single and unmarried adopters are equally valued.

	<p>in providing stable and nurturing environments.</p> <p>The team ensures that commissioned services do not discriminate based on marital or partnership status and that all families are treated equitably.</p>	
<p>3.10 Religion/belief – identify the impact/potential impact of the policy on people of different religious/faith groups and also upon those with no religion.</p> <p>Page 344</p>	<p>In relation to religion and belief AW will respect the impact of children’s religious beliefs, placing them with appropriate parents.</p>	<p>Mitigation / Positive Actions:</p> <ul style="list-style-type: none"> • Incorporate questions about religion, belief, and spiritual practices into adopter assessments and matching criteria. • Provide adopters with training on supporting children’s religious identity and respecting birth family beliefs. • Ensure availability of placements that can accommodate dietary, worship, and cultural observance needs.
<p>3.11 Socio-economically disadvantaged* – identify the impact on people who are disadvantaged due to factors like family background, educational attainment, neighbourhood,</p>		

<p>employment status can influence life chances</p> <p>(this is not a legal requirement but is a local priority).</p>		
<p>3.12 Rural communities* identify the impact / potential impact on people living in rural communities</p> <p>Page 345</p>	<p>In relation to rural communities, AW promotes equality by ensuring that services are accessible and responsive to the unique challenges faced by children and young people living in rural areas.</p> <p>This includes addressing issues such as geographical isolation, limited local resources, and travel barriers to accessing services, such as education, healthcare, and social care support.</p> <p>Monitoring and addressing the impact of rural isolation on well-being and service access is key to ensuring equality for children from these communities.</p>	
<p>3.13 Armed Forces Community ** serving members; reservists; veterans and their families, including the bereaved. Public services are required</p>	<p>Learning from colleagues working across B&NES and Wiltshire is drawn upon when required.</p>	

by law to pay due regard to the Armed Forces Community when developing policy, procedures and making decisions, particularly in the areas of public housing, education and healthcare (to remove disadvantage and consider special provision).		
<p>3.14 Care Experienced ***</p> <p>This working definition is currently under review and therefore subject to change:</p> <p>In B&NES, you are 'care-experienced' if you spent any time in your childhood in Local Authority care, living away from your parent(s) for example, you were adopted, lived in residential, foster care, kinship care, or a special guardianship arrangement.</p>	<p>In relation to care experience, AW promotes equality by ensuring that the unique needs of care-experienced young people are fully addressed.</p> <p>AW would support care-experienced people are not disadvantaged by their background, offering services that promote well-being and opportunities for personal development.</p>	

*There is no requirement within the public sector duty of the Equality Act to consider groups who may be disadvantaged due to socio economic status, or because of living in a rural area. However, these are significant issues within B&NES and have therefore been included here.

** The Equality Act does not cover armed forces community. However, the Armed Forces Bill (which came in on 22 Nov 2022) introduces a requirement to pay ‘due regard’ to make sure the Armed Forces Community are not disadvantaged when accessing public services.

***The Equality Act does not cover care experienced people. B&NES adopted this group as a protected characteristic in March 2024 alongside over 80 other Local Authorities. Although we have data for care leavers and children/young people who are currently in the care of B&NES we do not have wider data on disadvantage experienced through being in care.

4. Bath and North East Somerset Council

Equality Impact Assessment Improvement Plan

Please list actions that you plan to take as a result of this assessment/analysis. These actions should be based upon the analysis of data and engagement, any gaps in the data you have identified, and any steps you will be taking to address any negative impacts or remove barriers. The actions need to be built into your service planning framework. Actions/targets should be measurable, achievable, realistic and time framed.

Issues identified	Actions required	Progress milestones	Officer responsible	By when
It is a statutory duty to be part of a Regional Adoption Agency	New contract needs to be agreed and in place by February 2027	Single member agreement by December 2025 New contact signed by not later than November 2026	Ian Tomlinson	November 26

5. Sign off and publishing

Once you have completed this form, it needs to be 'approved' by your Divisional Director or their nominated officer. Following this sign off, send a copy to the Equalities Team (equality@bathnes.gov.uk), who will publish it on the Council's website. Keep a copy for your own records.

Signed off by: Jean Kelly

(Divisional Director or nominated senior officer)

Date: 10th October 2025

Bath & North East Somerset Council		
MEETING/ DECISION MAKER:	Cabinet	
MEETING/ DECISION DATE:	13 November 2025	EXECUTIVE FORWARD PLAN REFERENCE:
		E 3660
TITLE:	Local Government Association (LGA) Corporate Peer Challenge Action Plan	
WARD:	All	
AN OPEN PUBLIC ITEM		
List of attachments to this report: 1) LGA Corporate Peer Review Final Report 2) Corporate Peer Challenge Action Plan		

1 THE ISSUE

- 1.1 To provide Cabinet with the draft action plan, reflecting the feedback and recommendations from the Local Government Association's (LGA) Corporate Peer Challenge that took place in July 2025.

2 RECOMMENDATION

Cabinet is asked to;

2.1 Approve the draft action plan

- 2.2 **Agree to a follow up visit in Summer 2026 to help the council assess the impact of the peer challenge and demonstrate the progress made in response to the review's recommendations.**

3 THE REPORT

- 3.1 Corporate Peer Challenges (CPCs) are a form of sector-led improvement arranged by the LGA.
- 3.2 They are improvement-focused and tailored to meet individual councils' needs, designed to complement and add value to a council's own performance and improvement.

3.3 They are not inspections and do not provide a detailed diagnosis or scored assessment.

3.4 All CPCs assess councils against five key themes:

- i. Local priorities and outcomes
- ii. Organisational and place leadership
- iii. Governance and culture
- iv. Financial planning and management
- v. Capacity for improvement

3.5 In advance of their visit to Bath & North East Somerset, the peer team reviewed a range of documents shared by the council, to ensure familiarity with the organisation particularly in relation to the challenges.

3.6 The team then spent four days onsite from 8 - 11 July 2025, speaking to more than 120 people - including a range of council staff together with councillors and external stakeholders - and attending in excess of 30 meetings.

3.7 The team consisted off the following officers and elected members:

- Denise McGuckin, Managing Director, Hartlepool Borough Council
- Councillor Ruth Dombey, London Borough of Sutton (Liberal Democrat)
- Councillor Jim Robbins, Leader, Swindon Borough Council (Labour)
- Gary Fielding, Corporate Director of Resources, North Yorkshire Council
- Stuart Wright, Director of Place Strategy, South Tyneside Council
- Chris Bowron, LGA Peer Challenge Manager

3.8 The peer review report recognised delivery of many good things where the council is making a difference; including climate action, place-shaping, community wellbeing, staff culture, and financial management.

3.9 There were also a range of suggestions and observations within the main section of the report that will inform some practical actions and quick wins. This includes an immediate response of undertaking a communications peer review **7-9 October 2025** to further embed the council's core policy of 'giving people a bigger say' by reaching more widely and deeply into communities.

3.10 The peer team identified eight key recommendations. The proposed method of addressing these is outlined in the draft action plan (appendix 2).

4 STATUTORY CONSIDERATIONS

4.1 None

5 RESOURCE IMPLICATIONS (FINANCE, PROPERTY, PEOPLE)

5.1 The action plan will be delivered using existing resources.

6 RISK MANAGEMENT

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

7 EQUALITIES

7.1 The action plan (appendix 2) details the council's response to the recommendation relating to equalities, diversity and inclusion.

8 CLIMATE CHANGE

8.1 The report highlighted that the council has a very clear focus on climate and nature, with a reduction in the organisation's greenhouse gas emissions of 36% in the period from 2016/17 to 2023/24.

9 OTHER OPTIONS CONSIDERED

9.1 None

10 CONSULTATION

10.1 Monitoring officer and S151 officer.

Contact person	Ceri Williams - Policy Development and Statutory Scrutiny Officer Corporate Office 01225 396053
Background papers	None
Please contact the report author if you need to access this report in an alternative format	

This page is intentionally left blank

LGA Corporate Peer Challenge

Bath and North East Somerset Council

8th to 11th July 2025

Feedback report



Corporate Peer Challenge

Contents

1. Introduction	3
2. Executive summary.....	3
3. Recommendations	7
4. Summary of the peer challenge approach	9
5. Feedback	11
6. Next steps	28

1. Introduction

Corporate Peer Challenge (CPC) is a highly valued improvement and assurance tool that is delivered by the sector for the sector. It involved a team of senior local government councillors and officers undertaking a comprehensive review of key finance, performance and governance information and then spending four days at Bath and North East Somerset Council to provide robust, strategic and credible challenge and support.

CPC forms a key part of the improvement and assurance framework for local government. It is underpinned by the principles of Sector-led Improvement (SLI) put in place by councils and the Local Government Association (LGA) to support continuous improvement and assurance across the sector. These state that local authorities are responsible for their own performance; accountable locally not nationally; and have a collective responsibility for the performance of the sector.

CPC assists councils in meeting part of their Best Value Duty, with the government expecting all local authorities to have a CPC at least every five years.

Peers are at the heart of the peer challenge process and provide a 'practitioner perspective' and 'critical friend' challenge.

This report outlines the key findings of the peer team and the recommendations that the council are required to action.

2. Executive summary

The council's elected members and officers are the stewards of a fantastic set of places across Bath and North East Somerset. The organisation is delivering many good things that are making a difference and has examples of excellence in a range of areas. That said, given the council purpose of 'improving people's lives', our sense is that the inequalities that exist locally and the whole geography of Bath and North East Somerset need to feature much more prominently in the council's thinking, planning, narrative and delivery.

The political leadership style in the council creates an energy and sense of ambition. However, some officers reflected that it is difficult for them to see what matters most and where to apply their focus in a context of the range of ambitions and what is seen to be important but the decreasing level of resources. We see further dialogue being required across the political and managerial leadership to sharpen the focus on priorities. Without this, there is a risk of increasing tensions between ambition and capacity to deliver.

Key to the future is ensuring a consistent, collectively owned and strategic political direction which is focused on outcomes. This would enable officers to have a clearer sense of focus and priorities, which it is important they are then afforded the space to deliver. Underpinning this with an agreed set of performance and outcome measures would enable the council to demonstrate delivery and the difference that is being made.

The council is ambitious to reach more widely and deeply into communities as it seeks to ensure it is listening to a broad cross-section of society and not overlooking what may sometimes be the 'silent majority' or risking the 'loudest voices' unduly influencing things. This core policy of 'giving people a bigger say' is well understood across the organisation and there are a number of examples of good activity around it. A key consideration, however, is recognising that the response received from any given engagement activity may not always be what was anticipated or hoped for. Where that should prove to be the case and the political leadership either changes its mind or demonstrates 'the courage of its convictions' and continues as intended, it needs to be clear in its communication around such a decision.

The council is seen by partners to be much more outward looking now and it clearly recognises the importance of engaging widely. The Future Ambitions Board for Bath and North East Somerset comprises a number of very good, willing and ambitious partners and provides a tremendous opportunity for the council. The council and local strategic partners are also now much better positioned with the West of England Combined Authority (WECA). There is major opportunity for Bath and North East

4

18 Smith Square, London, SW1P 3HZ www.local.gov.uk Telephone 020 7664 3000 Email info@local.gov.uk

Local Government Association company number 11177145 Improvement and Development Agency for Local Government company number 03675577

Chair: Councillor Louise Gittins

Chief Executive: Joanna Killian

President: Baroness Grey-Thompson

Somerset in the development of the spatial strategy under WECA and the council needs to ensure it has the necessary expert capacity to capitalise upon this.

The council was shortlisted in 2024 for the 'Most Improved Council' at the Local Government Chronicle awards. More hard work has been taking place since then, as the council seeks to establish key 'foundations' for the future. The core components to support transformation and change in the council are in place and what this has enabled so far is impressive. However, the council recognises the need now to establish a single and council-wide transformation programme and for this to be linked to the medium-term financial strategy. This is crucial if the organisation is to deliver the savings and increased income necessary to address the projected £30m financial gap across the period to 2029/30. Establishing and delivering this transformation programme requires significant 'grip' from the council's senior leadership.

Significant staffing structural change is taking place in the organisation. The amount of change being delivered has been, and continues to be, a major undertaking and the council acknowledges that there is learning to be drawn from the approach adopted. This includes aspects of scoping any given project/programme/initiative, the scale and sequencing of things, capacity and ownership and oversight.

There is 'churn' taking place currently at the senior management level. This, combined with the scale of the challenges and opportunities for the council and the area, present a set of risks that the organisation needs to be mindful of in terms of capacity.

The council's Policy Development and Scrutiny Panels have been delivering good work in certain areas over the last couple of years. There is dialogue between the Chairs of the Panels to co-ordinate activity, Cabinet Members are featuring more prominently at Panel meetings and the Panels themselves are keen to make more of a difference. As part of this, in a context of the Panels currently being slanted more towards the scrutiny than the policy development element of their remit, there is a

5

18 Smith Square, London, SW1P 3HZ www.local.gov.uk Telephone 020 7664 3000 Email info@local.gov.uk

Local Government Association company number 11177145 Improvement and Development Agency for Local Government company number 03675577

Chair: Councillor Louise Gittins

Chief Executive: Joanna Killian

President: Baroness Grey-Thompson

desire to see this being re-balanced. The key consideration around Overview and Scrutiny is how the organisation supports and enables the Panels to play a more fundamental role.

Whilst the councillor induction programme following the elections is viewed positively, there is very little in the way of on-going development of elected members. The challenge is around the identification of need and the stimulation of interest amongst councillors and this remit does not appear to be owned within the organisation.

Informal Cabinet brings Cabinet and the managerial Executive Leadership Team together on a regular basis. There has been investment in development activity at this level and it will be important to continue this given the difficult decisions and challenges the council will face going forward and the strength of relationships and dialogue needed to navigate them.

The way in which Cabinet-level decision-making is slanted more towards individual Cabinet Member decisions than collectively at formal Cabinet meetings was widely commented upon during our discussions. People's perception was that the extent to which this is happening risks impacting a sense of collegiate working and undermining the council's commitment around transparency.

We developed an impression of an insufficiently clear, consistent and shared understanding of the council's decision-making framework across the organisation and this needs to be addressed. For example, it was difficult to determine the remit of elected members – in relation to oversight – of certain key projects.

The organisation has a track record of delivering balanced budgets but there is an underlying pattern of overspends and underspends across different services. Expenditure around Special Educational Needs and Disabilities (SEND), home to school transport and children's social care placements is the key financial challenge for the council. Work has been taking place to develop understanding and 'grip' here.

6

18 Smith Square, London, SW1P 3HZ www.local.gov.uk Telephone 020 7664 3000 Email info@local.gov.uk

Local Government Association company number 11177145 Improvement and Development Agency for Local Government company number 03675577

Chair: Councillor Louise Gittins

Chief Executive: Joanna Killian

President: Baroness Grey-Thompson

The council has a good track record of delivering savings. The requirement in the current year is to secure £14m of increased income and savings. A further £18.7m needs to be secured in the period across the medium-term to 2029/30. This level of financial challenge requires a robust set of arrangements for the implementation and monitoring of the initiatives to deliver it. This links back to the need to establish a single and council-wide transformation programme and the necessary related leadership 'grip'. The council has a relatively healthy level of reserves, which provides it with opportunities for investment to drive further transformation and improvement.

Staff reflected the friendly and supportive atmosphere that they enjoy with their colleagues. The office environment that has been established through the re-imagining of the civic centre in Keynsham is viewed positively and the flexible working arrangements are highly valued. This forms part of a picture staff outlined of feeling valued and invested in. It was good to hear the examples of people having been enabled to grow and progress within the council.

3. Recommendations

There are a number of observations and suggestions within the main section of the report. The following are the peer team's key recommendations to the council:

3.1 Recommendation 1

In line with the council purpose of 'improving people's lives', ensure the inequalities and whole geography of Bath and North East Somerset feature much more prominently in the council's thinking, planning, narrative and delivery

3.2 Recommendation 2

Develop an agreed set of performance and outcome measures to demonstrate delivery and the difference that is being made and which reflect a collectively owned and strategic political direction

3.3 Recommendation 3

Develop a shared place-based partnership narrative for use in influencing at the regional and national level

3.4 Recommendation 4

Ensure the council has the necessary expert capacity for Bath and North East Somerset to capitalise upon the opportunities in the development of the spatial strategy under the West of England Combined Authority, including the Bristol/Bath corridor

3.5 Recommendation 5

Establish a comprehensive programme of on-going elected member development

3.6 Recommendation 6

Establish a single and council-wide transformation programme for the council, linked to the medium-term financial strategy, with clear objectives, timescales and governance arrangements, including appropriate elected member oversight

3.7 Recommendation 7

Linked to the above, ensure there is a robust set of arrangements for the implementation and monitoring of the initiatives to address the gap outlined in the medium-term financial strategy

3.8 Recommendation 8

Provide demonstrable leadership around equalities, diversity and inclusion and ensure it is more actively 'lived and breathed' across the organisation

4. Summary of the peer challenge approach

4.1 The peer team

Peer challenges are delivered by experienced elected member and officer peers. The make-up of the peer team reflected the focus of the peer challenge and peers were selected by the LGA on the basis of their relevant expertise. The peers were:

- Denise McGuckin, Managing Director, Hartlepool Borough Council
- Councillor Ruth Dombey, London Borough of Sutton (Liberal Democrat)
- Councillor Jim Robbins, Leader, Swindon Borough Council (Labour)
- Gary Fielding, Corporate Director of Resources, North Yorkshire Council
- Stuart Wright, Director of Place Strategy, South Tyneside Council
- Chris Bowron, LGA Peer Challenge Manager

4.2 Scope and focus

The peer team considered the following five themes which form the core components of all corporate peer challenges. These areas are critical to councils' performance and improvement.

1. **Local priorities and outcomes** - Are the council's priorities clear and informed by the local context? Is the council delivering effectively on its priorities? Is there an organisational-wide approach to continuous improvement, with frequent monitoring, reporting on and updating of performance and improvement plans?
2. **Organisational and place leadership** - Does the council provide effective local leadership? Are there good relationships with partner organisations and local communities?
3. **Governance and culture** - Are there clear and robust governance arrangements? Is there a culture of challenge and scrutiny?
4. **Financial planning and management** - Does the council have a grip on its current financial position? Does the council have a strategy and a plan to address

its financial challenges? What is the relative financial resilience of the council like?

5. **Capacity for improvement** - Is the organisation able to bring about the improvements it needs, including delivering on locally identified priorities? Does the council have the capacity to improve?

As part of the five core elements outlined above, every corporate peer challenge includes a strong focus on financial sustainability, performance, governance and assurance.

4.3 The peer challenge process

Peer challenges are improvement focused; it is important to stress that this was not an inspection. The process is not designed to provide an in-depth or technical assessment of plans and proposals. The peer team used their experience and knowledge of local government to reflect on the information presented to them by people they met, things they saw and material that they read.

The peer team prepared by reviewing a range of documents and information to ensure they were familiar with the council and the challenges it is facing. This included a Position Statement prepared by the council in advance of the peer team's time on site. This provided a clear steer to the peer team on the local context for Bath and North East Somerset Council. It also included an LGA finance briefing (prepared using public reports from the council's website) and an LGA performance report outlining benchmarking data for the council across a range of metrics. The latter was produced using the LGA's local area benchmarking tool called 'LG Inform'.

The peer team then spent four days onsite at the council, during which they:

- Gathered evidence, information, and views from more than 30 meetings, in addition to further research and reading
- Spoke to more than 120 people including a range of council staff together with elected members and external stakeholders

10

18 Smith Square, London, SW1P 3HZ www.local.gov.uk Telephone 020 7664 3000 Email info@local.gov.uk

Local Government Association company number 11177145 Improvement and Development Agency for Local Government company number 03675577

Chair: Councillor Louise Gittins

Chief Executive: Joanna Killian

President: Baroness Grey-Thompson

This report provides a summary of the peer team's findings. In presenting feedback, they have done so as fellow local government officers and elected members.

5. Feedback

5.1 Local priorities and outcomes

The council's Corporate Strategy runs from 2023 to 2027 and outlines an organisational purpose of 'improving people's lives'. It features two core policies:

- Tackling the climate and ecological emergency
- 'Giving people a bigger say'

The strategy was agreed unanimously at Full Council in July 2023.

The council can be seen to be making a difference in a variety of ways in line with the ambitions of the Corporate Strategy. With climate and nature as a very clear focus and commitment, the council has delivered a reduction in the organisation's greenhouse gas emissions of 36 per cent in the period from 2016/17 to 2023/24. It has also led a 43 per cent reduction in such emissions across the whole area of Bath and North East Somerset in the period from 2005 to 2022. More than 300 electric vehicle charging points have been installed in the area; rewilding and nature recovery projects have been delivered; enhanced recycling facilities have been developed in various places; and climate literacy training is being undertaken across the council.

More than 5,000 homes in the area have been retrofitted and the council is setting high standards for housing development in relation to energy efficiency, climate resilience and biodiversity net gain. Further investment has been agreed to enhance the council's 'clean and green' street-scene activity and to decarbonise the council's vehicle fleet. The council does acknowledge, though, that it is not going to achieve the Net Zero goal set for the district for 2030.

The council is playing a key place-shaping role, for example through the Bath Quays commercial quarter redevelopment, and has been instrumental in the establishment of the net zero Somer Valley Enterprise Zone. Also, the council wholly owns three companies as part of Aequus Group Holdings Ltd, with these having been set up to deliver sustainable housing. Thus far, 95 apartments have been built and sold in Keynsham, along with seven social-rented apartments at Newbridge Hill in Bath plus other developments underway at Argyle Works and in Frenchay.

The Community Wellbeing Hub is a wide-ranging collaboration involving nearly 40 partner organisations and was born out of the pandemic. Thus far it has assisted more than 15,000 local people. At the heart of it is the leading edge sharing of data and information across different agencies and this element was integral in the project being highly commended in the Municipal Journal Awards 2025 in the 'Innovation in Public Private Partnerships' category.

The evidence base around the socio-economic benefits being secured through the Hub are starting to emerge and enhancing and understanding this data will be important in strengthening the approach to addressing inequalities across Bath and North East Somerset. Importantly, whilst the council is 'holding the ring' on the Hub initiative, in terms of providing the co-ordinating support, there is a sense of its potential not yet being recognised or bought into by the maximum possible range of council functions. There is seen to be significant scope, for example, for Public Health, Children's Services and Housing to play a much stronger role – with this being just one example of where there needs to be a greater willingness in the organisation to undertake 'difficult conversations'.

The council has been instrumental in facilitating the creation of a significant number of apprenticeships, both through local employer partnerships and as an employer itself, with around 100 apprentices now established within the council – reflective of its organisational purpose of 'improving people's lives'.

12

18 Smith Square, London, SW1P 3HZ www.local.gov.uk Telephone 020 7664 3000 Email info@local.gov.uk

Local Government Association company number 11177145 Improvement and Development Agency for Local Government company number 03675577

Chair: Councillor Louise Gittins

Chief Executive: Joanna Killian

President: Baroness Grey-Thompson

What is being achieved by the council is being done through talented people. It can be enhanced through the development of greater 'grip', increased join-up across the organisation and approaches being made more systematic, all of which we 'unpack' through the rest of this report.

The council's elected members and officers are the stewards of a fantastic set of places across Bath and North East Somerset. It covers a varied area, including the UNESCO World Heritage City of Bath; the market towns of Keynsham and Midsomer Norton; and a range of rural communities, including 50 parishes. It also includes two designated areas of Outstanding Natural Beauty – the Cotswolds and the Mendip Hills. The area attracts over 6 million visitors per annum. The local population has increased by ten per cent in the last decade, to around 196,000, with the rise mainly being attributable to the growth in the student population. Around half of the population live in the urban centre of Bath.

People described a council that is 'data rich' but which is not yet translating that sufficiently at the corporate level into insight and intelligence. Enhancing the council's capability in this area is particularly important in a context of understanding and leading the response to the inequalities that exist in Bath and North East Somerset. These inequalities include the variation in educational attainment across the area and the challenges faced by some rural communities around transport links, digital connectivity and access to services. Also, whilst the overall local authority area is ranked 269th out of 317 in the Indices of Multiple Deprivation (indicating it is relatively un-deprived), some parts such as Twerton and Whiteway, which are both in Bath, are amongst the 10 per cent most deprived council wards nationally. Enhancing the council's insight and intelligence capacity will be important in helping to fulfil the organisation's ambitions around evidence-based decision-making.

Our sense, looking at the above two elements and given the council purpose of 'improving people's lives', is that the inequalities and whole geography of Bath and North East Somerset need to feature much more prominently in the council's thinking, planning, narrative and delivery.

13

18 Smith Square, London, SW1P 3HZ www.local.gov.uk Telephone 020 7664 3000 Email info@local.gov.uk

Local Government Association company number 11177145 Improvement and Development Agency for Local Government company number 03675577

Chair: Councillor Louise Gittins

Chief Executive: Joanna Killian

President: Baroness Grey-Thompson

Performance reporting at the strategic level to elected members and publicly is in a state of flux currently. Efforts have been made at certain points since the elections in 2023 to determine a reporting format and set of performance indicators that reflect what is most important to the Administration. The most recent aspect of this was the drawing up by Cabinet members, in consultation with the wider Administration, of a list of 'Category A' priorities and performance measures. Elements of this ranged from the political imperative of the redevelopment of the Fashion Museum to the detailed, such as the frequency of litter picking on the streets in Bath and ensuring urban street weeds are kept under control without chemicals.

The political leadership style in the council creates an energy and sense of ambition. However, some officers reflected that it is difficult for them to see what matters most and where to apply their focus in a context of the range of ambitions and what is seen to be important but the decreasing level of resources. We see further dialogue being required across the political and managerial leadership to sharpen the focus on priorities. Without this, there is a risk of increasing tensions between ambition and capacity to deliver.

Key to the future is ensuring a consistent, collectively owned and strategic political direction which is focused on outcomes and linked to the purpose of improving the lives of people right across the different communities of Bath and North East Somerset. This would enable officers to have a clearer sense of focus and priorities, which it is important they are then afforded the space to deliver. Underpinning this with an agreed set of performance and outcome measures would enable the council to demonstrate delivery and the difference that is being made. The desire that exists corporately to enhance the use of comparative data in the council's performance reporting is positive and would enable the organisation to be measured against similar councils, providing a key source of learning and informing decision-making.

The core policy of 'giving people a bigger say' is well understood across the organisation. There are a number of examples of good activity around this, including

14

18 Smith Square, London, SW1P 3HZ www.local.gov.uk Telephone 020 7664 3000 Email info@local.gov.uk

Local Government Association company number 11177145 Improvement and Development Agency for Local Government company number 03675577

Chair: Councillor Louise Gittins

Chief Executive: Joanna Killian

President: Baroness Grey-Thompson

the Parishes Liaison forum, Area Forums, the work of the Economic Development team and a variety of specific consultations. The ambition is also informing wider dimensions of council policy and ways of working, including the development of a Carers Strategy to ensure their priorities and requirements are better understood by the organisation and a forum that has been established for providers of adult social care services aimed at enhancing the way the council works with them and strengthening the market in this sphere.

The council is ambitious to reach more widely and deeply into communities as it seeks to ensure it is listening to a broad cross-section of society and not overlooking what may sometimes be the 'silent majority' or risking the 'loudest voices' unduly influencing things. A prime example of this ambition relates to consultation and engagement around the revised Local Plan. The Plan is being developed in a context of a growing demand for affordable housing and the housing target for the area having been doubled. The council's commitment is to engage 10 per cent of the local population in the Local Plan process, ensuring that this comprises a statistically valid cross-section of the broad demography of Bath and North East Somerset.

With the council's ambitions around engaging more widely, it will be helpful for the organisation to be aware that some of the partners that we spoke to, whom already have strong links into communities, are willing to play a role in enabling this. Thus, the council does not necessarily need to undertake engagement directly itself.

There are a number of considerations that are emerging around 'giving people a bigger say'. This includes the opportunity to develop organisational understanding of the range of different approaches that can be adopted to reflect the objective of any particular 'engagement'. This range is encompassed by Arnstein's 'Ladder of Citizen Participation' model. A second consideration is that of recognising, particularly politically, that the response received from engagement activity may not always be what was anticipated or hoped for. Where that should prove to be the case and the political leadership either changes its mind or demonstrates 'the courage of its convictions' and continues as intended, it needs to be clear in its communication

15

18 Smith Square, London, SW1P 3HZ www.local.gov.uk Telephone 020 7664 3000 Email info@local.gov.uk

Local Government Association company number 11177145 Improvement and Development Agency for Local Government company number 03675577

Chair: Councillor Louise Gittins

Chief Executive: Joanna Killian

President: Baroness Grey-Thompson

around such a decision. Examples of where communication could have been clearer are the move not to continue with the Bath Area Forum and not changing course in the face of opposition to proposed changes to commercial waste collection in the city.

With 'giving people a bigger say' being a complex agenda, it could usefully form a key strand of the communications peer review that the council has commissioned from the LGA and which is scheduled for October this year.

5.1.1 Performance

Looking at the 'LG Inform' data and performance information system which the LGA hosts on behalf of the sector, the following can be seen for Bath and North East Somerset when comparing it with the other councils in its CIPFA 'family' grouping of similar authorities, using the most recently available data:

Where Bath and North East Somerset is amongst the better performers:

- Average Attainment 8 score
- The proportion of the population aged 16 to 64 qualified to at least Level 2
- Children looked after rate
- Care leavers in suitable accommodation
- Care leavers in education, employment or training
- Social care-related quality of life
- Overall satisfaction of people who use services with their care and support
- The time taken to process housing benefit new claims and change events
- The number of households living in temporary accommodation per 1,000 households
- The amount of residual waste per household
- The percentage of household waste sent for reuse, recycling and composting
- The percentage of adults classified as overweight or obese
- The percentage of children in year 6 who are obese
- The percentage of children in reception year who are obese

Where Bath and North East Somerset is less high performing:

- The percentage of non-domestic rates collected as a percentage of non-domestic rates due
- The percentage of children protection cases which were reviewed within required timescales
- Percentage of children becoming the subject of a child protection plan for a second or subsequent time
- The number of affordable homes delivered
- Processing of planning applications – minor
- Processing of planning applications – other
- Smoking prevalence in adults
- Percentage of people that received an NHS Health Check of those offered

Where performance in Bath and North East Somerset is around the average:

- The percentage of council tax collected as a percentage of council tax due
- Proportion of 16 and 17 year olds who were not in education, employment or training
- The percentage of vacant dwellings as a percentage of all dwellings in the area
- The number of households on the housing waiting list
- Processing of planning applications – major
- The percentage of adults who are active (150+ minutes per week)

The following is a link to the latest information for the council in the LG Inform system:

[Headline Report for Bath & North East Somerset Council - Bar Chart View | LG Inform](#)

5.2 Organisational and place leadership

The council is seen by partners to be much more outward looking now and it clearly recognises the importance of engaging widely. One example is being influential in the 'Key Cities' forum, with the Leader as its Vice-Chair and the Deputy Leader being the Portfolio Holder for the Climate Emergency. Another example is the way in which it is continuing to invest in the relationships formed through the Western Gateway following the formal body having been disbanded in April this year. It was established as a strategic partnership spanning South Wales and Western England and aimed at boosting productivity and driving inclusive economic growth. The relationships across the councils that formed it continue to have value.

The council has also dedicated the time and effort to reinvigorate partnerships at the strategic level more locally. The Future Ambitions Board for Bath and North East Somerset, comprising the leaders of key 'anchor institutions' in the area, provides a tremendous opportunity for the council. It comprises a number of very good, willing and ambitious partners. An Economic Strategy for the area has been developed through the Board. This includes a vision for the area into the future and there is seen to be benefit in now also developing a shared place-based partnership narrative for use in influencing at the regional and national level – essentially an 'elevator pitch' for the area.

The council and local strategic partners are now much better positioned with the West of England Combined Authority (WECA). There is major opportunity for Bath and North East Somerset in the development of the spatial strategy under WECA, including the enhancement of transport links along the A4 Bristol to Bath corridor. The council needs to ensure it has the necessary expert capacity to capitalise upon this opportunity.

Strategic partners in the locality highlighted the need for strong political leadership around some of the key challenges in the area. This includes resolving the long-running Planning issue in relation to the rugby stadium in the city; the fostering of

increased business 'start-up' space in the locality; and the facilitation of both more student accommodation and more affordable housing. These latter elements of housing and 'start-up' space are seen as crucial in the ambition for the area to retain a higher proportion of students when they graduate.

The council was shortlisted in 2024 for the 'Most Improved Council' at the Local Government Chronicle awards. This was a reflection in large part of the investment made in the re-imagining of the civic centre in Keynsham, where the majority of council staff are based, and efforts that have gone into enhancing the 'customer experience'. More hard work has been taking place since then, as the council seeks to establish a number of key 'foundations' for the future. This includes a fundamental review of pay and grading in the organisation; the establishment of a new customer relationship management (CRM); updated telephony systems; and the introduction of 'Power BI' software to the council.

The core components to support transformation and change in the council are in place. This includes the Business Change Hub and the Digital and Customer Service function. These are delivering impressive activity with, and in support of, the wider organisation, including the work around CRM and service re-design and improvement in spheres such as highways; the corporate landlord function; council tax collection; children's social care; special educational needs and disabilities (SEND); and home to school transport.

The changes and improvements that have been secured and the ways of working that have been demonstrated in delivering this range of transformation and change activity are impressive. However, the council recognises the need now to establish a single and council-wide transformation programme and for this to be linked to the medium-term financial strategy. This is crucial if the organisation is to deliver the savings and increased income necessary to address the projected £30m financial gap across the period to 2029/30.

Establishing and delivering this transformation programme requires significant 'grip' from the council's senior leadership. This includes clear objectives, timescales and accountabilities and robust governance arrangements, crucially including appropriate elected member oversight. There is a model to follow, in terms of programme management, governance and the way things were undertaken generally, in the form of the recent major project to return adult social care to direct council delivery.

Significant staffing structural change has already taken place in the organisation, with a new managerial leadership set-up introduced in 2021 and, in 2023, the commencement of the 'Being Our Best' (BOB) programme. It is through BOB that the pay and grading review has been undertaken but the programme has wider dimensions around workforce culture, behaviours and structures. This has seen the revision of structures and 'spans of control' down to Head of Service level. This is now being followed by 50 service reorganisations, led by those Heads of Service.

The amount of change being delivered has been, and continues to be, a major undertaking and the council acknowledges that there is learning to be drawn from the approach adopted. This includes aspects of scoping a project/programme/initiative, with the 'why' of aspects of what the council embarks upon not always being clear, whether in their design or communication. Other learning includes the scale and sequencing of things, capacity and ownership and oversight.

Heads of Service that we met emphasised the importance, during the period of change and uncertainty that remains for many staff as the service reorganisations are conducted, of the organisation being empathetic and recognising the impacts of this on people.

More structural change is almost inevitable in the coming months, in a context of the 'churn' taking place currently at the senior management level. The council is currently recruiting a Director of Children's Services following retirement; the Chief Operating Officer is leaving in August to head up North Somerset Council; and the Chief Executive recently announced his retirement, which will take full effect in early 2026.

20

18 Smith Square, London, SW1P 3HZ www.local.gov.uk Telephone 020 7664 3000 Email info@local.gov.uk

Local Government Association company number 11177145 Improvement and Development Agency for Local Government company number 03675577

Chair: Councillor Louise Gittins

Chief Executive: Joanna Killian

President: Baroness Grey-Thompson

Whoever is appointed to these senior leadership roles will be likely to want to consider the organisational arrangements and structures that are in place under them. In the view of the peer team, this might usefully include consideration of the status of the statutory officer functions in the council.

Staff that we spoke to described an organisation that demonstrates siloed ways of working still and one that is 'tricky to navigate'. They reflected that it is difficult to identify who to speak to on any given issue and would welcome the creation of more 'user-friendly' and accessible means to help them 'find' their way around, with frustration over the online people directory available on the Intranet. A 'Values Week' was held recently for staff, during which everybody was invited (and expected) to attend sessions helping to explore, on a cross-organisational basis, the values established in the council. Given human nature, this activity has inevitably been experienced by different people in different ways, with varying levels of commitment and enjoyment around it. What is clear, however, is the widespread recognition that has emerged of the benefit of bringing people together from across the organisation – irrespective of the purpose – and breaking down barriers. Many of the staff we spoke to would be keen to see this being built upon.

5.3 Governance and culture

Generally good relationships are felt to exist across the elected membership and between elected members and officers throughout the organisation. Elected members feel well supported by the Democratic Services function, both in relation to the administering of council meetings and the provision of general advice, guidance and signposting linked to their roles. There is, however, a 'patchiness' across the council more generally in terms of the level of responsiveness to ward member casework. The way such casework is brought forward is many and varied and there may be merit in the council looking at developing a more systematic approach, in order to help track the progress of cases and enhance organisational learning through the identification of patterns and trends. This would also help to identify those areas of the council where there needs to be a push around responding more

effectively to councillors.

The council's Policy Development and Scrutiny Panels have been delivering good work in certain areas over the last couple of years. Examples include shaping the enhancement of the recycling facility in Keynsham; constructively challenging the council's thinking in relation to revisions to community services funding, impacting the voluntary and community sector; approaches to tackling knife crime; support for local food growing; and the consideration of the approach locally to the 'School Streets' initiative.

There is dialogue between the Chairs of the Panels to co-ordinate activity, Cabinet Members are featuring more prominently at Panel meetings and the Panels themselves are keen to make more of a difference. As part of this, in a context of the Panels currently being slanted more towards the scrutiny than the policy development element of their remit, there is a desire to see this being re-balanced.

The key consideration around Overview and Scrutiny is how the organisation supports and enables the Panels to play a more fundamental role. The sense currently is that there is very limited officer support at the policy and research level and that this element of the council's governance arrangements is not seen as a particular priority.

Whilst the councillor induction programme following the elections was viewed positively, there is very little in the way of on-going development of elected members. Responsibility for this area seems to sit with HR. Whilst this function can take a lead on the organising of training and development activity, the challenge is around the identification of need and the stimulation of interest amongst councillors. This remit does not appear to be owned. Nor does there seem to be much appetite corporately around investment in councillor development, although we understand that there has been some participation in LGA Leadership Academy activity.

22

18 Smith Square, London, SW1P 3HZ www.local.gov.uk Telephone 020 7664 3000 Email info@local.gov.uk

Local Government Association company number 11177145 Improvement and Development Agency for Local Government company number 03675577

Chair: Councillor Louise Gittins

Chief Executive: Joanna Killian

President: Baroness Grey-Thompson

The consequence of the current approach is that, although elected members are provided with enough insight at the induction to 'keep them safe' and fulfil what is required to sit on quasi-judicial committees such as Planning, there is little ambition around councillors developing in their roles and ensuring they are fulfilling them to full effect. As an example, we understand there is an absence of corporate parenting training for councillors, which risks councillors not being fully aware of the responsibilities and opportunities that exist in this domain. This gap contrasts with the drive that the council has demonstrated in establishing 'care experience' as a protected characteristic; creating apprenticeship opportunities for care leavers; and delivering well in relation to care leavers being in suitable accommodation and in education, employment or training. The LGA can provide support to the organisation in seeking to enhance its approach to elected member development.

Informal Cabinet brings Cabinet and the managerial Executive Leadership Team together on a regular basis to consider collectively both the agenda for forthcoming Cabinet meetings and key strategic issues facing the council and the area. There has also been investment in development activity at this level, both separately with each of the two cohorts and jointly. This engagement has been very practically based, looking at learning that can be drawn from activity the council has undertaken. It will be important to continue development activity at this level given the difficult decisions and challenges the council will face going forward and the strength of relationships and dialogue needed to navigate them.

The way in which Cabinet-level decision-making is slanted more towards individual Cabinet Member decisions than collectively at formal Cabinet meetings was widely commented upon during our discussions. People's perception was that the extent to which this is happening risks impacting a sense of collegiate working and undermining the council's commitment (and indeed organisational Value) around transparency.

Whilst the concept of 'Policy Leads' linked to Cabinet is valuable in developing individuals, there needs to be mindfulness of the way this increases capacity

23

18 Smith Square, London, SW1P 3HZ www.local.gov.uk Telephone 020 7664 3000 Email info@local.gov.uk

Local Government Association company number 11177145 Improvement and Development Agency for Local Government company number 03675577

Chair: Councillor Louise Gittins

Chief Executive: Joanna Killian

President: Baroness Grey-Thompson

demands on the organisation. This comes in the form of increased briefing and liaison requirements of senior officers, with them potentially having up to six individuals linked to Cabinet who they need to keep appraised or take some form of direction from.

The above two elements link back to what we highlighted earlier in terms of the need to ensure a consistent, collectively owned and strategic political direction.

There is regular dialogue across the statutory officer posts of Head of Paid Service, Section 151 Officer and Monitoring Officer. Despite this, we developed an impression of an insufficiently clear, consistent and shared understanding of the council's decision-making framework across the organisation, including at senior levels. As an example, there appeared to be a lack of clarity on the part of some around the process and timescales for submitting reports for consideration and sign-off by statutory officers. As another example, it was difficult to determine the remit of elected members – in relation to oversight – of some key projects, including aspects of transformation and the 'Being Our Best' programme.

5.4 Financial planning and management

The council's net revenue budget for the current financial year is just under £152m. The organisation has a track record of delivering balanced budgets but there is an underlying pattern of overspends and underspends across different services, with some of these happening in the same budget areas as in previous years. The primary examples are overspending in Children's Services and underspending in Resources (which includes borrowing costs), with both being several million pounds in scale.

Expenditure around SEND, home to school transport and children's social care placements is the key financial challenge for the council. Work has been taking place to develop understanding and 'grip' here and additional senior officer capacity and

skills have been provided, at Assistant Director level, in recognition of the complexities and the need to develop more detailed delivery plans.

The council has a good track record of delivering savings, with the final forecast for 2024/25 being the achievement of £12.7m of the £16.4m (around 77 per cent) aspired to. A key aspect of the savings not achieved here relates to those to be derived from management and operating structural revisions which have not yet been feasible to undertake due to the pay and grading review becoming more drawn out than was anticipated. The requirement in the current year is to secure £14m of increased income and savings, which would represent the largest quantum achieved so far by the organisation in any given year. A further £18.7m needs to be secured in the period across the medium-term from 2026/27 to 2029/30.

This level of financial challenge requires a robust set of arrangements for the implementation and monitoring of the initiatives to deliver it. This links back to the council recognising the need now to establish a single and council-wide transformation programme and the significant ‘grip’ around this that is required from the council’s senior leadership, including appropriate elected member oversight.

The council has a relatively healthy level of reserves (based on the Chartered Institute of Public Finance and Accountancy – CIPFA – ‘Reserves Sustainability Measure’ for 2023/24 when looking at the ‘family group’ of similar councils), which provides it with opportunities for investment to drive further transformation and improvement.

Underspends have been seen in the council’s capital programme, amounting to £19m in 2023/24 and £43m in 2024/25. This has been in such areas as Highways, Resources, Economy and Culture and Children’s Services. There is an acknowledgement within the council of a tendency towards a ‘delivery optimism bias’ around capital spending, albeit this is not unique to Bath and North East Somerset.

25

18 Smith Square, London, SW1P 3HZ www.local.gov.uk Telephone 020 7664 3000 Email info@local.gov.uk

Local Government Association company number 11177145 Improvement and Development Agency for Local Government company number 03675577

Chair: Councillor Louise Gittins

Chief Executive: Joanna Killian

President: Baroness Grey-Thompson

The council has a significant investment property portfolio of £242m which delivers key income through commercial lets within Bath and North East Somerset. Whilst this does not pose a significant financial risk to the council by way of asset value, it does present a risk in the event of any major downturn in the economy impacting upon the retail and hospitality sectors. The council is cognisant of the risks to its future financial position posed by the Fair Funding Review and the Business Rates Retention System reset.

5.5 Capacity for improvement

Staff whom we met from various levels of the organisation reflected the friendly and supportive atmosphere that they enjoy with their colleagues. The office environment that has been established through the re-imagining of the civic centre in Keynsham is viewed positively and the flexible working arrangements, with the common-sense approach applied to it by managers and teams, are highly valued.

This forms part of a picture staff outlined of feeling valued and invested in, which has been boosted by the recent introduction of the staff recognition event. Another aspect of this picture is the good provision of opportunities for training and development. It was good to hear the examples of people having been enabled to grow and progress within the council. This hasn't been universal or systematic, however, and a desire was expressed to ensure the council invests in the identification and progression of talented people from across the board.

The management and leadership development programme recently made available at Team Leader level has gone down well, with this due to be expanded to other management levels in due course. Loosely linked to this, there is a desire amongst the Heads of Service for their continued development, including enabling them to come together both as a cohort and with the senior managerial leadership to enhance shared understanding and jointly problem-solve.

The 'business partner' model in place in the organisation is highly valued, particularly in relation to finance support for managers. As expectations on managers and staff around 'self-serve' increase, they have a desire for the organisation to ensure they receive sufficient corporate support in the transition, particularly around IT systems and corporate processes. Linked to this, the organisation tackling bureaucratic frustrations and ensuring the refreshed Intranet is an enabler would be welcomed. As an example, we heard anecdotes of people submitting forms to areas such as HR and finance and being informed that the document they had sourced from the Intranet was several years out of date.

A range of staff networks, including a women's network, LGBTQ+ network, access and inclusion network and care experience network, have been established and are playing an increasingly important role. Whilst key individuals, including the Leader and Chief Executive, hold championing roles around equalities, diversity and inclusion, this agenda would benefit from more demonstrable leadership and needs to become more actively 'lived and breathed' across the organisation. This is important in a context of the need to address the inequalities that exist across Bath and North East Somerset and in ensuring that the breadth of staff insights and experiences are fully factored into service planning and the way the organisation operates. This links back to what we highlighted earlier in relation to ensuring the inequalities and whole geography of Bath and North East Somerset feature much more prominently in the council's thinking, planning, narrative and delivery.

The council is committed to carrying out a staff survey later this year and it is important that this is delivered and the findings shared. This should then become a regular undertaking to enable benchmarking to happen and patterns and trends to be identified and responded to.

The 'BEST' Values of the organisation – Bold, Empowered, Supportive and Transparent – have a high profile and are widely recognised and understood. However, there is challenge being provided from staff around them needing to be lived and breathed and consistently adhered to. They want to be part of an

27

18 Smith Square, London, SW1P 3HZ www.local.gov.uk Telephone 020 7664 3000 Email info@local.gov.uk

Local Government Association company number 11177145 Improvement and Development Agency for Local Government company number 03675577

Chair: Councillor Louise Gittins

Chief Executive: Joanna Killian

President: Baroness Grey-Thompson

organisation that is bold in its addressing of the challenges facing Bath and North East Somerset – including the inequalities; capitalises fully upon their talents by empowering them and more systematically managing the investment in their development and growth; is supportive of the large body of staff who will continue to experience significant amounts of uncertainty and change in the coming months; and maximises transparency in its decision-making and governance arrangements.

6. Next steps

It is recognised that the council's senior political and managerial leadership will want to consider, discuss and reflect on these findings. The LGA will continue to provide on-going support to the council. As part of the CPC, the council are also required to have a Progress Review and publish the findings from this within twelve months of the CPC. The LGA will also publish the Progress Review report on their website.

The Progress Review will provide space for the council's senior leadership to report to peers on the progress made against each of the CPC's recommendations, discuss early impact or learning and receive feedback on the implementation of the CPC action plan. The Progress Review will usually be delivered on-site over a day and a half.

In the meantime, Paul Clarke, Principal Adviser for your region, is the main contact between your authority and the Local Government Association. He is available to discuss any further support the council requires and can be contacted via paul.clarke@local.gov.uk

Appendix B: Corporate Peer Challenge 2025 – Action Plan

No	Recommendations	Actions	Completed by	Lead Cabinet Member	Lead Officer
1	In line with the council purpose of 'improving people's lives', ensure the inequalities and whole geography of Bath and North East Somerset feature much more prominently in the council's thinking, planning, narrative and delivery	Embed tackling inequalities and geographic disparities as a core strategic objective in all council plans and policies, using the English indices of deprivation 2025 as a key evidence base. Explore the opportunities associated with: growing the community wellbeing hub, creating a single front door for service users, and reviewing services to further boost the focus on prevention.	On going	Council Leader	Executive Director for Operations
2	Develop an agreed set of performance and outcome measures to demonstrate delivery and the difference that is being made and which reflect a collectively owned and strategic political direction	Review and refine the Strategic Indicator set approved by Cabinet on 11 July 2024. Introduce a regular reporting cycle to Cabinet/scrutiny for performance monitoring.	February 2026	Cabinet Member for Resources	Executive Director for Resources
3	Develop a shared place-based partnership narrative for use in influencing at the regional and national level.	Build on the successes of our economic , local plan and transport strategies - which are shaping a bold new agenda – to co-produce a shared narrative with the Future Ambitions Board and anchor	February 2026	Council Leader	Executive Director for Sustainable Communities

		partners, ensuring consistent usage in external engagement.			
4	Ensure the council has the necessary expert capacity for Bath and North East Somerset to capitalise upon the opportunities in the development of the spatial strategy under the West of England Combined Authority, including the Bristol/Bath corridor.	Review the officer resource available to shape growth in the B&NES area (capacity and skills), ensuring efficient and effective working with the Mayoral Combined Authority.	January 2026	Council Leader	Chief Executive and Executive Director for Sustainable Communities
5	Establish a comprehensive programme of on-going elected member development	Strengthen the current member development plan to further ensure councillors have the necessary skills and training to undertake their roles.	March 2026	Council Leader	Chief Executive
6	Establish a single and council-wide transformation programme for the council, linked to the medium-term financial strategy, with clear objectives, timescales and governance arrangements, including appropriate elected member oversight	Introduce a single, council-wide transformation programme, which moves the council from good to great. To be aligned with the medium-term financial strategy, under a unified governance structure with clear objectives, milestones, and elected member oversight to ensure strategic delivery and financial sustainability.	February 2026	Cabinet Member for Resources	Executive Director for Resources
7	Ensure there is a robust set of arrangements for the implementation and monitoring of the initiatives to address the gap outlined in the medium-term financial strategy	Strengthen MTFs monitoring and delivery assurance to include ongoing reporting to ELT/CMT and public reporting to Cabinet and scrutiny.	Ongoing	Cabinet Member for Resources	Executive Director for Resources
8	Provide demonstrable leadership around equalities, diversity and inclusion (EDI) and ensure it is	Strengthen senior leadership sponsorship of staff networks and continue to enhance the use of	February 2026	Cabinet Member for Resources	Executive Director for Resources

	more actively 'lived and breathed' across the organisation	equality impact assessments in all stages of decision-making. EDI to be embedded into all service redesigns.			
--	--	--	--	--	--

This page is intentionally left blank

Bath & North East Somerset Council		
MEETING/ DECISION MAKER:	Cabinet	
MEETING/ DECISION DATE:	13 November 2025	EXECUTIVE FORWARD PLAN REFERENCE:
		E 3666
TITLE:	Q2 Corporate Strategy Performance Report	
WARD:	All	
AN OPEN PUBLIC ITEM/		
List of attachments to this report:		
None		

1 THE ISSUE

- 1.1 This report contains information and background on performance metrics collected as part of the Council's monitoring of Corporate Strategy priorities. In-year reports examine only indicators which have changed during the period in question.

2 RECOMMENDATION

The Cabinet is asked to;

- 2.1 Consider the findings of the performance report and recommend any follow-up actions or information requirements.

3 THE REPORT

3.1 Indicators on target

- **Number of air quality monitoring locations exceeding the targeted level of Nitrogen Dioxide:** Zero sites are exceeding the targeted level, confirming compliance with air quality goals. This reflects a positive outcome for district air quality.
- **% of household waste disposed in landfill (last complete rolling 12 months):** Landfill disposal is at 3%, well below the target of 15%, indicating strong performance in waste diversion.

- **% of household waste reused, recycled, composted or recovered:** Achieved 96% against a target of 80%, showing sustained high performance in waste management.
- **Residual waste per household (kg):** At 354.23, this is below the target of 400, reflecting effective waste minimisation.
- **% of household waste recycled/composted:** Performance is at 60%, matching the target, indicating stable recycling rates.
- **% of repeat referrals to Children's Social Care in 12 months:** At 13%, below the target of 21%, with the rate lower than national and statistical neighbour averages, suggesting successful interventions and positive trends in social care.

3.2 Indicators off target and outside of accepted tolerances

- **Total installed renewable energy capacity on B&NES Council's estate (MW):** At 1.57, significantly below the target of 12.00, indicating a need for accelerated investment and delivery. Opportunities to attract external funding to make more growth feasible are being investigated.
- **Housing Delivery Targets - Net new homes:** At 623, well below the new target of 1,501. Planning reforms have raised expectations, and while past delivery exceeded previous targets, current performance is not meeting the revised requirements.
- **Households in temporary accommodation:** At 121, above the target of 79, reflecting significant local demand and national trends. The service is working to enhance throughput and manage costs, with ongoing review of counting rules.
- **Total greenhouse gas emissions (ktCO₂e), B&NES district:** Improving, but not at the pace required to meet ambitions. To mitigate this, the Climate and Environment team are engaging district partners to convene and enable discussions about the contributions that our civic partners and communities (residents and businesses) can make. Outcomes and commitments will be included as part of the updated strategy.
- **% of B&NES Council owned commercial estate with an EPC rating of A-C:** At 58%, below the target of 100%, indicating underperformance. The emerging corporate estate strategy will include mitigations to improve building efficiency.

3.3 Indicators off target but within accepted tolerance

- **% of B&NES Council owned residential properties with an EPC rated A-C:** At 59%, slightly below the target of 62% but within tolerance. Performance has improved with the addition of new EPC A-rated properties and remains significantly better than private and owner-occupier sectors, though slightly behind the social rented sector.

- **Total installed renewable energy capacity, B&NES district (MW):** Improving, with planned capacity increases supporting progress towards the target.
- **Average estimated CO₂ emissions per residential property:** Improving, but further investment is needed to meet targeted rates.
- **Proportion of people with an up-to-date Adult Social Care review:** At 73%, below the target of 80% but within tolerance. Performance is above the national average, with ongoing improvement efforts.
- **Adult Social Care: Care Home admissions per 100k:** At 167.76, above the target of 161.30 but within tolerance. Eligible needs are being met at the right time, and the year-to-date position is on track despite quarterly fluctuations.

3.4 All other indicators

- **% of B&NES district residential properties with an EPC rating of A-C:** Showing steady progress, though there is limited control over this indicator.
- **Total greenhouse gas emissions from transport (ktCO₂e), B&NES district:** No status or target, but the trend is downward.
- **Children on Education Health & Care Plans (EHCP):** At 2,627, with implementation of the SEND & Inclusion Advice Service expected to provide increased early support and reduce future EHCP needs.
- **Child in Need Plan closures (step-downs):** At 82%, with a positive trend.
- **Children on Child Protection plan per 10k:** At 31.63, with a positive trend.
- **Child Protection Plans stepped down or closed:** At 78%, with a positive trend.
- **Children looked after per 10k:** At 63.80, with rates fluctuating due to care system dynamics and ongoing review of care plans.
- **Inequality in life expectancy at birth (female):** At 5.10, the gap has increased slightly but remains below regional and national averages.
- **Inequality in life expectancy at birth (male):** At 8.00, the gap has increased but is equal to the South West and below the England average.

4 STATUTORY CONSIDERATIONS

4.1 N/A

5 RESOURCE IMPLICATIONS (FINANCE, PROPERTY, PEOPLE)

5.1 N/A

6 RISK MANAGEMENT

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

7 EQUALITIES

- 7.1 Inequalities measures are included as part of the performance framework

8 CLIMATE CHANGE

- 8.1 Climate change measures are included as part of the performance framework.

9 OTHER OPTIONS CONSIDERED

- 9.1 None

10 CONSULTATION

- 10.1 S151 & Monitoring Officer

Contact person	Jon Poole – Business Intelligence Manager
Background papers	None
Please contact the report author if you need to access this report in an alternative format	

Bath & North East Somerset Council		
MEETING	Cabinet	
MEETING DATE:	13 November 2025	EXECUTIVE FORWARD PLAN REFERENCE:
		E 3661
TITLE:	2026/27 Medium Term Financial Strategy	
WARD:	All	
AN OPEN PUBLIC ITEM		
List of attachments to this report: Appendix 1 – Medium Term Financial Strategy		

1 THE ISSUE

- 1.1 The Medium-Term Financial Strategy (MTFS) sets out the strategic direction and priorities for the Council as well as outlining the financial context and challenges the Council faces over the next five years and the strategy that will be used to inform its annual budget process.

2 RECOMMENDATION

The Cabinet is asked to;

- 2.1 Approve the attached Medium Term Financial Strategy in Appendix 1.

3 THE REPORT

- 3.1 The Medium-Term Financial Strategy (MTFS) provides the framework for strategic planning, articulating the organisation's key aims and ambitions and guiding our activities with medium term budget setting and planning. It sets out the current financial challenge, strategic direction and financial priorities for the Council, as well as the financing mechanisms available to the Council to achieve this.
- 3.2 The MTFS models future years funding requirement for the Council's revenue budget and identifies where there are income shortfalls that require new savings plans. The strategy sets out the approach to address funding gaps prior to budget setting and the associated risks. Due to the financial challenges the Council faces, the MTFS sets out the strategic management options based on the high-level planning assumptions used in the MTFS budget forecast.
- 3.3 One of the key priorities in preparing this strategy is on understanding the impacts of Fair Funding on the Council, which is the new government

mechanism allocating grants to local government through a new funding formula. At the time of writing the MTFS the government have not yet published the results of the fair funding consultation exercise and their final plans for how the new model will be implemented. We have therefore based the MTFS on the initial government proposals which we have attempted to model and then validate externally.

3.4 The MTFS therefore assumes fair funding will be implemented as proposed over the medium term and that it will have a significant negative impact on the Council's financial position. Along with prior years cuts to funding, constraints will continue and budget options will therefore be guided by the priority areas of service delivery as set out in the Corporate Strategy.

3.5 Following the updating of assumptions, including the projected impacts of the Fairer Funding reforms, the current MTFS shows a budget gap of £8.9m for 2026/27 with projected budget gaps in each year of the period covering 2027/28 to 2030/31 as follows:

Budget Planning	Future years assumptions £m					Total
	2026/27	2027/28	2028/29	2029/30	2030/31	
Growth Requirement	11.97	16.49	14.49	14.92	15.21	73.08
Funding Increase	2.10	5.58	4.49	9.88	10.29	32.34
Annual Funding gap	9.87	10.91	10.00	5.04	4.92	40.74
Savings Proposals	0.96	0.85	0.10	0.10	0.10	2.11
Remaining Funding Gap	8.91	10.06	9.90	4.94	4.82	38.63

3.6 The level of uncertainty and risk is abnormally high for this strategy due to the uncertainties and impacts of Fair Funding which have compounded an already challenging financial position.

3.7 Officers therefore have been actively working on options to manage the funding gap within the budget proposals for some months, and these will be subject to consultation in the normal way later in the year.

3.8 All of this work will then culminate in the budget proposals for 2026/27 which Cabinet will formally review early in 2026.

4 STATUTORY CONSIDERATIONS

4.1 The Medium-Term Financial Strategy as outlined is part of the preparation for the budget and Council Tax setting for 2026/27 which will be considered by this Council in February 2026. Equality analysis will be carried out on specific budget proposals as part of that process.

5 RESOURCE IMPLICATIONS (FINANCE, PROPERTY, PEOPLE)

5.1 The resource implications are outlined within the Medium-Term Financial Strategy attached to this report.

6 RISK MANAGEMENT

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

6.2 The Medium-Term Financial Strategy includes a section on specific risks.

7 CLIMATE CHANGE

7.1 The Corporate Strategy highlights that “Addressing the Climate Emergency” is one of the key themes reflected in the administration’s priorities. This includes plans to work with local communities to deliver the Council resolution agreed in March 2019 to declare a climate emergency, and for the area to become carbon neutral by 2030.

8 OTHER OPTIONS CONSIDERED

8.1 The supporting paper outlines options for balancing future budgets.

9 CONSULTATION

9.1 A consultation plan is being assessed to ensure stakeholder engagement for the key aspects of the strategy, and this will take place during December / January.

Contact person	Jeff Wring - Director of Financial Services, Assurance & Pensions (S151 Officer) Jeff_Wring@bathnes.gov.uk Gary Adams, Head of Financial Management Gary_Adams@bathnes.gov.uk
Background papers	Budget and Council Tax 2025/26 and Financial Outlook – Council Agenda February 2025
Please contact the report author if you need to access this report in an alternative format	

This page is intentionally left blank

Appendix 1 - Bath & North East Somerset – Medium Term Financial Strategy 2026/27 - 2030/31

1. Purpose of the Strategy

The Medium Term Financial Strategy (MTFS) provides a budget setting framework which details the available resources for strategic financial planning, articulating the organisation's key aims and ambitions and guiding our activities with medium term budget setting and planning.

The MTFS will model the future years funding requirement for the Council's revenue budget and identify where there are income shortfalls that require new savings plans. The strategy will set out the approach to address funding gaps prior to budget setting and the associated risks. Due to the current financial challenges the Council faces the MTFS sets out strategic management options based on the high-level planning assumptions in section 9.

One of our key priorities in preparing this strategy is on understanding the impacts of Fair Funding on the Council, which is the new government mechanism allocating grants to local government through a new funding formula. At the time of writing the MTFS the government have not yet published the results of the fair funding consultation exercise and their final plans for how the new model will be implemented. We have therefore based the MTFS on the initial government proposals which we have attempted to model and then validate externally.

The MTFS therefore assumes fair funding will be implemented as proposed over the medium term and that it will have a significant negative impact on the Council's financial position. Along with prior years cuts to funding, constraints will continue and budget options will therefore be guided by the priority areas of service delivery as set out in the Corporate Strategy.

2. Expected Outcomes from the Strategy

The objective of this document is to publish existing Council agreed plans and set the future years strategic resourcing plan; recognising the resourcing requirement to meet the administration's priorities to deliver the 2023 – 2027 Corporate Strategy for the Council, whilst maintaining a balanced budget over the next five years.

A balanced budget requires the financial plan to set out how income will equal spend over the short and medium term. Plans will take into account cost savings alongside income growth strategies as well as useable reserves.

Operating and funding the Council in the current economic environment with constrained national public finances due to continued low economic growth continues to be challenging, the Council is impacted due to services being exposed to either people or contract inflation, alongside the additional demands on Children's and Adult Social Care. The Council has responded to this challenge over the past three years and in 2024/25 ended the financial year in a balanced position after transfers from reserves of **£0.21m**. The strategy therefore focusses on how this approach can be adopted in the current and future years addressing the short, medium and long-term financial planning requirements whilst implementing the Fair Funding mechanism.

3. Executive Summary and recommendations from the MTFS for consideration

The overall aim of the Medium Term Financial Strategy is to:

- Set out and deliver the Council's priorities within affordable and sustainable financial constraints;
- Ensure that the administration's (Council's) strategic priorities are reflected in its capital programme and also that the capital programme is affordable;
- Ensure that cash flows are adequately planned so that cash is available when required and the Council can meet its capital spending obligations; and
- Set a sound financial planning framework to underpin the effective financial management of the Council.

This MTFS update is taking place at a time of great uncertainty in respect of government funding for the period from 2026/27 onwards. The government launched a consultation on its "Fair Funding Review" over the Summer which detailed the direction of travel for Local Government funding and its distribution.

The Core principles of the Fair Funding Review as set out by government include:

- **Funding Simplification:** Last updated in 2013/14. Aim is to streamline the system by consolidating multiple grants into fewer, more predictable funding streams.
- **Needs-Based Allocation:** Using updated Relative Needs Formulas to assess local demand for services like adult social care, children's services, and fire and rescue.
- **Area Cost Adjustment:** Recognising regional differences in the cost of delivering services, such as higher wages or transport costs in rural or urban areas.
- **Resources Adjustment:** Factoring in each authority's ability to raise revenue locally, especially through council tax.
- **Business Rates Reset:** Overhauling the Business Rates Retention Scheme to reflect current economic conditions and ensure fairer distribution.
- **Devolution and Local Empowerment:** Reducing central government micromanagement and giving councils more control over spending decisions.
- **Ending Competitive Bidding:** Phasing out short-term, competitive grant applications in favour of multi-year settlements that offer stability.
- **Transitional Protection:** Gradually implementing changes over three years (2026–2029) to avoid sudden funding shocks.

The government has not provided exemplifications to show how the range of funding changes will impact on individual Councils. In the absence of such information the Council has used modelling undertaken by sector experts alongside our own funding information to forecast potential impacts. It must be noted that the potential outcomes of the Fair Funding Review should be treated with a degree of caution given that we are still awaiting the government's response to the consultation process. Additionally the implementation of the mechanism and final decisions and specific allocations will not be known until the Provisional Local Government Finance Settlement is announced. This is currently anticipated around Christmas although no specific date has currently been announced. This uncertainty and lack of exemplifications makes financing planning extremely challenging.

The modelling undertaken forecasts that the Council will be a net loser from the proposed changes. The main reasons are due to the relative needs of the Council being assessed as lower than other areas who have greater levels of deprivation, the assessment that the Council has a relatively higher ability to generate resources through Council Tax (having a relatively higher Taxbase) and the redistribution of Business Rate income arising from the proposed Business Rate Reset.

For financial planning and updating the MTFs, which was previously based on a largely cash flat roll forward of grant funding, the estimated impact is an estimated reduction in funding at an overall level of £13m over the next 3 years. This is profiled with estimated reductions of £4m in 2026/27, £4m in 2027/28 and £5m in 2028/29.

The following section provides details of the main grants the Council currently receives at 2025/26 levels. It is not currently possible to estimate individual impacts of the Fair Funding Review on each grant as these are subject to the outcomes of the review and finalisation of which grants will be rolled into core funding.

Despite this uncertainty the Council still needs to plan its finances for the medium to longer term and therefore the Strategy is based on best estimates at this stage. The Council has a good track record in savings delivery, in 2024/25 the budget had a savings requirement of £16.42m, of which 77% (£12.66m) were delivered in full, 17% (£2.78m) were mitigated through savings, contingency or income elsewhere in the respective service, with the remaining 6% (£0.98m) delayed until 2025/26 or addressed through the budget setting proposals. As a result of the ongoing budget challenge the 2025/26 budget requires the delivery of £14.01m in savings and income generation plans.

The MTFs base case as set out in the report (section 9) estimates that the Council will need to find up to £40.74m (including the £2.11m already identified) in savings over the next five years. This is based on the assumption that Council tax increases are capped at 4.99% for the five year period 2026/27 to 2030/31. This consists of a general increase of 2.99% and an Adult Social Care Precept increase of 2%.

The main contributing factors that are driving the budget gap is the new fair funding model along with sustained inflation and higher than expected interest rates due to cost-of-living, these impact the Council's running costs as well as the supply chain for external provision. In addition, the Council continues to see demand and activity rise for essential Social Care services, which is compounded by high market costs and a reliance on out of area provision.

In the shorter term the profile of the savings shows a requirement of £9.87m next year, of which there are confirmed planned savings of £0.96m.

To manage this risk section 10 of the report sets out the savings range and the level that has been used for planning purposes.

To manage financial risk the Council holds £12.58m of unearmarked reserves, this is reviewed annually as part of the Council's budget proposal where the S151 Officer carries out an assessment of budget risk and reserve levels to manage these risks.

The Council holds Revenue Budget Contingency and Financial Planning / Smoothing reserves that enable one-off transitional funding to meet revenue costs. Over the life of the MTFs these reserves when drawn down will be replenished to ensure financial resilience and availability for future years budgets. These reserves are replenished within the five year MTFs period. Flexible capital receipts will

continue to be utilised to fund the one off costs of transformation that result in delivering ongoing savings, this use will be in line with government guidance.

Capital spending will focus on the delivery of priority schemes within affordability levels, the 2026/27 Capital programme is being reviewed to ensure the most accurate delivery timetable, resulting in a more accurate budget profile.

As part of delivering this strategy plans are being put in place to engage with all elected members, partners and the public as part of the budget process for 2026/27 and the following years.

4. The Medium Term Financial Strategy

The MTFS outlines the factors which are expected to drive future costs and sets out the funding projections and our strategy for addressing the funding gap. It supports the medium term policy and financial planning process at the heart of setting revenue and capital budgets.

The core principles underlying the MTFS are as follows:

- That the Council will seek to maintain a sustainable financial position over the course of the five year planning period of the MTFS;
- That the Council will make provision for pressures, demographic changes, and inflation where appropriate with new priorities added only if “headroom” is achieved;
- The deployment of the Council's limited resources will be focused towards essential services and those that contribute to the delivery of the Corporate Strategy, tackling the Climate Emergency and giving residents a bigger say.
- Council tax increases have been included within the term of the MTFS to support essential services.
- New sustainable income opportunities are to be identified and maximised wherever possible while maintaining current income streams through current economic uncertainty.

5. The Current Financial Position

2024/25 Outturn

The Council delivered an adverse outturn position after carry forwards of £0.21m as follows:

Portfolio	Revised Budget £m	Outturn £m	Variance Over / (Under) £m
Leader of Council	(0.27)	(0.44)	(0.16)
Climate Emergency and Sustainable Travel	1.52	1.46	(0.07)
Council Priorities and Delivery	6.28	5.94	(0.34)
Resources - Services	6.36	5.72	(0.63)
Resources - Corporate	3.19	(2.09)	(5.29)
Economic and Cultural Development	(5.87)	(4.47)	1.40
Adult Services	62.88	62.95	0.07
Children's Services	46.41	52.59	6.18
Highways	(0.95)	(2.20)	(1.25)
Neighbourhood Services	27.09	28.30	1.21
Built Environment and Sustainable Development	2.92	2.79	(0.13)
Portfolios Total	149.56	150.55	0.99
Partial Release of Provision	0.00	(0.99)	(0.99)
Total (before Carry Forwards)	149.56	149.56	0.00
Carry Forward Requests (underspends)	0.00	0.21	0.21
Total (including Carry Forwards)	149.56	149.77	0.21

The £0.21m overspend was funded by a transfer from the Revenue Budget Contingency Reserve, which is used to fund unbudgeted revenue pressures which are unable to be mitigated by management and recovery actions.

Budget 2025/26

The 2025/26 net budget of £151.71m was approved by Council in February 2025. Quarter 2 budget monitoring to the end of September, shows a projected overspend of £2.42m against the revised budget of £152.10m as shown below.

Current monitoring highlights the continued impact of demand pressures on Council services, which have continued to increase since budgets were approved in February 2025.

Portfolio	Revised Budget £'m	Year End Forecast £'m	Variance Over / (Under) £'m
Leader of Council	(1.00)	(1.00)	0.00
Sustainable Bath and North East Somerset	3.43	3.46	0.03
Resources - Services	32.45	33.71	1.26
Resources - Corporate	5.15	3.50	(1.65)
Resources - Corporate Contingencies	9.83	0.00	(9.83)
Resources - Being Our Best Programme	(4.00)	(0.03)	3.97
Economic And Cultural Sustainable Development	(9.21)	(5.75)	3.46
Adult Services	64.08	65.07	0.99
Children's Services	42.74	48.75	6.00
Communications and Community	5.20	5.73	0.53
Sustainable Transport Strategy	(8.73)	(9.10)	(0.37)
Sustainable Transport Delivery	8.16	8.02	(0.15)
Built Environment and Sustainable Development	3.99	3.66	(0.33)
Total	152.10	156.01	3.91
<i>Job Evaluation and Pay Structure Reserve</i>	<i>0.00</i>	<i>(1.49)</i>	<i>(1.49)</i>
Quarter 2 Forecast Outturn Variance	152.10	154.52	2.42

Children's Services are forecasting the largest cost pressure of £6m, primarily due to high-cost packages required to support the most vulnerable and complex young people in the area. Adult Services and Corporate Estate are also forecasting significant expenditure pressures, while staffing costs across the organisation have increased because of the pay and grading review associated with the Being Our Best programme. Income is lower than budgeted for both the Roman Baths and the Commercial Estate, however Parking Services are seeing income exceed expectations. Lower borrowing costs and strong treasury management performance are also helping offset the adverse financial position.

The £2.4m forecast over budget position includes the use of £9.8m budgeted contingencies and the use of the Job Evaluation and Pay Structure reserve (£1.5m).

Directors are actively developing mitigation plans for the service areas which are in an over budget position, identified above, to manage this position in year and bring the Council back into a balanced position. Mitigations will be reported through the quarterly monitoring reports to Cabinet. In the event the above budget position cannot be fully mitigated the Council's Revenue Budget Contingency Reserve and unearmarked reserves will need to be utilised, subject to approval. Should this be required there would be a requirement to replenish these reserves in future years, putting further pressure on meeting the medium-term budget gaps.

6. Drivers of Demand

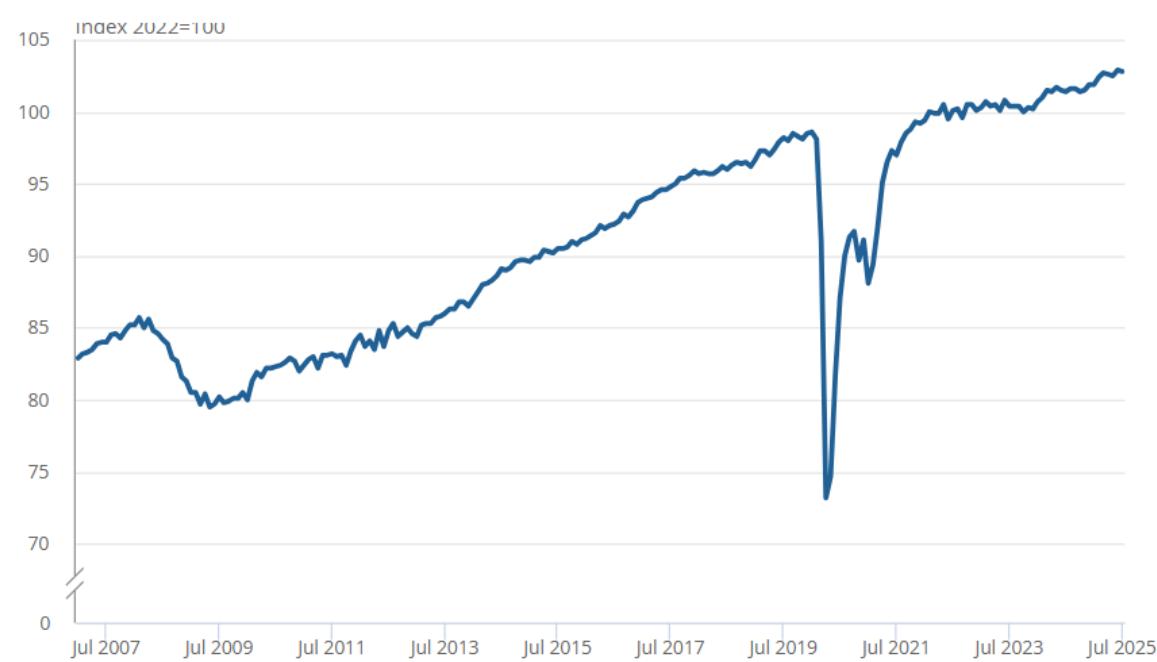
The Economic outlook

The post pandemic UK economy made a good recovery leading to an increase in activity, this created a shortage of supply at an international level resulting in a rise in inflation. In addition, the war in Ukraine impacted on energy supply and price that drove inflation to its highest level since the 1970's. Since 2022 growth has been sluggish and well below the pre pandemic range of 1.8% - 2% achieved between 2010 and 2019.

The diagram below shows that real Gross Domestic Product (GDP) is estimated to have grown by 0.2% in the three months to July 2025, compared with the three months

to April 2025. This rate of growth has slowed since the peak of 0.8% growth in the three months to April 2025.

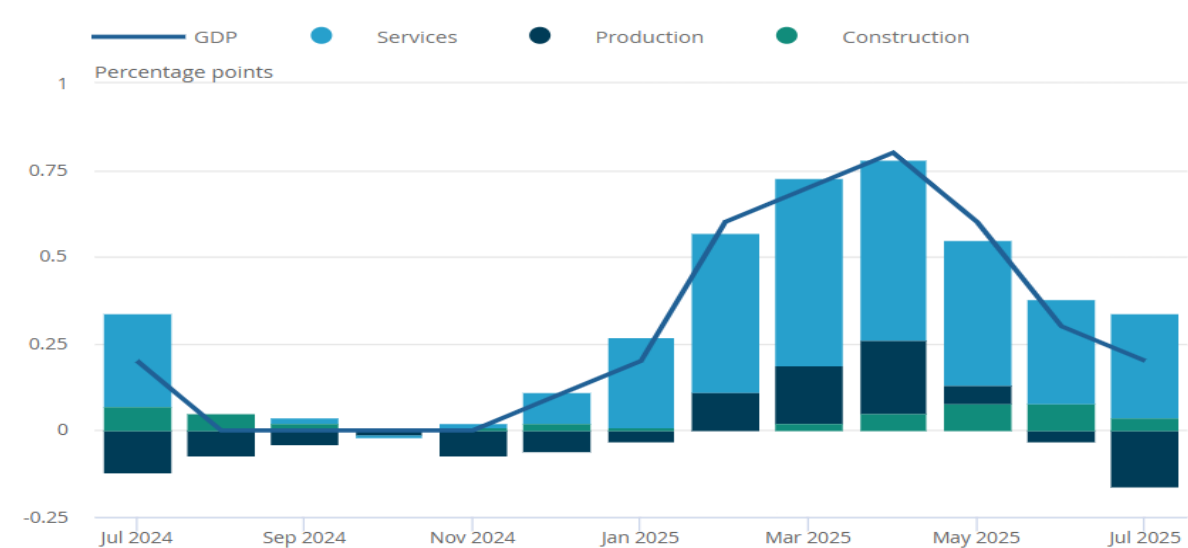
Monthly index 2022=100, January 1997 to July 2025, UK



Source: Office for National Statistics - Monthly GDP

The chart below shows the monthly sector movements contributing to the changes in UK GDP with overall monthly movements ranging between +0.75% and 0% over the past year.

Contributions to three-month GDP growth, July 2024 to July 2025 UK



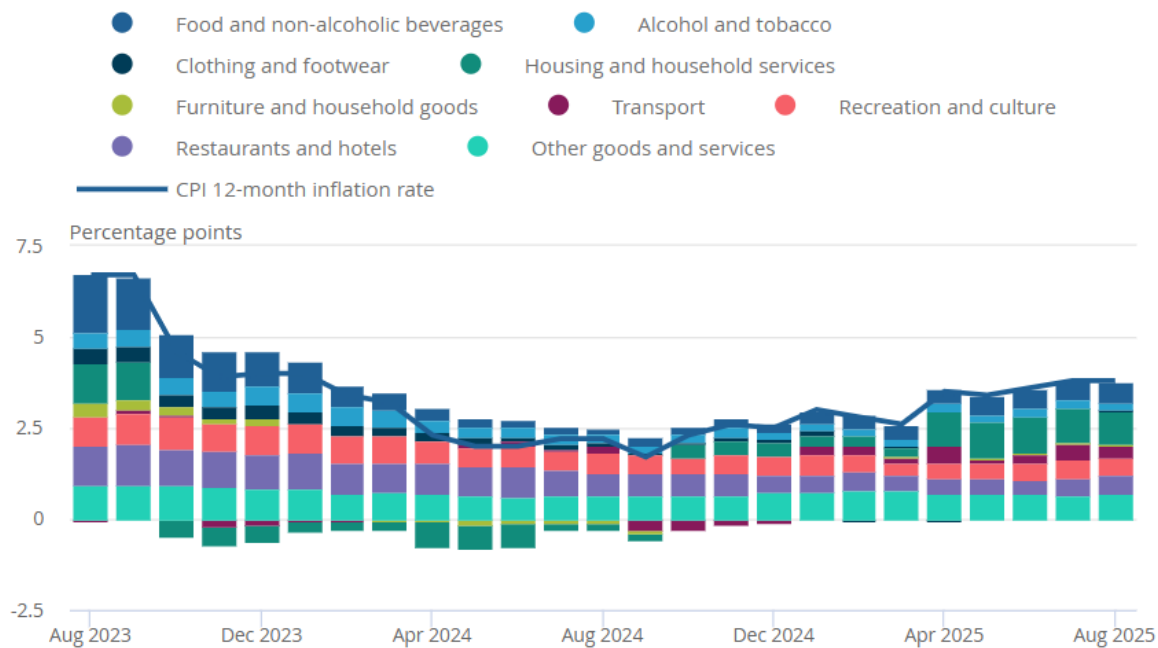
Source: GDP monthly estimate from the Office for National Statistics

The Consumer Prices Index (CPI) rose by 3.8% in the 12 months to August 2025, in line with the same increase in the period to July. On a monthly basis, CPI rose by 0.3% in August 2025, the same rise when compared with August 2024.

These levels of inflation have impacted on the cost of running the Council and its budgets resulting in an increase in staffing costs for employed and contracted employees, also on its supplies and services provided through contracts. Pay and contract inflation estimates have been refreshed to take into account the economic outlook.

The make up by sector in the movement in CPI can be found in the graph below.

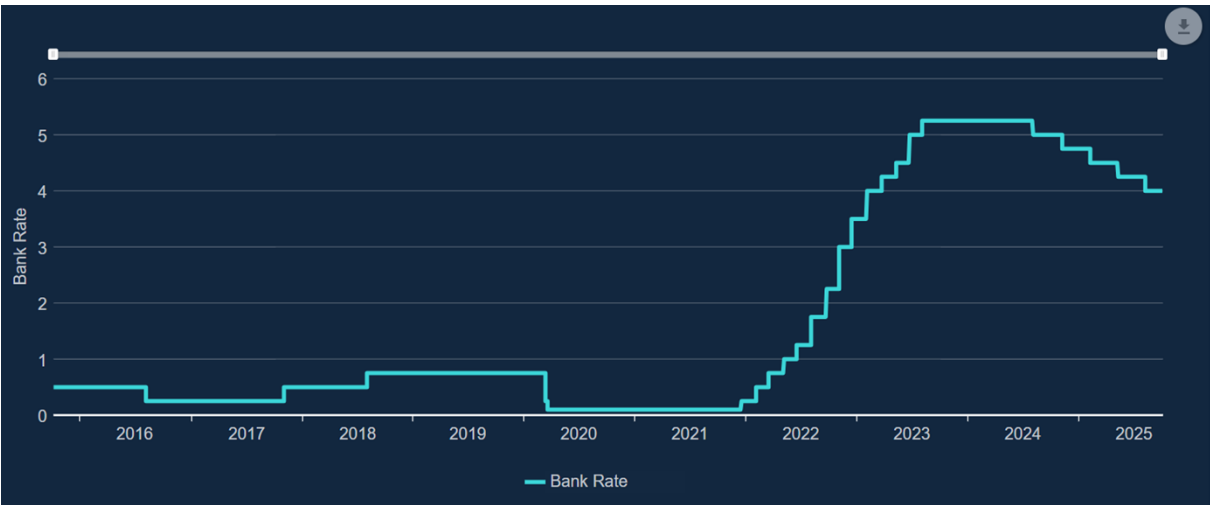
Contributions to the CPI annual inflation rate, UK, August 2023 to August 2025



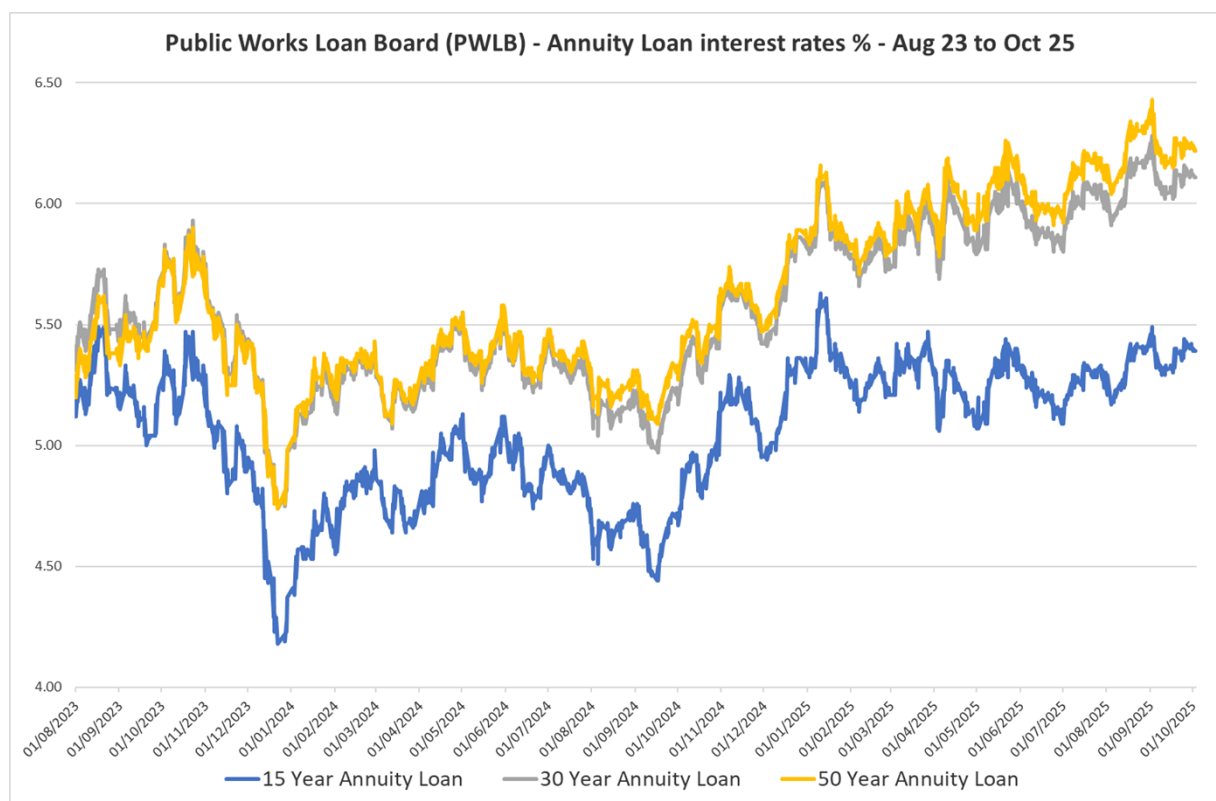
Source: Consumer price inflation from the Office for National Statistics

The Bank of England base interest rate reached a low of 0.10% in March 2020 before rising to 5.25% through the period to September 2023, where it remained until a 0.25% rate cut to 5.00% was agreed in August 2024. There has since been four further 0.25% reductions giving a rate of 4% agreed at the August 2025 Monetary Policy Committee meeting. This has an impact on the interest earned on the Council's cash balances and on the short term borrowing rates from the public works loan board (PWLb) for borrowing required to fund the Council's capital programme. The medium to longer term PWLB borrowing rates remain elevated and are driven by investor expectations on inflation, economic growth and central bank monetary policy.

Official Bank of England Interest rate



The graph below shows the latest PWLB interest rates trend for 15 year, 30 year and 50 year loans:



For new Capital borrowing scheme affordability is being calculated with a 5% cost of capital rate with borrowing likely to target the short to medium term maturity range if longer term rates remain elevated.

Economic impact on the Councils income budgets

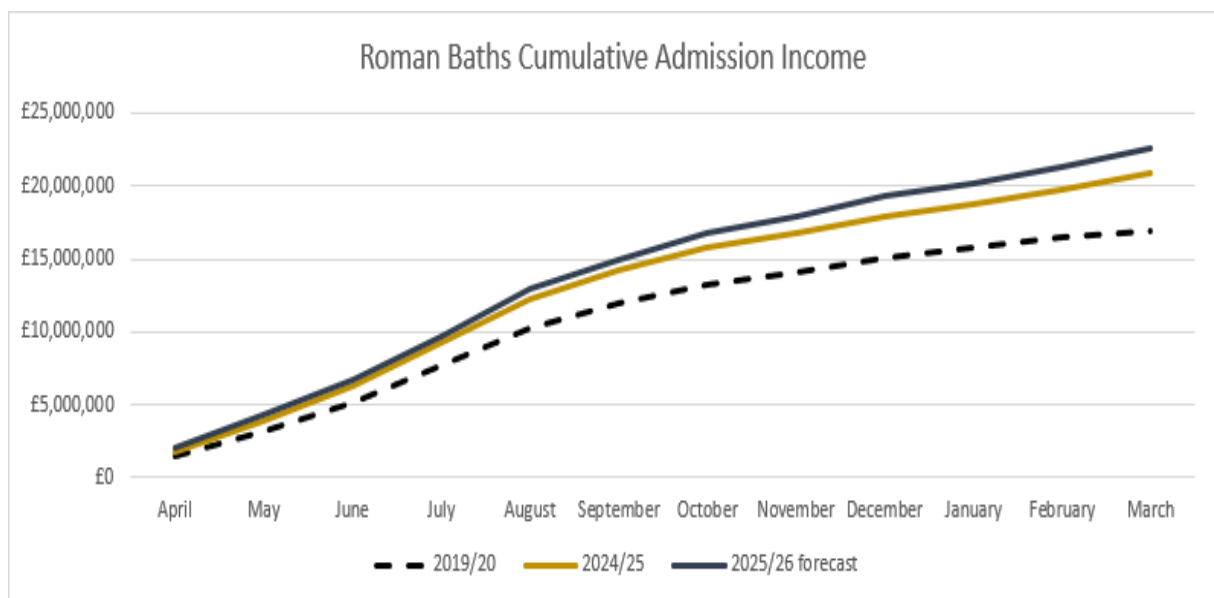
Current performance for the Council's main income generating services are below:

Culture & Heritage Services Income

Culture and Heritage Services income budgets are largely driven by visitor numbers to the Roman Baths. The budget for 2024/25 was set at 1,100,000 visitors, 92% of the pre-pandemic footfall.

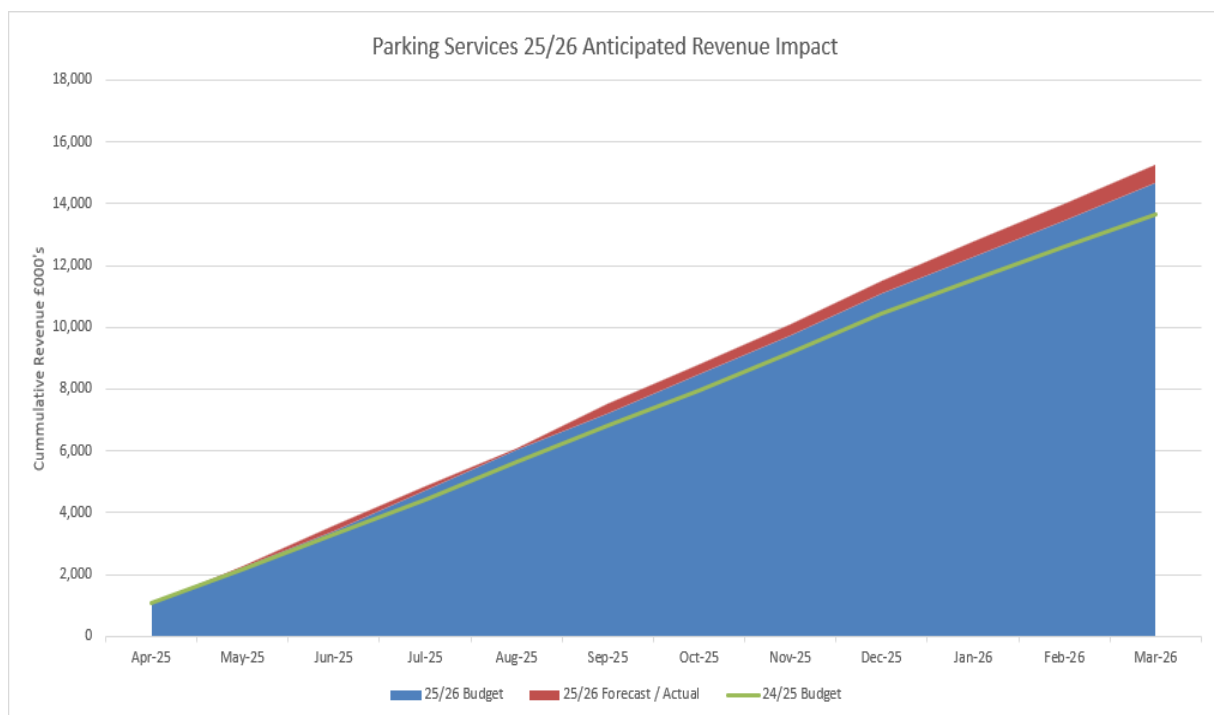
In 2024/25 Culture and Heritage Services significantly exceeded pre-COVID income and the chart below shows that the Service anticipates 2025/26 surpassing this total and delivering the highest income and surplus that the Service has ever returned to the Council.

However, footfall over the first half of the financial year was down on budget. This has been driven by an unanticipated reduction in US visitors, an increase in the numbers of domestic visitors taking overseas holidays and continued inflation pressures constraining disposable incomes.



Parking Services Income

Prior to the pandemic, the Parking Services income budget was c£12m. This has increased to £13.7m in 2024/25, and £14.7m in 2025/26. These increases reflect continued increase in parking use and planned parking price rises but also built in additional revenue associated with new Residential Parking Zones and emissions-based charging, which in 2024 was deployed across all car parking. Strong income is supported by changes in the national job market which have enabled the team to fill all vacant Civil Enforcement Officer posts, from a position during the pandemic where 50% of posts (15 in total) were vacant. The service is currently projecting an overall year end £0.5m favourable position due to the continued strong performance of all parking locations, with a positive performance during the first half of 2025/26.



Adult Social Care

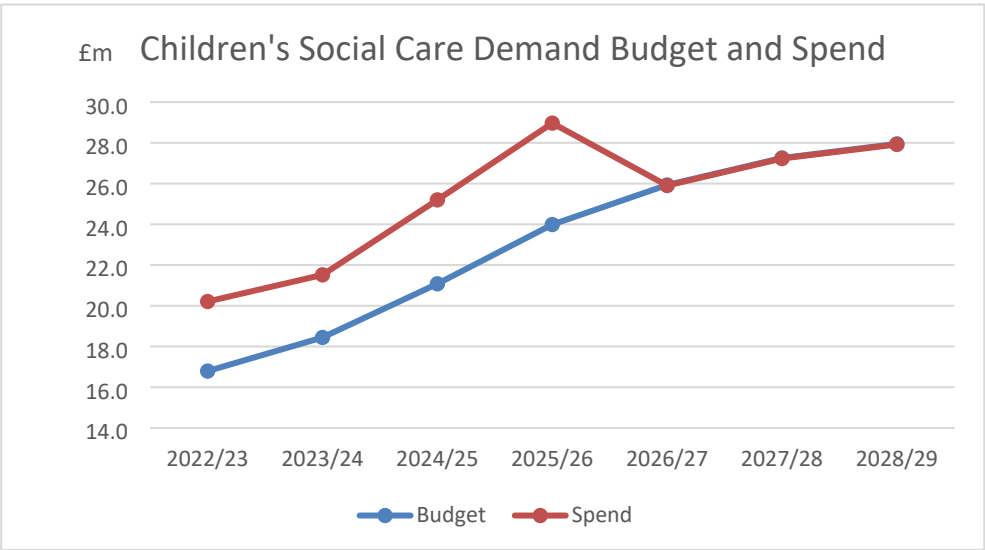
The Council has sought to set realistic and deliverable budgets through the MTFS and budgeting process. Significant resource has been added to Adult and Children’s services over the last few years whilst both services have delivered other savings and efficiency gains.

The challenges facing Adult Social Care (ASC) nationally as well as locally continue. It is predicted that demand for adult social care is projected to increase significantly in future years, largely due to an ageing population. The cost of care is also increasing and those entering care generally need higher levels of care and support. The capacity to deliver required care is impacted by recruitment and retention issues within the provider market. Inflationary pressures and market stability issues continue in the independent sector. These challenges are impacting all ASC users and carers. Funding for Market Sustainability of £3.2m was again received in 2025/26 from the Market Sustainability and Improvement Fund and this has been used to support the market challenges mentioned.

The MTFS allocates £19.5m for demographic and contract inflation pressures within ASC over the next five years, service demand levels are being reviewed and the current trend has shown that caseload is back to activity levels previously seen. Complexity of need and provider costs are continuing to increase.

Children’s Social Care

As demonstrated from the graph below Children’s Services expenditure has not been manageable within the current budget envelope. The service continues to see increasing cost in the numbers of children in care, in addition to the increasing costs of supporting disabled children at home. The number of children looked after (LAC) by the Council is currently 233. This number includes 23 that are classed as Unaccompanied Asylum Seeking Children (UASC). The MTFS allocates £6.2m for demographic and contractual inflationary pressures within Children’s Services over the next five years.



A further area of pressure within Children’s Services is the significant increases in children and young people with Special Educational Needs and Disability (SEND). This is adding to the pressure on the Dedicated Schools Grant (DSG) managed by the Council. The 2024/25 outturn resulted in a DSG cumulative overspend of £32.79m. The overspend of the DSG in year in 2024/25 was £10.53m. The historical deficit and

in year overspends are being addressed via the Safety Valve project in conjunction with the Department for Education (DfE) over a 6 year period.

In 2022/23, the first payment from the DfE of £7.68m was received and a further payment in 2023/24 of £0.55m has been received. A revised plan was requested by the DfE during 2023/24, this has been submitted and is awaiting agreement. The overspend is recorded as a specific unusable reserve in the Local Authority (LA) accounts.

Children's Services are very cognizant of the continued financial pressure that is resultant from the expense of providing appropriate care and placements to meet the needs of our children and young people. To mitigate these pressures Children's Services are delivering a targeted response through an enhanced Transformation Programme and detailed scrutiny of all areas of activity and spend. This has included a focused placements taskforce responsible for cost assurance and ensuring that young people's needs are met through the most effective and sustainable means possible.

2025/26 & 2026/27 has been deemed as a transformational period for the implementation of The Families First Partnership (FFP) Programme. This is a new national programme set up in the Department for Education (DfE) and supported by the Ministry of Housing, Communities and Local Government, Department of Health and Social Care and the Home Office. Through the programme, government is working in partnership with local areas (local authorities, police, health, education, childcare settings and other relevant agencies) to improve their local services and systems that help and protect children and families. The reforms include the introduction of Family Help, strengthening multi-agency child protection, and improving engagement with family network

7. Outlook for Government Grant Funding

As detailed above this MTFS update is taking place at a time of great uncertainty in respect of government funding for the period from 2026/27. The government launched a consultation on its "Fair Funding Review" over the Summer which detailed the direction of travel for Local Government funding and its distribution.

The Funding Review will update the methodology for distributing a fixed amount of funding between local authorities. The underlying data used in the current grant distribution system hasn't been updated since 2013 when the Business Rate Retention system was introduced.

The Core principles of the Fair Funding Review as set out by government include:

- **Funding Simplification:** Last updated in 2013/14. Aim is to streamline the system by consolidating multiple grants into fewer, more predictable funding streams.
- **Needs-Based Allocation:** Using updated Relative Needs Formulas to assess local demand for services like adult social care, children's services, and fire and rescue.
- **Area Cost Adjustment:** Recognising regional differences in the cost of delivering services, such as higher wages or transport costs in rural or urban areas.
- **Resources Adjustment:** Factoring in each authority's ability to raise revenue locally, especially through council tax.
- **Business Rates Reset:** Overhauling the Business Rates Retention Scheme to reflect current economic conditions and ensure fairer distribution.

- **Devolution and Local Empowerment:** Reducing central government micromanagement and giving councils more control over spending decisions.
- **Ending Competitive Bidding:** Phasing out short-term, competitive grant applications in favour of multi-year settlements that offer stability.
- **Transitional Protection:** Gradually implementing changes over three years (2026–2029) to avoid sudden funding shocks.

The government has not provided exemplifications to show how the range of funding changes will impact on individual Councils. In the absence of such information the Council has used modelling undertaken by sector experts alongside our own funding information to forecast potential impacts. It must be noted that these potential outcomes of the Fair Funding Review should be treated with a high degree of caution given that final decisions and specific allocations will not be known until the Provisional Local Government Finance Settlement is announced. This is currently anticipated around Christmas although no specific date has currently been announced. This uncertainty and lack of exemplifications makes financing planning extremely challenging.

The modelling undertaken forecasts that the Council will be a net loser from the proposed changes. The main reasons are due to the relative needs of the Council being assessed as lower than other areas who have greater levels of deprivation, the assessment that the Council has a relatively higher ability to generate resources through Council Tax (having a relatively higher Taxbase) and the redistribution of Business Rate income arising from the proposed Business Rate Reset.

For financial planning and updating the MTFS, which was previously based on a largely cash flat roll forward of grant funding, the estimated impact is an estimated reduction in funding at an overall level of £13m over the next 3 years. This is profiled with estimated reductions of £4m in 2026/27, £4m in 2027/28 and £5m in 2028/29.

The following section provides details of the main grants the Council currently receives at 2025/26 levels. It is not currently possible to estimate individual impacts of the Fair Funding Review on each grant as these are subject to the outcomes of the review and finalisation of which grants will be rolled into core funding.

Revenue Support Grant (RSG)

The Council received Revenue Support Grant (RSG) in 2025/26 of £1.256m (2024/25 £0.831m). The increase of £0.425m reflected the transfer into RSG of £0.411m in respect of the specific grants listed below, based on 2024/25 grant amounts, and an inflationary uplift of £0.014m on the core RSG:

- Extended Rights for Home to School Transport Grant - £0.379m
- Electoral Integrity Grant - £0.017m
- Transparency Code Grant - £0.013m
- Tenant Satisfaction Measures Grant - £0.002m

The RSG allocated to B&NES has been rolled into the 100% Business Rate Pilot Scheme, with the Council retaining an equivalent amount of business rates instead of receiving a RSG payment.

New Homes Bonus

The New Homes Bonus is a grant paid by central government to local councils to reflect and incentivise housing growth in their areas. It is based on the amount of extra Council Tax revenue raised for new-build homes, conversions and long-term empty homes brought back into use. There is also an extra payment for providing affordable homes.

The Settlement has outlined that the New Homes Bonus would continue in its current format for a final year in 2025/26. This resulted in a 2025/26 New Homes Bonus grant payment of £0.913m for new housing growth over the past year, an increase of £0.586m from 2024/25.

Social Care Grant

The 2025/26 settlement confirmed a further £2.2m Social Care grant funding which was combined with the continuation of the existing Social Care Support grant to give a revised total of £15.45m.

Adult Social Care Market Sustainability & Improvement Fund Grant

The Local Government Finance Settlement included grant funding for 2025/26 of £3.193m through the Market Sustainability & Improvement Fund Grant.

Local Authority Better Care Fund Grant

The 2025/26 Settlement included the Adult Social Care Discharge Fund Grant, previously received as a separate grant. The total grant for 2025/26 was £6m.

Better Care Fund

The Better Care Fund is intended to incentivize the integration of health and social care, requiring Integrated Care Boards (ICBs) and Local Authorities to pool budgets and agree an integrated spending plan. Greater integration is seen as a potential way to use resources more efficiently, by enabling people to stay well, safe and independent at home for longer and to provide the right care in the right place at the right time.

The Council and ICB's Better Care Fund has a minimum funding contribution of £18m in 2025/26, a 3.9% uplift on 2024/25. The Strategy currently estimates that funding will continue at current levels with inflationary uplift given annually to help fund the known pressures on both the Council and the ICB.

Children's Social Care Prevention Grant

The final 2025/26 settlement announced a new Children's Social Care Prevention grant with total funding of £270m. The grant is to fund the national rollout of "Family Help" a whole family preventative service. Conditions placed on the grant were published in the final settlement. The Council's share of the grant for 2025/26 was £0.401m and it is assumed that this is ring-fenced to cover the costs of implementing the Family Help service.

Children's & Families Grant

The government announced proposals to consolidate 6 children's social care programmes into a new Children's & Families Grant. The programmes are as follows:

- Supporting Families
- Supported Accommodation Reforms - New Burdens to LAs
- Staying Put
- Virtual School Heads Extension for previously looked after children
- Leaving Care Allowance uplift
- Personal Advisors

Funding for each component maintained 2024/25 funding levels and the Council's total of the consolidated funding is £0.982m

Public Health Grant

The 2025/26 Public Health Grant allocations were announced on the 7th February 2025. The Council's grant for 2025/26 is £10.901m, an increase of £0.627m over the 2024/25 grant. The grant is ring-fenced to public health activity.

Extended Producer Responsibility for Packaging Funding

2025/26 is the first year of the Extended Producer Responsibility for Packaging (pEPR) scheme. The extra funding announced at the Autumn Budget included a guarantee that local authorities in England will receive at least £1.1 billion in total in 2025/26 from the new Extended Producer Responsibility for packaging (pEPR) scheme, with each local authority guaranteed at least the level of income indicated in provisional local payment figures for the first year. The payment for the Council in 2025/26 is £2.7m, which was incorporated into the budget reflecting the cost pressures and investment made into waste services in this and previous years budgets. Future years funding will be based on data submitted by the Council to the scheme administrators, and this is currently included at the same level for future years.

Employers National Insurance Increase

The government announced that £515 million of new funding would be provided in 2025/26 to support councils and mayoral combined authorities with the costs associated with the increase in employer National Insurance Contributions (NICs). Individual allocations were based on 2023/24 Revenue Outturn data and were published at the final settlement. The 2025/26 grant allocation was £1.3m.

Business Rates

There will be a series of changes to the Business Rate Retention System coming into effect from 2026/27. These include:

- A full reset of the Business Rate baseline, where Business Rate growth above baseline achieved since 2013 will be redistributed based on the updated needs assessments as part of the Fair Funding proposals.
- A Business Rate revaluation with the changes to properties Rateable Values implemented with effect from 1st April 2026.
- Proposals to introduce new lower business rate multipliers for Retail, Hospitality and Leisure properties, funded by increasing the multipliers for businesses with rateable values of more than £500,000.
- Consideration by government on whether the multipliers are increased with inflationary uplifts or frozen.
- Reviewing whether the current 100% pilot schemes, including the West of England scheme, continue to operate after the reset.

The estimated impacts of the business rate reset have been included within the Fair Funding reductions referred to in the sections above.

The MTFs includes assumptions for the estimated levels of future Business Rate income, together with making specific provisions for appeals, changes in reliefs and growth and deletions. These assumptions will be kept under review as the final budget is developed, and system changes are finalised. Any surplus or deficit on the Business Rate Collection Fund and associated income will be transferred to or from the Business Rates Reserve for consideration as part of the Business Rates calculations for future years. This approach will include any changes that arise from the final settlement announcement relating to Business Rates.

Business Rates collection fund

The MTFS factors in the reduced 2024/25 actual Business Rates collection fund outturn position of £1.16m which requires funding in 2026/27. This will be funded by a transfer from the Business Rate Reserve which is earmarked to smooth Business Rate income over the medium term. This forecast will be reviewed and updated to take account of the 2025/26 in year performance of the Collection Fund as part of finalising the Business Rates income forecasts for the 2026/27 budget.

Schools Funding

Schools are funded through the Dedicated Schools Grant (DSG) which is initially allocated to the Council by the Department for Education (DfE). The DSG supports all expenditure in schools (who set their own budgets) and the activities that the Council carries out directly for schools. It does not cover the statutory responsibilities the Council has towards parents. These responsibilities are funded through the Council's main revenue funding and included as part of the proposed budget.

As schools convert to academies the DfE take back the element of DSG payable to the local authority in order to make payments direct to the academies.

For the 2026/27 financial year the DfE have yet to provide the provisional allocations of DSG increases. Normally these are provided in July but, due to the timing of the national budget, the DfE have delayed any announcements on the DSG allocations. It is anticipated that the information will be made during November. The DfE have made announcements of how specific grants allocated to schools in 2025-26 will be passported to schools in a formulaic approach and the grant is usually rolled into the National Funding Formula (NFF) allocations for schools in 2026-27

With the introduction of the NFF the DSG was ring-fenced for schools from 2018/19 making the local authority responsible for the demographic pressures being observed in the SEND / High Needs element of the DSG. In 2022/23 the local authority signed a safety valve agreement with the DfE to agree a plan to recover the deficit in the High Needs Block of the DSG with support from the DfE. During 2023/24 due to continued pressure on the finances of the High Needs Block the DfE placed the LA in enhanced monitoring and required the LA to develop a revised plan to recover the deficit. In September 2025 the LA was informed that DfE officials had recommended to ministers that B&NES should be returned to the normal monitoring process, though we await formal feedback. Once approved, the DfE will resume payments of the safety plan funding totalling £11.2m over the remainder of the plan

The deficit recovery plan shows our proposals to review our processes to encourage schools to develop early support for pupils with SEND thus limiting the need for Education, Health and Care Plans (EHCPs). We are also creating more localised provision to limit expenditure on expensive non-maintained special school places. The Education Capital Programme has been utilised to direct resources to provide additional SEND places in mainstream schools and extend special school provision.

We successfully bid for a new Special School, to be built under the free school programme, though both these new schools are currently pending national decisions in relation to the planned SEND reforms which may direct capital funding away from specialist provision and into mainstream provision.

As part of the recovery, the schools were asked to contribute resources from schools allocations to support the SEND expenditure. Regulations allow up to 0.5% of the

schools block to be transferred to the high needs block to support the SEND expenditure providing approval of schools through the Schools forum is obtained. The Schools forum has agreed this transfer every year up to 2025/26.

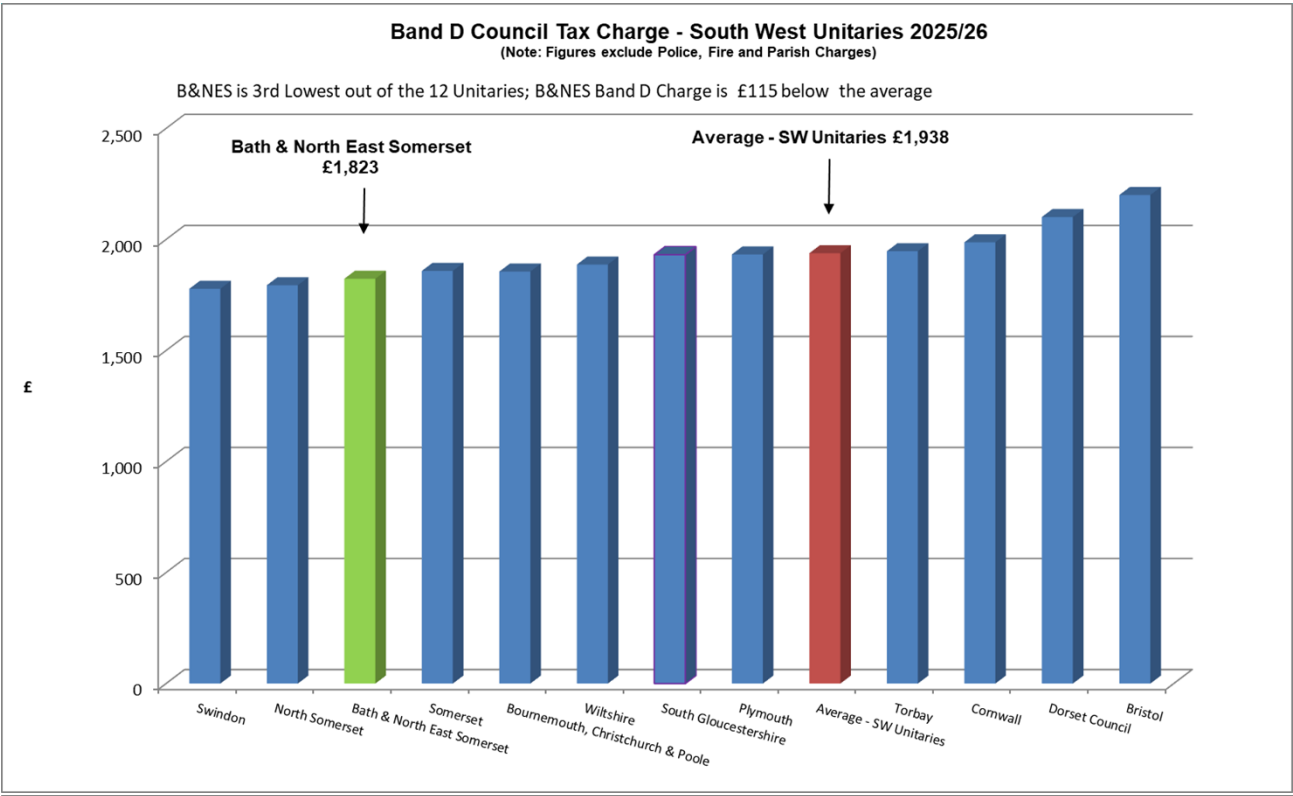
The school’s contributions are limited to 1 year under the NFF regulations and therefore further consultation is currently underway to gain a transfer from the schools block in 2026/27. This continues the transfers that have occurred in prior years and would amount to approx. £720k.

When schools convert to academies their reserves transfer to them and therefore school reserves have reduced significantly as a result reflecting that only 5 schools (1 Secondary and 4 Primary) remain as maintained schools. We anticipate the last remaining secondary school will convert to academy in the coming 18 months.

8. **Council Tax**

Comparison of 2025/26 Council Tax

The chart below shows how B&NES compares (3rd lowest) to other South West unitary authorities:



Council Tax collection fund

The MTFS factors in the negative 2024/25 actual Council Tax collection fund outturn position of £0.34m which requires funding in the 2026/27 Budget. It is proposed that this one-off impact is funded from the financial planning earmarked reserve. This forecast will be reviewed and updated to take account of the 2025/26 in year performance of the Collection Fund as part of finalising the Council Tax base and income forecasts for the 2026/27 budget.

Council Tax Precept

The current funding gap in the MTFS assumes a **2.99% increase** in council tax in 2025/26 and future years. This assumes that the Government’s referendum principles

in respect of general Council Tax will allow increases of up to 3% in 2026/27 and future years. In addition, the MTFS assumes that the Council tax base will grow with incremental growth of 1% per annum from 2026/27 onwards.

Adult Social Care Precept

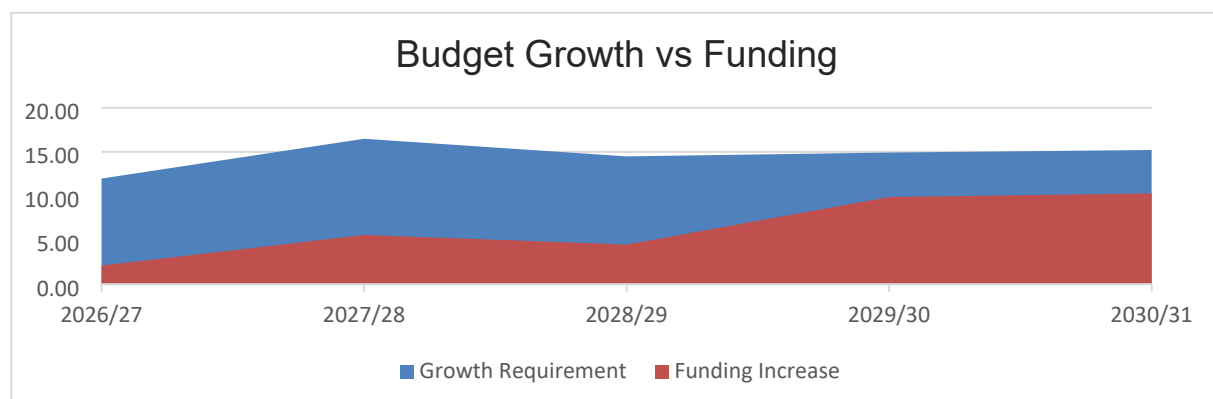
The MTFS assumes that the Government will recognise the continued pressures facing Adult Social Care (ASC) authorities and continue to allow for a further 2% increase per annum for 2026/27 and future years.

9. Financial Outlook

Following the updating of assumptions including the projected impacts of the Fairer Funding reforms the current MTFS shows a budgets gap of £8.9m for 2026/27 with projected budget gaps in each year of the period covering 2027/28 to 2030/31 as follows:

Budget Planning	Future years assumptions £m					Total
	2026/27	2027/28	2028/29	2029/30	2030/31	
Growth Requirement	11.97	16.49	14.49	14.92	15.21	73.08
Funding Increase	2.10	5.58	4.49	9.88	10.29	32.34
Annual Funding gap	9.87	10.91	10.00	5.04	4.92	40.74
Savings Proposals	0.96	0.85	0.10	0.10	0.10	2.11
Remaining Funding Gap	8.91	10.06	9.90	4.94	4.82	38.63

The funding gap over the medium term can be analysed further to identify additional pressures on expenditure and the impact of funding reductions in income as follows:



The MTFS has been updated to reflect changes in service demographic, inflation and ongoing pressures highlighted through the 2025/26 Quarter 2 budget monitoring report which are unable to be directly mitigated on an ongoing basis. These increases in growth are partly mitigated by releasing £6.8m of the corporately held contingency which form part of the 2025/26 base budget, favourable pension contribution rates arising from the latest triennial pension fund revaluation estimates.

Key changes are highlighted in the following table:

Change in Financial Assumptions	2026/27 Movement £'000
Fair Funding Estimated Impact	4,000
Demographic Growth	1,158
Inflation	2,313
Rebasing In Year Pressures	7,206
Children's 2026/27 Savings Rebasing	1,383
Grant Income	(0.716)
Council Tax	(1.307)
Employers Pension Contributions	(4.000)
Increase Corporate Contingency release to £6.8m	(6.515)
Total Changes	3.522

Indicative Budget Forecast

The detail of the budget gap is shown in the table below and outlines additional cost pressures and changes in funding:

Budget Planning	Future years assumptions £m				
	2026/27	2027/28	2028/29	2029/30	2030/31
Budget Requirement (Previous Year)	151.71	153.81	159.39	163.88	173.76
Budget Adjustments	(6.80)	0.00	0.00	0.00	0.00
Pay & Pension	3.57	5.71	4.49	5.28	5.46
Demographic Growth	4.72	3.82	3.59	3.72	3.92
Contract Inflation	5.13	4.13	3.24	3.31	3.38
New Homes Bonus Grant	0.00	0.00	0.00	0.00	0.00
Capital Financing	1.81	1.97	2.02	1.21	1.05
Settlement grant funding	(0.02)	0.00	0.00	0.00	0.00
Budget pressure / rebasing	3.55	0.85	1.14	1.40	1.40
Funding Requirement Sub Total	11.97	16.49	14.49	14.92	15.21
Draft Budget Before Savings	163.68	170.30	173.88	178.80	188.97
Proposed Savings Plans	(0.96)	(0.85)	(0.10)	(0.10)	(0.10)
Estimated Savings Required	(8.91)	(10.06)	(9.90)	(4.94)	(4.82)
Savings Requirement Sub Total	(9.87)	(10.91)	(10.00)	(5.04)	(4.92)
Budget Requirement	153.81	159.39	163.88	173.76	184.04
Funding of Budget Requirement					
Council Tax	136.86	145.49	154.28	163.45	173.02
Business rates retention	20.09	21.90	22.60	23.31	24.03
Fair Funding - Estimated Impact	(4.00)	(8.00)	(13.00)	(13.00)	(13.00)
Reserve transfers From	1.46	0.00	0.00	0.00	0.00
Reserve transfers (To)	(0.60)	0.00	0.00	0.00	0.00
Funding of Budget Requirement Total	153.81	159.39	163.88	173.76	184.04

The forecast includes the following cost pressures and assumptions:

- **Pay Inflation** – Estimated 3.00% in 2026/27 and future years.
- **Council tax** – General assumed at 2.99% and Adult Social Care precept 2% in 2026/27 and future years.
- **Pension Costs** – Projected reduction in Employer's Pension Contributions of 3 to 3.5% anticipated with effect from 2026/27 from the triennial revaluation and the associated improvement in the funding levels of the Avon Pensions Fund.
- **Demographic Growth & Increase in Service Volumes** – Additional demand from new placement and market pressures in Adult & Children Social Care;
- **Interest Rates** – Short Term Interest rate reductions to follow movement in Bank of England base rate currently 4% for treasury management cash investments with borrowing rates estimated at 5%. The Council will fix budget interest rates following the provisional settlement;
- **Inflation** – Impacts of Contract and Commissioning inflation across services.
- **Budget Pressures / Rebasing** – 2026/27 budget rebasing currently informed from the 2025/26 Q2 Council monitoring position where emerging pressures cannot be directly mitigated.
- **Capital Spending** – an allowance has been made to fund previously agreed provisional schemes requiring borrowing.
- **Borrowing** – longer term borrowing costs have been factored into the MTFS however the authority will continue to optimise the use of cash balances subject to market conditions and the overriding need to meet cash outflows;
- **Reserves** – The MTFS includes a £1.1m transfer from the Business Rate Reserve to fund the Business Rate Collection Fund deficit carried forward from the 2024/25 outturn position, £0.3m from the financial planning reserve to fund the carried forward Council Tax Collection Fund Deficit and a transfer of £600k to the Revenue Budget Contingency Reserve in line with the planned replenishment of the reserve following use to mitigate the impact of Covid in prior years.

10. Managing the Medium Term Financial Strategy

Current estimates are that £40.7m savings will now be required over the next five years including savings already approved.

The strategy has outlined that due to the current uncertainties with government funding allocations, the focus of savings plans will be on achieving a balanced budget in 2026/27 with work to develop a transformation plan over the medium terms continuing over the next 12 months. The current projected savings requirement for 2026/27 is £9.87m, including the rebased savings plans of £0.96m already identified. Due to the budget impact of rising demand, inflation and government funding changes this puts 75% of the 5 year MTFS savings in the next 3 years.

Budget management plan

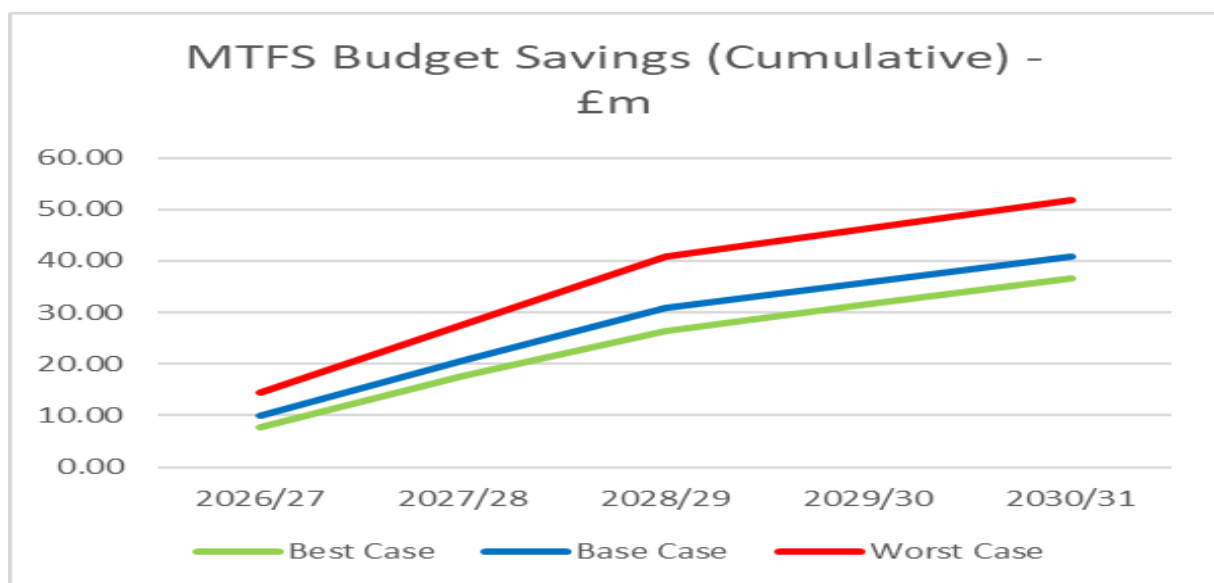
The following approach is recommended to create a robust plan of action, manage change and balance the budget.

Budget Setting Principles

- New policy or service demand funding requirements need to be evidenced with robust and realistic estimates for future years.
- For additional budget funding, un-avoidable growth only – other growth will require a defined funding source / saving.
- New savings will need to be material and over £50k per item, savings below this value will not be accepted (no use of one-off service reserves).
- The focus needs to be on high value strategic areas of change enabled by Business Change delivering multiyear savings.
- Stop doing will need to demonstrate how risk is appropriately managed.
- Savings with reputational / political implications need early engagement with Cabinet portfolio holders, with early, proportionate equality impact assessments completed.
- Savings proposals will need to have a budget profile in line with delivery plans that span multiple years.
- Delivery cost and timescale for implementation needs to be fully understood and captured in the budget proposal.

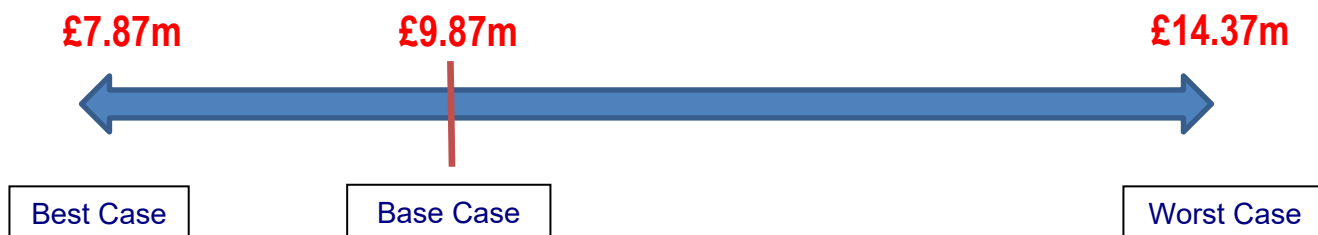
To manage the strategy financially and over a longer term there will need to be transformational changes to the organisations operating model and ways of working to support the way we approach budget planning to ensure a fully achievable set of proposals can be taken forward across the life of the strategy.

The chart below show's how the MTFS base case presented in this report may change due to the ongoing uncertainty over future funding and risks with managing current service demand and delivering savings.



Over the 5 year MTFS period the worst case scenario has a saving requirement of £51.7m, £11m higher than the base case and the best case scenario has a savings requirement of £36.5m, £4.2m lower than the base case.

The savings scale below shows how the range of savings requirement for 2026/27 may change based on these risks:



The base case is based on the budget assumptions and figures in section 9 of this report.

The worst-case scenario builds in allowance for the following potential adverse variations against the base case assumptions:

- Fair Funding Changes 50% worse than currently assumed impact - £2m
- Risk allowance for increased Service Demographic and Demand Pressures - £1.5m
- Risk Allowance on Council key Service income streams - £1m

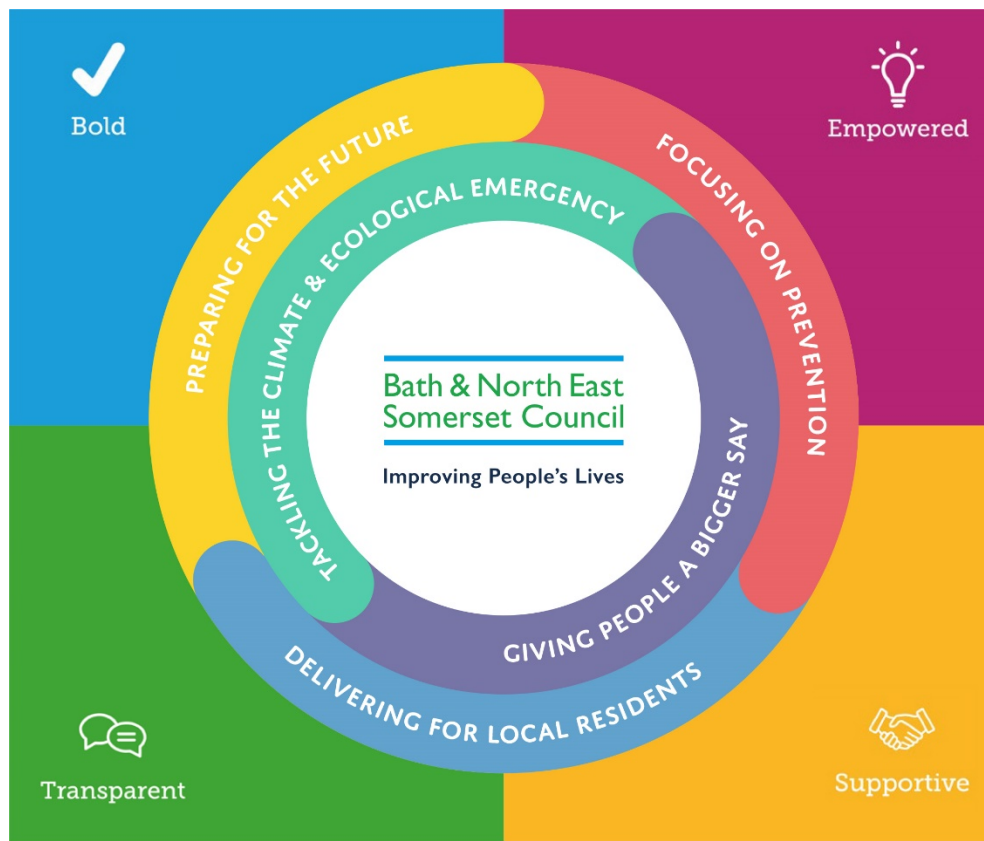
The best case scenario builds in allowance for the following potential favourable variations against the base case assumptions:

- Fair Funding Changes 25% better than currently assumed impact - £1m
- Additional Funding included in LG Financial Settlement recognising key demand service pressures - £1m

For financial planning purposes the base case is the most realistic assessment that recognises that numbers may move between now and the end of December. In the event that the local government funding position moves to the worst case the Council will need to consider further mitigations from the revenue budget.

11. Corporate Strategy and Council priority areas

The Medium Term Financial Strategy sets out the financial framework for allocating resources across the Council. How this is achieved will require close alignment to the Council's Corporate Strategy as set out in the diagram below:



<https://beta.bathnes.gov.uk/document-and-policy-library/corporate-strategy-2023-2027>

Alignment to the strategy creates the “golden thread” which drives what we do ensuring that setting budgets and managing our people - our most valuable resource - are guided by the council's priorities. It also means that our commitments are realistic and achievable.

Prioritising and allocating resources

To address longer-term financial planning and ensure corporate priorities shape our financial planning, for the 2026/27 and future years' budgets we are developing a more strategic approach built around:

- Identification of key scenarios, particularly in the light of central government fiscal policy and approach to local government funding
- Agreeing key priorities which will support delivery of our Corporate Strategy, in the light of the resources available to the council over the medium term
- Establishing a longer-term approach to budget planning, including investing in prevention to address budget pressures and reduce costs
- Introducing a new operating model which delivers the council's purpose through innovation in our ways of working

12. Capital Programme

The Prudential Code for Capital Finance in Local Authorities was updated in December 2021. The objectives of the Prudential Code are to ensure that the capital expenditure plans of local authorities are affordable, prudent and sustainable and that treasury management decisions are taken in accordance with good professional practice and in full understanding of the risks involved.

It requires authorities to assess capital expenditure and investment plans in the light of overall organisational strategy and resources and ensure that decisions are made with sufficient regard to the long-term financial implications and potential risks to the authority.

The Council follows this approach through:

- Continuing to review all existing schemes to simplify, challenge deliverability and put forward a more accurate funding and expenditure profile over multiple years;
- Minimising new schemes except those that meet corporate priorities;
- Agreeing an affordable limit for new schemes requiring corporate borrowing;
- Ensuring adequate investment in assets supporting key service provision (including meeting health and safety requirements or replacing obsolete or inefficient assets/equipment) and generate revenue savings for the council; and
- Delivering or working with partners to deliver high priority government funded programmes and West of England programmes where they meet corporate priorities.

The Capital Programme will retain the clear separation of schemes for **Full Approval** and those which are for **Provisional Approval**.

Items gaining **Full Approval** are clear to proceed to full scheme implementation and delivery, subject to appropriate project management and governance.

Items for **Provisional Approval** will require either a further Officer decision or in some cases a formal Cabinet member decision for Full Approval. The budget estimates for schemes shown for Provisional Approval are therefore included on an indicative basis, and as an aid to planning.

The Capital Programme will retain narrative only reference to pipeline projects and grant funding in early stage progression. These items will require further decision to incorporate into the programme at a later date, in line with the delegations outlined in the February Budget report.

The capital programme is aligned with the Community Infrastructure Levy allocations agreed for the coming financial year.

The following shows the capital programme approved in February 2025 as part of budget setting:

Capital Schemes for Approval

Cabinet Portfolio: Capital Schemes	Budget 2025/2026 £'m	Budget 2026/2027 £'m	Budget 2027/2028 £'m	Budget 2028/2029 £'m	Budget 2029/2030 £'m	Total £'m
Resources	17.701	9.767	0	0	0	27.468
Economic & Cultural Sustainable Development	11.932	16.786	14.557	1.792	0.050	45.117
Leader	0	0	0	0	0	0
Climate Emergency & Sustainable Travel	5.395	0.032	0.008	0	0	5.435
Built Environment & Sustainable Development	5.314	1.500	0	0	0	6.814
Adult Services	2.270	1.909	1.789	1.839	1.789	9.597
Children's Services	12.631	1.351	0	0	0	13.982
Neighbourhood Services	4.054	0.050	0.050	0.050	0.050	4.254
Highways	17.116	2.901	0	0	0	20.017
Total	76.413	34.296	16.404	3.681	1.889	132.683

Capital Schemes for Provisional Approval (Subject to)

Cabinet Portfolio: Capital Schemes	Budget 2025/2026 £'m	Budget 2026/2027 £'m	Budget 2027/2028 £'m	Budget 2028/2029 £'m	Budget 2029/2030 £'m	Total £'m
Resources	7.650	9.889	41.500	28.500	9.500	97.038
Economic & Cultural Development	14.589	11.776	6.677	26.802	8.835	68.679
Leader	0.214	0	0	0	0	0.214
Climate Emergency & Sustainable Travel	18.905	18.196	1.065	0.600	0.550	39.316
Built Environment & Sustainable Development	7.191	9.387	21.230	3.635	3.635	45.077
Adult Services	1.317	0.080	0.080	0.080	0.050	1.607
Children's Services	15.071	5.914	0	0	0	20.985
Neighbourhood Services	10.900	11.672	12.311	1.919	3.465	40.267
Highways	8.708	24.789	9.012	9.762	8.997	61.268
Total	84.545	91.703	91.875	71.298	35.032	374.453

Funded By

Financing	Budget 2025/2026 £'m	Budget 2026/2027 £'m	Budget 2027/2028 £'m	Budget 2028/2029 £'m	Budget 2029/2030 £'m	Total £'m
Grant	73.309	42.809	14.500	8.836	8.786	148.241
Capital Receipts/RTB	2.745	8.400	0.635	0.635	0.202	12.617
Revenue	2.292	3.570	0.050	0.050	0.050	6.012
Borrowing	73.705	66.400	92.315	65.456	27.883	325.759
3rd Party (inc S106 & CIL)	8.907	4.820	0.778	0.003	0	14.508
Total	160.957	125.999	108.279	74.980	36.921	507.136

Note this does not include slippage from 2024/25 which totalled £16.2m.

An allocation of £1.3m revenue budget to support new schemes has been factored into 2026/27, this is fully committed to the schemes and maintenance programmes added in the 2025/26 and previous years budgets. Any further capital investment requiring funding from corporately supported borrowing will require either the reduction of existing schemes or for the additional costs of borrowing to be incorporated in the 2026/27 and future years revenue budgets. The more detailed capital strategy will be updated for approval as part of the budget in February 2026.

Capital receipts will be used flexibly on appropriate revenue expenditure and further adjustments may be made as part of setting the budget for 2026/27 subject to any revision to government guidance being published. The current programme will continue to be reviewed to ease this financial impact.

The intention is to take a measured approach between borrowing in the current market climate and the utilisation of internal cash flow wherever possible. Borrowing has been factored into the strategy to ensure that the authority can meet its future borrowing obligations. The decision on the timing of new borrowing will still be driven by market factors, particularly movements in interest rates to provide overall value for money to the Council.

New capital schemes will be considered on a priority basis to minimise the impact on Council funded borrowing, and where appropriate maximise the use of external funding including the application of grants.

Capital Risk Contingency

There are three levels of risk provision in relation to the capital programme.

- Individual major projects within the capital programme hold their own contingency in accordance with good project management practise to meet unavoidable and unforeseen costs;
- The 2025/26 capital programme included a funded corporate risk contingency of £3.8m;
- The corporate risk assessment on which the general reserves target is based includes an element in the context of the capital programme based on the risks of the current programme.

As with all capital projects, relevant risks are being considered as part of the overall risk-assessed general reserves and the Corporate Risk Register.

Minimum Revenue Provision (MRP) Policy

The Council is required to make revenue provision to repay capital spend that is financed by borrowing (either supported or unsupported). This is called the Minimum Revenue Provision (MRP). The Department of Communities & Local Government has issued regulations that require full Council to approve a MRP Policy in advance each year, or if revisions are proposed during the year they should be put to the Council at that time.

11. Earmarked and Non-Earmarked Reserves

Earmarked Reserves are set aside for specific purposes whereas Non-Earmarked Reserves are retained to meet unforeseen risks. A regular review of financial risks to assess the optimum levels of balances and reserves will be reported to members annually. This ensures that the authority has sufficient funds to meet its key financial risks. The strategy remains that balances remain at a level that covers these key risks.

To manage financial risk the Council holds £12.58m of unearmarked reserves.

The following table shows each of the key earmarked reserves held for financial planning, the expected opening balance for 2026/27 and anticipated closing balance after the projected use:

	Estimated Balance 31/03/2026	Proposed Transfers	Projected Use in Year	Current Estimated Balance 31/3/27
	£'m	£'m	£'m	£'m
Revenue Budget Contingency	2.18	0.60	0.00	2.78
Financial Planning and Smoothing Reserve	3.61	(0.34)	(0.54)	2.73
Transformation Investment Reserve	3.19	0.00	(1.00)	2.19
Job Evaluation & Pay Structure Reserve	1.25	0.00	(0.25)	1.00
Restructuring & Severance Reserve	3.33	0.00	(1.50)	1.83

Flexible use of Capital receipts

The strategy requires flexibility around capitalising costs and the flexible use of capital receipts to fund redundancy, transformation, and ICT costs where appropriate to free up reserves in line with the availability of capital receipts.

12. Reviewing the Strategy

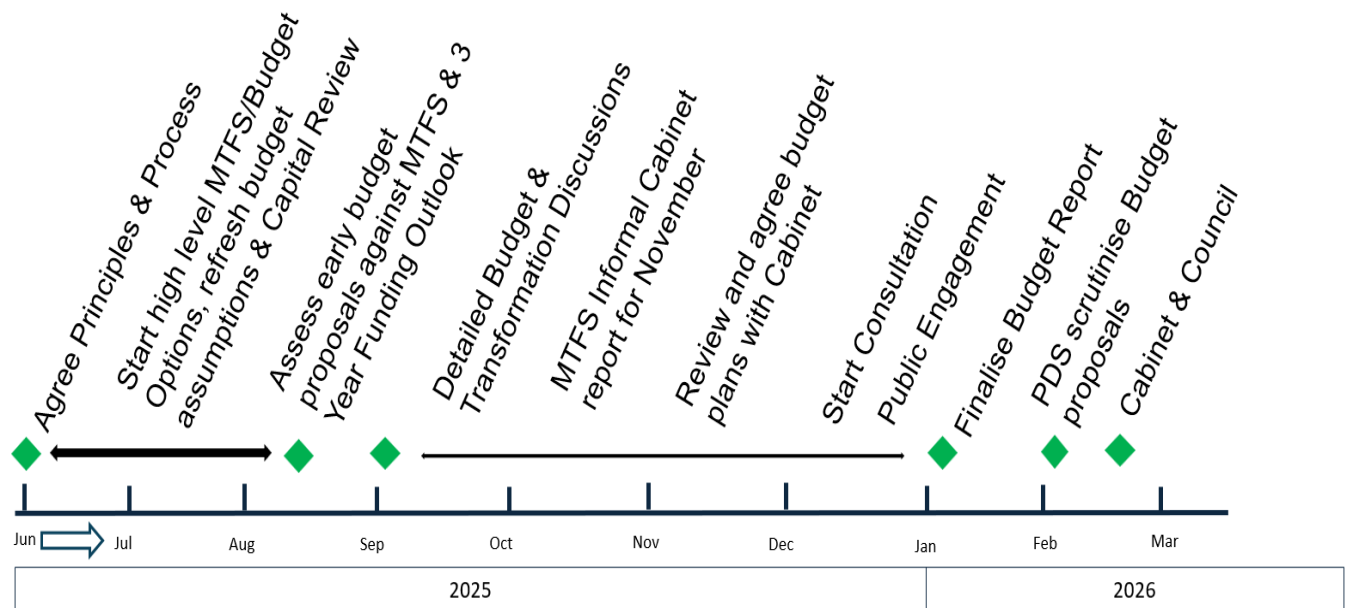
This strategy will naturally span the life of the Council Plan but will be reviewed annually to take into account changes within and external to the organisation. In more uncertain times the strategy will be reviewed more frequently.

13. Public/Stakeholder Engagement

Subject to the timing of central government funding announcements we plan to engage on more detailed budget proposals in December 2025 / January 2026, this will also be subject to scrutiny by Policy Development and Scrutiny Panels.

14. Budget Setting Timetable

The diagram below sets out the budget planning timetable.



15. Risks to the Medium Term Financial Strategy

The Strategy and Plan make regular risk predictions. The key risks to the plan are currently seen as:

Risk	Likelihood	Impact	Risk Management Update
Operational budget pressures due to rising demand	Likely	High	There is the risk of unplanned and unbudgeted growth in demand on Council services, particularly in Adult & Children's Social Care.
Volatility and uncertainty around business rates	Likely	High	<p>The impacts of the current economic challenges will increase the volatility and uncertainty around business rate income. Changes in the charges for Retail, Leisure and Hospitality businesses are planned to be introduced by the government for 2026/27.</p> <p>We continue to monitor arrears, CVAs, and liquidations with a specific reserve held to manage in-year volatility.</p>

Changes to Government Policy that affects future funding	Likely	High	New government policy and funding reforms that are planned for implementation from 2026/27 are likely to have an impact on resourcing of Council services and priorities. The MTFS includes an estimate of the potential impact on funding. This will continue to be assessed once further details are announced and the government confirms funding allocations.
Contract inflationary pressure	Possible	High	With increase in wage, energy and fuel costs, Council contracted services are at risk of above budget price increases. Capital Schemes may need to be paused due to unfunded viability gaps due to increased supply chain costs.
Viability risk on the Councils Commercial Estate assets held for income generation.	Possible	High	Current asset reviews have identified that due to the age and complexity of the Councils Commercial Estate, some assets operating costs and capital investment needs may exceed annual rental income values. This will be managed through a detailed asset review that informs a programme of prioritisation for investment in the estate.
Reinstated government restrictions in the event of a new pandemic.	Possible	High	This is certainly a material risk, whilst not one the Council has direct control over, every step would be put in place to follow government guidance following the recommendations of our Director of Public Health.
Impact on Reserves	Possible	High	Without additional government grant funding in recognition of unfunded pressures there is the risk that Council reserve levels are not enough to manage in-year and future years risk.
Capital projects not delivered resulting in revenue reversion costs or liabilities from underwriting agreements	Possible	High	The Council has a number of projects within this category. These risks will continue to be monitored and reported. An assessment is made as part of the budget process to ensure that revenue reserves are sufficient to meet these risks. The capital programme methodology looks to de-risk projects wherever possible.
Interest rates increase	Possible	Medium	A reserve is available for borrowing to manage market risk and long-term borrowing costs have been factored into the longer-term MTFS. Long term borrowing rates remain

			elevated due to market concerns around fiscal stability both in the UK & the US.
Funding pressures through WECA, ICB and other partners	Possible	Medium	Ensure good communication links with partner organisations.

The key risks will continue to be monitored throughout the budget setting process and subsequently outlined in each budget setting report to Council and will be reviewed regularly, and reported through budget monitoring to Cabinet.

Bath & North East Somerset Council

MEETING:	Cabinet	
MEETING DATE:	13 th November 2025	EXECUTIVE FORWARD PLAN REFERENCE:
		E 3651
TITLE:	Revenue and Capital Budget Monitoring, Cash Limits and Virements – April 2025 to September 2025	
WARD:	All	
AN OPEN PUBLIC ITEM		
<p>List of attachments to this report:</p> <p>Appendix 1 – Revenue Monitoring Commentary</p> <p>Appendix 2 – Key Scheme Capital Monitoring Commentary</p> <p>Appendix 3 (i) & 3 (ii) – Proposed Revenue Virements & Revised Revenue Cash Limits</p> <p>Appendix 4 (i) & 4 (ii) – Capital Virements & Capital Programme by Portfolio</p> <p>Appendix 5 – Revenue Savings Monitor</p>		

EXECUTIVE SUMMARY

a) Revenue budget

The Revenue budget outturn is currently forecast to be £2.4m over budget. Managers across the organisation continue to prioritise cost control measures to bring the budget back to a balanced position before year-end.

Children's Services are forecasting the largest cost pressure, primarily due to high-cost packages required to support the most vulnerable and complex young people in the area. Adult Services and Corporate Estate are also forecasting significant expenditure pressures, while staffing costs across the organisation have increased because of the pay and grading review associated with the Being Our Best programme.

Income is lower than budgeted for both the Roman Baths and the Commercial Estate, however Parking Services are seeing income exceed expectations. Lower borrowing costs and strong treasury management performance are also helping offset the adverse financial position.

The £2.4m forecast over budget position includes the use of £9.8m budgeted contingencies and use of the Job Evaluation and Pay Structure reserve (£1.5m).

Savings of £14.01m were included in the 2025/26 budget. At present £9.15m savings are forecast as delivered, with the remainder either being mitigated through alternative measures, or flagged as delayed or undeliverable. On-going budget pressures are being considered through the Council's budget setting process to ensure they do not continue to create financial pressures in 2026/27.

b) Capital budget

The current position of the 2025/26 Capital Programme is a forecast of £106.2m against a budget of £146.4m. Of the variance of £40.2m, £39.6m is anticipated will be rephased into future years.

c) Council Tax and Business Rates

The current forecast on Council Tax is an in-year collection fund deficit of £0.41m. The Council's share of the deficit is £0.34m and this represents a negative variance of 0.3% against the 2025/26 budgeted income.

The current in year forecast for the Business Rate element of the collection fund is a deficit of £0.63m, of which the council's share is £0.59m and this represents a negative variance of 0.9% against the 2025/26 budgeted net rates.

d) Council Reserves

The Council holds general unearmarked reserves of £12.6m, this is held corporately to manage in year financial pressures that cannot be mitigated within existing budget levels.

1 THE ISSUE

- 1.1 This report presents the financial monitoring information for the Authority for the 2025/26 financial year, using information available up to the end of September 2025.

2 RECOMMENDATION

The Cabinet is asked:

- 2.1 To note the 2025/26 revenue budget position detailed within the report (as at the end of September 2025).
- 2.2 To note and approve where required the revenue virements listed in Appendix 3(i).
- 2.3 To note the capital year-end forecast detailed in paragraph 3.32 of this report.
- 2.4 To note the changes in the capital programme including capital schemes that have been agreed for full approval under delegation listed in Appendix 4(i).

3 THE REPORT

- 3.1 The Budget Management Scheme requires that the Cabinet consider the revenue and capital monitoring position four times per year.

REVENUE BUDGET

- 3.2 The financial landscape for Local Government continues to be challenging. The 2025/26 Budget was agreed by Council in February 2025, which outlined the significant budget risks the organisation was facing. A high-level risk analysis was conducted in Quarter 1 monitoring, and this has now been built on through a much more detailed forecast for Quarter 2 with information available up until the end of September 2025.
- 3.3 Service Directors have been asked to outline the actual expected outturn for the year and the reasons to date for over / under budget forecasts. For revenue budgets which are forecast to be over budget, the Directors are expected to seek compensating savings to try and bring budgets back to balance.
- 3.4 A summary by Portfolio of the revenue position as at the end of the second quarter is shown in the table below:

Portfolio	Revised Budget £'m	Year End Forecast £'m	Variance Over / (Under) £'m
Leader of Council	(1.00)	(1.00)	0.00
Sustainable Bath and North East Somerset	3.43	3.46	0.03
Resources - Services	32.45	33.71	1.26
Resources - Corporate	5.15	3.50	(1.65)
Resources - Corporate Contingencies	9.83	0.00	(9.83)
Resources - Being Our Best Programme	(4.00)	(0.03)	3.97
Economic And Cultural Sustainable Development	(9.21)	(5.75)	3.46
Adult Services	64.08	65.07	0.99
Children's Services	42.74	48.75	6.00
Communications and Community	5.20	5.73	0.53
Sustainable Transport Strategy	(8.73)	(9.10)	(0.37)

Sustainable Transport Delivery	8.16	8.02	(0.15)
Built Environment and Sustainable Development	3.99	3.66	(0.33)
Total	152.10	156.01	3.91
<i>Job Evaluation and Pay Structure Reserve</i>	<i>0.00</i>	<i>(1.49)</i>	<i>(1.49)</i>
Quarter 2 Forecast Outturn Variance	152.10	154.52	2.42

- 3.5 The current year-end forecast is a £2.42m over budget position, after the use of £9.8m contingency and £1.49m pay reserve.

Portfolio Commentary

- 3.6 Key forecast variances and associated planned mitigating actions by Portfolio are as follows (a more detailed breakdown can be found in Appendix 1):

Leader of the Council

This portfolio only contains the Housing Delivery Vehicle (Aequus), of which a breakeven position is forecast.

Sustainable Bath and North East Somerset (£0.03m adverse variance)

Parks and Open Spaces have a small staffing pressure, partially offset by over-recovery of staff time to projects with the Environmental Monitoring team.

Resources – Services (£1.26m adverse variance)

Rental income shortfall within the Commercial Estate is the key area of pressure within the portfolio, although increased service supported borrowing costs and the cost of legal representation are also forecast to be contributing to increased costs within the service, totalling £0.9m.

Staffing pressures exist across Waste and Fleet Services, Legal Services and Revenues and Benefits, while the ICT service hasn't been able to deliver all savings linked to the move to cloud based solutions yet. HR and Procurement services staffing underspends help partially mitigate these pressures

Resources – Corporate (£1.65m favourable variance)

Interest rates have been favourable when compared to what was expected at budget setting on both borrowing and cash balances, resulting in an estimated £0.65m benefit to the council.

Some of the council's capital programme needs to be reprofiled into future years, resulting in less borrowing requirement in year (£0.8m). This was also the case last financial year, resulting in a lower Minimum Revenue Provision (MRP) charge in this year's accounts (£0.2m).

Corporate contingencies and being our best programme financial implications follow in the next section of the report.

Economic And Cultural Sustainable Development (£3.46m adverse variance)

Heritage Services ended the 2024/25 financial year £0.6m short of its net income target, primarily due to lower visitor numbers than anticipated compared to when setting the budget.

A total of 993k visitors came to the Roman Baths in 2024/25, with an increase to 1.1m visitors budgeted for 2025/26. Based on current demand data, visitor numbers are expected to fall short of budget, a trend that reflects what's happening across the sector, particularly in sites with high international visitor numbers. Visitor numbers are estimated at 985k for 2025/26.

Lower retail sales linked to lower visitor numbers and cost pressures linked to the vacation of the Culverhay site are adding to the financial challenge this year, which is estimated at a £2.3m overspend. A variety of cost mitigations are being pursued, as well as extra focus on wider income generating products.

The Corporate Estate service also ended last year with a financial pressure which continues into 2025/26. The key reason is undelivered budgeted savings linked to rationalising the estate, which has not progressed as quickly as anticipated. Staffing and maintenance costs are being actively managed to help offset the pressure.

The Regeneration service currently holds the budget for Bath Quays South (BQS), which at present is not fully let and as such is leading to a shortfall in budgeted income.

Adult Services (£0.99m adverse variance)

Adult Social Care reported a balanced position for 2024/25; this was following a transfer of £0.4m from the Adult Social Care Reserve. Increased activity had been seen in 2024/25 with demand for package placements increasing on average by 16%. The cost of care also continued to increase during the year due to the economic and market factors experienced through 2024/25 and the increasing complexity in care needs.

For 2025/26, the service is currently forecasting a net over budget position of £1.0m.

The overbudget positions seen in the Older Peoples and Learning Disabilities services, have continued into 2025/26, current forecast is £1.4m over budget. Residential Care and Home care are the areas of pressure within the older people's service, the number of residential placements stood at 154 as at the end of September 2025, compared to 143 at May 2025 and 129 at September 2024. This rapid rise continues to create budget pressure. Homecare hours stood at 4,701 as at September 2025, compared to 4,361hrs in May 2025 and 4,151hrs in September 2024. Whilst the increased use of homecare is in line with the services strategy, the continued increase in residential placements is impacting on overall costs.

The review of the pooled arrangements within the learning disabilities service was concluded in 2024/25, and new agreed joint funding arrangements are now in place. These arrangements now replace the previous long standing pooled funding arrangements with BSW ICB. However, budget pressure in residential and Supported living services has continued into 2025/26, with the service currently forecasting a £1.2m overspend.

Both services are working to reduce the budget pressures and be assured of costs. Arrangements for hospital discharges have continued into the current year enabling close working with BSW ICB to ensure effective and efficient discharge of clients. We continue to work closely with BSW ICB on both these areas to ensure appropriate funding is agreed.

The other areas within the service are forecasting to be balanced or under budget by a total of £1.6m, which will leave the net service forecast at an over budget position of £1.0m.

Children's Services (£6.0m adverse variance)

Children's Services (excluding home to school transport) closed the 2024/25 financial year with a £4.78m overspend, largely driven by rising demand and Residential placement costs. At quarter 1 a risk range of £4m to £8m was projected. The Quarter 2 forecast position is an over budget position of £6m. This is split as £5.7m across Children's Social Care and £0.3m from Education pressures.

Despite increased budget provision for 2025/26, a late-year increase of eight new Residential placements (Q4 2024/2025) resulted in a £2.7m pressure rolling forward. These pressures increased further during Q1 of 2025/26 following a further 4 additional placements required to safeguard vulnerable young people, increasing the pressure in Residential placements by a further £1.4m, to £4.1m total pressure.

Upward cost pressure from the market combined with higher cost packages required to support the most vulnerable and complex young people and increased demand are continuing to put a potential significant strain on the budget.

Ongoing pressures also stem from the support needs of disabled young people being cared for at home, a total of £0.6m pressure and £1m salary pressure from agency usage to cover vacancies and respond to demand.

In Education, teachers' pension costs, and historical reduced income pressures continue from 2024/25 totalling £0.26m, along with agency staffing pressures from the Education Psychology Team.

Home to School Transport has a small pressure of £0.02m due to demand and market price pressure. This position is the net pressure post implementation of planned savings initiatives, which have been a success. However, it should be noted that the full demand picture from the new academic year will not be known until later in the Autumn.

To mitigate these pressures Children's Services are delivering a targeted response through an enhanced Transformation Programme and detailed scrutiny of all areas of activity and spend, including but not limited to children's residential placements. This has included a focused placements taskforce responsible for cost assurance and ensuring that young people's needs are met through the most effective and sustainable means possible. This process will lead to reductions in cost for the financial year 2026/27. Other workstreams major on placement sufficiency and amending the market structure. These workstreams will deliver reduced costs over the medium term.

Schools (Dedicated Schools Grant)

The Dedicated Schools Grant (DSG) overspent for 2024/25 by £10.53m taking the cumulative to deficit at the end of 2024/25 to £32.795m.

Additional overspend for 2025/26 is anticipated at a similar, but slightly higher level than 2024/25, circa £12m. This overspend is due to the costs associated with supporting pupils with SEND needs and is marginally above the Safety

Valve plan in place currently. The Safety Valve plan seeks to address the built-up deficit of overspend of the DSG and bring spend in line with the grant allocation by the end of the Safety Valve term in 2030/31.

Communications and Community (£0.53m adverse variance)

Income is lower than expected in Bereavement Services (£0.1m), and Licensing and Pest Control services (£0.2m), whilst undelivered savings and staffing pressures are generating an adverse position in Customer Services too (£0.2m).

Sustainable Transport Strategy (£0.37m favourable variance)

Parking income is exceeding budgeted levels (£0.5m), while a shortfall in staffing time recharged to projects within the Transport Strategy service is partially offsetting this (£0.1m).

Sustainable Transport Delivery (£0.15m favourable variance)

Staffing underspends and increased income across Network and Traffic Management are the key reasons for the favourable portfolio variance.

Built Environment, Housing & Sustainable Development (£0.33m favourable variance)

The majority of the favourable variance is as a result of increased income across the Development Management service area, with small underspends across Building Control and Housing also contributing.

Budgeted Contingencies

3.7 When setting the 2025/26 budget, in recognition of the significant budget risks associated with national insurance changes, demand on statutory services rising above modelled levels, alongside savings delivery risk, the following contingencies and provisions were included in the budget:

- Corporate Contingency (£3m) for savings delivery risk and slippage
- Contract Inflation Provision (£2.6m) for the impacts of Employer National Insurance on supplies and services and contract spend across services.
- High Risk Service Demand and Cost Increase Provision (£4.2m)

3.8 All £9.8m of budgeted contingency has been released within the Quarter 2 forecast position to partially offset pressures as outlined across council services in section 3.6 and savings shortfalls outlined in section 3.9.

Savings Performance

3.9 The 2025/26 revenue budget approved savings of £14.01m. Delivery of these savings will be monitored throughout the year, with £9.15m forecast as achieved at the end of September, representing 65% delivery. Of the £4.86m not currently achieved, £2.04m are being mitigated through savings, contingency or income elsewhere in the respective service, while £0.68m of savings are currently delayed until 2026/27 and £2.15m are forecast as unachievable, resulting in material forecast pressures.

Being Our Best Programme

- 3.10 Included within the approved savings target is £2m of additional cost reductions relating to the organisation's Being Our Best programme. The programme was budgeted to deliver a £4.5m reduction in organisation staffing costs by 2025/26. As at the end of 2024/25, £0.5m had been delivered. Currently it is forecast that a further £1m will be delivered in year, resulting in a shortfall against the budgeted target of £2.5m.
- 3.11 The pay and grading review across the organisation has resulted in a net increase in salary costs. The increase has exceeded the budget by £1.49m and as such is creating both an in-year and on-going pressure. A Job Evaluation and Pay Structure reserve was created last financial year to cover any one-off impacts from the programme. It is recommended that this reserve is used to cover the in-year pressure (on top of estimated pay protection costs of £0.25m) and has been included as a direct mitigation in the quarter 2 summary table.

Budgetary Control and Management Action Plans

- 3.12 The Council has a positive record of strong financial management. Directors are actively developing mitigation plans for the service areas which are in an over budget position to manage the financial position in year and bring the Council back into a balanced position.
- 3.13 In the event the above budget position cannot be fully mitigated a combination of specific service reserves (such as the Adult Social Care Reserve) and the Council's Revenue Budget Contingency Reserve will need to be utilised, subject to approval. Should this be required there would be a requirement to replenish these reserves in future years, putting further pressure on meeting the medium-term budget gaps.

REVENUE BALANCES AND RESERVES

3.14 The Employer's national pay offer for 2025/26 has now been agreed and was within the 4% inflation included in the budget. Service budgets have been adjusted for Quarter 2 reporting to reflect the new pay levels.

Key Reserves

3.15 The following table shows the balances of key reserves at the beginning of the year, planned use, and expected balance at the year-end based on current forecast:

Reserve Title	Balance as at 01/04/2025 £'m	Projected Use / Commitments £'m	Estimated Balance 31/03/2026 £'m
Revenue Budget Contingency	2.97	(0.79)	2.18
Financial Planning and Smoothing	6.67	(3.06)	3.61
Transformation Investment	4.53	(1.34)	3.19
Restructuring & Severance	4.83	(1.50)	3.33
Job Evaluation and Pay Structure	3.00	(1.75)	1.25

Flexible Capital Receipts

3.16 Flexible Capital Receipts are being utilised for revenue spend that results in ongoing revenue savings. The February 2025 Budget Report – Efficiency Strategy confirmed a continued £11.5m allocation of capital receipts for this purpose. This has now been updated to reflect the re-profiled requirement and re-phasing into 2025/26 as follows:

	Actual Usage 2017/18 to 2024/25 £'m	Forecast Usage 2025/26 £'m	Est Total Usage £'m
Flexible Capital Receipts	11.11	0.39	11.50

3.17 Unapplied capital receipts of £3.380m were carried forward from 2024/25, with £0.105m received in 2025/26 so far and further forecast if £1.3m against £3.8m budgeted, with the sale of Lewis House now expected in 2026/27. This reprofiling is partly offset by other new identified sales.

General Fund Un-Earmarked Reserve

3.18 The General Fund Un-Earmarked Reserve is retained to meet the Council's key financial risks. The risk assessment has set a range of between £11.8m and

£13.0m to meet those risks in the 2025/26 financial year. The reserve has a current uncommitted balance of £12.6m in line with the level reported in the 2025/26 Budget Report.

Revenue Budget Virements

- 3.19 Any revenue budget virements which require Cabinet approval are listed in Appendix 3(i). Technical budget adjustments are also shown in Appendix 3(i) for information purposes, as required by the Budget Management Scheme.

COUNCIL TAX, COUNCIL TAX SUPPORT AND BUSINESS RATES

- 3.20 The 2025/26 tax base allowed for the same number of Local Council Tax Support (LCTS) recipients as at the end of November 2024 to continue into 2025/26. The budget estimate of costs of LCTS were set at £11.0m. The current cost estimate is £0.5m under budget at £10.5m with 6,288 working age claimants and 3,364 Pensioner claimants.
- 3.21 The actual outturn position on LCTSS and the impact on the Council Tax collection fund will depend on a number of variables, including the change in number of claimants and the period claimants remain eligible for support whilst seeking employment and this will continue to be monitored closely during the year.
- 3.22 The current overall forecast on Council Tax is an in-year collection fund deficit of £0.41m. This is mainly due to less than budgeted second homes and long-term empty properties where a premium is charged, and an increase in students occupied properties. This adverse variance is partially offset by a favourable trend against budget in LCTSS costs and single person discount. The Council's share of the deficit is £0.34m and this represents a negative variance of 0.3% against the 2025/26 forecast income.
- 3.23 The Council's share of the decreased 2024/25 Council Tax Collection Fund final outturn position of £0.34m, as reported to Cabinet in July has been reflected in the Medium Term Financial Strategy update which is also reported to this Cabinet meeting.

Business Rates

- 3.24 The government announced, as part of the Chancellor's Autumn Statement in November 2023, that the retail, hospitality, and leisure business rate relief scheme would be extended for a sixth year into 2025/26, but with a reduction in the level of relief from 75% to 40% whilst maintaining the cap on the relief at £110,000 per business.
- 3.25 The Council continues to be recompensed for the reduction in business rate income arising from this relief via a s31 compensation grant. The current level of retail business rate relief granted is £4.9m which is £0.6m above the £4.3m originally estimated for 2025/26.
- 3.26 Gross rates after reliefs is currently £0.9m adverse mainly due to the £0.6m adverse retail relief and £0.3m adverse small business rate relief against budget.
- 3.27 These adverse impacts on the collection fund are partially offset by a favourable forecast in relation to the provision for appeals, which is currently forecast to be £0.3m lower than budget. This is mainly due to some releases in respect of the 2017 rating list provision.

- 3.28 The current overall in year forecast for the Business Rate element of the collection fund is a deficit of £0.63m, of which the council's share is £0.59m.
- 3.29 The forecast overall impact on the business rates collection fund position including reliefs and appeals will continue to be reviewed during the remainder of the year.
- 3.30 Section 31 grant income from Business rate compensation grants is currently forecast to be £0.53m above budget, this relates to increased relief granted in respect of Retail Relief and Small Business Rate Relief.
- 3.31 As set out in the Budget Report, any surplus or deficit on the Business Rate Collection Fund and associated income will be transferred to or from the Business Rates Reserve for consideration as part of the Business Rates calculations for future years and this position will be reflected in the 2026/27 budget.

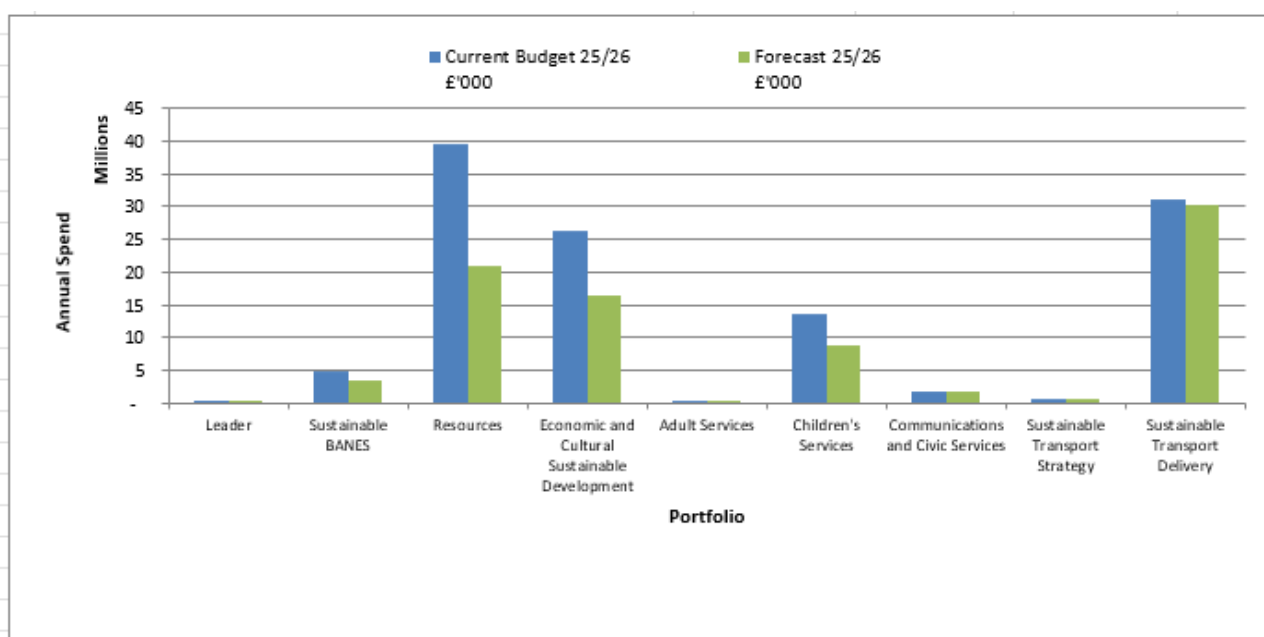
CAPITAL BUDGET

- 3.32 The current position of the 2025/26 Capital Programme is a forecast of £106.2m against a budget of £146.4m, giving a variance of £40.2m, £39.6m of which is forecast to be re-phased to future years.
- 3.33 The following table shows a summary of the current position by Cabinet Portfolio. The full breakdown of the Capital Programme by Portfolio can be found in Appendix 2(ii) with key scheme commentary in Appendix 2. Appendix 4(i) sets out budget changes actioned since the February Budget setting report.

Portfolio Summary Monitor	Annual Current Budget 2025/26 £'000	Forecast 2025/26 £'000	In-Year Variance 2025/26 £'000	Forecast Re-phasing to Future Years £'000
Leader	60	60	-	-
Sustainable BANES	4,915	3,385	1,530	1,529
Resources	39,461	21,056	18,404	18,404
Economic and Cultural Sustainable Development	26,201	16,354	9,846	9,846
Adult Services	293	293	-	-
Children's Services	13,526	8,844	4,682	4,682
Communications and Civic Services	1,666	1,648	18	-
Sustainable Transport Strategy	547	547	-	-
Sustainable Transport Delivery	31,093	30,099	994	994
Built Environment and Sustainable Development	28,643	23,964	4,679	4,118
Grand Total	146,405	106,252	40,153	39,574

Note: Some of the figures in this table are affected by rounding

The graph below illustrates the value and forecast against budget for all in year capital budgets by Cabinet Portfolio:



Capital Commentary

3.34 The key in-year programme variances, in order of scale by portfolio, are as follows:

Resources: £18.404m rephasing to future years

- Commercial Estate Programmes - Refurbishment £3.8m, Fire Safety £1.5m, Re-Investment /Jollies £1m - arising from resource constraints.
- Orange Grove £0.8m – paused to review repair options.
- Neighbourhood Services Vehicles £6.2m – including 6 electric RCVs on order for delivery in June 2026.
- Waste Infrastructure Modernisation £2.4m – re-phased in line with signed contracts. On track for completion in September 2026.
- Property Company Investment £2.5m – lower forecast Aequis loan drawdowns.

Economic & Cultural Sustainable Development: £9.8m rephasing

- Corporate Planned Maintenance £2.5m – a review undertaken on the progress of orders & historic performance has refined estimates.
- Heritage Collection Centre £0.5m – the withdrawal of Bath Spa University has stopped current project; alternative site options are being explored.
- Somer Valley Enterprise Zone £6.5m – land assembly is now expected later than previously forecast.

Built Environment & Sustainable Development: £4.679m, with £4.118m rephasing to future years

- Social Rent – £2.0m - Danes Lane delivery being key scheme in 2025/26.
- Bath Western Riverside 2 - £1m – focus is currently on £18m grant funded remediation activity with site planning permissions to be advanced in 2026.
- Disabled Facilities Grants - £0.5m no scope to catch-up on past carry-forwards.
- Local Authority Housing Fund - £0.6m saving with all properties purchased within government grant.

Children's Services: £4.682m rephasing to future years

- Small Residential Unit (Charlton House) – £4m Project was paused whilst Ofsted registration was clarified but has now restarted.
- Capitalised Maintenance - £0.6m Programme delivery updated after summer repair programme.

Sustainable B&NES: £1.530m rephasing to future years

- Parks Improvements £0.6m – multiple S106 projects rephased.
- Renewable Energy Development Fund £0.3m - realigned with delivery of Solar projects to increase capacity towards the 12kw target set for the corporate estate.

Sustainable Transport Delivery: £0.944m rephasing to future years

- Clean Air Zone £0.3m – Queen Square Wayfinding has been delayed.
- Local Active travel £0.3m – s106 funded Public Right of Way Schemes now programmed into 2026/27.

RISKS

3.35 The key risks to the budget were outlined in the Council's 2025/26 Budget Report, in compliance with the Council's decision-making risk management guidance. These have been reviewed and are listed below, along with any additional emerging risks:

Risk	Likelihood	Impact	Risk Management Update
Operational budget pressures due to rising demand	Likely	High	There is the high-risk of unplanned and unbudgeted growth in demand on Council services, particularly in Adult and Children's Social Care. Budgeted contingencies are in place to help mitigate the risk.
Contract inflationary pressure	Likely	High	With increase in wage, energy and fuel costs, and the Employers National Insurance increase, Council contracted services are at risk of above budget price increases. This is an economic risk that has been recognised in the budget with a contract inflation risk provision for potential areas that cannot be mitigated through activity management. Capital Schemes may need to be paused due to unfunded viability gaps due to increased supply chain costs.
Volatility and uncertainty around business rates	Likely	High	<p>The impacts of the current economic challenges will increase the volatility and uncertainty around business rate income. In 2025/26 this risk has been partly offset by the extension of the business rate relief scheme for Retail, Leisure and Hospitality businesses, although the level of relief has reduced.</p> <p>We continue to monitor arrears, CVAs, and liquidations with a specific reserve held to manage in-year volatility.</p>
Changes to Government Policy that affects future funding	Likely	High	New government policy and funding reforms that are planned for implementation from 2026/27 are likely to have an impact on resourcing of Council services and priorities. This have been assessed against available information but will not be fully understood until December 2025 when the Local Government Finance Settlement is announced.
Viability risk on the Councils Commercial Estate assets held for income generation.	Possible	High	Current asset reviews have identified that due to the age and complexity of the Councils Commercial Estate, some assets operating costs and capital investment needs may exceed annual rental income values. This will be managed through a detailed asset review that informs a programme of prioritisation for investment in the estate.
Reinstated government restrictions in the event of a new pandemic.	Possible	High	This is certainly a material risk, whilst not one the Council has direct control over, every step would be put in place to follow government guidance following the recommendations of our Director of Public Health.
Impact on Reserves	Possible	High	Without additional government grant funding in recognition of unfunded pressures there is the risk that Council reserve levels are not enough to manage in-year and future years risk.
Capital projects not delivered resulting in	Possible	High	The Council has a number of projects within this category. These risks will continue to be monitored and

revenue reversion costs or liabilities from underwriting agreements			reported. An assessment is made as part of the budget process to ensure that revenue reserves are sufficient to meet these risks. The capital programme methodology looks to de-risk projects wherever possible.
Interest rates increase	Possible	Medium	A reserve is available for borrowing to manage market risk and long-term borrowing costs have been factored into the longer-term MTFS. Long term borrowing rates remain elevated due to market concerns around fiscal stability both in the UK & the US.
Funding pressures through WECA, ICB and other partners	Possible	Medium	Ensure good communication links with partner organisations.

4 STATUTORY CONSIDERATIONS

- 4.1 The annual medium-term financial planning process allocates resources across services with alignment of these resources towards the Council's corporate priorities. This report monitors how the Council is performing against the financial targets set in February 2025 through the Budget setting process.

5 RESOURCE IMPLICATIONS (FINANCE, PROPERTY, PEOPLE)

- 5.1 The financial implications are contained within the body of the report.

6 RISK MANAGEMENT

- 6.1 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 Director, with these risks re-assessed regularly as part of the budget monitoring process.

7 CLIMATE CHANGE

- 7.1 The Medium Term Financial Strategy and budget process aligns resources towards the corporate priorities and objectives set out in the Corporate Strategy, which includes tackling the climate emergency. This report monitors the Council's financial performance against those budgets, and therefore does not include any decisions that have a direct impact on Climate Change.

8 OTHER OPTIONS CONSIDERED

- 8.1 None

9 CONSULTATION

- 9.1 Consultation has been carried out with the Cabinet Member for Resources, Directors, Section 151 Finance Officer, Chief Executive and Monitoring Officer.
- 9.2 Consultation was carried out at meetings and via e-mail.

Contact person	<p>Gary Adams – Head of Financial Management Gary_Adams@bathnes.gov.uk</p> <p>Paul Webb – Senior Finance Manager Paul_Webb@bathnes.gov.uk</p>
-----------------------	--

	Jeff Wring - Director of Financial Services, Assurance & Pensions (S151 Officer) Jeff_Wring@bathnes.gov.uk
Background papers	Budget and Council Tax 2025/26 and Financial Outlook (E3590)
Please contact the report author if you need to access this report in an alternative format	

Appendix 1 - Revenue Monitoring Commentary

Portfolio Number and Description		Cashlimit Number and Description		Current Budget £000	Actuals to date 31/09/2025	Forecast £000	Outturn Variance Over / (Under) £000	Forecast Outturn Variance Analysis	Outturn Recovery Plan
Detailed Analysis of Budgets for Leader of Council									
P04	Leader of Council	1112	Housing Delivery Vehicle	(1,000)	0	(1,000)	0	No variance reported.	Not applicable
P04 Leader of Council				(1,000)	0	(1,000)	0		
Detailed Analysis of Budgets for Sustainable Bath and North East Somerset									
P39	Sustainable Bath and North East Somerset	1127	Environmental Monitoring (Air Pollution)	222	57	171	(51)	Over recovery of staff time against projects is the key reason for the favourable variance	Not applicable
P39	Sustainable Bath and North East Somerset	1137	Green Transformation	701	633	701	0	No variance reported.	Not applicable
P39	Sustainable Bath and North East Somerset	1147	Parks & Open Spaces	2,510	1,417	2,591	81	Staffing pressures within the service, along with a £25k pressure due to dilapidations at Combe Down allotments.	Any opportunities for vacancy management or stopping discretionary spend will be actioned where possible.
P27 Sustainable Bath and North East Somerset Total				3,433	2,107	3,463	30		
Detailed Analysis of Budgets for Resources - Services									
P19	Resources	1032	Information Technology	8,562	6,201	8,762	200	Delays in realising intended cost savings from reducing servers as result in the move to cloud based provision is causing a pressure across the service.	All upcoming contract renewals are being scrutinised to reduce where possible.
P19	Resources	1040	Finance	3,366	2,097	3,426	60	Staffing pressures across financial systems and financial services teams.	Vacancy management in conjunction with optimising staffing resources charged to projects will be prioritised.
P19	Resources	1041	Revenues & Benefits	2,340	2,686	2,453	113	A combinations of uncertainty around grant income and staffing pressures are generating the forecast adverse position.	Prioritising court fee income recovery will help offset some of the existing expenditure pressures.
P19	Resources	1042	Risk & Assurance Services	1,754	640	1,754	0	No variance reported.	Not applicable
P19	Resources	1047	Human Resources & Organisational Development	3,118	1,708	3,018	(100)	Staffing underspends across the service.	Not applicable
P19	Resources	1053	Council Solicitor & Democratic Services	3,446	2,026	3,574	128	Under recovery of staff time to projects and cost pressures associated with recent by-elections are generating a forecast pressure.	Prioritising staff recharges to projects to ensure cost recovery where possible.
P19	Resources	1054	Hsg / Council Tax Benefits Subsidy	405	1,409	405	0	No variance reported.	Not applicable
P19	Resources	1081	Commercial Estate	(12,111)	(6,271)	(11,221)	890	Rental income shortfall is the key area of pressure, although increased service supported borrowing costs, the cost of legal representation and external charges are also forecast to be contributing to the reported adverse position. The rental income budget was increased by £0.2m for 2025/26 to reflect works to void units that would be completed during the early part of the year, allowing an increase in assets that could be let. Working to make properties available to market and let have been delayed due to insufficient resources in the maintenance team.	We are funding 2 posts in the maintenance team to provide the required resource to expediate works to buildings to enable us to offer the letting to the open market. This may not result in a full years rental income in this financial year (due to possible rent free periods) but it will ensure we have an ongoing income stream from the property for future years.
P19	Resources	1101	Neighbourhoods & Environment - Waste & Fleet Services	18,909	10,675	19,077	168	The service are continuing to see pressures on staffing costs, due to covering sickness and vacancies with temporary staff to avoid service failure. This is an unbudgeted cost, although there is a significant improvement on sickness costs from last year. This has been offset by increased income, including trade waste, garden waste, reuse shop and additional third party income from Pixash. Small savings on maintenance at Pixash depot and waste treatment and disposal costs also help mitigate the staffing pressures.	Any opportunities to increase income or stopping discretionary spend will be actioned where possible.
P19	Resources	1118	Procurement & Commissioning	406	677	286	(119)	Vacancies within the service are creating an underspend on staffing costs.	Not applicable
P19	Resources	1132	Business Change	775	503	775	0	No variance reported.	Not applicable
P19	Resources	1143	Corporate Office	1,744	790	1,660	(84)	Underspends on staffing and contract budgets.	Not applicable
P19	Resources	1145	Capital Programme and Project Delivery	(260)	374	(260)	0	No variance reported.	Not applicable
P19 Resources - Services Total				32,453	23,513	33,709	1,256		

Portfolio Number and Description		Cashlimit Number and Description		Current Budget £000	Actuals to date 31/09/2025	Forecast £000	Outturn Variance Over / (Under) £000	Forecast Outturn Variance Analysis	Outturn Recovery Plan
Detailed Analysis of Budgets for Resources - Corporate									
P19	Resources	N/A	Being Our Best Programme - Savings	(2,509)	0	(30)	2,479	Slippage in delivery of programme savings for 2025/26	Directors and Heads of Service have been tasked with increasing the pace of delivery to ensure the financial pressure is minimised where possible.
P19	Resources	N/A	Being Our Best Programme - Pay and Grading Review	(1,488)	0	0	1,488	Increase in staffing budgets as a result of pay and grading review and role profile mapping	Use of reserves to cover the increased costs are recommended and will be considered at year-end.
P19	Resources	N/A	Corporate Contingency	9,830	0	0	(9,830)	Release of corporate contingency to offset organisational budget pressures	Not applicable
P19	Resources	1055	Capital Financing / Interest	5,476	(3,075)	4,639	(837)	The forecast under budget position is due to a combination of £400k from lower rates achieved on new borrowing when compared to budgeted rates, £250k from higher rates earned on investments than budgeted, and a £187k lower Minimum Revenue Provision (MRP) charge, reflecting the rephasing of capital projects reported in the 2024/25 capital outturn report.	Not applicable
P19	Resources	1056	Unfunded Pensions	1,388	690	1,388	0	No variance reported.	Not applicable
P19	Resources	1057	Corporate Budgets including Capital, Audit and Bank Charges	(7,877)	725	(8,687)	(810)	Lower corporately supported borrowing (CSB) costs of £800k associated with capital schemes with spend to be reprofiled into future years in line with current delivery forecasts.	Not applicable
P19	Resources	1058	Magistrates	12	0	12	0	No variance reported.	Not applicable
P19	Resources	1059	Coroners	575	(114)	575	0	No variance reported.	Not applicable
P19	Resources	1060	Environment Agency	268	201	268	0	No variance reported.	Not applicable
P19	Resources	1061	West of England Combined Authority Levy	5,309	3,716	5,309	0	No variance reported.	Not applicable
P19 Resources - Corporate Total				10,984	2,145	3,474	(7,510)		
Detailed Analysis of Budgets for Economic And Cultural Sustainable Development									
P33	Economic And Cultural Sustainable Development	1018	Heritage Services	(14,192)	(8,778)	(11,850)	2,342	<p>The forecast assumes a continued reduction in group visitors of 6%, in line with industry performance to date and in line with September performance at the Roman Baths. It assumes growth of 1% in individual visitors through to the end of the year. This is again based on the level growth seen during September. It is an improvement on the performance through the summer, but a lower rate of growth than initially projected. We are forecasting 985,266 visitors at the Roman Baths in 2025/26. This new forecast in visitors results in a further reduction to admission income of £1.02 million on our Quarter 1 estimate.</p> <p>There is a further income pressure on retail sales and catering concession as a result of lower visitor numbers translating into fewer customers in the shop and diners in the Pump Room. These have added a further pressure of £339k.</p>	<p>The Service has mitigated the reduction in admission income by £350k through decisions we've recently taken to extend the £2 surcharge for on the day ticket purchases and increase the ticket price between Christmas and New Year when we are normally very busy.</p> <p>There are further mitigations of £377k that the service has identified, in addition to the £550k which was built in to the Quarter 1 estimate.</p>
P33	Economic And Cultural Sustainable Development	1038	Corporate Estate Including R&M	4,942	3,701	5,635	693	<p>Budgeted savings have not yet been achieved due to slippage in rationalising the estate through disposal or redeployment, and the delay in the adoption of the Corporate Landlord model.</p> <p>Property costs are high due to assets being held void. Some mitigations are available through recharging staff time to projects and holding posts vacant whilst smarter structures are implemented. There is also a balance to be struck in managing this year's financial position and further impacting future years' costs.</p>	Ongoing prioritisation of revenue spend across the estate, recharging of time to projects, alongside vacancy savings from mid-year recruitment are being adopted to mitigate the estimated overspend.
P33	Economic And Cultural Sustainable Development	1052	Regeneration	(508)	984	(67)	441	Unlet floor space at No.1 Bath Quays South is resulting in a shortfall against the budgeted income target.	Market sentiment and demand continues to be challenging given wider national and global macro-economic pressures. No.1 Bath Quays is now the only quality Grade A, EPC A, accommodation in the City and the remaining vacant accommodation sits well within general occupational needs, meaning the accommodation is well suited to tenant requirements as the market improves.
P33	Economic And Cultural Sustainable Development	1109	World Heritage	128	71	129	1	No material variance reported	Not applicable
P33	Economic And Cultural Sustainable Development	1128	Business & Skills	415	507	402	(13)	No material variance reported.	Not applicable
P33 Economic And Cultural Sustainable Development Total				(9,215)	(3,516)	(5,752)	3,463		

Appendix 1 - Revenue Monitoring Commentary

Portfolio Number and Description		Cashlimit Number and Description		Current Budget £000	Actuals to date 31/09/2025	Forecast £000	Outturn Variance Over / (Under) £000	Forecast Outturn Variance Analysis	Outturn Recovery Plan
Detailed Analysis of Budgets for Adult Services									
P20	Adult Services	1019	Leisure	302	1,363	302	0	The deed of variance on leisure contract has now been signed and is effective from start of October 2025. This is in line with budget plan for 2026-27. The tax advantages the deed of variance provides will produce a growth in income in 2026-27.	Not applicable
P20	Adult Services	1036	Adults Substance Misuse (DAT)	82	(331)	82	0	No variance reported.	Not applicable
P20	Adult Services	1073	Adults & Older People-Mental Health Commissioning	8,552	4,315	8,329	(223)	Forecast continues to be under budget. However some known hospital discharges are likely to lead to increased demand/increased costs. All reviews/requests for funding remain scrutinised at the joint forums with Health.	Not applicable
P20	Adult Services	1086	Adult Care Commissioning	4,625	2,384	4,613	(12)	The forecast includes delivery of the £325k savings target.	Not applicable
P20	Adult Services	1088	Older People & Physically Disabled Purchasing	14,307	7,840	15,676	1,369	We have seen a significant rise in demand for our services linked to supporting people to live independent lives in their own homes, keeping people safe and supporting hospital discharge and preventing readmission. We are seeing people living longer with care needs and also a rise in needs relating to Mental Health concerns.	We are continuing our scrutiny of care packages working with the Occupational Therapy service to maximise independence and with the partners in the community wellbeing hub.
P20	Adult Services	1091	Learning Disabilities Commissioning	19,614	8,853	20,789	1,175	Continued Demand for services is resulting in an over budget forecast , particularly with the needs of young people transitioning into adult services.	Continued scrutiny of packages of care, working with BSW ICB Health colleagues, to ensure the appropriate reflection of health contributions.
P20	Adult Services	1093	Physical Disability, Hearing & Vision	3,957	1,602	3,607	(350)	Forecast continues to be under budget, however there are known transitions of young people to adult services which remain under scrutiny and review as to the need for longer term on going services.	Not applicable
P20	Adult Services	1094	Public Health	0	(3,740)	0	0	No variance reported.	Not applicable
P20	Adult Services	1110	Better Care Fund	(7,999)	(7,153)	(7,999)	0	No variance reported.	Not applicable
P20	Adult Services	1113	CCG B&NES CHC and FNC Payments	0	614	0	0	No variance reported.	Not applicable
P20	Adult Services	1114	Community Equipment	253	346	253	0	Demand pressures are being met from funding earmarked to support hospital discharge and maintaining independence within the Better Care Fund (BCF).	Not applicable
P20	Adult Services	1123	Safeguarding Adults	(1,992)	(2,263)	(2,004)	(12)	One off savings linked to staff turnover	Not applicable
P20	Adult Services	1124	Community Resource Centres & Extra Care Income	8,792	4,072	8,398	(394)	Fee income has risen as a result of improved occupancy , in particular, the improved occupancy at Cleeve Court Community Resource Centre achieved through a phased approach over the last 6 months has contributed to this. Agency use has risen in first half of the year across the services, but actions have been taken to bring this down. The service has also reviewed and increased our fee rates in line with local providers which has supported increase in fee income position and forecast.	Not applicable
P20	Adult Services	1141	Social Care	9,703	4,568	9,394	(310)	Vacancy savings in lieu of a staffing restructure which comes into effect from 1.10.25. Agency staff have been used on an interim basis to cover some of the posts.	Not applicable
P20	Adult Services	1146	Provider Services	3,880	1,954	3,628	(253)	Salary savings due to staff turnover.	Not applicable
P20 Adult Services Total				64,077	24,423	65,068	991		

Appendix 1 - Revenue Monitoring Commentary

Portfolio Number and Description		Cashlimit Number and Description		Current Budget £000	Actuals to date 31/09/2025	Forecast £000	Outturn Variance Over / (Under) £000	Forecast Outturn Variance Analysis	Outturn Recovery Plan
Detailed Analysis of Budgets for Children's Services									
P21	Children's Services	1076	Children, Young People & Families	22,209	14,732	27,936	5,726	The main driver of pressure is Residential placements overspend at £4.1m. Additional placements that have been required in order to safeguard young people in conjunction with the increasing costs of these placements due to the increasing complexity of need that young people are presenting with, and the continued lack of sufficiency in the placement sector. The next largest pressure is salary at £1m which is due to agency staffing usage to both cover vacancies that are difficult to recruit to and to respond to the demand within the service. The remainder of the pressure is due to increased spend to support our families with disabled children in their home. This area has a pressure of £0.6m. This position includes full delivery of the budgeted £2.3m savings targets for 25/26.	In addition to the established review panels for new and existing placements and packages of care, a detailed review of all placements and packages of care is near completion, allowing for detailed service actions plans and responsive financial modelling. Agency usage reduction will be targeted where possible with urgency. A service redesign is underway to align with the Government's Families First initiative and is part of transformation activity overseen by the Children's Transformation Board. Other workstreams target placement sufficiency and market structure. Transformational outcomes will be delivered over the medium term.
P21	Children's Services	1077	Inclusion & Prevention	3,296	1,580	3,215	(80)	Under budget position due to one-off staffing savings, primarily within the Children Centres service.	Not applicable
P21	Children's Services	1078	Education Transformation	5,628	127	5,944	316	£0.15m pressure from Teacher Pension costs. £0.1m pressure due to historical income pressures. Balance of overspend due to staffing pressures as a result of agency use in the Education Psychology Team due to service demands. This pressure was £0.17m but has been largely mitigated by holding vacancies elsewhere.	Plan to hold vacancies where possible until the new financial year, and stop any discretionary spend that is possible.
P21	Children's Services	1079	Schools Budgets	(1,506)	1,005	(1,506)	0	Although no variance reported there is an underlying overspend of the Dedicated School Grant (DSG) this year forecast of circa £12m. This is £0.28m higher than the planned overspend position held within the Safety Valve plan. The Safety Valve plan seeks to address the built-up deficit of overspend of the DSG and bring spend in line with the grant allocation by the end of the Safety Valve term in 2030-31.	The historical deficit and in year overspends are being addressed via the Safety Valve project in conjunction with the Department for Education (DfE) over a 6 year period.
P21	Children's Services	1116	Integrated Commissioning - CYP	1,580	349	1,600	20	Over budget position is as a result of spend on Children's and Young People's equipment.	This spend is primarily contracted, however any opportunity for spend reduction in non contracted areas will be pursued.
P21	Children's Services	1117	Safeguarding - CYP	102	(98)	102	0	No variance reported.	Not applicable
P21	Children's Services	1142	Home to School Transport	11,435	4,297	11,455	20	As expected the service are seeing significant increases in cost relating to both demand and market price which is creating a financial pressure in delivering the statutory home to school transport service. However, the savings implemented by the service have reduced this position significantly. The forecast is based on quarter 1 data but modelled on the increase in demand that the service are currently seeing.	Any opportunities for vacancy management or implementing further route savings will be actioned where possible.
P21 Children's Services Total				42,744	21,992	48,747	6,002		
Detailed Analysis of Budgets for Communications and Community									
P36	Communications and Community	1089	Community Safety	402	361	390	(12)	No material variance reported	Not applicable
P36	Communications and Community	1044	Communications and Marketing	316	148	315	(1)	No material variance reported	Not applicable
P36	Communications and Community	1115	Registrars Service	(73)	(275)	(73)	(0)	No material variance reported	Not applicable
P36	Communications and Community	1119	Emergency Planning	758	344	732	(26)	An underspend on contract expenditure due to being in the early stages of the CCTV maintenance contract are more than offsetting pressures on staffing due to sickness backfill requirements.	Not applicable
P36	Communications and Community	1121	Events and Active Lifestyles	453	(414)	460	7	No material variance reported	Not applicable
P36	Communications and Community	1122	Customer Services (Including Libraries)	3,113	1,479	3,333	220	A 2024/25 savings target around reducing customer related costs across the organisation is still unachieved. Staffing and materials pressures are also contributing to the projected overspend.	Investment in digital solutions across customer interactions and postage costs will bring down the costs of running the service in the medium term.
P36	Communications and Community	1139	Public Protection	1,406	876	1,619	213	Pressures on licensing income is the main contributor to the adverse forecast variance. The service has also seen a reduction in pest control income, a staffing pressure and increased water monitoring costs.	Limited scope to find savings within the service to offset income shortfall. Expenditure being closely monitored and any savings opportunities will be realised.
P36	Communications and Community	1144	Park and Ride	(546)	1,907	(546)	0	No variance reported.	Not applicable
P36	Communications and Community	1148	Bereavement Services	(629)	(186)	(504)	125	A small staffing pressure within the service. Bereavement services are also seeing a pressure on cremation income at Haycombe Crematorium.	Any opportunities for vacancy management or stopping discretionary spend will be actioned where possible.
P34 Communications and Community Total				5,200	4,240	5,728	527		

Appendix 1 - Revenue Monitoring Commentary

Portfolio Number and Description		Cashlimit Number and Description		Current Budget £000	Actuals to date 31/09/2025	Forecast £000	Outturn Variance Over / (Under) £000	Forecast Outturn Variance Analysis	Outturn Recovery Plan
Detailed Analysis of Budgets for Sustainable Transport Strategy									
P37	Sustainable Transport Strategy	1103	Transport & Parking Services - Parking	(9,150)	(4,786)	(9,656)	(506)	Parking income is continuing to remain above budgeted levels, but we are seeing some pressures on permit income. The overall position has been reduced by £210k due repayment of borrowing for a resident parking zone (RPZ) implementation.	Not applicable
P37	Sustainable Transport Strategy	1129	Clean Air Zone	0	(735)	0	0	No variance reported.	Not applicable
P37	Sustainable Transport Strategy	1135	Transport Strategy	419	2,329	552	133	A shortfall in staff time recharged to projects has resulted in this forecast adverse position.	Opportunities are being explored for recharges to new projects along with a review of future spend to help mitigate the adverse position.
P05 Sustainable Transport Strategy Total				(8,732)	(3,192)	(9,104)	(372)		
Detailed Analysis of Budgets for Sustainable Transport Delivery									
P38	Sustainable Transport Delivery	1133	Network & Traffic Management	1,005	166	829	(176)	Staffing underspends and income generation over and above budget across the service is generating the favourable variance.	Not applicable
P38	Sustainable Transport Delivery	1134	Highway Maintenance	7,157	2,336	7,186	29	Pressure on gully emptying due to an increase in costs since the introduction of the third tanker for Clean & Green initiatives. Pressures on the staffing due to recruitment issues in the structures team and team manager post. This overspend is reduced due to a reduction in our annual electricity price for street lighting.	Any opportunities for vacancy management or stopping discretionary spend will be actioned where possible.
P05 Sustainable Transport Delivery Total				8,162	2,501	8,016	(147)		
Detailed Analysis of Budgets for Built Environment and Sustainable Development									
P35	Built Environment and Sustainable Development	1029	Housing	2,378	(586)	2,357	(21)	Domestic abuse service expenditure has been maintained within the grant allocation and therefore hasn't relied on budgeted contingency, whilst there are small staffing underspends across the service, which combined are more than mitigating a shortfall in income on Homesearch implementation fees.	Not applicable
P35	Built Environment and Sustainable Development	1106	Development Management	1,531	242	1,247	(285)	Planning income over and above budgeted levels, combined with staffing underspends are generating the favourable variance.	Not applicable
P35	Built Environment and Sustainable Development	1138	Building Control	84	(73)	61	(23)	A combination of increased income staffing underspends has generated a favourable variance.	Not applicable
P35 Built Environment and Sustainable Development Total				3,993	(417)	3,664	(329)		
Council Total				152,101	73,797	156,012	3,911		
Use of Job Evaluation and Pay Structure Reserve				0	0	(1,488)	(1,488)	Recommended use of reserve to mitigate costs of implementing new organisational pay and grading structure.	Not applicable
Revised Council Total				152,101	73,797	154,524	2,423		

This page is intentionally left blank

FINANCE BUDGET MONITORING QUARTERLY DASHBOARD - April to September 2025

CAPITAL APPENDIX 2 - KEY SCHEME VARIANCE ANALYSIS

		Sum of 25/26 Forecast £'000	Sum of 25/26 Total Current Budget £'000	Sum of 25/26 Variance £'000	Re-phasing to Future Years £'000
Children's Services					
Basic Needs - School Improvement / Expansion	<p>Programme Highlights:</p> <p>St Keyna Primary - An expansion by one form entry to enable a 420 place school, with a new 6 classroom block built to Passivhaus standard: Delay to completion is due to the building control sign off for the cavity walls and fire stopping. Planned completion is December 2025.</p> <p>Oldfield School Technical Block - The project is complete and occupied from June 2025.</p> <p>Keynsham East towards provision of Two Rivers playing field - This will be delivered across 2025/26 and 2026/27.</p> <p>A feasibility budget will be rephased into 2026/27 to fund future studies.</p>	3,196	3,246	50	50
Schools Capital Maintenance Schemes	<p>Schools Condition Grant provides for a programme of repair and maintenance works to maintained schools. The programme of works identified to be carried out in 2025/26 include : On-going programme of repairs at Newbridge Primary: 1) Re-wiring and replacement LED lighting – complete; 2) On-going assessment and repair to a boundary wall; 3) Removal of old music block and re-provide new external learning space 4) repairs/replacement to windows and concrete window surrounds 5) roof repairs 6) external doors replacement – rephase £20k budget to 2026/27. Twerton Infants 1) LED lighting upgrade – complete with a few final elements to be finalised in October half term. 2) Roof covering replacements including strengthening – contractor appointed, programme to be advised. At St Keyna Primary 1) LED lighting upgrades to be carried out on completion of the Expansion project – rephase £100k budget to 2026/27.</p> <p>Paulton Juniors – works to a retaining wall in the playground.</p> <p>Rephasing includes Radon works will continue into 2026/27 £36k, contingency £50k, minor works £226k and Emergency Works £147k.</p>	1,422	2,002	580	580
SEND (Special Education Needs & Disability) Capital Programme	<p>Projects to provide Resource Bases and SEND adaptations at schools and colleges across BANES are progressing well. Projects in delivery are:</p> <p>1) Autism Spectrum Disorder (ASD) 20 place Resource Base (RB) new build at Ralph Allen, completed August 2025 for September 2025 occupation.</p> <p>2) ASD 20 place RB remodelling at St Mark's - project completed to budget June 2025, ready for September 2025 occupation.</p> <p>3) Abbot Alphege separation works, adaptations and remodelling for Alternative Provision (AP) relocation from the Culverhay site. The contractor started on site June 2025. As the school building is returning to the Council following the closure of Abbot Alphege Primary, new leases are being drawn up for two Multi Academy Trusts (MATs - AP on the ground floor and HERs will continue to occupy the first floor) to occupy the building. Due to complete for October 2025 half term occupation. Currently on time and within budget.</p> <p>4) Social, Emotional and Mental Health (SEMH), 10 place RB new build standalone building at Mulberry Park Primary. Planning submitted with a target date for determination October 2025 and the contractor tender specification will be published in Quarter 3. Completing for September 2026 occupation. £54k to be rephased into 2026/27.</p>	3,210	3,262	52	52
Small Residential Unit - New Residential & Day School - Charlton House	<p>Due to Ofsted registration requirements the project was paused while further research and development was carried to determine the number of bedrooms that could be provided for the children's home; now confirmed that the project will provide two separate homes, each for 4 children whilst the SEND school remains as at 30 places. The project re-started September 2025 working towards stage 2 for Gateway sign off. Due to the delays, £2,649k budget to be rephased into 2026/27 and £1,351k 2027/28.</p>	668	4,668	4,000	4,000

FINANCE BUDGET MONITORING QUARTERLY DASHBOARD - April to September 2025

CAPITAL APPENDIX 2 - KEY SCHEME VARIANCE ANALYSIS

		Sum of 25/26 Forecast £'000	Sum of 25/26 Total Current Budget £'000	Sum of 25/26 Variance £'000	Re-phasing to Future Years £'000
Economic and Cultural Sustainable Development					
Bath Quays North	Works are progressing with design team appointment being finalised to secure amendments to the existing planning consent. This will result in full utilisation of 2025/26 Budget. Analysis of delivery options against the planning objectives is in progress to develop fully worked up scheme.	1,358	1,358	-	-
Corporate Estate Planned Maintenance	Due to long-term staffing constraints, the focus has been reactive, essential maintenance (as well as elsewhere commercial estate work to maintain income-generating. At the time of writing orders are placed for £1,086k and also we are out to tender for £724k. A completed works snapshot-Care Home repairs to a retaining wall and new hydraulic lift controls, works to various closed burial grounds, resurfacing and non-highway bridge remedials and new LED lighting at the Civic Centre.	3,111	5,611	2,500	2,500
Somer Valley Enterprise Zone - Infrastructure	Substantial consultancy/professional advice is in progress along with necessary surveys are underway. Land assembly is expected at end of in 2025/26 into 2026/27, A further WEMCA funding bid to deliver enabling works with start anticipated in June 2027, with an 18-month timescale.	2,500	8,897	6,397	6,397
Midsomer Norton High Street Renewal Programme	A Town Centre Masterplan is at an advanced stage which together with the Regeneration Action Plan for the town will confirm the scope of the next stage of project delivery utilising CIL and s106 funding, including reallocation from Parks. Underspend to budget will be carried forward to 2026/27.	200	257	57	57
Bath City Centre Renewal Programme	This programme contains a series of projects and installations in Bath city centre to improve the accessibility of the public realm. This includes works to install electricity points for markets and street traders at Milsom Street, small scale public realm works in the Milsom Quarter and new street furniture in Kingsmead Square.	1,128	1,128	-	-
Milsom Quarter Masterplan Delivery	Public Realm improvements progressing to full design with WEMCA business Case due to be submitted in November 2025. Broad St Yards scheme outline design completed and meetings underway to find a Joint venture partner before progressing further Walcot Gateway due diligence completed.	613	613	-	-
Radstock Regeneration	Improvements to create a community hub and event space in Trinty Church has led to funding awarded to Radstock Town Council and works have started on site . Additional budget from grant award pending.	194	194	-	-
Fashion Museum Renovation	Development continues on design and broader project work to inform the investment in and conversion of the grade 2 listed, Old Post Office Building in Bath to provide a future Fashion Museum as centrepiece to transform the Milsom Quarter area of Bath into a fashion destination. It is a strong fundraising proposition, and it should be possible to raise funds to support this project, through a mix of West of England and National Heritage Lottery grant funders, individual philanthropy and corporate sponsorship.	1,768	1,923	155	155
High Street Recovery	The project is redeveloping Council owned vacant units in Keynsham Temple Street/Riverside to bring them back into productive use and employment. Contractors appointed to start on site in November and on track for completion by March 2026.	1,126	1,126	(0)	(0)
Corporate Estate Decarbonisation Programme	Work is in progress to deliver solar schemes and improve data systems and carry out feasibility only Hydro works.	250	250	-	-
Guildhall Roof Refurbishment	Major £4m refurbishment now approved to proceed with completion of design and specification in Q3, along with working towards listed building consents.	190	190	-	-

FINANCE BUDGET MONITORING QUARTERLY DASHBOARD - April to September 2025

CAPITAL APPENDIX 2 - KEY SCHEME VARIANCE ANALYSIS

		Sum of 25/26 Forecast £'000	Sum of 25/26 Total Current Budget £'000	Sum of 25/26 Variance £'000	Re-phasing to Future Years £'000
Resources					
Commercial Estate Refurbishment Programme	A programme is underway to repair and improve vacated commercial properties for new lettings. Resource challenges impacted progress in Q1 and Q2, but additional specialist support is expected to enhance delivery in the second half of the year.	2,148	5,948	3,800	3,800
Property Company Investment - Council (Loan): Developments	The Aequus loan requirements arises from business cases from homes for rent. The variance reflects updated forecast of loans aligned to the business plan.	1,350	3,816	2,466	2,466
Orange Grove	Project paused whilst asset repair options are being re-evaluated .	113	919	806	806
Pixash Site Redevelopment	Main completed and we are delivering final works in quarter 3, including snagging, a lockout system, an upgraded fire wall, new recycling optical sorting line and light bar modifications. Overage and retention are not yet paid and we expecting to release contingency £192k.	140	332	192	192
Waste Infrastructure Modernisation	The project is to provide a Recycling Centre (RC) at Locksbrook Road (South) and to co-locate Cleansing Services with the Transport Depot in Locksbrook Road (North). A contractor is now appointed with planned works for Unit 1 Locksbrook North to complete by end of March 2026, to be followed by Unit 2 Locksbrook to complete by August 2026. The Recycling Centre (Locksbrook South) starts February 2026 to be delivered by September 2026. We are ensuring adherence to planning conditions and are undertaking flood risk assessment, asbestos and roof surveys. We are currently on schedule, with slippage representing refinement of budgets in light of contractor appointment and an updated schedule of works.	3,646	6,048	2,402	2,402
Commercial Asset Re-Investment	Remedial works at the former Jolly's building are progressing, with the contractor on-site. The programme is on track and the rephasing represents refinement to the programme . The team is working to minimise further delay risks. The main contractor has commenced on site. Detailed opening up works have progressed during the summer along with extensive window repairs and redecoration works. Scaffold access, including back propping is now in place permitting large areas of re-roofing works.	5,327	6,327	1,000	1,000
Commercial Estate Fire Safety Works	Works completed to date have indicated a greater complexity than envisaged which will extend the timescales into future years .We are currently assessing the resource impacts of this to inform future years budgets.	1,000	2,452	1,452	1,452

FINANCE BUDGET MONITORING QUARTERLY DASHBOARD - April to September 2025

CAPITAL APPENDIX 2 - KEY SCHEME VARIANCE ANALYSIS

		Sum of 25/26 Forecast £'000	Sum of 25/26 Total Current Budget £'000	Sum of 25/26 Variance £'000	Re-phasing to Future Years £'000
Sustainable BANES					
Bath River Line	Project to delivery Bath River Line improvements through Bath. Phase 1A is in construction, Phase 1B is out to tender and due to start on site in January 2026. The Wayfinding scheme is due for completion in November 2025. Phase 1C requires a funding uplift which will be arranged via a Change Request, which will be submitted Q3 2025/26. Feasibility and Development for Phase 2 is to be progressed in 2026/27 and move to delivery in 2027/28.	1,721	1,721	-	-
Parks Improvements Programme	Projects highlights : 1) Weston: Picnic Benches, Social Seating, path and entrance works, we have commissioned access audit and designs. We will consult with Active Weston then look to deliver by Q4 2025/26 2) Hedgemead: There is no resource to deliver in 2025/26 so rephasing in full to 2026/27 3) Linear Park: Completed planned works, with the residual budget funded from by 3rd party contribution proposed to deliver a shelter 4) Foxhill: We are ready to start works on Hawthorne's, Grove & Backstones & continue feasibility at Springfields. Works will continue 2026/27 and we will rephase £250k 5) Manor Rd: We have commissioned a bridge to cover a ditch at one of the entrances. Further works are planned for when the ground is dryer/firmer along with vegetation clearance. We will rephase £40k 6) Abbots Wood: Ground investigation and design works are complete. RIBA stage 4 is nearly complete. We are currently requesting permission to proceed with planning and RIBA stage 5 for delivery in 2026/27. We will rephase £150k 7) Teviot Rd: We have completed the Grant payment to Keynsham Town Council to carry out works. 8) Allotments: We are delivering new allotments at Hawthorne in 2026/27 with further site options being investigated. We will rephase the full budget 9) Paulton Parish Council: We have completed the Grant payment to Parish Council to carry out works.	415	1,022	607	607
Sustainable Transport Delivery					
CAZ - Clean Air Zone	The CAZ-Public Realm residual budget is being spent on the Queen Square Wayfinding project, with £332k of works being rephased into 2026/27.	495	827	332	332
Highways Maintenance Block	All workstreams across Highway Maintenance are progressing well. Carriageway Resurfacing and Surface Dressing works are mainly completed. Phase 1 and 2 of the Spray Injection Patching Programme are completed. We also carried out emergency repairs to resurface a section of the A37 near Pensford following an extensive fuel oil spill.	10,359	10,359	-	-
CRSTS Liveable Neighbourhoods	<p>A full business case fully identifying proposed interventions for 11 Liveable Neighbourhood (LN) areas was approved by WEMCA in September 2024, releasing the remaining CRSTS grant to deliver these schemes before 31 March 2027.</p> <p>Under the programme, 5 trials of through traffic restrictions have been conducted using Experimental Traffic Regulation Orders (ETROs). The schemes in Southlands, Weston, Queen Charlton Lane, Whitchurch and Church Street, Widcombe were made permanent in 2024. More recently, the trial in Sydney Road was made permanent following public consultation in October 2025. A decision on the remaining trial in Lower Lansdown will be made later in Autumn 2025.</p> <p>8 LN schemes are now in the delivery phase, the first construction planned for December 2025. Two schemes have been paused at this time (Pulteney Estates Area and London Road and Snow Hill) and the scheme in Lower Lansdown will await the outcome of the decision on the trial schemes before proceeding. A change request is being drafted to confirm these changes with Mayoral Combined Authority (MCA).</p>	3,306	3,306	-	-

FINANCE BUDGET MONITORING QUARTERLY DASHBOARD - April to September 2025

CAPITAL APPENDIX 2 - KEY SCHEME VARIANCE ANALYSIS

		Sum of 25/26 Forecast £'000	Sum of 25/26 Total Current Budget £'000	Sum of 25/26 Variance £'000	Re-phasing to Future Years £'000
CRSTS Manvers Street Remediation	This is an WECA funded budget held for Manvers Street Remediation. The preliminary design is now complete following surveys and a decision has been made to fully refurbish the Manvers Street section of road. A tender was released over the summer of 2025, the outcome of which is expected shortly. Delivery is expected to commence in 2026.	4,260	4,260	-	-
CRSTS Somer Valley Links (SVL)	This project aims to improve travel between Midsomer Norton, Radstock, Westfield and Bath via the A367, the A37 and the A362 link road between them. The project seeks to provide better bus infrastructure and enable more walking and cycling through a variety of interventions such as quiet routes, travel hubs and segregated cycle tracks. Following the public consultation which was undertaken in Spring 2025, the project has now been split into 3 overall phases, each of which will be supported by an FBC. The first of these will be submitted to WECA in January26 with construction to begin in spring and complete by March27.	2,278	2,278	-	-
Local Active Travel Safety Programme (LATS)	All schemes are progressing as planned, with the exception of S106 Public Right of Way schemes. Most schemes are at detailed design stage or consultations are underway. Completed schemes are: Crossing at Monkedale Road/Sandpits Park, Widcombe Hill, Bathampton plus Church Hill/North Road Junction Safety Improvements.	3,120	3,382	263	263
CRSTS - Scholars Way Delivery	The scheme is funded through £2m CAZ funding, £3m CRSTS funding, awarded in Summer 2025, along with £370k LATS funding for the Oakley & Copseland crossings. Delivery and construction have now commenced. Construction is complete on the first 2 site locations, Ralph Allen School Crossing and St Martin's Garden Primary School, with works now ongoing on 3 next sites; Entry Hill, Bradford Road, Midford Road. Scholars Way West scope is due to be completed by January 2026.	2,205	2,205	-	
School Streets	School Streets aim to improve the environment directly outside schools at the start and end of the school day by restricting access for most of the motorised vehicle traffic. The selected schools are St Phillips Primary School, Widcombe Infant and Primary Schools and St Stephen Primary School. Utilising funding of £250k CAZ reinvestment reserve, one-off revenue funding of £87k as well as the potential to attract future funding opportunities. Mainly revenue works to date developing proposals with schools and assessing feasibility, with planned delivery across the financial years in Easter Holidays 2026.	43	250	207	207
Built Environment, Housing and Sustainable Development					
BWR Phase 2	Homes England funded work continues at pace. Remediation element the largest element of the budget and is under constant review and Berkeley are required to deliver a fully remediated site by March 26. HE Funding availability to March 26, Highways works and works to boundary wall are at risk of falling outside the programme and funds will need to be available to complete works. Budget outside of Homes England funding is forecast to underspend by £1m which will then be carried forward to fund BWR planning application and associated costs for the site in 26 27. Also preliminary works continue in relation to Midland Road and consideration will be needed re 26 27 funding requirements.	17,560	18,560	1,000	1,000
Disabled Facilities Grant	Forecasting to broadly to spend the 2025-26 government grant allocation. Carry forward of previously unused grant is also reflected in this budget and whilst we are aiming to increase staffing capacity to deploy reserve to reduce waiting list demand, it is unlikely to have significant impact this financial year.	1,784	2,284	500	500
Englishcombe Lane Supported Housing	Scheme to provide 16 homes for neurodivergent clients with Learning Difficulties and Autism. Business Case was for £10.9m approved by Single Member Decision E3633 on 11th September, with budget approval pending imminent award for £2.2m Home England Grant.	371	371	-	-

CAPITAL APPENDIX 2 - KEY SCHEME VARIANCE ANALYSIS					
		Sum of 25/26 Forecast £'000	Sum of 25/26 Total Current Budget £'000	Sum of 25/26 Variance £'000	Re-phasing to Future Years £'000
Local Authority Housing Fund (Ukrainian/Afghan homes)	The Council is on track to meet the required number of properties for the Local Authority Housing Fund (LAHF) programme Round 3, with one remaining property to purchase. This MHCLG programme is due to complete by March 2027. There is potential underspend to return of grant to government (MHCLG).	620	1,181	561	
Social Rent Programme (Phase 1 of BANES Homes)	Works continues on site to deliver ten affordable, energy efficient, apartments in Dane's Lane, Keynsham. Feasibility work being undertaken for proposals at Redfield Road and land adjacent to Sainsbury's car park in Midsomer Norton.	2,654	4,661	2,007	2,007
Communications and Civic Services					
Bath City Centre Security	The final stage of all security works at Beau Street was completed September 2025 and the final account is expected to be within budget.	1,035	1,035	-	

2025/26 Revenue Virements for INFORMATION

Appendix 3 (i)

REF NO	REASON / EXPLANATION	CABINET PORTFOLIO	TRANSFER FROM	Income	Expenditure	CABINET MEMBER	TRANSFER TO	Income	Expenditure	DESCRIPTION	ONGOING EFFECTS
			CASHLIM	(£'s)	(£'s)		CASHLIM	(£'s)	(£'s)		

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 25#09	2024/25 Revenue Carry Forwards	Resources	Council Balances		205,586	Sustainable Bath & North East Somerset	Green Transformation		16,840	Carry forwards from 2024/25 underspends, as approved by July'25 Cabinet in Outturn report.	Budget virement is one off.
						Resources	Corporate Office		120,285		
						Children's Services	Inclusion & Prevention		57,066		
						Communications & Community	Community Safety		11,395		
INFO 25#10	Being Our Best Programme	Resources	Corporate Budgets incl. Capital, Audit & Bank Charges		3,650,936	Sustainable Bath & North East Somerset	Various		-1,254	Distribution of corporately held Pay & Grading Review Contingency Budget following the implementation of the Being Our Best Programme role changes.	Budget virement is ongoing.
						Resources	Various		430,766		
						Economic & Cultural Sustainable Development	Various		109,845		
						Adult Services	Various		1,544,731		
						Children's Services	Various		1,117,399		
						Communications & Community	Various		260,703		
						Sustainable Transport Strategy	Various		95,590		
						Sustainable Transport Delivery	Various		33,293		
						Built Environment, Housing & Sustainable Development	Various		59,863		

<u>REF NO</u>	<u>REASON / EXPLANATION</u>	<u>CABINET PORTFOLIO</u>	<u>TRANSFER FROM</u>	<u>Income</u>	<u>Expenditure</u>	<u>CABINET MEMBER</u>	<u>TRANSFER TO</u>	<u>Income</u>	<u>Expenditure</u>	<u>DESCRIPTION</u>	<u>ONGOING EFFECTS</u>
			<u>CASHLIM</u>	<u>(£'s)</u>	<u>(£'s)</u>		<u>CASHLIM</u>	<u>(£'s)</u>	<u>(£'s)</u>		
INFO 25#11	2025/26 Pay Award	Resources	Corporate Budgets incl. Capital, Audit & Bank Charges		3,796,485	Sustainable Bath & North East Somerset	Various		106,076	Distribution of corporately held budget for 2025/26 Pay Award following national agreement.	Budget virement is ongoing.
						Resources	Various		1,346,481		
						Economic & Cultural Sustainable Development	Various		104,490		
						Adult Services	Various		867,583		
						Children's Services	Various		748,362		
						Communications & Community	Various		253,864		
						Sustainable Transport Strategy	Various		108,674		
						Sustainable Transport Delivery	Various		99,997		
						Built Environment, Housing & Sustainable Development	Various		160,958		
INFO 25#12	Designated Social Care Officer	Adult Services	Adult Services		39,970	Children's Services	Education Transformation	39,970		Realignment of budgets following the removal of internal recharge to Adult Services for contribution to SEN Designated Social Care Officer.	Budget virement is ongoing.
INFO 25#13	Contracts & Commissioning	Children's Services	Integrated Commissioning - CYP		21,150	Adult Services	Adult Services		21,150	Transfer of responsibility for the management of the Contract & Commissioning Team's procurement budget.	Budget virement is ongoing.

<u>REF NO</u>	<u>REASON / EXPLANATION</u>	<u>CABINET PORTFOLIO</u>	<u>TRANSFER FROM</u>	<u>Income</u>	<u>Expenditure</u>	<u>CABINET MEMBER</u>	<u>TRANSFER TO</u>	<u>Income</u>	<u>Expenditure</u>	<u>DESCRIPTION</u>	<u>ONGOING EFFECTS</u>
			<u>CASHLIM</u>	<u>(£'s)</u>	<u>(£'s)</u>		<u>CASHLIM</u>	<u>(£'s)</u>	<u>(£'s)</u>		
INFO 25#14	Sustainable Transport	Sustainable Transport Strategy	Transport Strategy		277,829	Sustainable Transport Delivery	Network & Traffic Management		131,598	Transfer of management responsibilities for the Transport Policy & Development, Sustainable Transport & Bikeability teams as part of organisational redesign.	Budget virement is ongoing.
						Built Environment, Housing & Sustainable Development	Development Management		146,231		
INFO 25#15	Visit Bath	Economic & Cultural Sustainable Development	Visit Bath		977	Economic & Cultural Sustainable Development	Heritage Servies		977	Transfer of residual budget for Visit Bath into Heritage Services.	Budget virement is ongoing.
INFO 25#16	Being Our Best Programme Savings	Sustainable Bath & North East Somerset	Parks & Open Spaces		40,000	Resources	Human Resources & Organisational Development		1,050,518	Distribution of savings target for Being Our Best Programme.	Budget virement is ongoing.
			Green Transformation		30,000						
		Resources	Council Solicitor & Democratic Services		45,000						
			Risk & Assurance Services		50,000						
			Business Change		63,000						
		Economic & Cultural Sustainable Development	Capital Programme & Project Delivery		260,000						
		Adult Services	Adult Services		262,518						
		Built Environment, Housing & Sustainable Development	Development Control		200,000						
			Housing		100,000						
INFO 25#17	Client Finance Support	Children's Services	Children, Young People & Families		126,820	Resources	Finance	126,820		Realignment of budgets following the removal of the internal recharge to Children's Services for Client Finance Officer posts.	Budget virement is ongoing.
INFO 25#18	IT Centralisation	Adult Services	Adult Services		2,908	Resources	Information Technology		2,908	Transfer of residual service IT support budget to centralised team.	Budget virement is ongoing.

<u>REF NO</u>	<u>REASON / EXPLANATION</u>	<u>CABINET PORTFOLIO</u>	<u>TRANSFER FROM</u>	<u>Income</u>	<u>Expenditure</u>	<u>CABINET MEMBER</u>	<u>TRANSFER TO</u>	<u>Income</u>	<u>Expenditure</u>	<u>DESCRIPTION</u>	<u>ONGOING EFFECTS</u>
			<u>CASHLIM</u>	<u>(£'s)</u>	<u>(£'s)</u>		<u>CASHLIM</u>	<u>(£'s)</u>	<u>(£'s)</u>		
INFO 25#19	Equalities and Asylum Services	Resources	Corporate Office		171,941	Communications & Community	Community Safety		171,941	Transfer of management responsibilities for the Equalities and Asylum Services as part of organisational redesign	Budget virement is ongoing.
INFO 25#20	Public Conveniences	Resources	Waste & Fleet Services		276,543	Economic & Cultural Sustainable Development	Corporate Estate Including R&M		276,543	Transfer of management responsibility from Waste Services to Corporate Estate as part of the transition to a Corporate Landlord Model.	Budget virement is ongoing.
INFO 25#21	Waste Services Redesign	Resources	Waste & Fleet Services		311,867	Resources	Human Resources & Organisational Development		311,867	Contribution to savings target following service redesign in Waste Services.	Budget virement is ongoing.
OVERALL TOTALS				0	9,933,530			166,790	9,766,740		
					9,933,530				9,933,530		

Portfolio Cash Limits 2025/26 - Revenue Budget

Appendix 3(ii)

CABINET PORTFOLIO	Service	Jul'25 Revised Cash Limits	Technical Adjustments, below BMS limits or already agreed - shown for information	Total Virements for Approval	Nov'25 Revised Cash Limits
		£'000	£'000	£'000	£'000
Leader	Housing Delivery Vehicle	(1,000)			(1,000)
	PORTFOLIO SUB TOTAL	(1,000)			(1,000)
Sustainable Bath & North East Somerset	Parks & Open Spaces	2,474	36		2,510
	Environmental Monitoring (Air Pollution)	213	9		222
	Green Transformation	694	7		701
	PORTFOLIO SUB TOTAL	3,381	52		3,433
Resources	Waste & Fleet Services	18,991	(82)		18,909
	Council Solicitor & Democratic Services	3,292	154		3,446
	Finance	3,024	410		3,434
	Revenues & Benefits	2,200	141		2,340
	Risk & Assurance Services	1,672	82		1,754
	Procurement & Commissioning	348	58		406
	Human Resources & Organisational Development	(948)	1,488		540
	Business Change	803	(27)		775
	Corporate Office	1,775	(32)		1,744
	Information Technology	8,268	294		8,562
	Commercial Estate	(12,168)	57		(12,111)
	Hsg / Council Tax Benefits Subsidy	405			405
	Capital Financing / Interest	5,476			5,476
	Unfunded Pensions	1,388			1,388
	Corporate Budgets incl. Capital, Audit & Bank Charges	8,898	(7,519)		1,379
	New Homes Bonus Grant	(913)			(913)
	Magistrates	12			12
	Coroners	575			575
	Environment Agency	268			268
	West of England Combined Authority Levy	5,309			5,309
	PORTFOLIO SUB TOTAL	48,674	(4,976)		43,698
Economic & Cultural Sustainable Development	Corporate Estate Including R&M	4,501	441		4,942
	Regeneration	(522)	14		(508)
	Business & Skills	383	32		415
	Capital Programme & Project Delivery		(260)		(260)
	Heritage Services	(14,193)	1		(14,192)
	World Heritage	124	4		128
	Visit Bath	1	(1)		
	PORTFOLIO SUB TOTAL	(9,705)	231		(9,475)
Adult Services	Adult Services	61,582	2,111		63,693
	Public Health				
	Adult Substance Misuse (Drug Action Team)	75	7		82
	Leisure	292	10		302
	PORTFOLIO SUB TOTAL	61,949	2,128		64,077
Children's Services	Children, Young People & Families	21,218	991		22,209
	Integrated Commissioning - CYP	1,601	(21)		1,580
	Safeguarding - CYP	99	3		102
	Inclusion & Prevention	2,969	327		3,296
	Education Transformation	5,211	417		5,628
	Home to School Transport	11,338	97		11,435
	Schools' Budget	(1,506)			(1,506)
	PORTFOLIO SUB TOTAL	40,929	1,815		42,744

CABINET PORTFOLIO	Service	Jul'25 Revised Cash Limits	Technical Adjustments, below BMS limits or already agreed - shown for information	Total Virements for Approval	Nov'25 Revised Cash Limits
		£'000	£'000	£'000	£'000
Communications & Community	Emergency Planning	738	20		758
	Events and Active Lifestyles	439	14		453
	Park and Ride	(546)			(546)
	Bereavement Services	(678)	50		(629)
	Customer Services (including Libraries)	2,885	228		3,113
	Public Protection	1,289	116		1,406
	Community Safety	195	207		402
	Registrars Service	(124)	51		(73)
	Communications & Marketing	303	12		316
	PORTFOLIO SUB TOTAL	4,503	698		5,200
Sustainable Transport Strategy	Transport Strategy	665	(246)		419
	Clean Air Zone				
	Transport & Parking Services - Parking	(9,323)	173		(9,150)
	PORTFOLIO SUB TOTAL	(8,658)	(74)		(8,732)
Sustainable Transport Delivery	Network & Traffic Management	812	193		1,005
	Highway Maintenance	7,086	72		7,157
	PORTFOLIO SUB TOTAL	7,897	265		8,162
Built Environment, Housing & Sustainable Development	Building Control	31	53		84
	Development Management	1,462	70		1,531
	Housing	2,433	(55)		2,378
	PORTFOLIO SUB TOTAL	3,926	67		3,993
	NET BUDGET	151,896	206		152,101

Sources of Funding

Council Tax	129,390			129,390
Retained Business Rates	22,905			22,905
Collection Fund Deficit (-) or Surplus (+)	6,925			6,925
Transfers (to) / from Reserves	(7,323)	206		(7,118)
TOTAL FUNDING	151,896	206		152,101

REF NO	REASON / EXPLANATION	TRANSFER / FUNDING FROM	Income (£'s)	Expenditure (£'s)	TRANSFER TO	Income (£'s)	Expenditure (£'s)	Notes
CAP2526#029	Neighbourhood Services Vehicles	SSB, CSB	6,789,968		Resources		6,789,968	Officer Delegated Decision by the Director of Place on 02/07/25 to fully approve £6.790m for the procurement of vehicles over two years.
CAP2526#030	Special Education Needs & Disability (SEND) Education Provision"	Govt grant	123,000		Children's Services		123,000	Officer Delegated Decision by the Director of Education and Safeguarding to re-profile Mulberry Park Resouce Base Budget.
CAP2526#031	Special Education Needs & Disability (SEND) Education Provision"	Govt grant	101,000		Children's Services		101,000	Officer Delegated Decision by the Director of Education and Safeguarding on 28/07/25 to expand the Margerat Coates Centre.
CAP2526#032	Englishcombe Lane Supported Housing	SSB	310,000		Built Environment, Housing & Sustainable Development		310,000	Officer Delegated Decision by the Director of Capital and Housing Delivery on 09/07/25 to extend development costs.
CAP2526#033	Renewable Energy Development Fund	SSB	64,528		Sustainable BANES		64,528	Officer Delegated Decision by Executive Director of Sustainable Communities on 19/06/25 to install solar panels on the Pump Room roof using Renewable Energy Development Fund SSB.
CAP2526#034	Renewable Energy Development Fund	SSB	109,802		Sustainable BANES		109,802	Officer Delegated Decision by Executive Director of Sustainable Communities on 19/06/25 to install solar panels on the Odd Down Sports Ground pavilion roof using the Renewable Energy Development Fund SSB.
CAP2526#035	Renewable Energy Development Fund	SSB	122,730		Sustainable BANES		122,730	Officer Delegated Decision by Executive Director of Sustainable Communities on 25/07/25 to install solar panels on the Carrswood Adult Day Care Centre roof using the Renewable Energy Development Fund SSB.
CAP2526#036	Corporate Estate Decarbonisation Programme	CSB	250,000		Economic and Cultural Sustainable Development		250,000	ODD by Director of Sustainable Communities on 25/07/25 to approve project set-up to the value of £250,000 of the Decarbonisation Programme.
CAP2526#037	Haycombe Cremator	CSB	398,000		Communications and Civic Services		398,000	Single Member Decision E3629 by Cabinet Member for Communications and Community on 23/07/25 to approve Cremator Replacement at Haycombe. Expenditure over 2 years 25/26-26/27.
CAP2526#038	Leisure - Commercialisation of Parks	CIL	51,000		Adult Services		51,000	Officer Delegated Decision by the Director of Public Health and Prevention on 14/08/25 to improve Lansdown Sports Pitches.
CAP2526#039	Keynsham High Street Renewal Programme	SSB, WECA grant	2,354,000		Economic and Cultural Sustainable Development		2,354,000	ODD by Director of Sustainable Communities on 18/08/25 to deliver the Keynsham Riverside Refurbishment.
CAP2526#040	Milsom Quarter Masterplan Delivery	WCA grant	-49,500		Economic and Cultural Sustainable Development		-49,500	Techncial Adjustment to re-alignment of WECA grant to other associated works.
CAP2526#041	Bath Area Forum Grants	Bath CIL	6,661		Leader		6,661	Single Member Decision by Leader E3611 on 09/07/25 - Bath Advisory Board Further award for Bath CIL to Percy Community Centre Floodlights Upgrade.
CAP2526#042	CRSTS Manvers Street Remediation	WCA grant	4,113,000		Sustainable Transport Delivery		4,113,000	Officer Delegated Decision by Director of Place Management on 30/06/25 for delivery of Manvers Street Remediation Works.
CAP2526#043	CRSTS Somer Valley Links (SVL)	WCA grant	1,800,000		Sustainable Transport Delivery		1,800,000	Officer Delegated Decision by the Director of Sustainable Communities on 03/07/25 to improve walking, wheeling and cycling infrastructure.
CAP2526#044	Bath River Line	CIL, CSB, WECA grant	179,184		Sustainable BANES		179,184	Officer Delegated Decision by the Director of Sustainable Communities on 27/08/25 for interventions at Comfortable Place, Norfolk Crescent, Green Park.
CAP2526#045	Heritage Infrastructure Development	SSB	53,000		Economic and Cultural Sustainable Development		53,000	Officer Delegated Decision by Executive Director of Sustainable Communities on 13/04/25 for Warehouse FitOut.
CAP2526#046	Heritage Infrastructure Development	SSB	62,500		Economic and Cultural Sustainable Development		62,500	Officer Delegated Decision by Executive Director of Sustainable Communities on 29/04/25 for Visitor Management System Replacement.
CAP2526#047	Estate Rationalisation	Capital Receipts, CSB	800,000		Economic and Cultural Sustainable Development		800,000	Single Member Decision E3650 by Cabinet Member for Economic and Cultural Sustainable Development on 01/10/25 - Development of Guildhall and Parkside to realise Lewis House Disposal.
CAP2526#048	Estate Rationalisation	CSB	-80,000		Economic and Cultural Sustainable Development		-80,000	Single Member Decision E3650 by Cabinet Member for Economic and Cultural Sustainable Development on 01/10/25 - Development of Guildhall and Parkside to realise Lewis House Disposal - return of Project Inception Fund.
CAP2526#049	Heritage Infrastructure Development	SSB	63,000		Economic and Cultural Sustainable Development		63,000	Officer Delegated Decision by Executive Director of Sustainable Communities on 15/07/25 to provide retail stock management and electronic point of sale system.

REF NO	REASON / EXPLANATION	TRANSFER / FUNDING FROM	Income (£'s)	Expenditure (£'s)	TRANSFER TO	Income (£'s)	Expenditure (£'s)	Notes
CAP2526#050	Guildhall Roof Refurbishment	CSB	190,000		Economic and Cultural Sustainable Development		190,000	Officer Delegated Decision by Director of Capital and Housing on 03/10/25 for essential maintenance over 3 years.
CAP2526#051	Local Active Travel Safety Programme (LATS)	WECA grant	205,000		Sustainable Transport Delivery		205,000	Officer Delegated Decision by the Director of Place Management on 22/7/25 to deliver a toucan crossing at Newbridge as part of the BBSC CRSTS capital scheme.
CAP2526#052	CRSTS Cycling and Walking Bath Quays Links	WECA grant	2,686,000		Sustainable Transport Delivery		2,686,000	Single Member Decision E3632 by Cabinet Member for Sustainable Transport Delivery dated 30/08/25. Approval of funding for Priority Infrastructure.
CAP2526#053	Highways Maintenance Block	3rd party contrib.	300,000		Sustainable Transport Delivery		300,000	Officer Delegated Decision by the Director of Place Management on 30/09/25 to make emergency repairs to the surface of the A37 road between Pensford and Chelwood.
CAP2526#054	School Streets project	3th party contrib.	250,000		Sustainable Transport Delivery		250,000	Single Member Decision E3588 by Cabinet Member Climate Emergency and Sustainable Travel on 31/03/25 - School Streets.
Total			21,252,873				21,252,873	
Check (hide)			21,252,873				21,252,873	

Capital Virements - Additions & Reductions Future Years

FY CAP2526#004	Special Education Needs & Disability (SEND) Education Provision"	Govt grant	-123,000		Children's Services		-123,000	Officer Delegated Decision by the Director of Education and Safeguarding to re-profile Mulberry Park Resouce Base Budget.
FY CAP2526#005	Haycombe Cremator	CSB	1,102,000		Communications and Civic Services		1,102,000	Single Member Decision E3629 by Cabinet Member for Communications and Community on 23/07/25 to approve Cremator Replacement at Haycombe. Expenditure over 2 years 25/26-26/27.
FY CAP2526#006	Estate Rationalisation	Capital Receipts	1,750,000		Economic and Cultural Sustainable Development		1,750,000	Single Member Decision E3650 by Cabinet Member for Economic and Cultural Sustainable Development on 01/10/25 - Development of Guildhall and Parkside to realise Lewis House Disposal.
FY CAP2526#007	Guildhall Roof Refurbishment	CSB	3,810,000		Economic and Cultural Sustainable Development		3,810,000	Officer Delegated Decision by Director of Capital and Housing on 03/10/25 for essential maintenance over 3 years.
FY CAP2526#008	CRSTS Cycling and Walking Bath Quays Links	s106, WECA grant	522,000		Sustainable Transport Delivery		522,000	Single Member Decision E3632 by Cabinet Member for Sustainable Transport Delivery dated 30/08/25. Approval of funding for Priority Infrastructure.
FY CAP2526#009	CRSTS Cycling and Walking Bath Quays Links	WECA grant	641,000		Sustainable Transport Delivery		641,000	Single Member Decision E3632 by Cabinet Member for Sustainable Transport Delivery dated 30/08/25. Approval of funding for Priority Infrastructure.
Total			7,702,000				7,702,000	
			7,702,000				7,702,000	

Capital Scheme	Cap Prog Number	Budget after July 2025 Cabinet	July - Sep virements	Budget at October 2025 Cabinet
Full Approval				
Resources				
Agresso System Development & Upgrade	Cap1415125	1	0	1
Capital Contingency	Cap1415131	3,824	0	3,824
Cleveland Pools Grant	Cap1718065	10	0	10
Commercial Asset Re-Investment	Cap2425002	6,327	0	6,327
Commercial Estate Fire Safety Works	CAP2526004	2,452	0	2,452
Commercial Estate Planned Maintenance Programme	Cap2425003	592	0	592
Commercial Estate Refurbishment Programme	Cap1920022	5,948	0	5,948
Customer Payments Security and Channel shift	Cap1920021	1	0	1
Flexible Use of Capital Receipts (Transformation)	Cap1819080	385	0	385
Healthcare Projects to Increase Clinical Capacity	CAP2425007	84	0	84
IT Asset Refresh	Cap1819061	81	0	81
Litter Bin Replacement Programme	Cap2425012	40	0	40
Neighbourhood Services Vehicles	Cap1718036	938	6,790	7,728
Orange Grove	CAP1920036	919	0	919
Pixash Site Redevelopment	CAP2122022	332	0	332
Preparing for the Future - New Technology	Cap2122020	406	0	406
Property Company Investment - Council (Loan): Developments	Cap1617027	3,816	0	3,816
Property Disposals (Disposals Programme (Minor))	Cap1415098	160	0	160
Waste Container Replacements	Cap1617032	40	0	40
Waste Depot Relocation	Cap1516011	158	0	158
Waste Infrastructure Modernisation	CAP2223017	6,048	0	6,048
Waste Welfare Facilities	Cap2021003	109	0	109
Subtotal Full Approval - Resources		32,671	6,790	39,461

Capital Scheme	Cap Prog Number	Budget after July 2025 Cabinet	July - Sep virements	Budget at October 2025 Cabinet
Economic and Cultural Sustainable Development				
Bath Central Riverside	CAP2223029	57	0	57
Bath City Centre Renewal Programme	Cap1920026	1,128	0	1,128
Bath Quays North	Cap1415114	1,358	0	1,358
Bath Quays South	Cap1415138	52	0	52
Carrswood Day Centre Roof	CAP2223004	-21	0	-21
Corporate Estate Decarbonisation Programme	CAP2526010	0	250	250
Corporate Estate Planned Maintenance	Cap1415097	5,611	0	5,611
Digital B&NES	Cap1415069	306	0	306
Equality Act Works	Cap1415104	40	0	40
Estate Rationalisation	cap2425014	82	720	802
Fashion Museum Renovation	Cap2425004	1,923	0	1,923
Grand Parade & Undercroft	Cap1415103	117	0	117
Guildhall Roof Refurbishment	CAP2526006	0	190	190
Heritage Collections Centre	CAP1920035	380	0	380
Heritage Infrastructure Development	CAP1415052	168	179	347
Heritage Services Retail System	CAP1415050	100	0	100
High Street Recovery	Cap2425010	1,126	0	1,126
Innovation Quay - Strategic Flooding Solution	Cap1415064	9	0	9
Keynsham High Street Renewal Programme	Cap1718011	-12	2,354	2,342
Keynsham Memorial Park Bridge	Cap2223003	10	0	10
Keynsham Regeneration & New Build	Cap1415094	105	0	105
Local Centres Renewal Programme	CAP2122010	4	0	4
Midsomer Norton High Street Renewal Programme	Cap1819050	257	0	257
Milsom Quarter Masterplan Delivery	CAP2223030	662	-50	613
Office Reconfiguration Costs	CAP2122005	3	0	3
Radstock Healthy Living Centre	Cap1718061	-56	0	-56
Radstock Regeneration	CAP2223034	194	0	194
Somer Valley Enterprise Zone - Infrastructure	Cap1718067	8,897	0	8,897
Victoria Art Galley Roof Refurbishment	cap2425017	35	0	35
York Street Vaults Phase 2	Cap1819059	24	0	24
Subtotal Full Approval - Economic and Cultural Sustainable Development		22,558	3,643	26,201
Communications and Civic Services				
Bath Christmas Market	Cap2122023	50	0	50
Bath City Centre Security	Cap1920027	1,035	0	1,035
CCTV Camera Replacement	Cap2223006	165	0	165
CIL – Library Hublets	CAP2223009	13	0	13
Emergency Response Equipment	CAP2324001	6	0	6
Haycombe Cremator	CAP2223001	0	398	398
Subtotal Full Approval - Communications and Civic Services		1,268	398	1,666
Leader				
Bath Neighbourhood CIL	Cap1718068	54	7	60
Subtotal Full Approval - Leader		54	7	60

Capital Scheme	Cap Prog Number	Budget after July 2025 Cabinet	July - Sep virements	Budget at October 2025 Cabinet
Sustainable Transport Strategy				
Active Travel Prescribing Project	CAP2223032	73	0	73
Car Park Security	Cap2223024	65	0	65
Office for Low Emission Vehicles (OLEV) Bid -GULW	Cap1617008	293	0	293
Parking Enforcement Hand Held Computer Terminal Replacement	Cap1415026	45	0	45
Parking Radio System Replacement	Cap1415024	30	0	30
Pay & Display Machines	Cap1617014	41	0	41
Subtotal Full Approval - Sustainable Transport Strategy		547	0	547
Built Environment, Housing and Sustainable Development				
Affordable Housing (Enabling)	Cap1415091	212	0	212
BWR Phase 2	Cap1920012	18,560	0	18,560
Disabled Facilities Grant	Cap1415089	2,284	0	2,284
Englishcombe Lane Supported Housing	CAP2223027	61	310	371
Housing Delivery Vehicle/ Schemes (Capital Disposals ADL)	Cap1516042	578	0	578
North Keynsham SDL - External Fees	Cap1819091	199	0	199
Local Authority Housing Fund (Ukrainian/Afghan homes)	CAP2223035	1,181	0	1,181
Social Rent Programme (Phase 1 of BANES Homes)	CAP2122025	4,661	0	4,661
Supported Housing Scheme	CAP2122021	598	0	598
Subtotal Full Approval - Built Environment, Housing and Sustainable Development		28,333	310	28,643
Adult Services				
Community Resource Centre Capital Investment	Cap1718076	37	0	37
Community Resource Centre Equipment Replacement	CAP2324007	43	0	43
Leisure - Commercialisation of Parks	CAP2223031	8	51	59
Odd Down Sports Ground and Other Leisure Feasibility	CAP2122007	154	0	154
Subtotal Full Approval - Adult Services		242	51	293
Children's Services				
Basic Needs - School Improvement / Expansion	Cap1415135	3,246	0	3,246
Culverhay SEND project - Feasibility to clear the site.	cap2425016	171	0	171
Early Years Premises Improvements	CAP2425015	140	0	140
Schools Capital Maintenance Schemes	Cap1415073	2,002	0	2,002
Schools Devolved Capital	Cap1920028	37	0	37
SEND (Special Education Needs & Disability) Capital Programme	Cap1718071	3,038	224	3,262
Small Residential Unit - New Residential & Day School - Charlton House	Cap2425013	4,668	0	4,668
Subtotal Full Approval - Children's Services		13,302	224	13,526

Capital Scheme	Cap Prog Number	Budget after July 2025 Cabinet	July - Sep virements	Budget at October 2025 Cabinet
Sustainable BANES				
Alice Park - Skate Park	Cap1415035	4	0	4
Bath River Line	CAP1920030	1,542	179	1,721
Bathscape	Cap1819011	161	0	161
Keynsham Memorial Park	CAP2122013	266	0	266
Parks Improvements	Cap1718037	1,022	0	1,022
Play Area Refurbishment / Equipment	Cap1415039	431	0	431
Renewable Energy Development Fund	CAP2122009	39	297	336
Somer Valley Rediscovered	CAP2223028	666	0	666
Tree Planting	CAP2021005	188	0	188
Waterspace Connected	Cap1920016	119	0	119
Subtotal Full Approval - Sustainable BANES		4,439	476	4,915
Sustainable Transport Delivery				
CAZ - Clean Air Zone	Cap1920031	827	0	827
CRSTS - Midsomer Norton & Westfield, Walking, Wheeling & Cycling Links	CAP2324024	156	0	156
CRSTS Bath City Centre (BCC)	CAP2324017	347	0	347
CRSTS Bath Sustainable Walking & Cycling Links (BSWCL)	Cap2324019	697	0	697
CRSTS Cycling and Walking - Bath Quays Links	CAP2324016	0	2,686	2,686
CRSTS Cycling and Walking - Scholars Way	CAP2324012	2,205	0	2,205
CRSTS FBC (Scholars Way + Bath Quays Links)	CAP2122012	14	0	14
CRSTS Liveable Neighbourhoods	Cap1920003	3,306	0	3,306
CRSTS Manvers Street Remediation	CAP2324005	147	4,113	4,260
CRSTS Somer Valley Links (SVL)	CAP2324018	478	1,800	2,278
Cycle Hangers	CAP2324022	83	0	83
Highways Maintenance Block	Cap1415184	10,059	300	10,359
Highways S106 Projects	cap2425018	193	0	193
Local Active Travel Safety Programme (LATS)	Cap1415009	3,177	205	3,382
London Road Modification	Cap1718022	51	0	51
School Streets	CAP2425019	0	250	250
Subtotal Full Approval - Sustainable Transport Delivery		21,739	9,354	31,093
TOTAL CAPITAL SCHEME BUDGET		125,152	21,253	146,405

Sources of Funding				
Grants		62,059	9,669	71,728
Council Support including Borrowing & Capital Receipts		51,031	10,847	61,878
S106		2,226	0	2,226
CIL		1,833	183	2,016
3rd Party		4,708	550	5,258
Revenue		3,295	5	3,300
Total Sources of Funding		125,152	21,253	146,405

Appendix 5 - Revenue Savings Monitor

Savings Proposal Title	Description	Cash Limit	Cash Limit Description	Exp / Income	Permanent Saving Value £000	One-Off Saving Value £000	Permanent Savings Delivery Forecast	One-Off Savings Delivery Forecast	Total Savings Delivery Forecast	Total Savings Forecast Variance	Saving delayed until 2026/27	Saving mitigated by one-off underspend or income	Saving mitigated on an on-going basis	On-going budget pressure	Variance Commentary
Portfolio: Sustainable Bath and North East Somerset															
Fees and Charges	Inflationary increases in discretionary fees	1147	Parks and Open Spaces	Income	(7)	0	(7)	0	(7)	0	0	0	0	0	Forecast as fully delivered
Sustainable Bath and North East Somerset Total					(7)	0	(7)	0	(7)	0	0	0	0	0	
Portfolio: Resources															
Being Our Best Programme	Targeted staffing savings from Being Our Best Programme through the planned review and rationalisation of the council's management and operating structures.	1047	Human Resources & Organisational Development	Exp	(2,000)	0	0	0	0	2,000	0	2,000	0	0	Delays to the programme has a knock-on impact to service smarter structure proposals. The programme will partially deliver against the £2.5m built into the budget for 2024/25, but will not deliver the additional £2m in the 2025/26 budget
Household Support Fund Grant	Recover admin costs from Household Support Fund grant	1041	Revenues & Benefits	Exp	(50)	0	(50)	0	(50)	0	0	0	0	0	Forecast as fully delivered
City Region Deal Business Rates Pool - Tier 3 income	Increased income from the City Region Deal Business Rates Pool	1057	Corporate Budgets incl. Capital, Audit & Bank Charges	Income	(1,000)	0	(1,000)	0	(1,000)	0	0	0	0	0	Forecast as fully delivered
Commercial Estate - Increased Income	Deliver additional income by refurbishing empty commercial properties more quickly so they can be let.	1081	Commercial Estate	Income	(200)	0	0	0	0	200	200	0	0	0	The commercial estate income forecast currently comprises revenue from assets within both the Commercial and Corporate Estates. As at Quarter 2 there is an expected shortfall of £507k on the rental income target and therefore it is not anticipated that the budgeted increase in income will be achieved this year.
Recycling Income	Income growth projected for 25-26 due to market prices and optical sorting at new facility.	1101	Waste & Fleet Services	Income	(450)	0	(450)	0	(450)	0	0	0	0	0	Forecasting as fully delivered, however this is subject to market fluctuations so remains a risk
Green Waste Fees and Charges Uplift	Increase garden waste fees from £57 to £70 per year to cover the increasing collection costs of running the service, so that subscribers contribute more to the cost of the service.	1101	Waste & Fleet Services	Income	(350)	0	(350)	0	(350)	0	0	0	0	0	Forecasting as fully delivered, however renewals are due in June/July, so will have a more accurate picture at Quarter 2 monitoring
Income From New Fees and Charges For Business Rates	Introduction of new chargeable services for commercial customers in our fleet workshop and charge developers for waste & recycling containers to be provided for each new build property.	1101	Waste & Fleet Services	Income	(77)	0	(37)	0	(37)	40	0	40	0	0	Pressures on achieving commercial income, mitigated by increased income across waste services
Fees and Charges	Inflationary increases in discretionary fees	1101	Waste & Fleet Services	Income	(48)	0	(48)	0	(48)	0	0	0	0	0	Forecast as fully delivered
Resources Total					(4,175)	0	(1,935)	0	(1,935)	2,240	200	2,040	0	0	
Portfolio: Economic And Cultural Sustainable Development															
Heritage Business Plan	Update to projected surplus to reflect visitor projections, updated income forecasts and service efficiencies	1018	Heritage Services	Income	(2,148)	0	0	0	0	2,148	0	0	0	2,148	As a result of a continuation of visitor numbers below the budgeted 1.1m at the Roman Baths, the Service has put forward an adjustment to the MTFS and does not anticipate delivering this savings target.
Corporate Estate & Development – Corporate Landlord	Reducing Corporate Estate size and holdings and reduce energy costs through investment in renewables and retrofit.	1038	Corporate Estate Including R&M	Exp	(275)	0	0	0	0	275	275	0	0	0	Although some properties / land have been identified for disposal, they have minimal impact on the reduction of our running costs. With more assets being identified, this saving could materialise over the next few years.
Bath Quays South Lettings	New lettings secured for Bath Quays South (BQS) offices over and above previous financial projections.	1052	Regeneration	Income	(150)	0	0	0	0	150	150	0	0	0	BQS is partially vacant so not earning rental income. All spaces are due to be filled in May 26, therefore we hope to achieve the full rental income for the 26/27 financial year.
Visit West	WECA funding has now replaced Unitary Authority contributions and no commitment is required at a Council level from 25/26 onwards.	1126	Visit Bath	Exp	(75)	0	(75)	0	(75)	0	0	0	0	0	Forecast as fully delivered
Income Generation From New Regeneration Assets	Potential income stream to Corporate Estates team from joint projects with Regeneration to unlock under used assets and support with grant funded activities.	1052	Regeneration	Income	(50)	0	0	0	0	50	50	0	0	0	Both new and historic savings targets are challenging to meet until the estate is rationalised and running costs of existing assets are reduced.
Business and Skills: Recharge Officer Time To Projects	Provide Business and Skills services to employers through external grant funded activity only and reduce additional Council support.	1128	Business & Skills	Income	(6)	0	(6)	0	(6)	0	0	0	0	0	Forecast as fully delivered
Economic And Cultural Sustainable Development Total					(2,704)	0	(81)	0	(81)	2,623	475	0	0	2,148	

Appendix 5 - Revenue Savings Monitor

Savings Proposal Title	Description	Cash Limit	Cash Limit Description	Exp / Income	Permanent Saving Value £000	One-Off Saving Value £000	Permanent Savings Delivery Forecast	One-Off Savings Delivery Forecast	Total Savings Delivery Forecast	Total Savings Forecast Variance	Saving delayed until 2026/27	Saving mitigated by one-off underspend or income	Saving mitigated on an on-going basis	On-going budget pressure	Variance Commentary
Portfolio: Adults Services															
Adult Social Care Commissioning	This proposal will be achieved through maximizing the use of the Better Care Fund and Improved Better Care Fund to protect social care expenditure.	1110	Better Care Fund	Income	(650)	0	(650)	0	(650)	0	0	0	0	0	Forecast as fully delivered
Adult Social Care Commissioning	This proposal will be achieved through efficient management of contracts for services and optimisation of commissioning resources.	1086	Adult Care Commissioning	Exp	(75)	0	(75)	0	(75)	0	0	0	0	0	Forecast as fully delivered
Review of Care Packages	The approach to social care reviews under the Care Act will ensure people's needs are being met, their outcomes are being achieved and that support when needed is provided in the most cost effective way. Savings have been identified through matching levels of care to people's needs.	1073 & 1088	Adults & older People, Adults & Older People Mental Health	Exp	(900)	0	(900)	0	(900)	0	0	0	0	0	Forecast as fully delivered
Technology Enabled Care	This proposal will be achieved by using technology enabled care to reduce social care resource requirements. Technology enabled care products such as personal alarms and pendants, bed and chair sensors, pills dispensers and door sensors support people to undertake daily living tasks and enable independence.	1091	Learning Disabilities	Exp	(50)	0	(50)	0	(50)	0	0	0	0	0	Forecast as fully delivered
Provider Services Income Opportunities	As a provider of Learning Disabilities Day Services, Community Resource Centres - Residential Care Homes and an Extra Care Service the council has always offered a service to self-funders. This proposal seeks to increase the level of income generated from self-funders, placements commissioned by other local authorities and Integrated Care Board (ICB) by charging the actual cost of delivering care.	1124 & 1146	Provider Services	Income	(250)	0	(250)	0	(250)	0	0	0	0	0	Forecast as fully delivered
Prevention and Early Intervention in Adult Social Care	Deliver savings through efficiencies from services, recommissioning services within existing budget and maximising alternative funding sources for housing related support.	1086	Adult Care Commissioning	Exp	(402)	0	(402)	0	(402)	0	0	0	0	0	Forecast as fully delivered
RVP Leisure Facilities	New contract in place for the operation of the leisure facilities in RVP including tennis courts, adventure golf, events spaces and café.	1019	Leisure	Income	(15)	0	(15)	0	(15)	0	0	0	0	0	Forecast as fully delivered
Adult Services Total					(2,342)	0	(2,342)	0	(2,342)	0	0	0	0	0	

Page 16 of 16

Appendix 5 - Revenue Savings Monitor

Savings Proposal Title	Description	Cash Limit	Cash Limit Description	Exp / Income	Permanent Saving Value £000	One-Off Saving Value £000	Permanent Savings Delivery Forecast	One-Off Savings Delivery Forecast	Total Savings Delivery Forecast	Total Savings Forecast Variance	Saving delayed until 2026/27	Saving mitigated by one-off underspend or income	Saving mitigated on an on-going basis	On-going budget pressure	Variance Commentary
Portfolio: Children's Services															
Reunifications	The savings will be delivered by an increase in family reunifications and step downs from residential placements.	1076	Children, Young People & Families	Exp	(1,400)	0	(1,415)	0	(1,415)	(15)	0	0	0	0	Additional achievement is offsetting under achievement for the Early Help Saving in cashlimit 1116 Integrated Commissioning - CYP.
Specialist Commissioning Saving	These savings will reduce reliance on high-cost placements, particularly out-of-area or unregulated provisions, promoting stability and better outcomes for children. However, achieving these savings requires a careful balance to ensure cost reductions do not compromise the quality, safety, or suitability of placements, which are essential for meeting the complex needs of Children Looked After.	1076	Children, Young People & Families	Exp	(923)	0	(923)	0	(923)	0	0	0	0	0	Forecast as fully delivered
Home to School Transport Savings	Reduced costs as a result of investment in internal provision.	1142	Home to School Transport	Exp	(600)	0	(600)	0	(600)	0	0	0	0	0	Forecast as fully delivered
Early Help	Early help in B&NES aims to provide children, young people and families with the right support at the right time by the right service as soon as needs are identified to prevent them getting worse.	1116	Integrated Commissioning - CYP	Exp	(150)	0	(135)	0	(135)	15	0	0	0	0	Under achievement is offset by over achievement for the Reunifications saving in cashlimit 1076 Children, Young People & Families.
Children's Services Total					(3,073)	0	(3,073)	0	(3,073)	0	0	0	0	0	
Portfolio: Sustainable Transport Delivery															
Parking Services - Income Rebasing	Increased income rebasing across Highways and Parking Services	1103	Transport & Parking Services - Parking	Income	(560)	0	(560)	0	(560)	0	0	0	0	0	Forecast as fully delivered
Parking Charges Review	Income generated from the implementation of a parking review and emissions-based pay and display	1103	Transport & Parking Services - Parking	Income	(334)	0	(334)	0	(334)	0	0	0	0	0	Forecast as fully delivered
Parking Permit Charges Review	Income generated from a review of the baseline charge for on street parking permits, including emissions-based resident parking permits	1103	Transport & Parking Services - Parking	Income	(172)	0	(172)	0	(172)	0	0	0	0	0	Forecast as fully delivered
Parking Reinvestment Fund	Budget saving by not spending the Reinvestment Fund in Parking Services (one-off 2025/26 only).	1103	Transport & Parking Services - Parking	Exp	0	(210)	0	(210)	(210)	0	0	0	0	0	Forecast as fully delivered
Fees and Charges	Inflationary increases in discretionary fees	1134	Highway Maintenance	Income	(2)	0	(2)	0	(2)	0	0	0	0	0	Forecast as fully delivered
Fees and Charges	Inflationary increases in discretionary fees	1133	Network & Traffic Management	Income	(11)	0	(11)	0	(11)	0	0	0	0	0	Forecast as fully delivered
Sustainable Transport Delivery Total					(1,079)	(210)	(1,079)	(210)	(1,289)	0	0	0	0	0	
Portfolio: Communications and Community															
Registrars	Increased income forecast for the service	1115	Registrars Service	Income	(45)	0	(45)	0	(45)	0	0	0	0	0	Forecast as fully delivered
Park and Ride	Updated income forecast for the Park and Ride	1144	Park & Ride	Income	0	(200)	0	(200)	(200)	0	0	0	0	0	Forecast as fully delivered
Fees and Charges	Inflationary increases in discretionary fees	1148	Bereavement Services	Income	(7)	0	(7)	0	(7)	0	0	0	0	0	Forecast as fully delivered
Neighbourhood Services Total					(52)	(200)	(52)	(200)	(252)	0	0	0	0	0	
Portfolio: Built Environment, Housing and Sustainable Development															
Housing	Housing - reprofile work on Housing delivery - (25/26 one off saving)	1029	Housing	Exp	0	(75)	0	(75)	(75)	0	0	0	0	0	Forecast as fully delivered
Housing	Budget for capital delivery of housing programme to match pipeline (25/26 one-off saving)	1029	Housing	Exp	0	(75)	0	(75)	(75)	0	0	0	0	0	Forecast as fully delivered
Fees and Charges	Inflationary increases in discretionary fees	1138	Building Control	Income	(20)	0	(20)	0	(20)	0	0	0	0	0	Forecast as fully delivered
Built Environment, Housing and Sustainable Development Total					(20)	(150)	(20)	(150)	(170)	0	0	0	0	0	
Council Total					(13,452)	(560)	(8,589)	(560)	(9,149)	4,863	675	2,040	0	2,148	

This page is intentionally left blank

Bath & North East Somerset Council		
MEETING	Cabinet	
MEETING DATE:	13 th November 2025	EXECUTIVE FORWARD PLAN REFERENCE:
		E3641
TITLE:	Treasury Management Performance Report to 30 th September 2025	
WARD:	All	
AN OPEN PUBLIC ITEM		
List of attachments to this report:		
Appendix 1 – Performance Against Prudential Indicators		
Appendix 2 – The Council’s Investment Position at 30 th September 2025		
Appendix 3 – Average monthly rate of return for the first six months of 2025/26		
Appendix 4 – The Council’s External Borrowing Position at 30 th September 2025		
Appendix 5 – Arlingclose’s Economic & Market Review Q2 of 2025/26		
Appendix 6 – Interest & Capital Financing Budget Monitoring 2025/26		
Appendix 7 – Summary Guide to Credit Ratings		
Appendix 8 – Extract from Treasury Management Risk Register		

1 THE ISSUE

- 1.1 Treasury risk management at the Authority is conducted within the framework of the Chartered Institute of Public Finance and Accountancy’s Treasury Management in the Public Services: Code of Practice 2021 Edition (the CIPFA Code), which requires the Council to approve a Treasury Management Strategy before the start of each financial year, review performance during the year, and approve an annual report within six months after the end of each financial year.
- 1.2 This report gives details of performance against the Council’s Treasury Management Strategy for the first six months of 2025/26.

2 RECOMMENDATION

The Cabinet is asked to note;

- 2.1 The Treasury Management Report to 30th September 2025, prepared in accordance with the CIPFA Treasury Code of Practice; and
- 2.2 The Treasury Management Indicators to 30th September 2025.

3 THE REPORT

Summary

- 3.1 The Council's Treasury Management Indicators for 2025/26 were agreed by Council in February 2025 and performance against the key indicators is shown in **Appendix 1**. All indicators are within target levels.
- 3.2 The estimated average rate of return on operational investments for the period 1st April 2025 – 30th September 2025 is 4.19%, which is 0.04% above the 7 Day SONIA benchmark rate of 4.15%. For the same period, it is estimated that strategic investments earned 4.22% which is 0.03% below the budgeted return of 4.25%.
- 3.3 The Council's revenue budget for interest & capital financing costs for 2025/26 is currently forecast to be £0.837m under budget. This is due to a combination of lower rates achieved on new borrowing when compared to budgeted rates, higher rates earned on investments than budgeted and a lower Minimum Revenue Provision (MRP) charge, reflecting the rephasing of capital projects reported in the 2024/25 capital outturn report. The breakdown of the 2025/26 revenue budget for interest and capital financing, and the forecast year-end position, is included in **Appendix 6**.

Economic Overview

- 3.4 The Council's Treasury Management Advisor's economic and market review for 2025/26 is included in **Appendix 5**. The main headlines are as follows:
- Interest Rates were cut by 0.25% to 4.00% on 7th of August and have been decreasing at 0.25% each quarter for the last year. While the market has priced in another 0.25% before April 2026, there is now increased uncertainty as to exactly when this might occur.
 - UK Inflation has increased from 2.6% in March to 3.8% in August.
 - The UK Economy expanded by 0.3% in the second quarter of 2025, down from 0.7% in the first quarter of 2025.
 - Gilt yields continued to be volatile with the 10-year UK benchmark gilt ranging from 4.45% to 4.82% in the quarter ending it at 4.70%.
 - The 7-day average SONIA (Sterling Overnight rate) for the first half of 2025/26 is 4.15%. This is the benchmark rate used by the council for operational investments.

Borrowing

- 3.5 The Council's external borrowing as at 30th September 2025 totalled £278.01m and is detailed in **Appendix 4**. This includes £10m in new short-term loans taken out in April 2025, to cover the annual pension contribution prepayment, and allow us to maintain our liquidity indicator above £15m, as well as £40m of borrowing to replace maturing loans. The summary of the movement in borrowing during the quarter and for the full financial year is shown in the following table:

Borrowing Portfolio Movements	Financial Year 2025/26 £m
Balance as at 1st April 2025	275.713
New Loans Taken	50.000
Maturity Loan Repayments	(45.000)
PWLB Annuity Loan principal repayments	(2.703)
Balance as at 30th September 2025	278.010

- 3.6 The Council's Capital Financing Requirement (CFR) is forecasted to be £441.8m on 31st March 2026 based on the Capital Programme agreed in February 2025, including both fully and provisionally approved schemes. The Actual CFR on 31st March 2025 was £373m. This represents the Council's underlying need to borrow to finance capital expenditure and demonstrates that the borrowing taken to date relates to funding historical capital spend.
- 3.7 The difference between the CFR and the current borrowing of £278m represents re-investment of the internal balances including reserves, reducing the in-year borrowing costs in excess of the potential investment returns.
- 3.8 The Liability Benchmark in **Appendix 1** illustrates the current borrowing and current and projected CFR and liability benchmark. The benchmark is lower than the CFR as it recognises the Council's ability to internally borrow to fund capital and therefore shows the optimum level of borrowing for the council that minimises risks and costs of borrowing. This gap is a useful guide to the optimal amount and duration of borrowing to minimise interest and credit risk. This is currently £43.59m and circa 28 years.
- 3.9 Following Local Government Reorganisation in 1996, Avon County Council's residual debt is administered by Bristol City Council. All successor Unitary Authorities make an annual contribution to principal and interest repayment, for which there is a provision in the Council's revenue budget. The amount of residual debt outstanding as of 31st March 2025 apportioned to Bath & North East Somerset Council is £9.277m. Since this borrowing is managed by an external body and treated in the Council's Statement of Accounts as a deferred liability, it is not included in the borrowing figures referred to in paragraph 3.5.

Investments

- 3.10 As demonstrated by the liability benchmark in **Appendix 1**, the Council expects to be a long-term borrower and new treasury investments are therefore primarily made to manage day to day cash flows using short-term low risk instruments. The existing portfolio of strategic pooled funds will be maintained to diversify risk into different asset classes and maintain stable investment income over the medium to long term.
- 3.11 At 30th September 2025, the Council had £51.8m in investments, with £41.8m in short term liquid investments and £10m in externally managed strategic funds. The balance of deposits is set out in the charts in **Appendix 2**, along with the equivalent for the previous quarter and year for comparison.

3.12 **Appendix 3** details the investment performance, showing the average rate of interest earned over this period, which are made up as follows:

Investment Type	Average Investment Return
Money Market Funds (MMF)	4.26%
Call Accounts	3.54%
Fixed Deposits	4.23%
Operational Investments Total	4.19%
CCLA Local Authorities Property Fund	3.87%
FP Foresight UK Infrastructure Income Fund	4.96%
VT Gravis Clean Energy Income Fund	4.00%
Strategic Investments Total (Est.)	4.22%

3.13 At 30th September 2025, the Council has earned 4.19% from Operational investments, which is 0.04% above the 7-day SONIA benchmark Rate of 4.15% and 0.19% above the budgeted rate of 4.00%. Strategic funds earned an estimated return of 4.22% which is 0.03% below the budgeted rate of 4.25%.

3.14 The Council hold £10m invested in externally managed strategic pooled funds, where the objectives are regular revenue income and long-term price stability. These investments were made with the knowledge that there is a risk that capital value could move both up and down on a frequent basis and are intended to be held over a long period of time.

This investment includes £5m in Environmental Social and Governance (ESG) focused funds, and £5m in a property fund, as listed below.

- £5m CCLA Local Authorities Property Fund.
- £3m FP Foresight UK Infrastructure Income Fund.
- £2m VT Gravis Clean Energy Income Fund.

In the current economic environment of high inflation and interest rates, the value of equity, bonds and property have fallen significantly. However, in the last six months we have seen a small increase in the value of our strategic investments of £176k to £7.729m, up from £7.553m on 31 March 2025. This is shown in the table below:

	CCLA Local Authorities Property Fund	FP Foresight UK Infrastructure Income Fund	VT Gravis Clean Energy Income Fund	Total
Historic Cost	5,000,000	3,000,000	2,000,000	10,000,000
Fair Value as at:				
30/09/2025	4,269,278	2,162,156	1,297,843	7,729,276
30/06/2025	4,260,249	2,246,128	1,336,119	7,842,497
31/03/2025	4,253,634	2,072,300	1,227,138	7,553,072
31/03/2024	4,177,465	2,173,120	1,346,161	7,696,746

This change in valuation does not currently have an impact on the revenue account or usable reserves due to a statutory override, and gains/losses will instead go to an unusable reserve. With the extension of the statutory override until 31st March 2029 for investments existing before 1st April 2024, these will only be charged to revenue if/when the Council's holding in the pooled funds are sold, or in 2029/30. The Council has in place a Capital Financing Reserve which can be used to mitigate any future revenue impacts should the statutory override be removed.

Budget Implications

- 3.15 The breakdown of the 2025/26 revenue budget and the forecast year end position for interest and capital financing, based on the period April to September 2025, is included in **Appendix 6**. An overall underspend of £837k is reported towards the Council's net revenue outturn. This is due to lower borrowing rates achieved on year to date borrowing when compared to budgeted rates, higher interest rates than budgeted earned on investments and a lower than budgeted MRP charge.

4 STATUTORY CONSIDERATIONS

- 4.1 This report is for information only.

5 RESOURCE IMPLICATIONS (FINANCE, PROPERTY, PEOPLE)

- 5.1 The financial implications are contained within the body of the report.

6 RISK MANAGEMENT

- 6.1 The Council's lending & borrowing list is regularly reviewed during the financial year and credit ratings are monitored throughout the year. All lending/borrowing transactions are within approved limits and with approved institutions. Investment and borrowing advice is provided by our Treasury Management consultants, Arlingclose.
- 6.2 The CIPFA Treasury Management in the Public Services: Code of Practice requires the Council to nominate a committee to be responsible for ensuring effective scrutiny of the Treasury Management Strategy and policies. The Audit Committee carries out this scrutiny.
- 6.3 In addition, the Council maintain a risk register for Treasury Management activities, which is regularly reviewed and updated where applicable during the year. An extract from the risk register, detailing how the top 5 risks are managed, is included as **Appendix 8**.

7 EQUALITIES

- 7.1 As this report contains performance information for noting only, an Equality Impact Assessment is not considered necessary.

8 CLIMATE CHANGE

- 8.1 The Council will continue to avoid any direct treasury management investments in fossil fuel related companies and will engage with its advisors to explore and assess the potential for any future investment opportunities in funds with a Renewable Energy & Sustainability focus, as and when these products continue to be developed by the market in response to the Climate & Nature Emergency agenda.

8.2 An ESG section has been included the Treasury Management Strategy document for 2025/26, with the treasury team monitoring investment options permitted under the new guidelines.

8.3 The Council holds £5m in longer term investments, split across two ESG focussed Strategic Funds, as detailed under 3.14.

9 OTHER OPTIONS CONSIDERED

9.1 None

10 CONSULTATION

10.1 Consultation has been carried out with the Cabinet Member for Resources, Director of Financial Services, Assurance & Pensions (s151 Officer) and Monitoring Officer.

Contact person	Claire Read - 01225 477109; Jamie Whittard - 01225 477213 Claire_Read@BATHNES.GOV.UK ; Jamie_Whittard@BATHNES.GOV.UK
Background papers	2025/26 Treasury Management & Investment Strategy
Please contact the report author if you need to access this report in an alternative format	

APPENDIX 1

Performance against Treasury Management Indicators agreed in Treasury Management Strategy Statement

1. Treasury Borrowing limits

These limits include current commitments and proposals in the budget report for capital expenditure, plus additional headroom over & above the operational limit for unusual cash movements.

The Authorised limits for external debt include current commitments and proposals in the budget report for capital expenditure, plus additional headroom over and above the operational limit for unusual cash movements.

The Operational boundary for external debt is based on the same estimates as the authorised limit but without the additional headroom for unusual cash movements. This level also factors in the proposed approach to use internal cash-flow and future capital receipts as the preferred financing method for the capital programme.

	2025/26 Prudential Indicator	Actual as at 30 th September 2025
Operational boundary – borrowing.	£414m	£278.01m
Operational boundary – other long-term liabilities	£9m	£0m
Operational boundary – TOTAL	£423m	£278.01m
Authorised limit – borrowing.	£442m	£278.01m
Authorised limit – other long-term liabilities.	£9m	£0m
Authorised limit – TOTAL	£451m	£278.01m

2. Security: Average Credit Rating*

The Council has adopted a voluntary measure of its exposure to credit risk by monitoring the value-weighted average credit rating of its investment portfolio. A summary guide to credit ratings is set out at **Appendix 7**.

	2025/26 Prudential Indicator	Actual as at 30 th September 2025
	Rating	Rating
Minimum Portfolio Average Credit Rating	A-	AA

* The calculation excludes the strategic investment in the CCLA Local Authority Property Fund and ESG focussed Investment Funds, which are unrated.

3. Liquidity

The Authority has adopted a voluntary measure of its exposure to liquidity risk by monitoring the amount of cash available to meet unexpected payments within a rolling three-month period, without additional borrowing.

Liquidity risk indicator	2025/26 Prudential Indicator	Minimum During year	Date of minimum
Minimum total Cash Available within 3 months	£15m	£18.8m	30-Apr-25

4. Interest rate exposures

This indicator is set to control the Council's exposure to interest rate risk. The upper limit represents the maximum one-year revenue impact of a 1% rise or fall in interest rates.

	2025/26 Prudential Indicator	Actual as at 30 th September 2025
Upper limit on one-year revenue impact of a 1% rise in interest rates	+/- £0.80m	-£0.06m
Upper limit on one-year revenue impact of a 1% fall in interest rates	+/- £0.80m	£0.06m

The impact of this limit is that the Council should never be holding a maturity adjusted net debt / investment position on variable rates of more than £80m.

The impact of a change in interest rates is calculated on the assumption that maturing loans and investments will be replaced at new market rates, which includes amounts which are maturing each year in PWLB annuity loans.

5. Maturity Structure of borrowing

This indicator is set to control the Council's exposure to refinancing risk.

	Upper Limit	Lower Limit	Actual as at 30 th September 2025
	%	%	%
Under 12 months	30	Nil	17.98
12 months and within 24 months	30	Nil	0.00
24 months and within 5 years	50	Nil	7.19
5 years and within 10 years	75	Nil	12.70
10 years and within 25 years	100	25	37.24
Over 25 years	100		24.89

Time periods start on the first day of each financial year. The maturity date of borrowing is the earliest date that the lender can demand repayment. For LOBO's, this is shown at the date of maturity as the council would only consider repaying these loans if the lenders exercised their option to alter the interest rate.

6. Upper limit for total principal sums invested for over 364 days

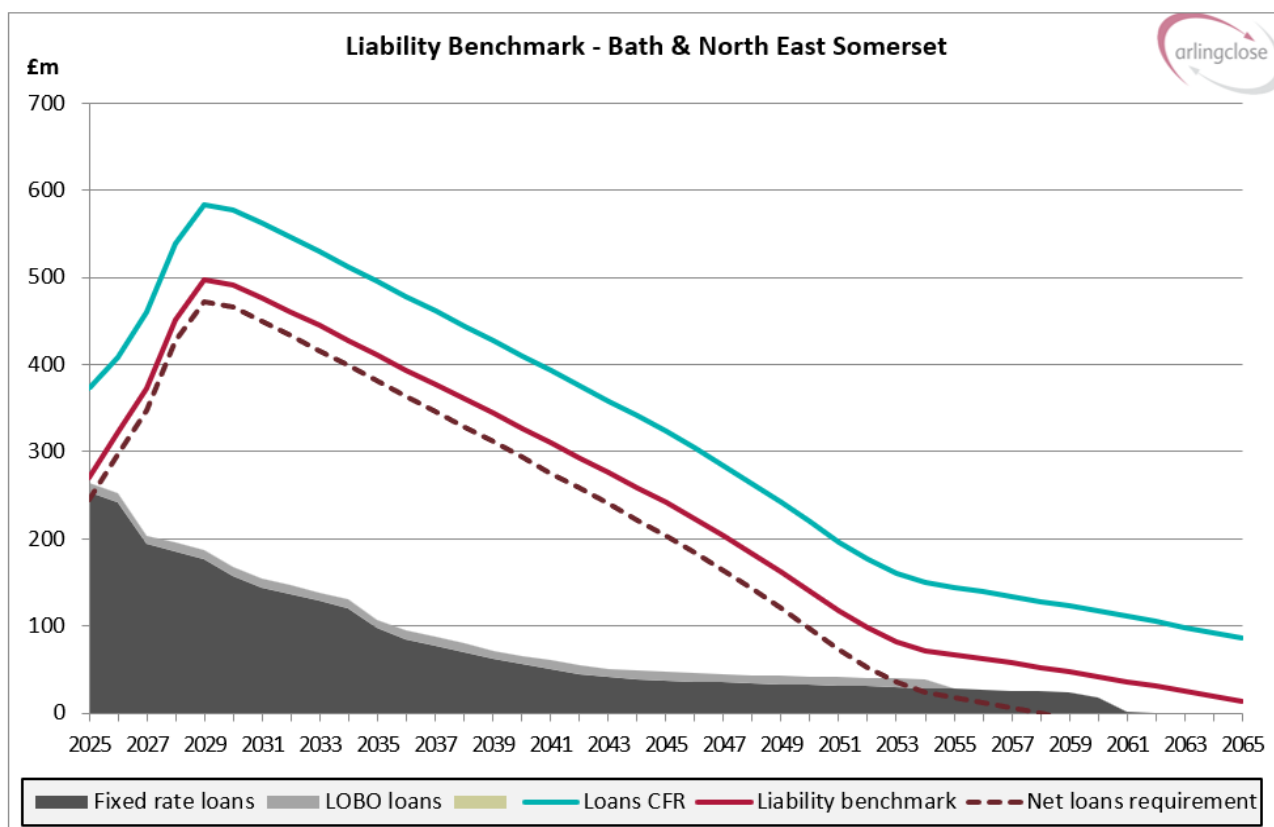
The purpose of this indicator is to control the Authority's exposure to the risk of incurring losses by seeking early repayment of its investments. The limits on the long-term principal sum invested to final maturities beyond the period end will be:

Price risk indicator	2025/26 Prudential Indicator	Actual as at 30 th September 2025
Limit on principal invested beyond 31 st March 2025	£50m	£10m*
Limit on principal invested beyond 31 st March 2026	£20m	£10m*
Limit on principal invested beyond 31 st March 2027	£10m	£10m*

*The Council includes the CCLA LA Property Fund & two long term ESG focussed Investment Funds against this indicator as they are both held as Long-Term Strategic Investments.

7. Liability Benchmark

The liability benchmark is an important tool to help establish whether the Council is likely to be a long-term borrower or long-term investor in the future, and so shape its strategic focus and decision making. The liability benchmark itself represents an estimate of the cumulative amount of external borrowing the Council must hold to fund its current capital and revenue plans while keeping treasury investments at the minimum level required to manage day-to-day cash flow.



The difference between the actual borrowing (the grey slopes) and the liability benchmark (the solid red line) shows that the council is under borrowed by around £43.59m in 2025/26. When it comes to new borrowing this funding gap can be used as a guide to the optimal amount and length of borrowing required to minimise interest rate and credit risk.

APPENDIX 2

The Council's Investment position at 30th September 2025

The term of investments is as follows:

Term Remaining	Balance at 30 th September 2025	Comparator	
		Balance at 30 th June 2025	Balance at 31 st March 2025
	£m	£m	£m
Notice (instant access funds)	31.80	30.40	22.60
Up to 1 month	0.00	0.00	0.00
1 month to 3 months	10.00	0.00	0.00
3 months to 6 months	0.00	0.00	0.00
6 months to 12 months	0.00	0.00	0.00
Strategic Funds	10.00	10.00	10.00
Total	51.80	40.40	32.60

The investment figure is made up as follows:

	Balance at 30 th September 2025	Comparator	
		Balance at 30 th June 2025	Balance at 31 st March 2025
	£m	£m	£m
B&NES Council	48.59	36.93	29.77
Schools	3.21	3.47	2.83
Total	51.80	40.40	32.60

The Council had a total average net positive balance of £55.5m during the period April 2025 to September 2025.

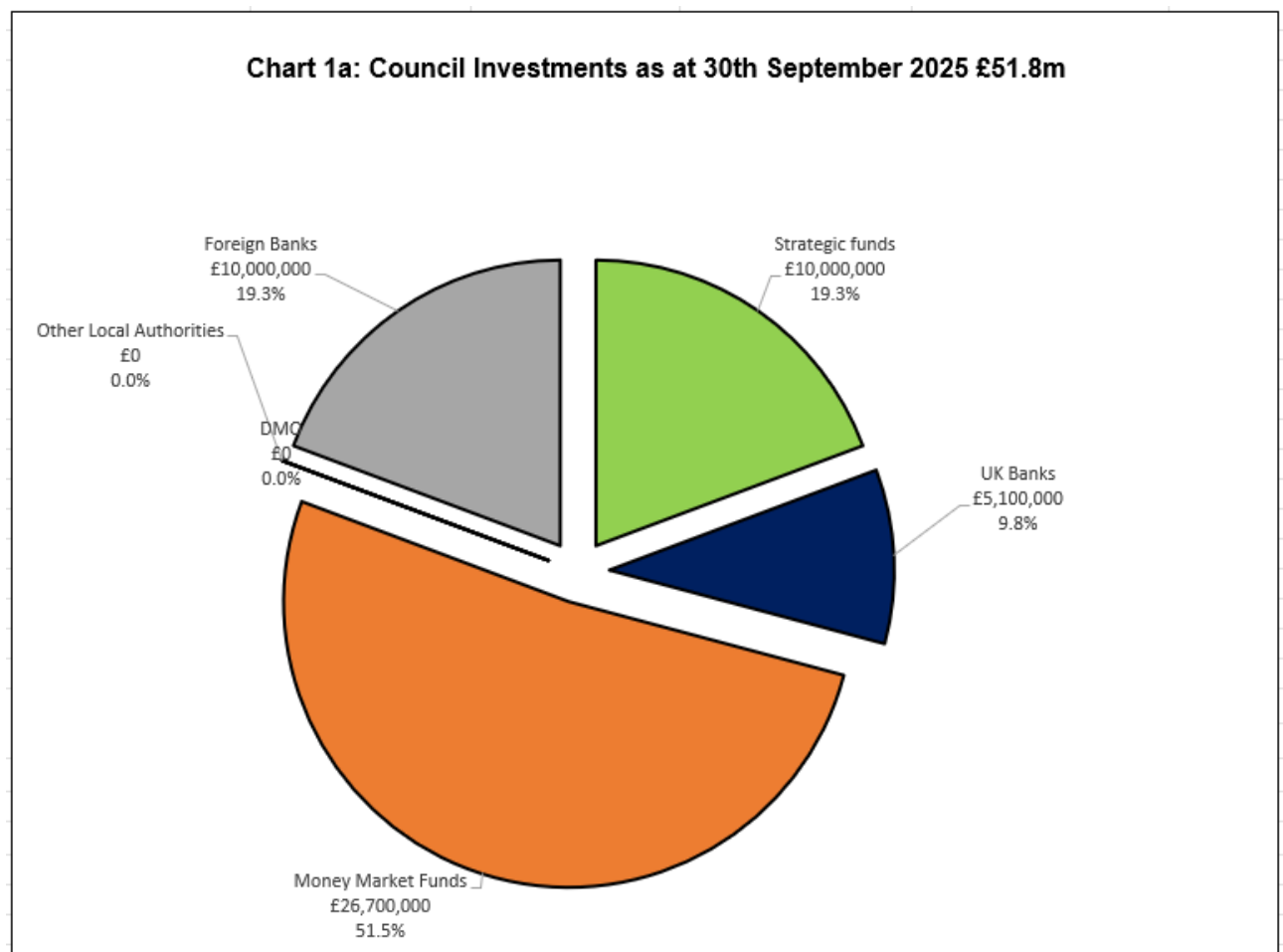
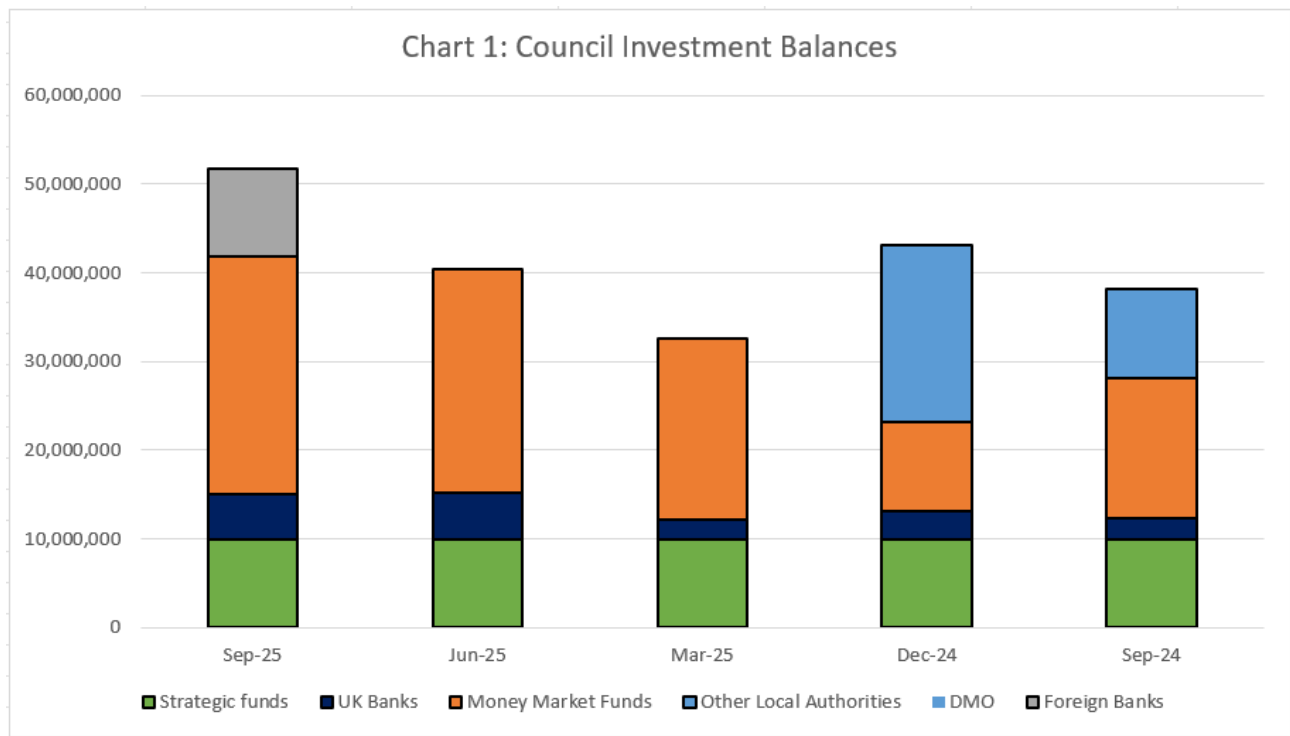


Chart 2: Council Investments Per Lowest Equivalent Long Term Credit Rating

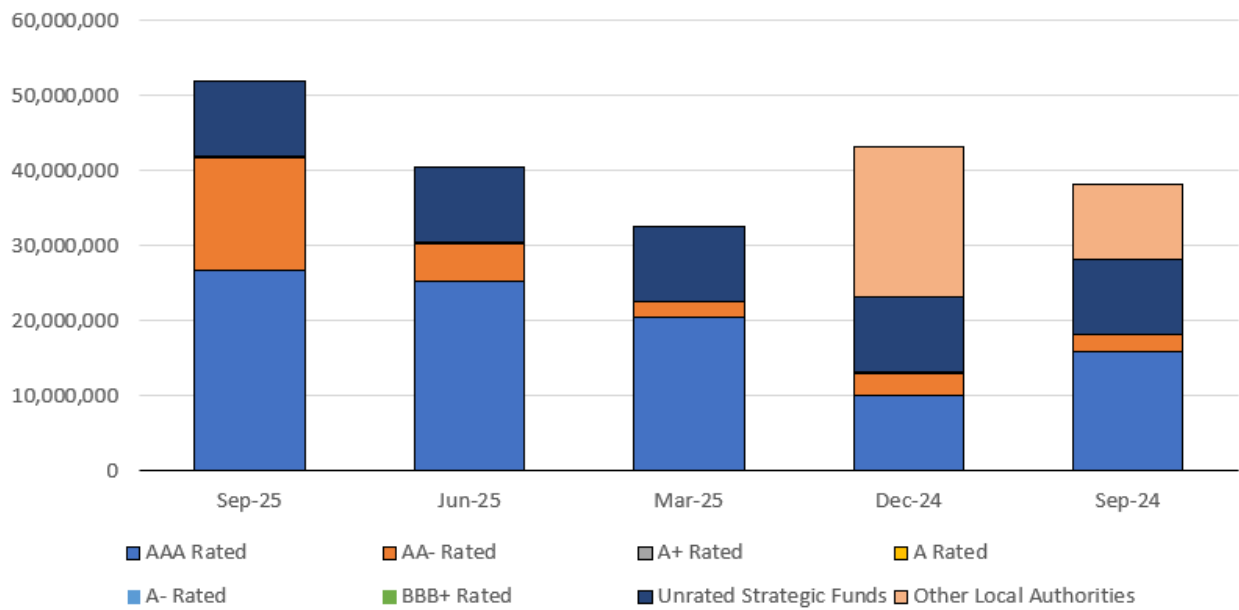
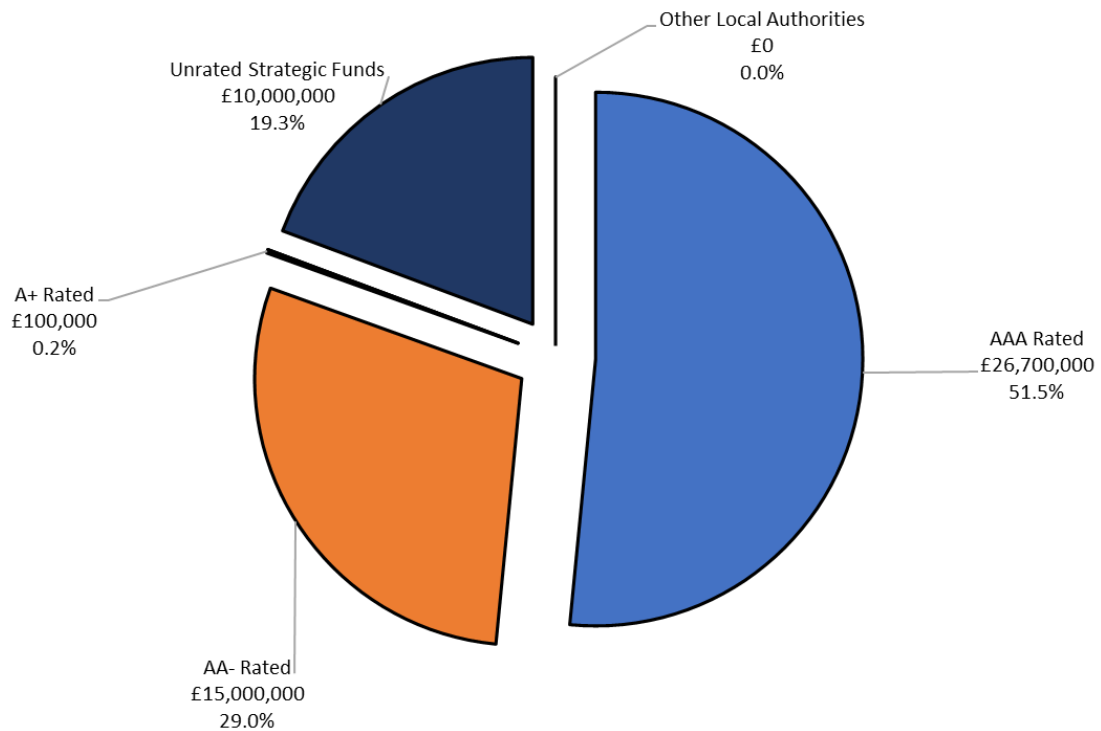


Chart 2a: Council Investments Per Lowest Equivalent Long Term Credit Rating as at 30th September 2025 £51.8m



APPENDIX 3

Operational investment return

	Average rate of interest earned	Benchmark = Average 7 Day SONIA rate	Performance against Benchmark
April 2025	4.33%	4.41%	-0.08%
May 2025	4.32%	4.18%	0.14%
June 2025	4.22%	4.19%	0.03%
July 2025	4.18%	4.21%	-0.03%
August 2025	4.08%	3.95%	0.13%
September 2025	4.02%	3.94%	0.08%
Average	4.19%	4.15%	0.04%

For comparison, the average rate of return on investments in 2024/25 was as follows:

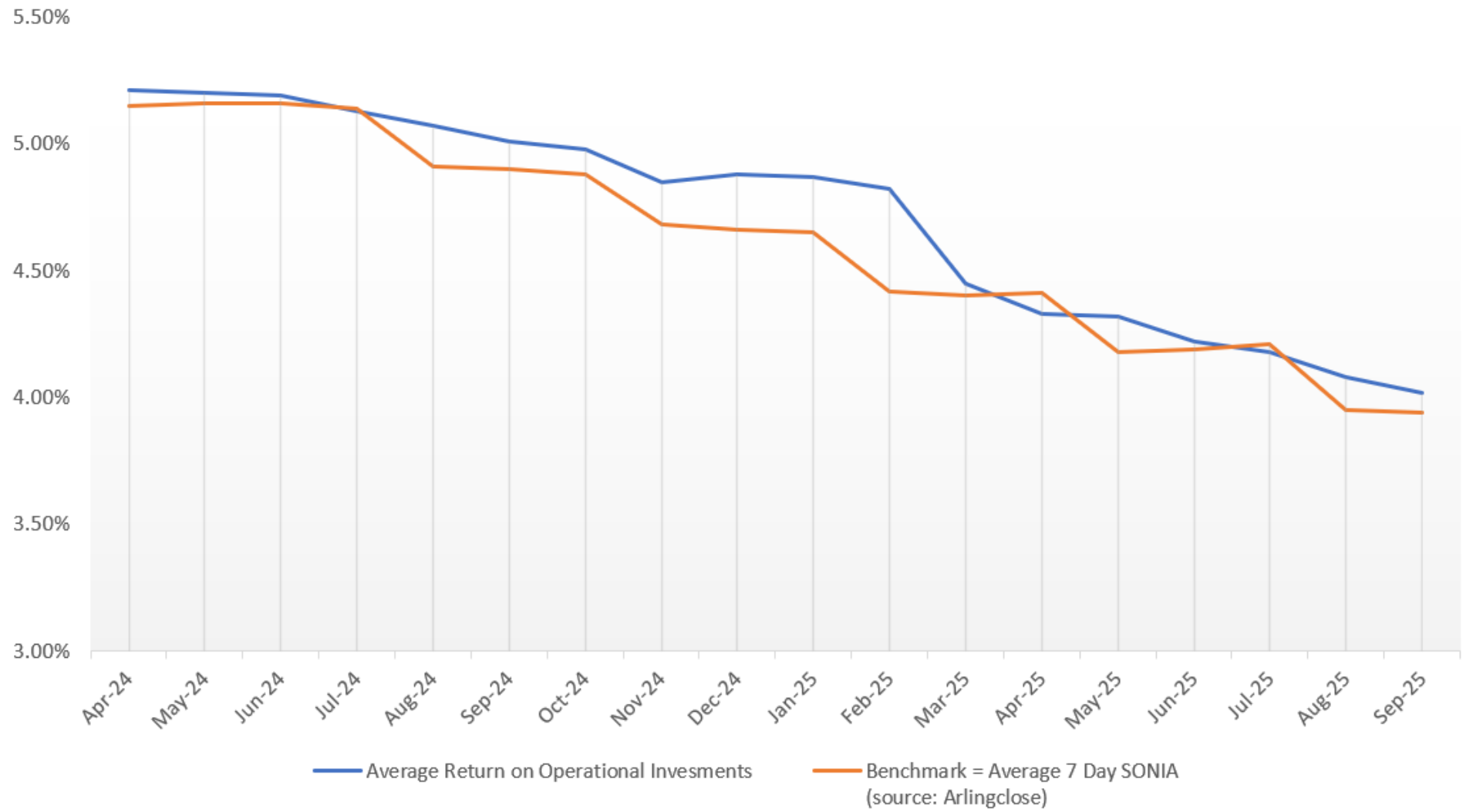
	Average rate of interest earned	Benchmark = Average 7 Day SONIA rate	Performance against Benchmark
April 2024	5.21%	5.15%	0.06%
May 2024	5.20%	5.16%	0.04%
June 2024	5.19%	5.16%	0.03%
July 2024	5.13%	5.14%	-0.01%
August 2024	5.07%	4.91%	0.16%
September 2024	5.01%	4.90%	0.11%
October 2024	4.98%	4.88%	0.10%
November 2024	4.85%	4.68%	0.17%
December 2024	4.88%	4.66%	0.22%
January 2025	4.87%	4.65%	0.22%
February 2025	4.82%	4.42%	0.40%
March 2025	4.45%	4.40%	0.05%
Average	4.97%	4.84%	0.13%

Strategic investment return

Estimated average return for strategic investments was 4.22% against a budgeted return of 4.25%. In 2024/25 the average return was 4.25%

Average Return on Operational Investments 2024/25 & 2025/26 compared to Benchmark

Page 480



APPENDIX 4

Council's External Borrowing at 30th September 2025

Lender	Amount outstanding @ 30 th June 2025 £	Change in Quarter £	Amount outstanding @ 30 th September 2025 £	Start date	End date	Interest rate
Long term						
PWLB489142	10,000,000	-	10,000,000	15/10/2004	15/10/2034	4.75%
PWLB497233	5,000,000	-	5,000,000	12/05/2010	15/08/2035	4.55%
PWLB497234	5,000,000	-	5,000,000	12/05/2010	15/02/2060	4.53%
PWLB498834	5,000,000	-	5,000,000	05/08/2011	15/02/2031	4.86%
PWLB498835	10,000,000	-	10,000,000	05/08/2011	15/08/2029	4.80%
PWLB498836	15,000,000	-	15,000,000	05/08/2011	15/02/2061	4.96%
PWLB503684	5,300,000	-	5,300,000	29/01/2015	08/04/2034	2.62%
PWLB503685	5,000,000	-	5,000,000	29/01/2015	08/10/2064	2.92%
PWLB505122	14,105,914	-	14,105,914	20/06/2016	20/06/2041	2.36%
PWLB508126	7,767,122	-	7,767,122	06/12/2018	20/06/2043	2.38%
PWLB508202	9,246,861	-	9,246,861	12/12/2018	20/06/2068	2.59%
PWLB508224	3,868,978	-	3,868,978	13/12/2018	20/06/2043	2.25%
PWLB505744	7,011,719	(205,378)	6,806,341	24/02/2017	15/08/2039	2.28%
PWLB505966	7,387,372	(179,414)	7,207,958	04/04/2017	15/02/2042	2.26%
PWLB506052	6,277,170	(152,583)	6,124,587	08/05/2017	15/02/2042	2.25%
PWLB506255	6,397,257	-	6,397,257	10/08/2017	10/04/2067	2.64%
PWLB506729	7,585,986	-	7,585,986	13/12/2017	10/10/2042	2.35%
PWLB506995	7,625,752	-	7,625,752	06/03/2018	10/10/2042	2.52%
PWLB506996	8,178,315	-	8,178,315	06/03/2018	10/10/2047	2.62%
PWLB507749	7,947,620	(171,569)	7,776,051	10/09/2018	20/07/2043	2.42%
PWLB508485	18,678,776	(119,326)	18,559,450	11/02/2019	20/07/2068	2.52%
PWLB509840	8,089,023	(181,106)	7,907,916	04/09/2019	20/07/2044	1.40%
PWLB677322	4,646,572	-	4,646,572	22/11/2023	22/11/2038	4.88%
PWLB687799	4,630,494	-	4,630,494	29/12/2023	29/12/2038	4.28%
PWLB700594	9,522,146	(247,093)	9,275,053	09/02/2024	09/02/2039	4.54%

Lender	Amount outstanding @ 30 th June 2025 £	Change in Quarter £	Amount outstanding @ 30 th September 2025 £	Start date	End date	Interest rate
PWLB815779	10,000,000	-	10,000,000	10/04/2025	09/04/2030	4.45%
PWLB816767	10,000,000	-	10,000,000	14/04/2025	13/04/2035	4.50%
KBC Bank N.V *	5,000,000	-	5,000,000	08/10/2004	08/10/2054	4.50%
KBC Bank N.V *	5,000,000	-	5,000,000	08/10/2004	08/10/2054	4.50%
Medium term		-	5,000,000			
Tunbridge Wells B.C.	5,000,000	-	10,000,000	14/11/2024	14/11/2025	4.85%
PWLB781146	10,000,000	-	5,000,000	09/12/2024	09/12/2025	5.09%
North Yorkshire Council	5,000,000	-	5,000,000	26/03/2025	25/03/2026	4.75%
Halton Borough Council	-	-	5,000,000	21/03/2025	20/06/2025	6.00%
West of England Combined Authority	5,000,000	-	5,000,000	25/04/2025	27/10/2025	4.50%
South Oxfordshire District Council	5,000,000	-	10,000,000	25/04/2025	24/04/2026	4.50%
West of England Combined Authority	5,000,000	-	5,000,000	29/04/2025	28/04/2026	4.50%
West Midlands Combined Authority	10,000,000	-	10,000,000	30/04/2025	29/04/2026	4.45%
Portsmouth City Council	5,000,000	-	5,000,000	07/05/2025	06/05/2026	4.50%
Total Borrowing	279,267,077	(1,256,469)	278,010,608			

*All LOBO's (Lender Option / Borrower Option) have reached the end of their fixed interest period and have reverted to the variable rate of 4.50%. The lender has the option to change the interest rate at 6 monthly intervals. Should the lender use the option to change the rate, then at this point the borrower has the option to repay the loan without penalty.

The "Change in Quarter" movement on some of the PWLB loans reflects that these loans have an annuity repayment profile, so repayments of principal are made on a 6 monthly basis throughout the life of the loans.

APPENDIX 5: Arlingclose Economic & Market Review

Economic background: The first quarter was dominated by the fallout from the US trade tariffs and their impact on equity and bond markets. The second quarter, still rife with uncertainty, saw equity markets making gains and a divergence in US and UK government bond yields, which had been moving relatively closely together.

From late June, amid a UK backdrop of economic uncertainty, concerns around the government's fiscal position and speculation around the autumn Budget, yields on medium and longer term gilts pushed higher, including the 30-year which hit its highest level for almost 30 years.

UK headline annual consumer price inflation (CPI) increased over the period, rising from 2.6% in March to 3.8% in August, still well above the Bank of England's 2% target. Core inflation also rose, from 3.4% to 3.6% over the same period, albeit the August reading was down % from 3.8% the previous month. Services inflation also fell from July to August, to 4.7% from 5.0%.

The UK economy expanded by 0.7% in the first quarter of the calendar year and by 0.3% in the second quarter. In the final version of the Q2 2025 GDP report, annual growth was revised upwards to 1.4% y/y. However, monthly figures showed zero growth in July, in line with expectations, indicating a sluggish start to Q3.

Labour market data continued to soften throughout the period, with the unemployment rate rising and earnings growth easing, but probably not to an extent that would make the more hawkish MPC members comfortable with further rate cuts. In addition, the employment rate rose while the economic inactivity rate and number of vacancies fell.

The BoE's Monetary Policy Committee (MPC) cut Bank Rate from 4.5% to 4.25% in May and to 4.0% in August after an unprecedented second round of voting. The final 5-4 vote was for a 25bps cut, with the minority wanting no change. In September, seven MPC members voted to hold rates while two preferred a 25bps cut. The Committee's views still differ on whether the upside risks from inflation expectations and wage setting outweigh downside risks from weaker demand and growth.

The August BoE Monetary Policy Report highlighted that after peaking in Q3 2025, inflation is projected to fall back to target by mid-2027, helped by increasing spare capacity in the economy and the ongoing effects from past tighter policy rates. GDP is expected to remain weak in the near-term while over the medium term outlook will be influenced by domestic and global developments.

Arlingclose, the authority's treasury adviser, maintained its central view that Bank Rate would be cut further as the BoE focused on weak GDP growth more than higher inflation. One more cut is currently expected during 2025/26, taking Bank Rate to 3.75%. The risks to the forecast are balanced in the near-term but weighted to the downside further out as weak consumer sentiment and business confidence and investment continue to constrain growth. There is also considerable uncertainty around the autumn Budget and the impact this will have on the outlook.

Against a backdrop of uncertain US trade policy and pressure from President Trump, the US Federal Reserve held interest rates steady for most of the period, before cutting the Fed Funds Rate to 4.00%-4.25% in September. Fed policymakers also published their new economic projections at the same time. These pointed to a 0.50% lower Fed Funds Rate by the end of 2025 and 0.25% lower in 2026, alongside GDP growth of 1.6% in 2025, inflation of 3%, and an unemployment rate of 4.5%.

The European Central Bank cut rates in June, reducing its main refinancing rate from 2.25% to 2.0%, before keeping it on hold through to the end of the period. New ECB projections predicted inflation averaging 2.1% in 2025, before falling below target in 2026, alongside improving GDP growth, for which the risks are deemed more balanced and the disinflationary process over.

Financial markets: After the sharp declines seen early in the period, sentiment in financial markets improved, but risky assets have generally remained volatile. Early in the period bond yields fell, but ongoing uncertainty, particularly in the UK, has seen medium and longer yields rise with bond investors requiring an increasingly higher return against the perceived elevated risk of UK plc. Since the sell-off in April, equity markets have gained back the previous declines, with investors continuing to remain bullish in the face of ongoing uncertainty.

Over the period, the 10-year UK benchmark gilt yield started at 4.65% and ended at 4.70%. However, these six months saw significant volatility with the 10-year yield hitting a low of 4.45% and a high of 4.82%. It was a broadly similar picture for the 20-year gilt which started at 5.18% and ended at 5.39% with a low and high of 5.10% and 5.55% respectively. The Sterling Overnight Rate (SONIA) averaged 4.19% over the six months to 30th September.

Credit review: Arlingclose maintained its recommended maximum unsecured duration limit on the majority of the banks on its counterparty list at 6 months. The other banks remain on 100 days.

Early in the period, Fitch upgraded NatWest Group and related entities to AA- from A+ and placed Clydesdale Bank's long-term A- rating on Rating Watch Positive. While Moody's downgraded the long term rating on the United States sovereign to Aa1 in May and also affirmed OP Corporate's rating at Aa3.

Then in the second quarter, Fitch upgraded Clydesdale Bank and also HSBC, downgraded Lancashire CC and Close Brothers while Moody's upgraded Transport for London, Allied Irish Banks, Bank of Ireland and Toronto-Dominion Bank.

After spiking in early April following the US trade tariff announcements, UK credit default swap prices have since generally trended downwards and ended the period at levels broadly in line with those in the first quarter of the calendar year and throughout most of 2024.

European banks' CDS prices has followed a fairly similar pattern to the UK, as have Singaporean and Australian lenders while Canadian bank CDS prices remain modestly elevated compared to earlier in 2025 and in 2024.

Overall, at the end of the period CDS prices for all banks on Arlingclose's counterparty list remained within limits deemed satisfactory for maintaining credit advice at current durations.

Financial market volatility is expected to remain a feature, at least in the near term and, credit default swap levels will be monitored for signs of ongoing credit stress. As ever, the institutions and durations on the Authority's counterparty list recommended by Arlingclose remain under constant review.

APPENDIX 6

Interest & Capital Financing Costs – Budget Monitoring 2025/26

April 2025 to March 2026	YEAR END POSITION			ADV/FAV
	Budgeted Spend or (Income) £'000	Published Forecast (Income) £'000	Forecast Over or (Under) spend £'000	
Interest & Capital Financing				
- Debt Costs	11,932	11,532	(400)	FAV
- Internal Repayment of Loan Charges	(17,372)	(17,372)	0	-
- Ex Avon Debt Costs	860	860	0	-
- Minimum Revenue Provision (MRP)	11,417	11,230	(187)	FAV
- Interest on Balances	(1,361)	(1,611)	(250)	FAV
Total	5,476	4,639	(837)	FAV

APPENDIX 7

Summary Guide to Credit Ratings

Rating	Details
AAA	Highest credit quality – lowest expectation of default, which is unlikely to be adversely affected by foreseeable events.
AA	Very high credit quality - expectation of very low default risk, which is not likely to be significantly vulnerable to foreseeable events.
A	High credit quality - expectations of low default risk which may be more vulnerable to adverse business or economic conditions than is the case for higher ratings.
BBB	Good credit quality - expectations of default risk are currently low but adverse business or economic conditions are more likely to impair this capacity.
BB	Speculative - indicates an elevated vulnerability to default risk, particularly in the event of adverse changes in business or economic conditions over time.
B	Highly speculative - indicates that material default risk is present, but a limited margin of safety remains. Capacity for continued payment is vulnerable to deterioration in the business and economic environment.
CCC	Substantial credit risk - default is a real possibility.
CC	Very high levels of credit risk - default of some kind appears probable.
C	Exceptionally high levels of credit risk - default is imminent or inevitable.
RD	Restricted default - indicates an issuer that has experienced payment default on a bond, loan, or other material financial obligation but which has not entered into bankruptcy filings, administration, receivership, liquidation, or other formal winding-up procedure, and which has not otherwise ceased operating.
D	Default - indicates an issuer that has entered into bankruptcy filings, administration, receivership, liquidation, or other formal winding-up procedure, or which has otherwise ceased business.

APPENDIX 8

Extract from Treasury Management Risk Register – Top 5 Risks

Page 488

			Current Risk Score											Trend						
	Risk Nr	Description	Likelihood					Impact					This Period	Periods Ago			Management Action			
			1	2	3	4	5	1	2	3	4	5		1	2	3				
1	R06	Inflation Risk The risk that prevailing levels of inflation cause an unexpected or unbudgeted burden on the organisation's finances, against which the organisation has failed to protect itself adequately.	L		M		H			L		M		H		12	12	12	12	Liaise with Chief Finance Officer to ensure Inflation both current and projected forms part of the medium term financial planning framework.
2	R09	Legal & Regulatory Risk - Changes Risk that regulatory changes are not planned for and adversely impact the Council's budget and or ability to borrow			3							3				9	9	12	12	Read, respond and calculate the impact of Local Government accounting, investment and capital financing / borrowing consultations have on treasury management. Plan for the implementation of new regulations, conditions and accounting treatment
3	R04	Interest Rate Risk The risk that fluctuations in the levels of interest rates create an unexpected or unbudgeted burden on the organisation's finances, against which the organisation has failed to protect itself adequately			3							3				9	9	9	9	Monitor interest rates on a monthly basis and compare with budget to determine impact on Council finances and report through monthly Treasury Dashboard. Report implication of interest rate changes to Cabinet as part of quarterly Treasury Management Performance Report. Explore alternative potential investment products following new freedoms - including corporate bonds, gilts, Certificate of Deposits etc. Discussion with our treasury advisors on any new borrowing in terms of duration and timing given the current volatility in the gilt market and PWLB interest rates.
4	R07	Refinancing Risk The risk that maturing borrowings, capital, project or partnership financings cannot be refinanced on terms that reflect the provisions made by the organisation for those refinancings, both capital and current (revenue), and/or that the terms are inconsistent with prevailing market conditions at the time.			3							3				9	9	9	6	When deciding on the duration of new borrowing consider existing debt maturity profile before submitting an approval to Chief Finance Officer on the new borrowing. Consult with treasury Advisor Arlingclose with regards to risks in the lending market and consider their guidance when making refinancing decisions Complete Annual PWLB certainty rate return and any other returns that provide a discounted lending rate. Maintain a relationship with at least 2 brokers in order to ensure that the council avoids the risk of accepting terms which are not in line with prevailing market conditions.
5	R08	Legal & Regulatory Risk - Acting Outside Powers The risk that the organisation itself, or a third party with which it is dealing in its treasury management activities, fails to act in accordance with its legal powers or regulatory requirements, and that the organisation suffers losses accordingly.		2									4			8	8	8	8	Obtain independent review of the council's strategy and polices to ensure compliance with the CIPFA Code of Practice on Treasury Management Local Authorities (Capital Finance and Accounting) (England) Regulations, Local Government Act and any other regulation or guidance as specified by the Secretary of State.. Stay on top of Government and CIPFA consultations on Treasury and Capital Financing regulations.