

# **Corporate Policy Development and Scrutiny Panel**

**Date: Tuesday 3rd February 2026**

**Time: 4.00 pm**

**Venue: Council Chamber - Guildhall, Bath**

**Councillors:** Robin Moss, Toby Simon, Malcolm Treby, Colin Blackburn, Duncan Hounsell, Jess David, Gavin Heathcote and Stuart Bridge



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.

To comply with the Data Protection Act 1998, we require the consent of parents or guardians before filming children or young people. For more information, please speak to the camera operator.

The Council will broadcast the images and sound live via the internet [www.bathnes.gov.uk/webcast](http://www.bathnes.gov.uk/webcast) An archived recording of the proceedings will also be available for viewing after the meeting. 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 or a deputation on behalf of a group.

**Advance notice is required not less than two full working days before the meeting. This means that for meetings held on 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**

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**Corporate Policy Development and Scrutiny Panel - Tuesday 3rd February 2026**

**at 4.00 pm in the Council Chamber - Guildhall, Bath**

**A G E N D A**

1. WELCOME AND INTRODUCTIONS
2. EMERGENCY EVACUATION PROCEDURE

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

3. APOLOGIES FOR ABSENCE AND SUBSTITUTIONS
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 CHAIRMAN
6. ITEMS FROM THE PUBLIC OR COUNCILLORS - TO RECEIVE STATEMENTS, PETITIONS OR QUESTIONS RELATING TO THE BUSINESS OF THIS MEETING

At the time of publication no notifications had been received.

7. MINUTES (Pages 7 - 14)
8. CABINET MEMBER UPDATE

The Cabinet Member will update the Panel on any relevant issues. Panel members may ask questions on the update provided.

9. HERITAGE SERVICES BUSINESS PLAN (Pages 15 - 86)
10. CORPORATE ESTATE ASSET MANAGEMENT FRAMEWORK 2025-2030 (Pages 87 - 110)

11. DRAFT BUDGET AND COUNCIL TAX 2026/27 AND FINANCIAL OUTLOOK (Pages 111 - 316)
12. PANEL WORKPLAN (Pages 317 - 320)

This report presents the latest workplan for the Panel. Any suggestions for further items or amendments to the current programme will be logged and scheduled in consultation with the Panel's Chair and supporting officers.

The Committee Administrator for this meeting is Michaela Gay who can be contacted on [michaela\\_gay@bathnes.gov.uk](mailto:michaela_gay@bathnes.gov.uk), 01225 394411.

**BATH AND NORTH EAST SOMERSET**

**MINUTES OF CORPORATE POLICY DEVELOPMENT AND SCRUTINY PANEL  
MEETING**

Tuesday 25th November 2025

Present:- **Councillors** Robin Moss, Toby Simon, Malcolm Treby, Duncan Hounsell, Jess David, Gavin Heathcote, Stuart Bridge and Shaun Hughes (in place of Colin Blackburn)

Apologies for absence: Councillors: Colin Blackburn

**170 WELCOME AND INTRODUCTIONS**

The Chair welcomed everyone to the meeting.

The Chair noted that Councillors Ian Halsall and Hal MacFie had stepped down from the Panel and thanked them for their work.

The Chair welcomed new member Councillor Stuart Bridge

**171 EMERGENCY EVACUATION PROCEDURE**

The Chair drew attention to the emergency evacuation procedure.

**172 APOLOGIES FOR ABSENCE AND SUBSTITUTIONS**

Councillor Colin Blackburn sent his apologies and was substituted by Councillor Shaun Hughes.

The Chair noted that Councillor Stuart Bridge had joined the Panel.

The Chair noted that Councillor Ian Halsall and Hal McFie had stepped down from the Panel and thanked them for their contributions.

**173 DECLARATIONS OF INTEREST**

There were none.

**174 TO ANNOUNCE ANY URGENT BUSINESS AGREED BY THE CHAIRMAN**

There was none.

**175 ITEMS FROM THE PUBLIC OR COUNCILLORS - TO RECEIVE STATEMENTS, PETITIONS OR QUESTIONS RELATING TO THE BUSINESS OF THIS MEETING**

Councillor Karen Walker made a statement to the Panel regarding budget setting process and Peasedown St John (a copy of the statement is attached to the minutes).

## **176 MINUTES**

The Panel confirmed the minutes of the previous meeting as a true record and they were duly signed by the Chair.

## **177 CABINET MEMBER UPDATE**

Councillor Mark Elliott, Cabinet Member for Resources, reported that his main activity had been around the budget setting process and items on the agenda.

Councillor Moss asked about changes such as housing costs and also mentioned the tourism levy which would potentially be under the Metro Mayor. He stated that in other countries the funds are used to enhance the area. The Cabinet Member stated that he did not have the full information from Government yet but overall it was understood that the Fair Funding Formula would be negative for this authority. Regarding the tourism levy, he stated that this authority had been at the forefront of lobbying for this and again, he needs to see more detail. Councillor Moss stated that the authority has a good working relationship with the Mayor.

## **178 MEDIUM TERM FINANCIAL STRATEGY 2026/27**

The Cabinet Member for Resources, Councillor Mark Elliott, introduced the report.

Panel members raised the following points and asked the following questions:

Councillor Hounsell stated that there had been speculation that the government might allow councils to levy a council tax above the current cap of 4.99% without a referendum. He asked if the Cabinet Member could give an indication of what raising the council tax beyond the cap would do to alleviate our deficit.

The Cabinet Member explained that every 1% on council tax is about £1.4 million extra revenue.

Councillor Moss stated that there have been rumours that the top bandings of council tax may well be extended. Has there been any modelling on how many houses in Bath and North East Somerset we have that are at the top band and what that could possibly mean? The Cabinet Member stated that he is not aware of any modelling as there is no detail as to what that might be yet. There are also concerns that if central government go ahead with this, they might not allow Councils to keep the money.

Councillor Simon stated that there is going to be a body to look at pay in the social care sector and set national rates for social care. Have we factored that in when looking at adult social care costs? The officer stated that he is not aware of any specific modelling for that around adult social care funding and believes that it may not kick in until April 2028.

Councillor Hughes asked that, other than the Fair Funding which obviously adds an element of uncertainty, where are the main areas that are causing that?

The Cabinet Member explained that the uncertainty part comes mainly from the fair funding issue because we don't know what income we're going to get. There is always uncertainty in predicting demand in children's and adult's services particularly in children's as a very small change in the number of children in care can be another million pounds on the budget if they're very high need.

Councillor Hughes asked if the assessment of £13 million on fair funding over three years could be wildly out? The Cabinet Member stated that he did not think it'll be wildly out and that we should know by the end of the week once we've worked through all of the modelling. We won't know for definite until the middle of December when we actually get a number from the government.

The Chair thanked the Cabinet Member and officers

## 179 Q2 BUDGET MONITORING REPORT 2025/26

The Cabinet Member for Resources, Councillor Mark Elliott, introduced the report.

Panel members raised the following points and asked the following questions:

Councillor Hounsell asked why staffing underspends and vacancies are being used to manage overspends. The Cabinet Member explained that vacancy management is a common financial tool. Current vacancy levels are within tolerance and not considered a significant risk.

Councillor Hughes asked what is causing delays in capital projects like Somer Valley Enterprise Zone. The Cabinet Member explained that the project is a key priority.

Councillor Hughes mentioned Bath Quays not being full and the Roman Baths income targets not being met and asked if there is overoptimism.

The Cabinet Member explained that visitor numbers from international markets (e.g., China) have not recovered as forecast. Income per head is strong, but overall footfall is lower than expected. He explained that Jolly's opening has moved from late Spring to Summer – this is due to the extensive work to mend the roof.

Councillor David asked what is done when it looks like areas may go over budget, for example Parks department forecast overspend. She added that the team is already stretched so vacancy management may have a strong effect. The Cabinet Member stated that he would take these comments back.

Councillor Hughes asked about the status of Being Our Best (BoB) savings target. The Cabinet Member explained that the point was not to drive savings but to pay at the right level – some jobs were graded upwards. The officer added that full savings expected by 2026/27, mainly from structural changes yet to be implemented.

Councillor Malcolm Treby asked if capital rephasing affects revenue savings. The Cabinet Member explained that the impact varies by project. For example, delays in the SEND school rebuild (Culverhay) affect long-term revenue savings. Treasury management ensures borrowing is optimized.

The Chair stated that it was good to hear that there is more confidence regarding Children's Services.

The Chair thanked the Cabinet Member and officer.

## **180 HOME TO SCHOOL TRANSPORT FINANCE AND ACTIVITY**

The Cabinet Member for Sustainable Transport Delivery, Councillor Lucy Hodge, introduced the report. There was a presentation that covered the following:

- Home to School Transport Finance and Activity
- Services provided
- National context
- Service pressures in BANES
- Independent review
- Improvements & efficiencies already undertaken
- Further improvements being explored

Panel members raised the following points and asked the following questions:

Councillor Hughes stated that it is good to see a lot of proactive steps are being taken. He asked if we have a rough number on how many journeys are going out of area each day. The Cabinet Member explained that exact data is difficult to extract due to system limitations; work underway to improve reporting. Placements are based on best provision for the child.

Councillor Hughes asked about the trajectory. The officer explained that this is difficult to predict and will depend on the Government White Paper. The Cabinet Member explained that existing SEND capacity is full and there are plans for new schools in house (e.g., Culverhay) with an aim to reduce out-of-area placements.

Councillor Treby asked if we know what saving Culverhay and Charlton House would make and would better bus services also make a difference. The officer explained that bus routes have a marginal impact as most SEND journeys require specialist transport. He did not have figures regarding savings.

Councillor Simon asked if transport costs are considered in SEND tribunal appeals? The officer explained that relatively few go to appeal and they are usually down to eligibility.

Councillor David asked if the use of council-owned cars delivering savings. The officer explained that early savings are reported. Recruitment of suitable drivers remains a challenge and if a driver is off sick, we use an agency.

Councillor Moss noted that the number of Councils moving to an in house model is increasing and there could be coordination with home to hospital transport. He stated that the appeals system is a grey area and supported the suggestion that the financial cost should be included. He asked if this authority contributes to the LGA debate. The officer stated that we do contribute nationally and are at the forefront of

discussions. The Cabinet Member stated that she wanted to get more detail in the future.

The Chair thanked the Cabinet Member and officer.

## **181 COUNCIL TAX REDUCTION SCHEME UPDATE**

The Cabinet Member for Resources, Councillor Mark Elliott, introduced the report.

Panel members raised the following points and asked the following questions:

Councillor Simon thanked officers and the Cabinet Member for their work on this. He stated that the CAB (Citizen's Advice Bureau) had been flagging this as a potential issue. He stated that he is persuaded and that this is a well-argued paper.

Councillor Hughes stated that he is surprised that this capital figure of £6,000 is so low - it penalizes financial prudence. He suggested a percentage of household total income. The Cabinet Member stated that 3.3 were receiving 100% relief.

Councillor Treby asked how arrears are managed for affected households. The officer explained that typically this is done via deductions from Universal Credit; enforcement agents are a last resort. Discretionary write-offs and welfare support available.

The Chair thanked the Cabinet Member and officer.

## **182 PARISH COUNCIL ELECTIONS AND BY-ELECTIONS RECHARGES**

The Cabinet Member for Resources, Councillor Mark Elliott, introduced the report.

(Councillor Moss declared that he acts as clerk to 2 small parish councils)

Panel members raised the following points and asked the following questions:

Councillor Hughes stated that North East Somerset will pay for our own elections and asked how elections in Bath are financed. The Cabinet Member stated that there aren't parish elections in Bath, the equivalent would be the Charter Trustees elections, and I believe those are recharged. Councillor Moss stated that it is a running issue that North East Somerset residents pay additionally.

Councillor Treby stated that a lot of income is brought into the Council by tourism and the Roman Baths which is redistributed. There are arguments both ways. Councillor Moss stated that North East Somerset residents come into Bath which adds to the economy.

Councillor Moss stated that this is an ongoing discussion and there are a percentage of residents that are resentful of what they see as a second tier of Council Tax. He stated that it would be interesting to see some numbers around elections in North

East Somerset. Many vacancies are filled by co-opting. He stated that the cost for wealthy areas is different to other parishes. Councillor Hughes stated that it is a worrying trend that more and more is getting sent down to Parish and Town Councils.

Councillor Heathcote asked what feedback had been received from clerks of parish councils up to now. The officer explained that one parish clerk commented that the parish council were not happy about the decision, no other emails received.

The Chair thanked the Cabinet Member and officer.

### **183 CAPITAL DELIVERY PROJECT ASSURANCE**

The Cabinet Member for Resources, Councillor Mark Elliott, introduced the report.

Panel members raised the following points and asked the following questions:

Councillor Simon stated that according to the risk table, it seems the risks are pretty low, especially cyber security. The officer stated that the numbers themselves are more an illustration, the actual risk register goes through assurance at steering group and capital strategy group before informal cabinet.

Councillor Hughes asked if councillors will have access to dashboards and training. The officer stated that they would.

Councillor Treby stated his concerns with borrowing £325 million over five years. He stated that during scrutiny of the budget, we would need to understand the breakdown of what comes from grants/borrowing etc. The officer explained that borrowing includes internal borrowing. Councillor Treby stated that money internally borrowed is not then available for other things.

Councillor Hughes stated that the graph should be detailed in a way that reflects what we're doing. The Cabinet Member explained it isn't misleading, corporate supported borrowing means financed from council's funding, not necessarily external loans. Treasury management ensures we don't borrow unnecessarily.

Councillor Treby stated that when the Panel scrutinize the budget, we need to see what pays back and how long it takes otherwise we can't prioritize properly. The officer stated that future reports will include clearer linkage between project benefits, funding sources, and repayment timelines.

The Chair thanked the Cabinet Member and officers.

### **184 PANEL WORKPLAN**

The Panel noted the future workplan and the following suggestions for future items:

- Motion from Council regarding AI

The meeting ended at 6.11 pm

Chair(person) .....

Date Confirmed and Signed .....

**Prepared by Democratic Services**

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# Heritage Services Sustainability Action Plan

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Bath & North East  
Somerset Council

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Improving People's Lives

# Contents

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# A Message from our Managing Director

Bath & North East Somerset Council (B&NES) was one of the first councils to declare a climate emergency in 2019, followed by an ecological emergency in 2020. The Council are committed to building a sustainable future for Bath and North East Somerset that is net zero and nature positive.

The Council's current priorities in tackling the climate emergency are to: decarbonise buildings, decarbonise transport, increase renewable energy generation, and cut council operational emissions to net zero<sup>1</sup>.

Heritage Services is an essential part of B&NES; responsible for stewarding the public facing heritage assets in the council's care.

The Council established Heritage Services as an independent business unit in 2005 allowing the service greater financial freedom and agility delivering, in return, an agreed surplus for the council. In 2045/25 this was £11.6M. Heritage Services is unique amongst UK local authorities in operating at no cost to the local taxpayer; the service is singular, within the council, in self-funding all cost increases.

The profit from commercial operations contributes directly to the surplus Heritage Services returns to the council to support core services.

This action plan sets out how Heritage Services plan to cut our greenhouse gas emissions in the next 3 years, whilst establishing a pathway to reach net zero green-house-gas emissions.

Preserving the monuments, buildings and collections in our care is essential for creating memorable, relevant and emotionally charged experiences for all. These assets embody the history and identity of local communities. As the effects of climate change are becoming increasingly prevalent on a local and global scale, we must take bold strategic action to minimise our impacts on the climate so that future generations can continue to engage with and enjoy the monuments, buildings and collections we care for. Engaging with people on this topic can positively impact their well-being, much like the social connection sought by people coming to The Roman Baths for over two millennia

 This 3-year Sustainability Action Plan sets out how Heritage Services will tackle the climate emergency, become more resilient to the effects of climate change, and contribute to the climate & ecological priorities set out by B&NES. The cornerstones guiding our sustainability goals & focus are:

## PLACE | PEOPLE | HERITAGE

Anchoring all goals & targets to these 3 interconnected pillars ensures that we respect and preserve Bath & North East Somerset's culture and history whilst meeting the needs of current and future stakeholders.



Robert Campbell,  
Managing Director, Culture and Heritage Services

Our Heritage Services sustainability objectives are as follows:

DECARBONISE OUR OPERATIONS

• IMPROVE SUSTAINABILITY DATA ACCURACY

• EMPOWER AND ENGAGE OUR VISITORS, EMPLOYEES AND SUPPLIERS

• LEAD BY EXAMPLE





# Heritage Services Portfolio

Heritage Services is responsible for the following:

## THE ROMAN BATHS

The Roman Baths is an award-winning museum and ancient monument with a designated on-site collection, located in the heart of the UNESCO World Heritage City of Bath. It has the hottest geothermal spring in the UK, some of the finest Roman remains in Northern Europe and has a continuous flow of millions of people bringing their experiences and cultures to shape its story through the ages.

## THE PUMP ROOMS

The Pump Rooms were first built in 1706. To cope with increasing demands, a new Pump Room was begun in 1789 and finished in 1799. It was built in the classical style and was a meeting place for the Georgian elite where people were able to take refreshment and also drink the mineral-rich spa water. This is the primary food and beverage venue operated by the Service. We partner with Searcys to provide the offer here.

## FASHION MUSEUM BATH

Visitor numbers 0 (approx. 100,000 pre-closure)

Fashion Museum Bath is currently undergoing a transformation to create a groundbreaking museum that will bring fashion to life for local and global audiences, reshaping Bath for the future. Although currently closed, its object loans to other institutions were seen by over 1.3m people globally in 2024.

Alongside these buildings Heritage Services also operates the Bath Historic Venues brand. This team oversee the commercial venue hire offer across the above sites, the Guildhall and B&NES' parks.

## VICTORIA ART GALLERY

Victoria Art Gallery was named to celebrate Queen Victoria's 60 years on the throne; the public gallery includes over 1,500 decorative arts treasures from the 17th century to the present day with works by Thomas Gainsborough, Thomas Jones Barker and Walter Sickert.

## THE BATH RECORD OFFICE

Visitor numbers 1,500

The Bath Record Office Archives and Local Studies collects, preserves, promotes and provides access to archives and local studies collections relating to Bath & North East Somerset and its communities.

## WORLD HERITAGE CENTRE

World Heritage Centre hosts interactive exhibits and displays designed to inspire, excite and inform visitors about the city's attributes of outstanding universal value. The City of Bath is exceptional in having two UNESCO inscriptions. In 1987 it was inscribed for its Hot Springs, Roman archaeology, Georgian buildings and natural landscape setting. In 2021 a second inscription was received as one of the Great Spa Towns of Europe – fashionable spa towns laid out around natural springs which are used for health and wellbeing.

## CLORE LEARNING CENTRE

Clore Learning Centre was a former Victorian spa laundry building, sitting beneath street level in between The Roman Baths and The World Heritage Centre. With support from the National Lottery Heritage Fund, in 2022 it was sensitively renovated to allow schools and community groups to learn about history and heritage in a hands-on and accessible way.

## Current Impact

Our annual carbon footprint covers all visitor attraction sites, the Pump Room restaurant, offices and leased storage facilities under the care of Heritage Services. Calculating the emission intensity per visitor and employee allows us to see the carbon costs associated with the economic benefit brought to the area, which will in time help to shape our approach to carbon off-setting any residual emissions.



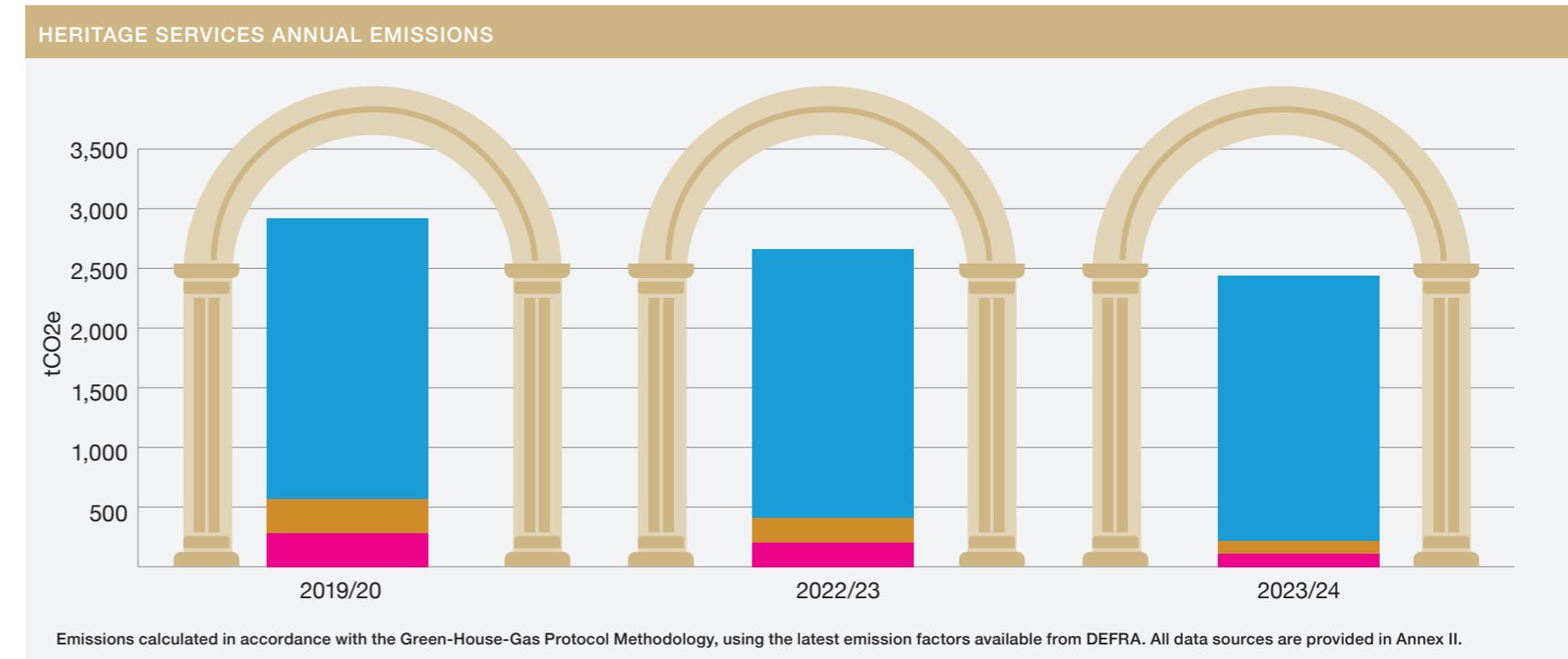
## Current Impact

# Our Carbon Footprint

The year which we are tracking targets against, our baseline year, is 2019/20.

As with many in the sector, the COVID-19 years between 2020-2022 were not truly representative of our business operations, and therefore omitted from analysis. Since our baseline year, we have made progress in reducing our total carbon footprint.

This is primarily due to the installation of heat exchange pumps in 2022 at the Roman Baths, and national grid decarbonisation. Currently, as with many organisations and with the complexities of Scope 3, 90% of our Scope 3 emissions are calculated using spend data, which is not conducive to effective decision making and subject to a high margin of error. We have plans to improve the quality and accuracy of our scope 3 data over time and how we do this is set out further down in this action-plan.



Emission Scope (tCO2e)	2019/20	2022/23	2023/24
Scope 1	293.7	242.0	77.5
Scope 2	345.3	201.5	221.7
Scope 3	2,416.3	2,421.3	2,210.5
Total (tCO2e)	3,055.4	2,864.8	2,509.6
Intensity: kgCO2e / Visitor	2.6	3.4	2.5
Intensity: tCO2e / FTE	19.7	19.0	17.1

### Scope 1:

Direct emissions from owned and controlled sources of on-site gas and fugitive emissions.

### Scope 2:

Indirect emissions from the purchase of grid energy.

### Scope 3:

Indirect emissions from organisational activities outside of our direct control, but within our sphere of influence.

# Current Impact

# Annual Emissions Tracking

## Our source of green-house-gas emissions

Graph showing our sources of green-house-gas emissions for latest reporting year of 23/24. We recognise that there are key sources of greenhouse gas emissions missing, such as digital and capital projects. We have specific targets set out below related to improving our data accuracy and broadening the scope of our understanding on some of these additional sources.

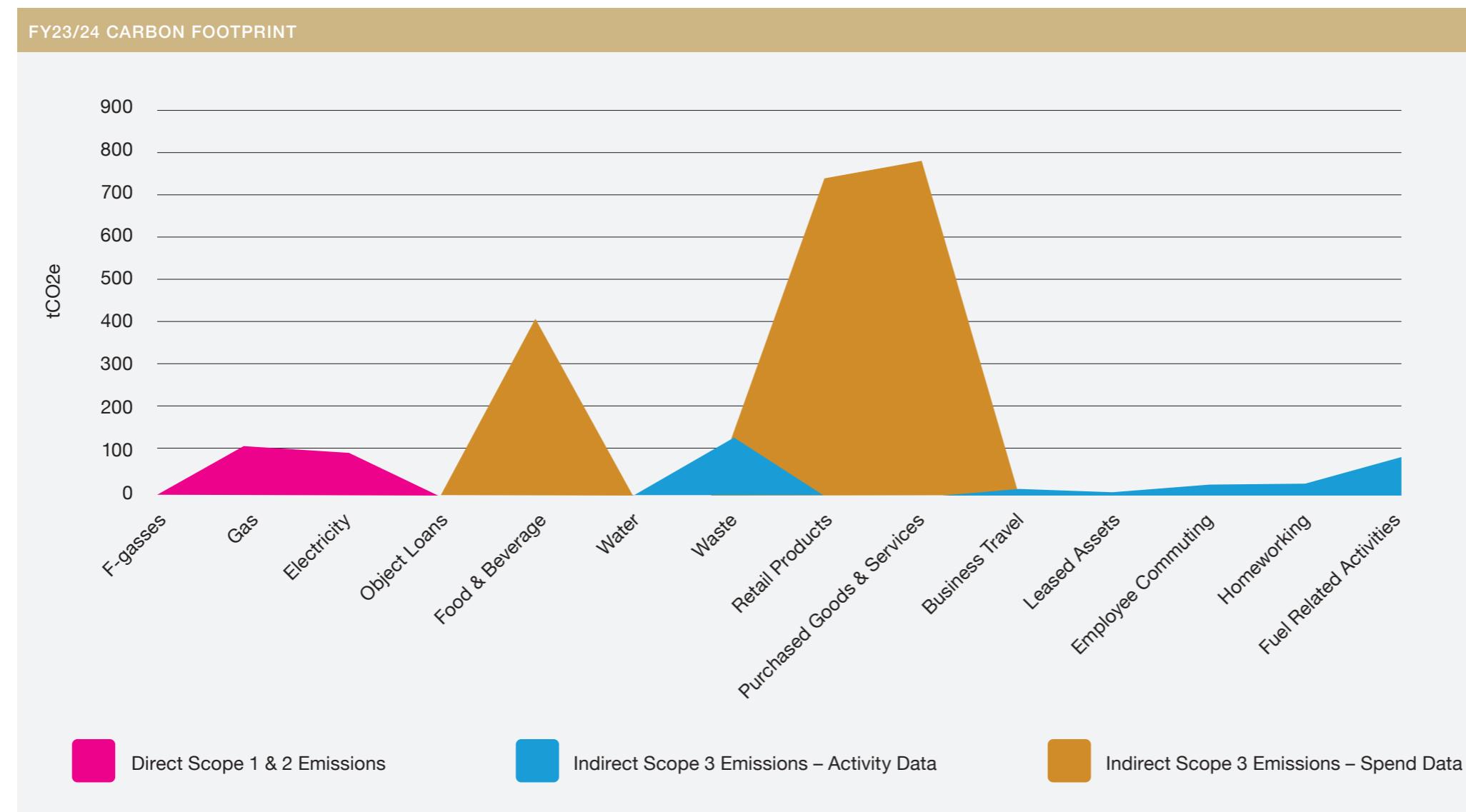


Table showing figures for the latest carbon footprint report, FY23/24. £ denotes categories calculated using spend-based proxy.

## Current Impact

# Annual Emissions Tracking

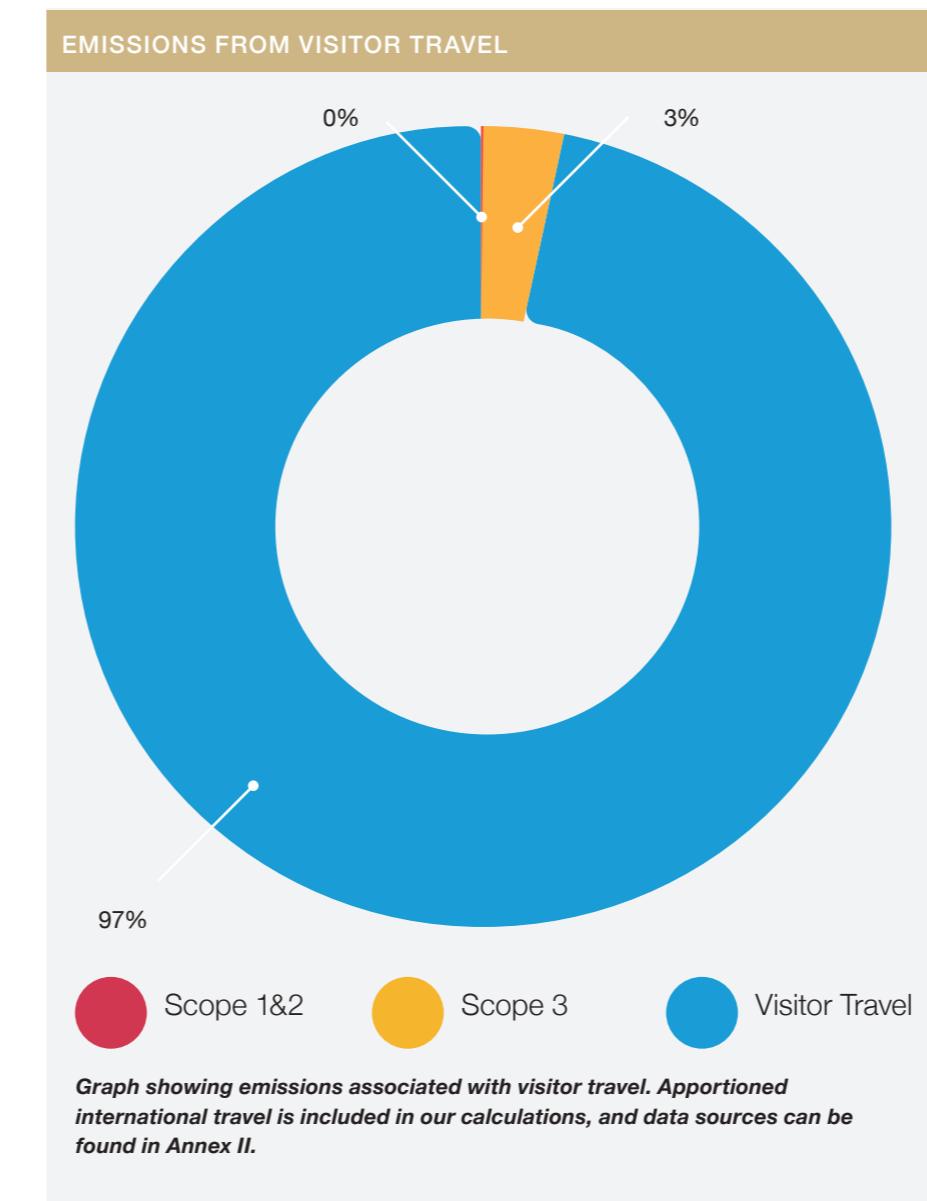
### Visitor Travel Emissions

The emissions associated with visitor travel are not formally included in our carbon boundary – yet.

The very small data sample from our post-visit survey and the number of variables and uncertainty make for insubstantial analysis and reporting. We are, therefore, not confident in using this to inform any decision making. To address this issue, we are reviewing the data we have available to us from our own systems, and working with industry peers to formulate a common methodology for apportioning emissions based on mode of transport, dwell time, local and regional statistics.

In time, as we improve our data on visitor travel, we will be able to quantify visitor carbon emission costs against economic impact. In the meantime, we will work to enable and influence our visitors to make low emission choices and bring our total carbon footprint down.

	2019/20	2022/23	2023/24
Visitor Travel (tCO2e)	44,559.6	71,331.4	97,915.0



Our goals are centred around 3 key pillars:

# People • Place • Heritage

We have set out interim goals that will enable us to close the gap between ambition and action as we progress towards net zero.

Underpinning the overarching goals laid out below are the United Nations Sustainable Development Goals (SDGS). Created under the 2030 Agenda for Sustainable Development in 2015, these goals act as a universal blueprint for all organisations, destinations and countries to achieve peace and prosperity for people and the planet.



## FY27/28 Sustainability Goals

# Place



The goals and targets under the Place pillar will ensure that our wider influence is underpinned by sustainable building infrastructure and impact monitoring mechanisms.



## FY27/28 Sustainability Goals

# Goal: Decarbonise our Operations

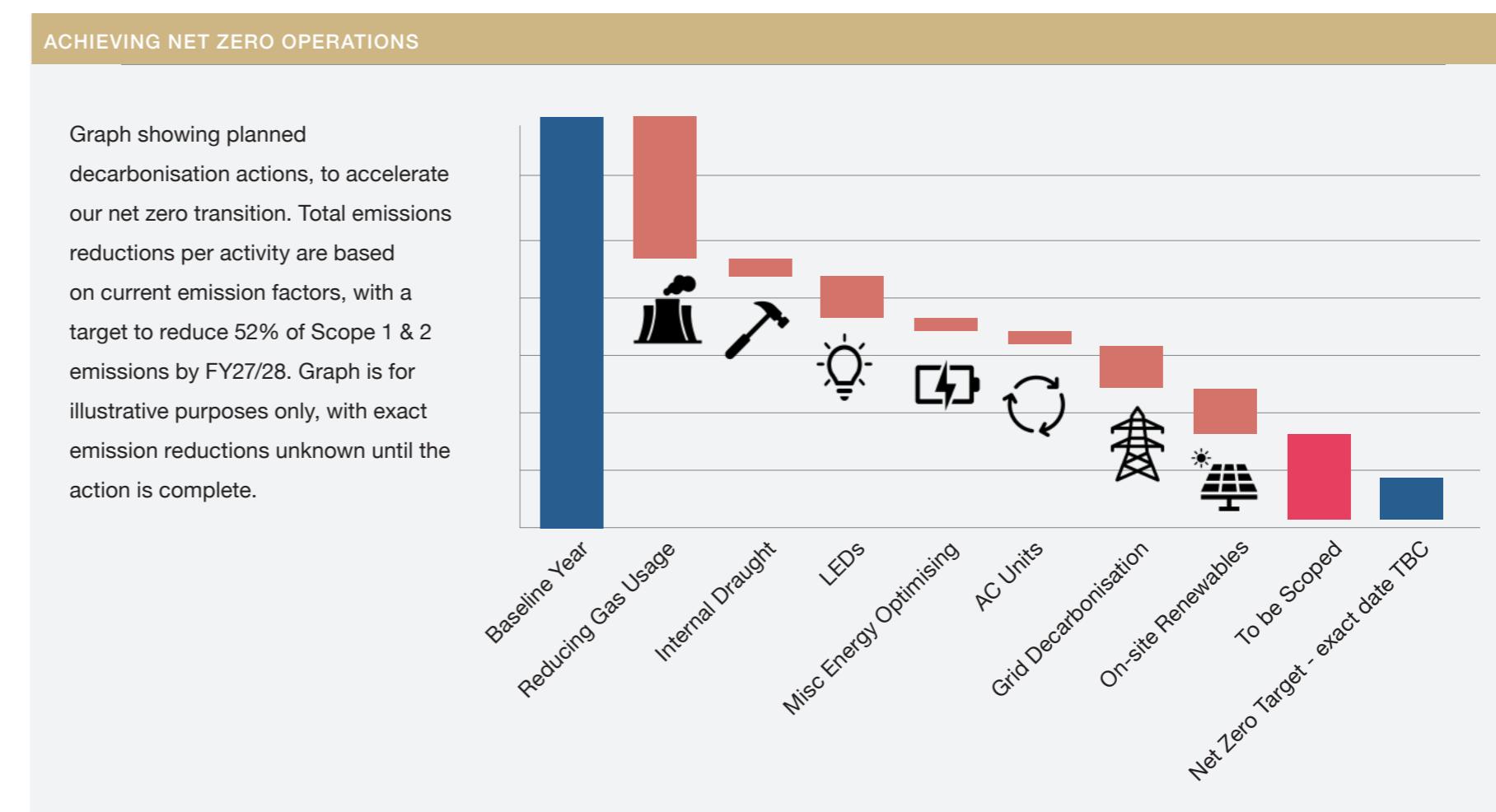
Reducing our operational emissions is a key enabling action. By this we mean taking actions that create conditions for more sustainable practices to be maintained and removing any barriers to implementation.



Between now and FY27/28, we will work with our key contractors to ensure efficient use of energy and resources, improve our recycling rate, optimise our existing systems and explore on-site renewable energy generation. Specific actions can be found in the table at the end of this document.



The term "Net Zero" focuses on **reducing** green-house-gas emissions as much as possible, with room to off-set any residual emissions. We have a clear plan to reduce our operational emissions by 52% over the next 3 years. We have wider external infrastructure challenges to overcome in order to be certain of the total sum of carbon emissions we will be able to eliminate from our operations. By the end of this action plan covers, we will have our net zero target date set.



## FY27/28 Sustainability Goals

# Food and Beverage at the Pump Room

Heritage Services has a contract with Searcys to provide food and beverage services and event catering at the Roman Baths and Pump Rooms. Searcys have been proactively working to reduce their environmental impact at the Pump Room through their own Environmental Social Governance (ESG) Strategy, *Second Nature*. 2024 initiatives include<sup>3</sup>:

- Introducing two venue-based Sustainability Champions who have been ISEP (Institute of Environment and Sustainability Professionals) trained and attend quarterly sustainability best practice sharing sessions with the wider Searcys community
- Undertaking a sustainability assessment and proactively targeting improvements including reviewing our packaging solutions, measuring and reducing food waste and increasing our range of local suppliers
- Working collaboratively with suppliers to ensure ongoing improvements in animal welfare, environmental impact and ethical sourcing.

## ENERGY REDUCTION:

Working in collaboration with Heritage Services, Searcys are targeting a move to 100% electric equipment when grid capability allows. Until that time, we are taking positive action through the implementation of:

- Energy and water efficiency checklist
- Energy saving posters
- ‘Step Up’ training which covers 5 modules including Sustainability & Energy at Work
- Steaming not boiling and using lids to reduce energy and water consumption
- Checking for leaking taps and monitoring behaviours
- Switching off computers, printers, phone chargers overnight or not in use.

## FOOD WASTE IN FOCUS:

Searcys proactively measure food waste to assist in targeting reductions through behavioural change and positive actions. Food waste is separated into three categories – production, plate and spoilage waste. The cost of food waste is then measured against the cost of total purchases. Across 2024 food waste was 4.14% of total purchases. Searcys have an ultimate goal for food waste to be less than 3% of purchases.

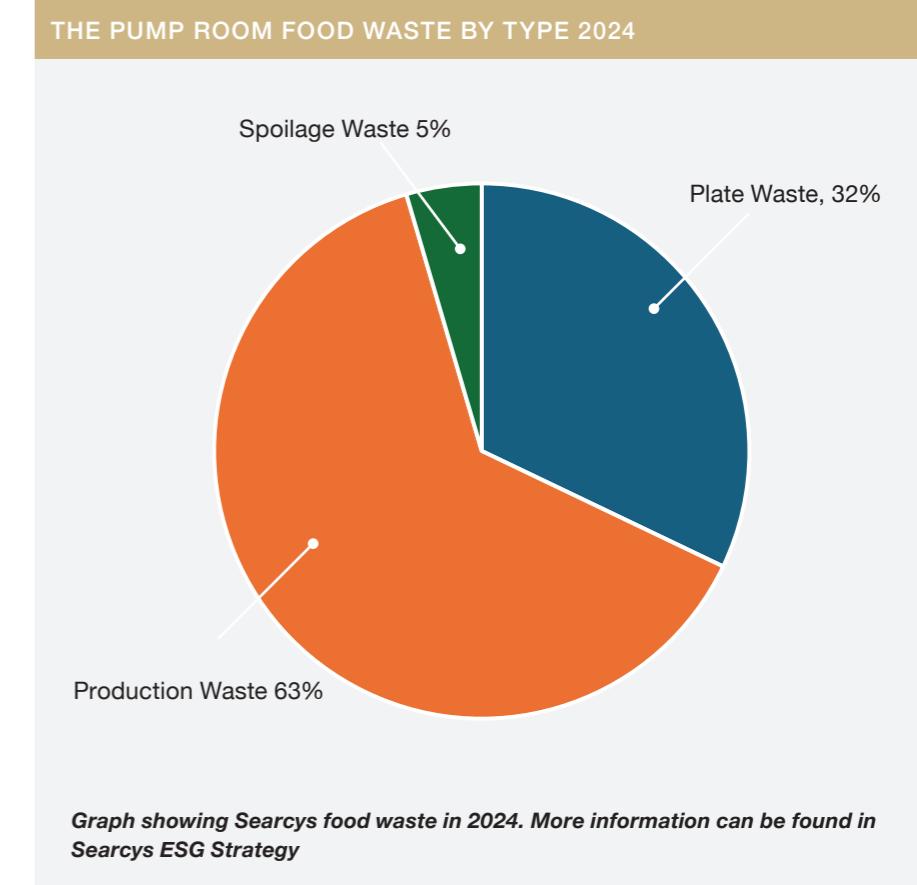
Current actions Searcys have implemented include;

- Effective stock control measures to minimise spoilage
- Production sheets aligned to booking requirements
- An ongoing review of standing orders to ensure they reflect business needs week to week
- Maximising use of all ingredients i.e. not peeling vegetables unnecessarily
- Batch cooking. Pre-booking has allowed us to prepare more effectively for volumes anticipated.
- Looking for patterns and trends in plate waste to identify where portion size is over-generous.

## RECENT DEVELOPMENTS INCLUDE:

- Incorporating coffee waste into food waste for recycling
- Introducing clear bags to visually aid our team to see the volume and type of waste being created
- Dedicated bins for separation in the servery and kitchen.

Searcys are actively seeking local partners for redistribution of edible food waste from the Pump Room Restaurant.



## FY27/28 Sustainability Goals

# Goal: Improve our sustainability data accuracy

Accurate data monitoring is crucial for place-based decision making that helps contribute to future climate-change resilience.

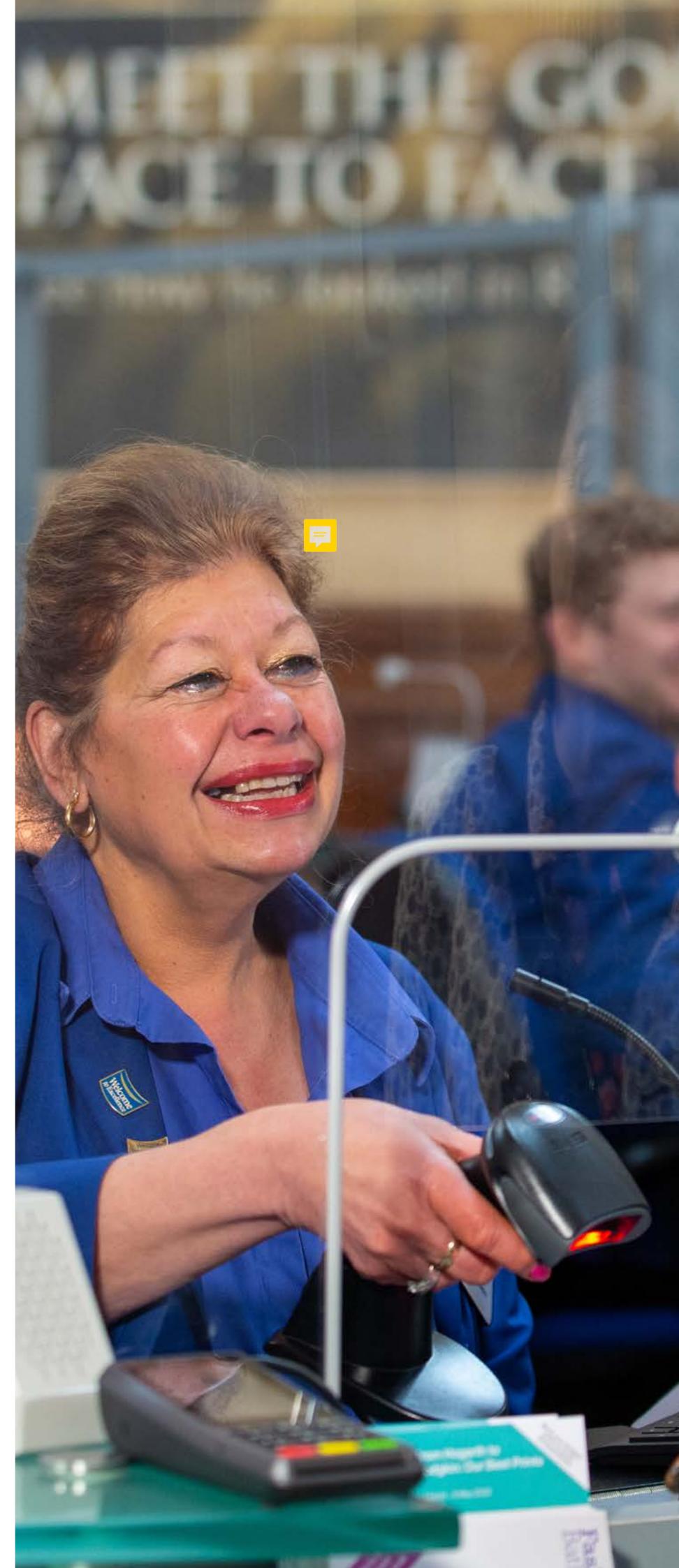
### KPI'S:

- Biennial update of employee commuting & homeworking data
- Supplier specific data covering 30% of retail spend
- Supplier specific data covering 30% of PG&S spend
- Begin digital carbon footprint measurement
- Improved visitor travel data accuracy

For us this is a great opportunity to make a positive impact within our sphere of influence. We have committed and already started supporting our suppliers with getting to grips with their first carbon footprints, meaning they can make informed decisions to increase their resource efficiency, reduce carbon and indirectly reduce costs too.



Data improvement is an on-going process, there will always be room for improvement and we don't want to wait for perfect data to start making changes to reduce our Scope 1 & 2 emissions. Our Scope 3 emissions are, like many, harder to quantify and rely on suppliers providing us with their emissions data.



## FY27/28 Sustainability Goals

# People

To achieve our environmental goals, we must ensure stakeholders are well-informed about the effects of climate change. We have significant influence over the communities we serve – residents, visitors, employees, and suppliers.



## FY27/28 Sustainability Goals

# Goal: Empower and engage our visitors, employees and suppliers

By empowering people to make informed decisions, and having the right infrastructure in place, we can continue providing rich cultural experiences for decades to come and increase the social value<sup>1</sup> that visitor spending brings to Bath and North East Somerset.

### KPI'S:

- Retail suppliers covering 30% of spend to have net zero target in place
- Suppliers covering 30% of spend in Purchased Goods & Services category to have net zero target in place
- 100% of Full Time Employees to be certified carbon literate
- All teams to have environmental action plan objectives included in individual forward job plan objectives
- Reduction in emissions intensity per kg of Pump Room food & beverages
- 100% in sustainability question within mystery visitor reports

The actions to deliver this goal are based on communicating and engaging with our key stakeholders. We have already started to deliver this through supporting some of our suppliers with sustainability training and guidance on data. In order to deliver our decarbonisation actions and improve the way we communicate our environmental impact to visitors our employees must feel confident on the subject matter of climate change, so we will be offering all employees the opportunity to undertake carbon literacy training with a target for 100% of FTE (full-time equivalent) employees to be certified by FY2027/28.

We already communicate to our visitors through Audioguides and guided tours, but we plan to improve this by widening the scope, embedding more sustainability topics into communications, and building strategic partnerships that help to minimise environmental impacts.



## FY27/28 Sustainability Goals

# Heritage

The heritage assets we preserve for future generations are recognised as having outstanding importance for people across the globe. Their historical significance has been confirmed at a national level and they contribute to the City's unique offering and double UNESCO inscription.



## FY27/28 Sustainability Goals

# Goal: Lead by Example

Everything we do as a service must protect this special place. In the face of a climate emergency, we will draw from partnerships, industry standards, government guidance, and stakeholder feedback to develop our approach in adapting and being more resilient to future climate risks.

### KPIs:

- Obtain external accreditation & recognition for organisational sustainability
- Number of climate-related risks identified and adapted to
- Visitor, employee and industry-peer engagement metrics
  - Employee training, visitor questions, website sustainability section engagement, sustainability marketing campaigns, and sector partnerships
- Number of joint partnerships and projects undertaken

To lead by example we must take bold actions, and share our learnings. As such a unique site, with 1 million litres of water running through each day, we face challenges in adapting to climate related risks. We will share progress as we develop our approach and better understand how heritage assets and listed buildings can become more resilient to climate change. Facilitated sharing is beneficial when developing new solutions. We have already started to engage with external partners to unpick some of the key problems in our sector - sustainable tourism, climate risk adaptation, retrofitting historic buildings - and will continue to develop and share what we collectively think is best practise on some of these industry-wide concerns.



# Adapting to Climate-related Risks

To anticipate, adapt and be more resilient to future climate-related risks, we need to map risks. We will use our agency as a leading visitor attraction to share findings and help the heritage sector to prepare for the future.

The latest science is clear – our climate has already changed, and we are heading towards uncharted territory. In 2024, global warming exceeded the limit of 1.5°C above pre-industrial levels for the first time since records began<sup>8</sup>. We are already seeing an increase from climate-related pressures, a primary example being flooding from the River Avon backing up into the Great Drain and having an adverse impact on the Roman Baths complex. Other climate-related risks can manifest in a number of ways, whether storm damage or urban heat island effects, the predicted future climate projections pose a threat to heritage buildings and people's cultural experiences. We must learn from the past and prepare for the future. However, the impacts of potential natural hazards compounded with the uncertainty of future climate change scenarios makes it difficult to identify and measure risks accurately. By leveraging research, innovation and creativity we plan to map, mitigate and adapt to climate risks so that heritage assets can be passed through time and not damaged in transition.

## MITIGATION:

Actions taken to reduce the impact of climate change on our planet. We are mitigating these impacts through reducing our carbon emissions.

## ADAPTATION:

Actions taken to adjust to the physical effects of climate change. We are adapting to changing climates by putting in place measures to protect the Roman Baths against increased rainfall and flood risks.

## RESILIENCE:

The ability and capacity to foresee and manage adverse climate-related risks. We are working on ensuring we can respond and be resilient in the face of unknown climate-related risks<sup>9</sup>.

The latest independent assessment of UK Climate Risks sets out 61 specific risks to local governments. We will be working closely with the Council, and external organisations, to better understand these risks and what actions we need to take to manage and adapt to them. Insights from the Met Office, and The West of England Mayoral Combined Authority state the climate hazards most relevant to us in B&NES are:<sup>10</sup>



Fluvial / Pluvial Flooding



Overheating



Drought



High winds (storms)

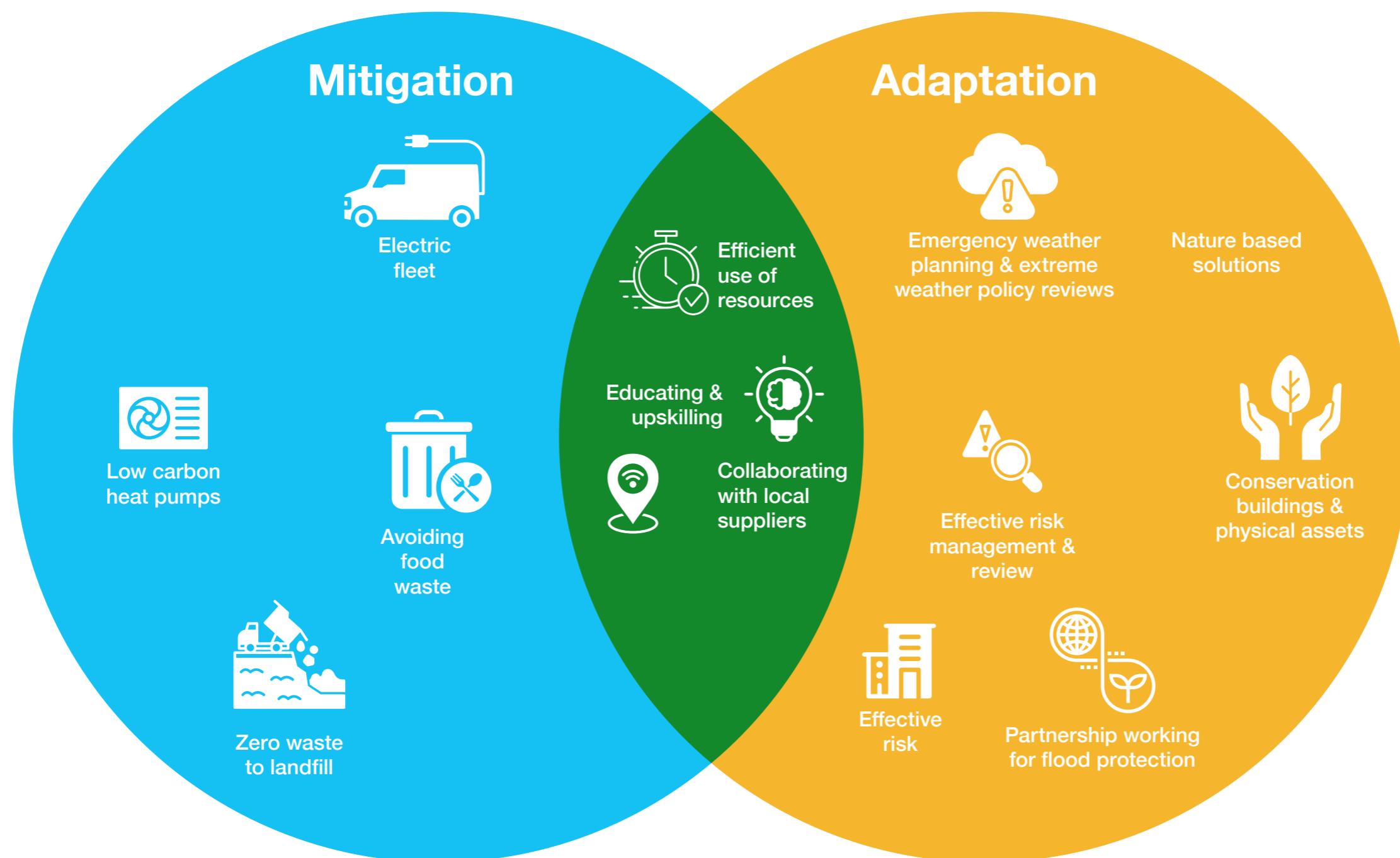
<sup>8</sup> Based on 6 international data sets used by the World Meteorological Organisation. The 2015 United Nations Paris Agreement set a global goal to limit Global Temperatures to 1.5 ° C in order to lessen the effects of climate change.

<sup>9</sup> All definitions come from the IPCC <https://www.ipcc.ch/sr15/chapter/glossary/>

<sup>10</sup> <https://www.westofengland-ca.gov.uk/wp-content/uploads/2023/07/WoE-MCA-Climate-Adaptation-Report-1.pdf>

# Adapting to Climate-related Risks

Work in this area is still underway, and whilst many of the risks we identified are picked up in our routine maintenance and conservation schedules, there are some gaps and areas for concern – most notably the Thermal Spring. In 2026, we plan to improve our understanding of the climate impacts on the thermal spring with improved monitoring and evaluation. Our risk register is reviewed and updated quarterly.



# Adapting to Climate-related Risks

## Climate Risk Summary

### Roman Baths

As climate change continues to affect weather patterns and environmental conditions, the Roman Baths is taking proactive steps to understand and manage the risks it faces.

This summary outlines the key climate-related risks identified and the actions being taken to protect our heritage, visitors, staff, and collections for generations to come.

In FY26/27 we will repeat this process for all other Heritage Services sites.

#### 1. Heavy Rainfall & Flooding

Risks: Damage to historic buildings, monuments, and collections; health and safety concerns for visitors and staff; potential financial losses from closures



#### Actions underway:

- Roof drainage improvements
- Flood management plans
- Regular conservation and environmental monitoring
- Emergency procedures for visitor safety

#### 2. Overheating

Risks: Damage to collections from heat and UV exposure; discomfort for staff and visitors; potential drop in visitor numbers



#### Actions:

- UV filters and blinds where relevant
- Staff provided with shade and sun protection
- Monitoring systems track environmental changes

#### 3. Drought

Risks: Unknown impacts on the thermal spring; increased fire risk to wooden structures



#### Actions:

- Research and collaboration with external experts (e.g., UNESCO) underway
- Discussions underway to better understand and prepare for long-term effects

#### 4. High Winds & Storms

Risks: Structural damage from debris; safety risks on terraces



#### Actions:

- Regular roof inspections and surveys
- Terrace closures during severe weather
- Reactive maintenance protocols in place

#### 5. Infrastructure Disruption

Risks: Power outages and transport issues affecting operations



#### Actions:

- Emergency procedures for electricity failures
- Review of extreme weather policies planned

#### How We're Responding

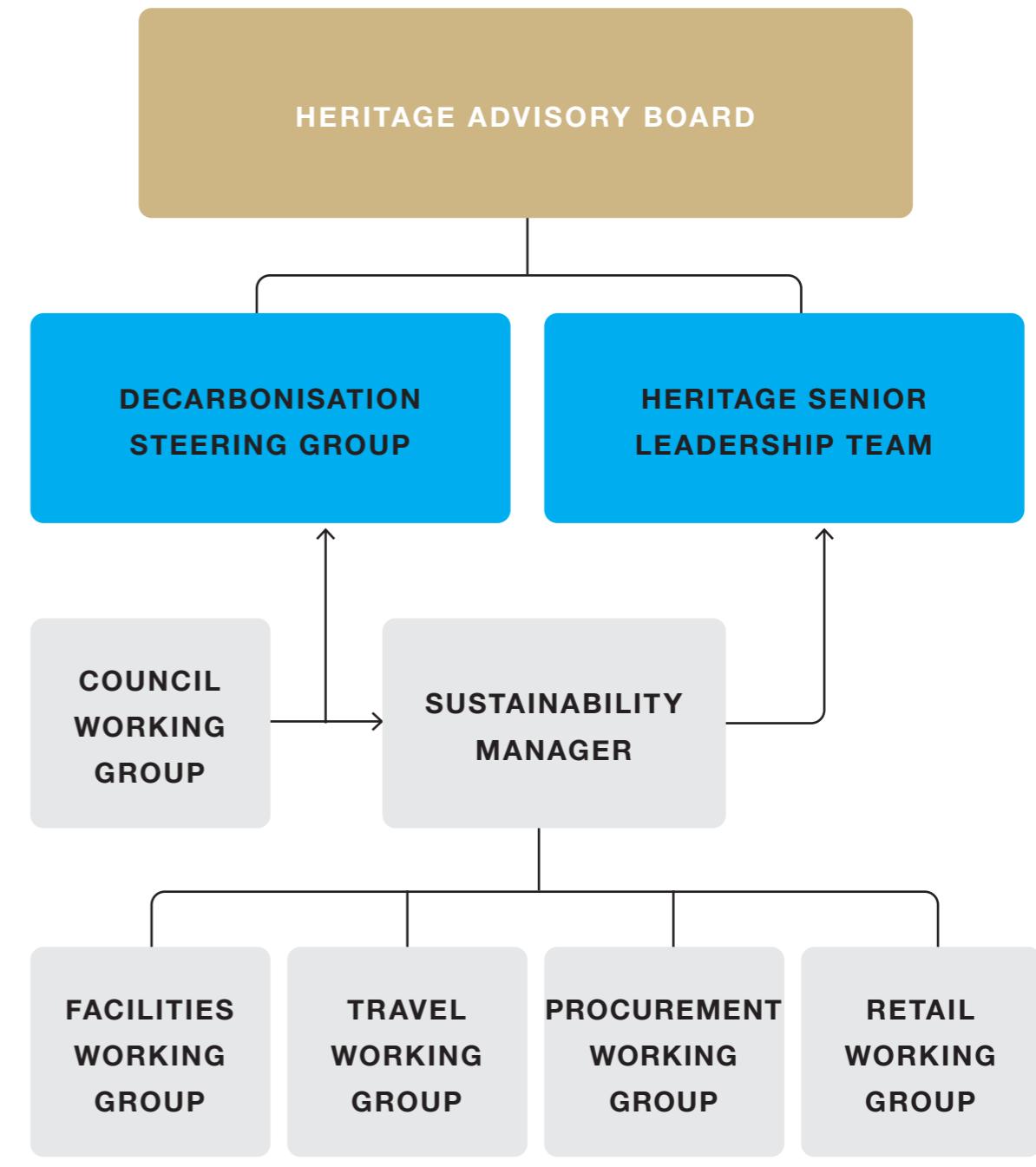
Short-Term: Maintenance, monitoring, and emergency procedures are in place and regularly reviewed

Long-Term: Investment in infrastructure, conservation, and climate resilience is being planned based on ongoing assessments and expert advice

# Sustainability Governance

Our targets and actions are regularly reviewed by the Heritage Service Senior Leadership Team. Progress against targets is also included in the annual business plan which is reviewed yearly as part of the Council's budget setting process.

Targets are also reported on and overseen by the independent Heritage Services Advisory Board. Although the Heritage Services has set their own sustainability commitments, the Service is aligned with the Council's overall approach to tackling the climate & nature emergencies. The head of Sustainable Economy, also under the Sustainable Communities Directorate, is included in the Decarbonisation Steering Group, and we work closely with the Council's Climate and Environment Team.



## Examples in Practice

# Decarbonisation in Action

Public bathhouses were a hallmark of Roman towns and cities, serving not only as places for bathing but also as vibrant social hubs. These complexes featured rooms with varying temperatures: the caldarium (hot), the tepidarium (warm), and the frigidarium (cold). Managing heat effectively was essential to the bathing experience.

The Roman Baths in Bath, known to the Romans as Aquae Sulis, were unique because they were built around Britain's only natural hot springs. The Sacred Spring, at the heart of the bathing complex, dedicated to the goddess Sulis Minerva, provided a constant supply of hot water. Reaching temperatures of up to 46°C (114.8°F), the spring-fed water kept the baths warm even during the coldest winters.

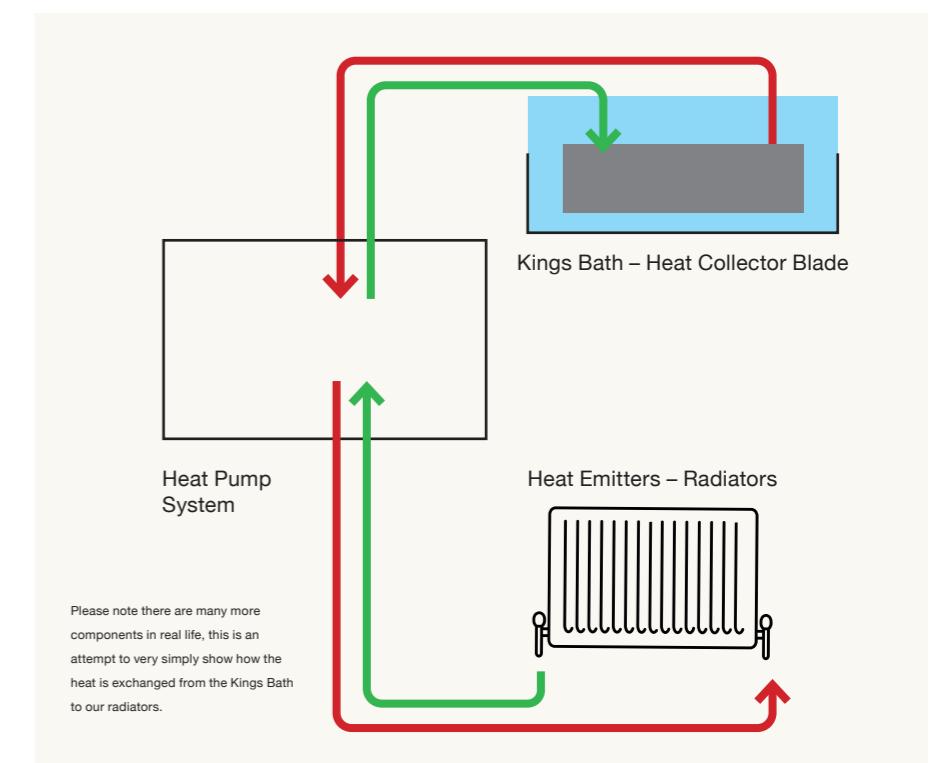
Beyond offering warmth, the baths were central to Roman social and cultural life. People from all walks of life gathered to bathe, relax, and socialise. The Romans recognised the power of the hot springs and made them the centrepiece of one of the most impressive architectural complexes in Roman Britain.

Today, the same naturally heated waters continue to flow through the historic site and the energy is captured and used in our heating system. In 2022, we installed a heat pump system which includes a series of pumps, compressors, expanders and exchangers to extract heat from one place and re-use it elsewhere. In our case, we are extracting heat from the Kings Bath and using it to heat the World Heritage Centre and The Roman Baths.

A heat pump system is very complex, we are 'pumping' heat as a flow – from one fluid to another. We start with a source of heat, in this case the Kings Bath. Underwater blades in the Kings Bath collect heat from the naturally warm spring water that is circulating at 46°C, it then gets transferred to a Heat Pump. The Heat Pump uses compression and expansion of a gas to create a 'hot' zone and a 'cold' zone – The Cold zone extracts heat from the Blade water and then the energy is passed to the Hot zone to heat the water that then circulates around radiators, heating the buildings.

Heat Pumps are efficient – they generally output a lot more heat than they consume in electricity. In the Heat Pumps we have here, 1 unit of electricity makes 3 units of heat.

In 2024, the heat pumps produced **99% of the heat demands of the World Heritage Centre**, and around **20% of the demand at The Roman Baths**. This has **saved around 38 tonnes of CO<sub>2</sub>e** compared to using the equivalent in gas, which is equal to 4 return flights from London to Sydney<sup>11</sup>.



<sup>11</sup> According to the latest emission factors from DEFRA for Natural Gas (2024), LDN – SYD Return = 34,032 kms. Average passenger long-haul flight = 0.26128 kgCO<sub>2</sub>e = 8.9 tCO<sub>2</sub>e 38 / 8.9 = 4.2 return flights. DEFRA 2024 Emission Factors.

## Examples in Practice

# Supplier Spotlight – St Ewe Eggs

St Ewes Eggs have a commitment to source only RSPCA Free range assured eggs and commenced a partnership with St Ewe's in Cornwall.

St Ewe works exclusively with RSPCA-assured farms as a minimum standard. This means eggs laid by hens that have guaranteed:

1. Environmental enrichment both inside and outside.
2. Shade and shelter, including trees and bushes which protect the birds from bad weather and predators. This helps the birds feel safer and range more freely, as well as provides natural foraging opportunities.
3. Access to dust pits giving them the opportunity to dustbathe and keep their feathers healthy and clean, an essential requirement for hens.

Across 2024, The Pump Room purchased 10,000 RSPCA Assured eggs, this relates to 91% compliance to our ambition. In Q1 2025, we are currently tracking at 97%.

St Ewe's have recently announced their B-Corp certification, supporting their sustainability initiatives taken to date which include:

- Installing solar panels on the roof of their packing facility, as well as sourcing all grid electricity from renewables sources. Around 50% of their packing centre electricity is from their solar array
- Working to ensure all soy in their feed is from responsible sources by 2026 in line with the UK Soy Manifesto
- Building a 3-year restorative plan to reach net positive biodiversity including soil health, water resilience, carbon emissions and animal and farmer welfare. Their target is to have all farms audited with a plan in place by 2027
- All packaging is between 70-100% recycled content, and is 100% recyclable, produced using solar and wind energy
- Launched electric vehicle deliveries to local customers in Cornwall, looking to expand further

St Ewe is currently working on farm agroforestry projects enabling some of their hens to be raised amongst woodlands and orchards, which is beneficial for soil, water, hens and biodiversity. They already have several farms working in this way including one farm in Devon where the flock is raised amongst an established woodland. This was created over 20 years ago to promote good soil, create resilience for the farm against climate change and extreme weather and to enable a biodiverse habitat for the hens to range in, for the wider benefit of the landscape. The result is happy hens who feel safe to range in the tree covers and enjoy the natural larder, enrichment, and hedgerows.



## Examples in Practice

# Supplier Focus – Wildfarmed Flour

Wildfarmed are on a mission to change soil health and biodiversity through a commitment to growing flour with farmers who follow their 'Soil Standards'.

These were developed in response to a lack of industry definition regarding 'regenerative'. Wildfarmed standards stipulate that all of their growers must engage in the following:

- Include species rich cover crops or diverse pasture mixes to keep their soil covered at all times
- Cereals to be grown alongside companion crops – this could be bi or poly-cropping
- Integrating animals wherever possible
- No pesticides on growing crop
- Nutrition to be applied based on plant need through sap testing

In July 2024, Searcys moved to incorporating Wildfarmed flour in their scones, signature Sourdough and through ranges such as La Tua pasta. Since July, they have sold 67,556 scones, equating to the use of 1,330kg of Wildfarmed flour in lieu of standard flour. Using Wildfarmed flour results in 2.5kg less CO<sub>2</sub>e emissions compared to standard flour, resulting in 3,326.89kg CO<sub>2</sub>e saved in making the swap<sup>12</sup>. This is the equivalent to 7.5 return flights between Bristol and Barcelona<sup>13</sup>.

*'3.6 million tonnes of carbon could be saved by 2030 if every operator across the UK hospitality and brewing sector switched to regenerative flour and barley, according to new data from not-for-profit Zero Carbon Forum and the UK's leading regenerative farming and food business, Wildfarmed. That's the same as cancelling more than 5.5 million one-way flights between London and New York.'*

[www.zerocarbonforum.com](http://www.zerocarbonforum.com)



<sup>12</sup> According to a cradle to grave lifecycle assessment undertaken by Wildfarmed, in comparison to standard flour (-1.5kg CO<sub>2</sub>e/kg vs +1kg CO<sub>2</sub>e/kg, including removals and avoidance). Further information available on request with Searcys & Wildfarmed directly.

<sup>13</sup> BRS – BCN Return = 2,360 kms. Average passenger short-haul flight = 0.18592 kgCO<sub>2</sub>e = 438 kgCO<sub>2</sub>e (DEFRA 2024 Emission Factors) 3,326.89 / 438 = 7.5 return flights

# Annex I – Sustainability Actions

## Table of sustainability actions

Heritage Goal	Service Action	Indicator (s)	Which Council priority is the action aligned with?	Sustainable Development Goal and aligned target
Decarbonise operations	All office lighting to be LED	Reduction in electricity kWh consumed	Decarbonise buildings & Net Zero operations	Goal 9, Target 4
	Optimise usage of existing Building Management System	Reduction in electricity kWh consumed		Goal 9, Target 4
	Reduce electricity consumption with replacement and upgrades of older and high consuming units	Reduction in electricity kWh consumed		Goal 7, Target 2
	Explore opportunities for on-site renewable electricity generation	Reduction in general waste kg produced		Goal 7, Target 2
	Work with waste contractors to ensure no waste to landfill	Increase in mixed recycling / general waste ratio kg produced		Goal 12, Target 5
	Improve the employee & visitor led recycling bin set up	Increase in mixed recycling / general waste ratio kg produced		Goal 12, Target 5
Improve our sustainability data accuracy	Improve electricity metering set up across all sites	Resources available, supplier engagement and improved Scope 3 data accuracy	Decarbonise Council own operations	Goal 13, Target 2
	Support suppliers with relevant sustainability resources and guidance	Improved Scope 3 data, additional categories		Goal 13, Target 2
	Map and begin quantifying digital emission sources	Improved Scope 3 data, additional categories		Goal 13, Target 2
	Collaborate with other attractions nationwide to arrive at a standardised methodology for apportioning visitor travel emissions	Improved Scope 3 data, additional categories	Decarbonise transport	Goal 12, Target 12.b
	Collate better data on visitor origin from booking system data	Improved Scope 3 data, additional categories		Goal 12, Target 12.b

# Annex I – Sustainability Actions

## Table of sustainability actions

Heritage Goal	Service Action	Indicator (s)	Which Council priority is the action aligned with?	Sustainable Development Goal and aligned target
Empower and engage our visitors, employees and suppliers	Set up regular supplier engagement workshops to support with data collection	Number of suppliers engaged with, improved scope 3 data	Decarbonise Council own operations	Goal 12, Target 6
	Create strategic partnerships that reward low-carbon visitor travel	Number of partnerships created, lower visitor travel emissions	Decarbonise transport	Goal 13, Target 2
	Undertake an audit of all retail product materials and packaging and assign internal Red / Amber / Green sustainability rating	Number of products rated against the internal criteria	Decarbonise Council own operations	Goal 12, Target 6
	Deliver Carbon Literacy training to all employees	Number of employees certified carbon literate	Decarbonise Council own operations	Goal 13, Target 2
	Work with catering partners to ensure visitors at the Pump Room restaurant have access to sourcing information and impacts	Dish provenance, visitor engagement, and external communications	Decarbonise Council own operations	Goal 8, Target 9
	Establish a programme of communication and activity that positively influences visitors behaviour. E.g. engage visitors on climate issues through our learning and participation programme	Visitor engagement with sustainability communications & initiatives	Decarbonise Council own operations	Goal 8, Target 9
	Develop a sustainability policy and action plan for our venue hire	Improved Scope 3 data, additional categories	Decarbonise Council own operations	Goal 13, Target 2
	Communicate the story of human impact on the environment through our collections and thermal Spring	Visitor engagement with sustainability communications & initiatives	Decarbonise Council own operations	Goal 13, Target 2
	Begin work on implementing the Doughnut Economic model to business operations	Improved Scope 3 data, better understanding of Bath's visitor economy through improved data accuracy	Decarbonise Council own operations	Goal 8, Target 9

# Annex I – Sustainability Actions

## Table of sustainability actions

Heritage Goal	Service Action	Indicator (s)	Which Council priority is the action aligned with?	Sustainable Development Goal and aligned target
Lead by example	Improve our sustainability data, monitoring and reporting related to climate-related risks and adaptation	Number of climate-related risks identified and adapted to	Decarbonise Council own operations	Goal 11, Target 4
	Use our agency as a leading visitor attraction to share data and best practices to aid industry benchmarking	Shared case-studies, external events attendance and hosting		Goal 11, Target 4
	Establish meaningful partnerships with other organisations	Number of partnerships created, improved data		Goal 11, Target 4
	Finalise work on drainage and flooding issues on the Roman Baths roof	Project completion	Decarbonise buildings	Goal 11, Target 4
	Undertake work to understand how to stop the great drain from flooding under heavy rainfalls	Monitoring and evaluation of environmental impacts on the great drain and thermal spring	Decarbonise Council own operations	Goal 11, Target 4
	Finalise and publish our Climate Change Risk Assessment and Adaptation Plan	External facing climate adaptation plan, internal climate risk assessment embedded within current risk management framework		Goal 11, Target 4
	Continue to deliver Fashion Museum Bath as an exemplar of environmental sustainability	Project completion	Decarbonise buildings	Goal 13, Target 2

# Annex II – Emissions Data & Methodology

Table showing emission calculation data sources, accuracy and plans to improve over time:

Accurate activity data	Spend / other proxy data	Estimated activity data
Emission Source	Data Used	Method & Emission Multipliers
Gas	Meter & billing data	GHG Protocol, DEFRA Emission Factors
Fugitive Emissions	Contractor service & maintenance records	GHG Protocol, DEFRA Emission Factors
Electricity	Meter & billing data	GHG Protocol, DEFRA Emission Factors
Object Travel	Internal object loan records	Vehicle types estimated, DEFRA Emission Factors
F&B	Searcys spend data	Searcys own carbon calculation. Specialised SaaS platform which uses Exiobase, Ecolnvent and CEDA Emission Factors
Water	Meter & billing data	GHG Protocol, DEFRA Emission Factors
Waste	Estimated from capacity & pick up frequency (SEPA Density Conversion factors)	GHG Protocol, DEFRA Emission Factors
Retail	Internal spend data	GHG Protocol, UK Government S.I.C. Codes with inflation applied
Purchased Goods & Services	Internal spend data	GHG Protocol, UK Government S.I.C. Codes with inflation applied
Business Travel	Internal booking system, spend data, and expense claims	GHG Protocol, DEFRA Emission Factors
Upstream Leased Assets	Spend data (Dents leased storage facility) and mileage (retail van)	GHG Protocol, DEFRA Emission Factors, SIC Codes
Employee Commuting	Internal survey 43% response rate	GHG Protocol, DEFRA Emission Factors
Homeworking	Internal survey 43% response rate	GHG Protocol, DEFRA Emission Factors
WTT   T&D	All relative to individual fuel and electricity related categories	GHG Protocol, DEFRA Emission Factors
Visitor Travel	audioguide language data, post-visit survey & national averages from Visit Britain	Apportioning calculation applied based on average reasons for visiting Bath & dwell time. Modes of transport estimated based on distance to Bath.
		Plans to collate better visitor origin data from new visitor management system. Plans to streamline apportioning methodology in the sector / region.

# Heritage Services Business Plan 2026–2031

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## 1. Summary

The Heritage Services Business Plan 2026-2031 outlines the Service's strategic vision and mission as we adapt to a challenging economic landscape and continue to deliver key Council corporate priorities.

The Service anticipates continued growth in visitors at the Roman Baths in the 26/27 financial year. This will lead to increases in income and profit. Heritage Services is projected to deliver a financial surplus of £13.269 million in 2026/27.

This financial success is built on investment in staff and the heritage assets that we care for alongside prudent cost management and entrepreneurial approaches to pricing and revenue generation. There will be two main strands to drive footfall at the Roman Baths. The first is to focus on attracting more international visitors through marketing and relationship building within the travel trade market. The second is to increased domestic visitation by improving the value of a visit to the Baths when compared to competing attractions. This will include considering new pricing options, introducing new programming and making the depth of experience available at the site more central to our communications.

Heritage Services will match this commercial activity with a continued commitment to delivering social value impact across our activities. These are aligned with core Council strategies including the Economic and Joint Health and Wellbeing Strategy. These activities will centre on the continued use of our dedicated learning and community engagement spaces at the Victoria Art Gallery and Clore Learning Centre as hubs for learning and participation in the heart of Bath. We will also continue to invest in and grow our successful volunteer programme.

26/27 will also see us strengthen our approach to supporter engagement. Primarily this will be through the ongoing implementation of a new Customer Relationship Management (CRM) system. The relationships with the independent charities that support us will be deepened and we will work in partnership with them to ensure we benefit from philanthropic contributions to our activities.

Operational efficiency will be measured through benchmarking within the Association of Leading Visitor Attractions (ALVA) and a review of the governance structure will update the operating arrangements for the Service within the Council. Focus will increasingly be placed

on environmental sustainability and this report is accompanied by the Service's first ever Environmental Action Plan. As always, the Service will focus on the safety, security and conservation of the buildings and collections in our care. This was demonstrated in 2025 when a proportion of the Bath Record Office collection was re-located to more suitable storage. In 2026 we will move the majority of our reserve collections associated with the Roman Baths to a more suitable location also.

The relocation of the Fashion Museum to the Old Post Office remains the Service's flagship capital project. The Museum's departure from Bath's historic Assembly Rooms in 2022 created a rare opportunity to establish a bold, pioneering museum that reflects the significance of one of the world's leading fashion collections. This development exemplifies the Service's priorities—audience engagement, research excellence, collections care, social value, and financial sustainability. In 2026, the project will focus on securing substantial funding, alongside obtaining planning permission and listed building consent.

The Service's current strategy period ends in 2027. Cast in 2022 in the immediate post-covid world much has now changed. As such, the Service will begin to consider its strategy for the period 2028 – 2033 in the 26/27 financial year. This will take into account the changing context that the Service operates in and look forward to the opening of the Fashion Museum in 2030.

We are proud to be a Service that is part of B&NES and everything we do is dedicated to delivering on the purpose, principles, commitments and priorities of the Council. This is evident throughout the content of this plan.

## 2. Service Vision and Mission

### 2.1. ***Bath and North East Somerset Corporate Strategy***

Heritage Services is dedicated to the delivery of Council Corporate priorities via the preservation and enhancement of the cultural heritage of Bath and North East Somerset. Through strategic investments, innovative initiatives, and a commitment to sustainability, we aim to deliver exceptional visitor experiences and contribute to the region's economic and social prosperity.

Bath and North East Somerset Council (B&NES) has one overriding purpose – to improve people's lives.

The Corporate Strategy has nine priorities for the period 2023-2027. Heritages Services feels that it can contribute significantly to 7 of these through its current and future activities:

- Clean, safe and vibrant neighbourhoods - working with local communities to promote civic pride and preventative approaches
- Support for vulnerable adults and children – securing safe, effective services that meet the needs of our changing population
- Delivering for our children and young people – working with our partners to narrow the early years attainment gap
- Healthy lives and places – working with health and other partners to tackle inequalities, promote healthy places, and support people to live healthier lives
- Good jobs - aiming to increase the median wage in a regenerative economy
- Skills to thrive - an inclusive economy where prosperity is shared
- Cultural life - valuing and developing its contribution to Bath and North East Somerset.

To this end we will be aligning a lot of the work we undertake against key Council strategies. Primarily the [Health and Wellbeing Strategy](#) and the [Economic Strategy](#) with the data contained with the [Strategic Evidence Base](#) underpinning how we direct many of our activities. With the emergence of the West of England Combined Authority's [Growth Strategy](#) we will also begin to align our operations with the outcomes envisaged for the region as a whole. Finally, 2026 will also see the adoption of the Council's Cultural Development Plan in which the work of Heritage Services is paramount.

## **2.2. Vision**

A document outlining the Service's strategy 2022 – 2027 can be found [here](#).

The Service's vision is to: **Learn from the past, understand the present, shape the future**

There are three over-arching aims to achieve between now and 2030:

- Return the Service to pre-COVID profitability;
- Move the Fashion Museum
- Achieve Net Zero.

## **2.3. Mission**

The Service's Mission is to:

- Create memorable, relevant and emotionally charged experiences for local, national and international audiences;
- Conserve the monument, buildings and collections in our care;
- Be supporter centric – building long-term, mutually beneficial relationships with people who engage with us;
- Act commercially to generate significant income from our activities and work to contribute to the wider economic prosperity of the region;
- Offer an unparalleled customer experience for everyone;
- Be a leader in sustainable and responsible practice in the Museums, Heritage and Archive sector.

## **2.4. Strategic Priorities**

The Service has six strategic priorities which it will deliver on over the course of the Plan:

1. To provide maximum access to our buildings, monuments and collection to as wide an audience as possible to facilitate learning, understanding and emotional connection;
2. To be a supporter focussed organisation;
3. To maximise income;
4. To operate efficiently and effectively as an organisation;
5. To bring benefit to Bath, the South-West and the UK;
6. To act as an environmentally sustainable and responsible organisation in everything we do.

### 3. Business Strategy

#### 3.1. Performance Overview

##### Roman Baths

Visitor numbers at the Roman Baths have been lower than budgeted in 2025/26. The Service set a budget for 10% growth in visitors during this financial year. Across the year there has been minimal growth with overall visitor numbers down 2% financial year-to-date (end of December 2025). This is the continuation of a trend experienced in the second half 24/25 and the Service has proactively responded with initiatives such as enhanced school-holiday experiences and the successful programming over July and August as part of the Summer lates programme.

The lower than budgeted footfall at the Roman Baths has resulted in a lower than budgeted admission income. It should also be noted that admission income is up 6% on 24/25 at the Roman Baths, despite the reduced visitor numbers. This is due to the increases in prices made possible by detailed planning work in 24/25 and the Service is on-track to return its largest ever surplus to the Council of £11.8million. The Service has responded pro-actively with additional income activities and prudent cost control which has mitigated over £700k of the shortfall in projected income.

Figure 1 below shows footfall relative to budget, pre-pandemic and prior year. At Q3 the forecast for visitors in 2025/26 has reduced from a budget of 1,100,000 to 972,000.

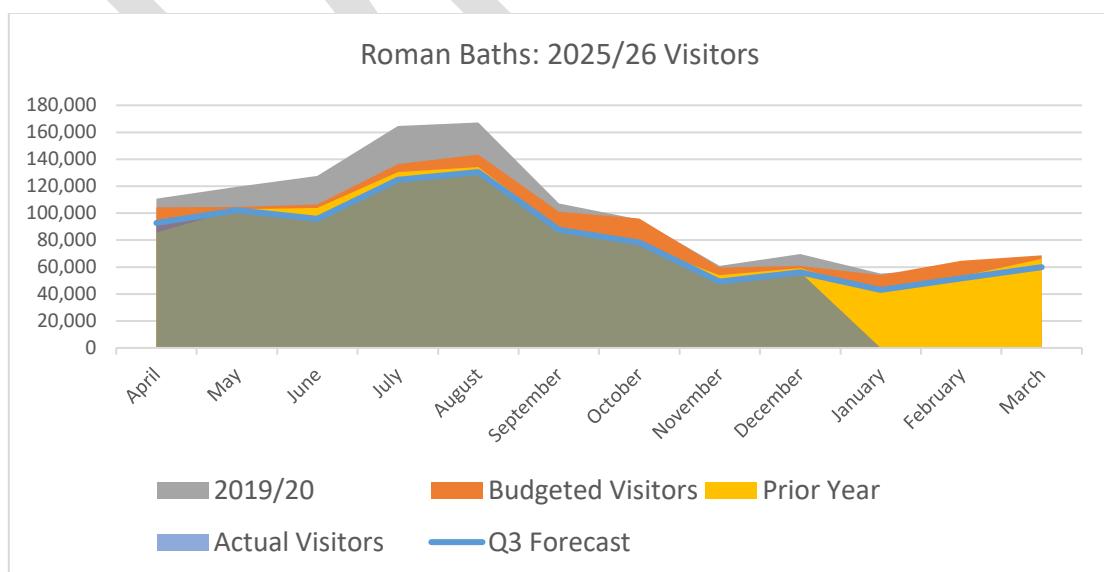


Figure 1: 25/26 Financial Year Roman Baths visitor numbers

The chart below provides a longer-term view of the pandemic's impact and recovery, shown alongside the visitors to Department of Culture Media and Sport (DCMS) funded museums (chosen as comparators due to their high visitor numbers, national significance and large tourist markets and including: the British Museum, Science Museum, V&A, Natural History Museum and Tate).

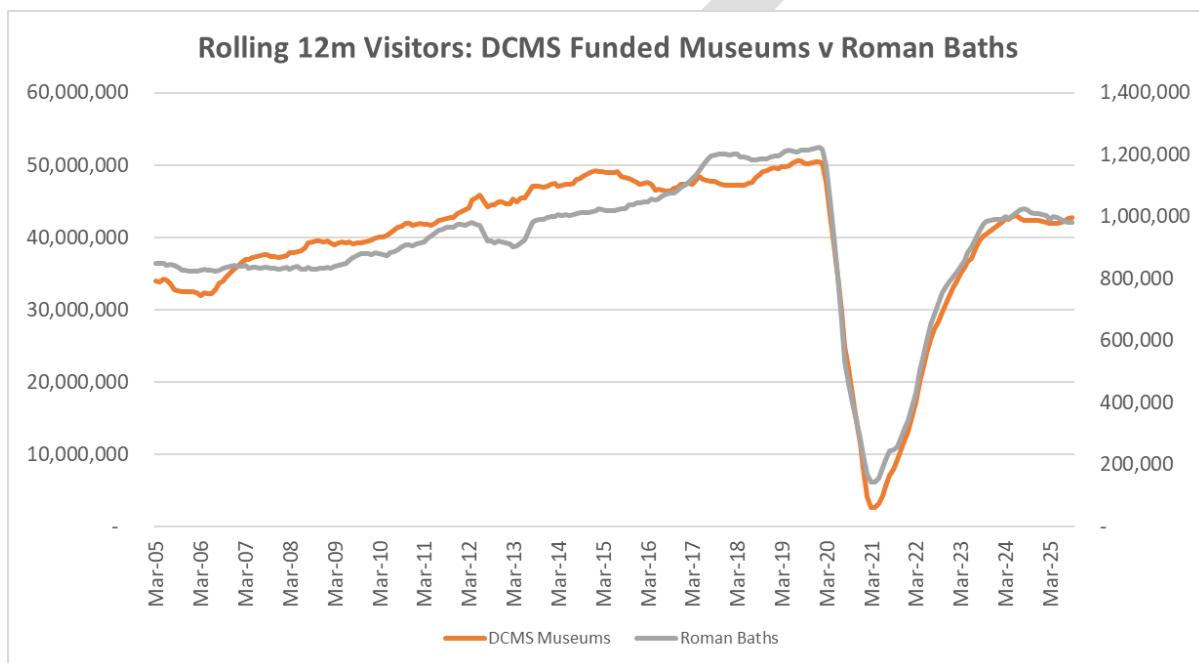


Figure 2: Rolling 12 month DCMS funded museum and Roman Baths visitor numbers

Figure 2 shows that over the 12 months to September 2025, the DCMS funded museums have seen a small (1.5% growth in visitors), whereas the Roman Baths has seen a reduction as set out above. It should be noted that DCMS funded museums are largely free to enter, attracting predominantly domestic audiences, which may help to stabilise their visitor numbers, particularly during a period of prolonged cost of living pressures when paid for attractions such as the Roman Baths can be seen as discretionary spending which can be constrained.<sup>1</sup>

<sup>1</sup> More broadly, the chart sets some of the longer-term context for the Roman Baths, in the build up to COVID. The Brexit referendum (and weakening of GBP) drove a steady increase of visitors to both sets of attractions. The impact of terror attacks in 2017, saw a switch out of London, this chart shows that switch very clearly in May – Aug 2017. Then COVID, which came just after the Roman Baths' busiest ever year. The fuller impacts of the pandemic have been set out in previous versions of the Plan and are not repeated here.

The DCMS chart in figure 2, demonstrates that the slowdown in Roman Bath's COVID recovery from the middle of 2023 is mirrored across the sector, with sites seeing declining visitor numbers since summer 2024. Across the Association of Leading Visitor Attractions (ALVA) sites there is regional disparity with London, the South-East, East of England and Scotland reporting growth in the calendar year, whereas Wales, Northern Ireland, the North West and South West of England all recording a decline in visitors.

There are a range of factors depressing the inbound tourist market. These include:

- The strengthening of GBP against both USD and EUR, making overseas holidays less affordable for US and European travellers. International inbound travel only grew by 0.6%.
- Global political instability discouraging travel, there have been two active conflicts in Europe.
- Economic and political factors discouraging a recovery of the mainland Chinese market (e.g. pre-covid mandarin speakers at the Roman Baths were 120k per year, in 2025 it was less than half this figure).
- Real and perceived difficulties for long-haul visitors in including the UK as part of their visit to Europe including new visa rules
- There has been a consistent decline in the average length of stay for inbound visitors to the UK. As a result, international tourists can limit their itineraries to major destinations such as London and Edinburgh, leading to a continued concentration of economic benefits in these established "honeypot" locations
- US travellers now account for a much larger share of inbound spend than before the pandemic—rising from 16% in 2019 to 28% in 2024. Given the Roman Baths' global appeal, this highlights the challenges of missing key visitor segments that previously contributed to performance, created by the slower or incomplete return of other international markets compared with 2019.

In terms of domestic audiences, factors influencing visits have included:

- Domestic audiences, who could afford to, have opted for more overseas holidays driven by poor weather across 2023 and 2024. The strengthening of GBP against both USD and EUR, makes it more affordable for British people to travel to these locations. In 2025 domestic outbound travel grew by 7.2%.
- Cost of living has meant that many domestic visitors are choosing to take fewer days out and prioritising free visitor attractions, as noted above.

- The sites that have seen growth this year have programmed to add to their normal offer. This proved successful during the Summer Lates music programme at the Baths and is something which will be expanding in 2026.

Retail sales have mirrored the decline in visitors as the cost of living impacted on visitor's desire to spend. Retail sales have been down 3% during the 25/26 financial year to date compared to 24/25. Sales in the Pump Room has been solid across the financial year to date with spend per diner up over 8%.

Visitor Enjoyment scores at the Roman Baths have exceeded target and, in the most recent mystery visit, the Roman Baths scored 99%, one of the top scores for all participating attractions in 2025. While overall scores remain strong, they are slightly lower than in 2024/25.

This is partly due to our more commercial pricing approach: the average admission price has risen by 8%. Although enjoyment scores confirm that the quality of the experience remains high, the price increase has naturally influenced the value for money rating.

It is worth noting that scores in the final quarter are typically higher, as this period benefits from lower prices and quieter visitor numbers. We therefore expect overall scores to improve by yearend.

	Apr-Nov 2025	Apr-Nov 2024	TARGET
Visitor Enjoyment	8.68	8.80	8.60
Value for Money	7.84	8.00	8.00
Net Promoter Score	+57	+62	+60

Figure 3: Roman Baths Visitor Experience Scores 2025/26 v 2024/25

In 2025, 1,570 people were directly engaged through targeted community activities, up from 1,012 in 2024—a 55% increase. The programme prioritised building and sustaining meaningful relationships and initiatives. The Roman Baths Youth Forum grew with new members, while Minerva Mondays (a monthly wellbeing group) expanded. Key partnerships continued with Bath Carers Centre, local universities, and the Council's Resettlement Team. New collaborations included Blind Veterans UK, now a valued partner returning in 2026. Health and wellbeing initiatives reached a broader audience via social prescribing and ongoing support for internal Council services. Our inclusion in the Wellbeing Courses Working Group reflects strong ties with these teams.

The Service launched Archaeology Adventures, a paid family activity in the Investigation Zone, which has become a core part of our holiday offer. Our Free School Meal initiative broadened access and attracted more schools that might not have otherwise visited, strengthening our educational outreach. We renewed the Learning Outside the Classroom Quality Badge, maintaining national recognition for quality and safety. Additionally, we delivered specialist day schools, including *Latin for Beginners* and *The Latin Express*.

### World Heritage Centre

The World Heritage Centre is expecting to welcome around 90,000 visitors in 25/26. The Centre recently won Gold for Visitor Information Service of the Year at the Bristol Bath and Somerset Tourism awards.

### Victoria Art Gallery

The Victoria Art Gallery celebrated its 125<sup>th</sup> anniversary in 2025. The Service was able to mark this milestone with the re-opening of the Upper Gallery following an extensive investment in repairs to the historic roof. The Council's investment in these repairs demonstrated the organisational commitment to publicly available culture for all. Visitors to the Upper Gallery have been ahead of budget each month since its reopening in May, demonstrating the popularity of this space, particularly with local audiences. Overall, the Gallery has welcomed 66,122 visitors in the financial year-to-date (end of December 2025), an increase of 57% on last year, as demonstrated in the chart in figure 4.

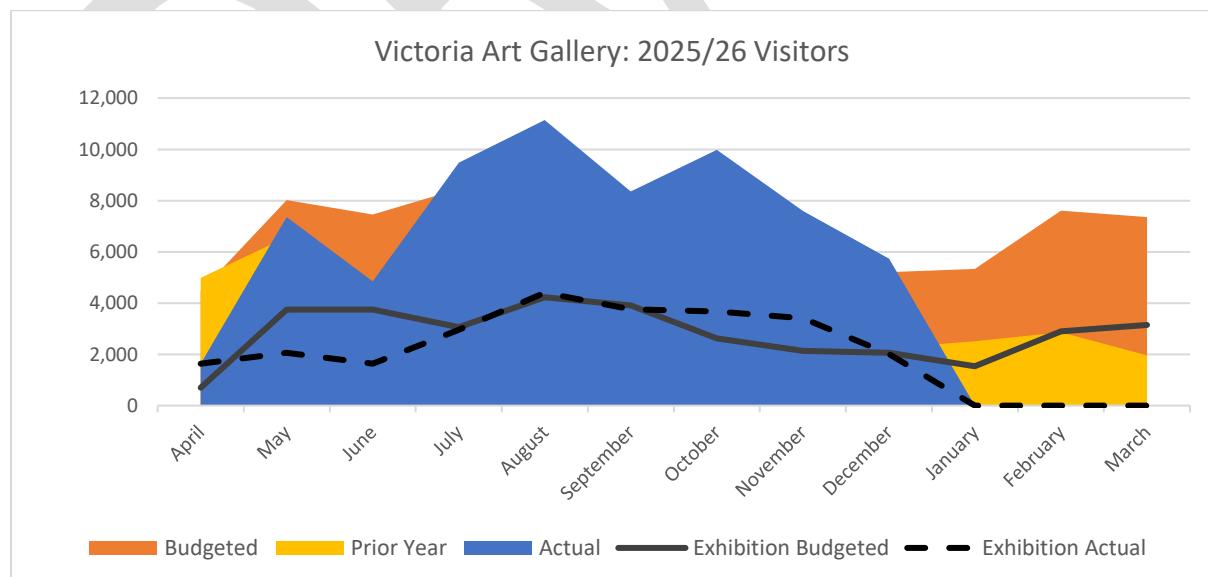


Figure 4: 2025/26 Victoria Art Gallery Visitor Numbers

The Service was also able to open 'the Modelling Room'. This space, dedicated to learning and engagement activities has the potential to be transformational for the audiences and relevancy of the institution. It was funded almost entirely by third party funds from the Friends of Victoria Art Gallery and an individual donor.

## **Fashion Museum**

Whilst the Fashion Museum is now closed, we have continued to loan objects from the collection to major fashion exhibitions across the world. In 2025 over 550,000 people saw Fashion Collection objects across the UK and around the world. Items from the Council's internationally significant collection were loaned to several prestigious exhibitions across Europe and the UK. These included:

- **Petit Palais & Palais Galliera, Paris, France**

Two couture dresses by the House of Worth featured prominently in *Worth, Inventing Haute Couture*. These garments, created around 1903 for Empress Eugénie and Mary Curzon, exemplify the origins of haute couture and were displayed until September 2025.

- **National Galleries of Scotland: Portrait Gallery, Edinburgh**

A pair of elaborately embroidered gloves once owned by King James I and a 17th-century embroidered waistcoat appeared in *The World of King James VI & I* (April–September 2025).

- **The Garden Museum, London**

*Cecil Beaton's Garden Party* (May–September 2025) included a hat worn by Beaton and a silk dress featuring his hand-painted ivy-leaf design.

- **Polesden Lacey, National Trust, Surrey**

*Dress to Impress* (May–November 2025) showcased an 18th-century blue silk waistcoat with military-style gold embroidery from the Bath collection.

These loans demonstrate the breadth of the Fashion Museum Bath's holdings—from early 17th-century accessories to early 20th-century haute couture—and their continued cultural impact during the museum's transition to its new home in Bath.

Over 2025 the Fashion Museum Bath project has made excellent progress. The start of the financial year was marked by the announcement that the project was successful in its application for development phase funding to the National Lottery Heritage Fund (NLHF). The Lottery contribution of £768k was joined by a contribution from B&NES of £1,359,231

which allowed the project to progress through RIBA Stage 3. The project passed its NLHF development phase review in November 2025 and an internal review of the RIBA 3 design phase. Part of this work involved a consultation exercise across BANES, with over 4,500 residents consulted on the proposals for the new Museum and associated public realm works.

The project has maintained its strong focus on sustainability, operational efficiency, and robust engagement with communities across BANES. The project remains ambitious in its vision, with a clear path to opening in Winter 2030, subject to continued funding success and effective risk management.

### **Systems Infrastructure**

In the 2025/26 financial year, Heritage Services prioritised strategic investment in core systems to enhance operational efficiency and customer engagement. This included the implementation of Phase 1 of the new ticketing system, Expian, implementing Futura to optimise point of sale and back of house retail processes, and the procurement of Good CRM to strengthen marketing automation and relationship management. These investments will support streamlined workflows, and enhanced visitor communications, aligning with our long-term digital transformation objectives. By modernising these platforms, we will deliver a more personalised experience for customers, improved reporting capabilities, and ensured scalability to meet future service demands across all our sites. These system changes will also realise productivity and resource efficiencies for the Service.

### **3.2. Future targets**

The financial summary and key future targets are set out in appendix 1 and 2 respectively, alongside the prior year actuals and current year forecast. Figure 4 below shows the expected recovery of both income and profit.

	2024/25 (actual)	2025/26 (Q3 fcast)	2026/27 (proposed)	2027/28 (proposed)	2028/29 (proposed)	2029/30 (proposed)	2030/31 (proposed)
<hr/>							
External turnover (£'000)	26,008	27,369	29,441	30,498	31,040	31,802	32,735
<b>Net Profit  (£'000)</b>	<b>11,648</b>	<b>11,754</b>	<b>13,261</b>	<b>13,515</b>	<b>13,525</b>	<b>13,508</b>	<b>13,517</b>

<i>Profit as a % of income</i>	44.7%	43.0%	45%	44.3%	43.6%	42.5%	41.3%
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Figure 5: Heritage Services income and profit

The Plan projects growth in visitor numbers and visitor-driven income from the current performance outlined above. We anticipate visitor numbers of 1,005,000 at the Roman Baths in 26/27 which will be a 3.4% increase on the projected visitor numbers in 25/26. It is noted that this growth is primarily related to the two Easter weekends in the 26/27 financial year (due to an early Easter in March 2027) and the Service feels it is prudent to model minimal year-on-year growth. In effect, the strategies to encourage visitation outlined in section 3.3.3 will stop the trend of footfall decline seen across the 24/25 and 25/26 financial years.

The actual visitor figures outlined in section 3.1. confirm that the period of rapid growth driven by the COVID recovery has concluded. As noted in the 25/26 iteration of the Business Plan, we have used the current trend to update long-term projections for visitor numbers and therefore income in future years. As noted in section 3.3.3. we will employ a number of strategies to drive additional visitation to the Roman Baths, but we will not have an indication as to their efficacy in slowing or reversing market trends until they are put into place.

The outermost year of the plan has been modelled as flat growth as we are not yet in a position to confirm the impact of the Fashion Museum on the overall cost-base and income projections for the Service. At 5 years out from opening of the new facility this is understandable and it is our expectation that we will be able to confirm this in the next iteration of the Business plan.

The financial targets for the Service absorb the recent increases in pay created as part of the Being our Best Programme and further anticipated pay awards to be agreed by the Council for each year of the plan, as well as other inflation pressures on the cost base. With the future anticipated rises to the living wage, pay is expected to be the biggest cost pressure facing the Service. Another notable cost increase is related to the requirement to store the Council's reserve collections in commercial storage the costs of which have been realised partly in 25/26 and will be fully realised in 26/27.

### **3.3. Action Against Strategic Priorities**

#### **3.3.1. To provide maximum access to our buildings, monuments and collections to as wide an audience as possible to facilitate learning, understanding and emotional connection**

The Service will continue to offer free admission to schools where 30% of pupils receive free school meals. The Service will introduce a £1 ticket for those in receipt of Universal Credit and will continue to provide tickets through [Tickets for Good](#). These measures are designed to attract new audiences, who we have not traditionally welcomed to our site, from outside of the local authority area. This activity, the provision of access to culture to those for whom price represents a significant barrier to entry, aligns with the priorities of national funding bodies such as the National Heritage Lottery Fund, Arts Council England and independent trusts and foundations. It also offers a strong connection to the West of England Combined Authority's cultural plan. The financial impact of these activities will be very limited.

In 2025, the Service continued to advance research at the Roman Baths, with ongoing work on the human skeletal material and the AHRC-funded PhD led by Edward Knowles in partnership with the Universities of Exeter and Reading. This research is deepening our understanding of the site and its collections. Looking ahead, the Service will support the launch of the "Voices of Britain under and after Rome" project in October 2026, following a successful AHRC funding application for £1.4m. As a key partner, the Roman Baths will collaborate with Professor Alex Mullen's team to reassess the curse tablet collection using advanced imaging and interdisciplinary approaches, further enhancing the reinterpretation of the Roman Baths.

In 2026, the community engagement programme will continue to maintain and create sustainable relationships and activities. This includes the refugee programme, Roman Baths Youth Forum, partnerships with the Carers Centre and Headway, as well as other local community groups and charities. There is a desire to expand this to include Bath Mencap and other organisations as part of the site's Audience Development Plan. The Service will be applying to become a Museum of Sanctuary this year. Health and wellbeing activities will be developed further, reaching a wider audience through social prescription, and continuing the support of internal B&NES services such as Public Health and Children's Services.

Although the Fashion Museum is without a physical location during this period of capital development, work is underway to ensure the Collection is accessible to the public. Collection visits, an ambitious loans programme as well as workshops and events will ensure that Fashion Museum Bath is never far from people's minds. *Explore the Collection* is a digital innovation project which will launch in early 2026, part-funded by Arts Council England. The first stage will focus on the Dress of the Year Collection combining collection data with multimedia and rich narrative-based content revealing the extraordinary stories that each object can tell. This project will be delivered with B&NES Library Services and will be co-created with local young people in Bath and North East Somerset.

Our ambitious National Lottery Heritage Fund Activity Plan has been developed with a range of partners including Bath College, Youth Connect South West and London School of Architecture. The plan will ensure we can engage with new and underrepresented audiences across B&NES using our collection as the starting point. In order to deliver this, in 2026 we will be recruiting two new FMB team members – a Learning & Engagement Coordinator for Young People and a Learning and Engagement Social Prescribing Officer (Public Health). We will also be growing our pool of volunteers and freelance artists/designers/creative practitioners to help deliver a dynamic, high-quality programme. Building on the success of our current outreach resource Fashion Unpacked – the 'Trunk' we are working on the next phase of our outreach project 'Trunk Show'; with the second in a series of trunks developed and ready for a programme of community outreach starting in autumn 2026.

A programme of temporary exhibitions will continue to be delivered at the Victoria Art Gallery.

- **Poster Power:** 23 January – 10 May 2026
- **Norman Ackroyd: Through the Years:** 22 May – 6 September 2026
- **Bath Society of Artists 121<sup>st</sup> Annual Open Exhibition:** 19 September – 7 November 2026
- **The World of the Snowman:** 20<sup>th</sup> November 2026 – 28<sup>th</sup> February 2027

We will also review the forward plan for the Gallery in 26/27 allowing us to confirm the strategic position of the Gallery and the Council's civic art collection within the cultural landscape of BANES.

Bath Record Office will continue with its audience development plan so that the archives and local studies collections can reach wider and more diverse audiences. One of the main

areas of activity is the 60<sup>th</sup> anniversary of the archives service in 2027 to include a week-long exhibition, a series of talks, and a touring display around local libraries. Other activities will include temporary displays in the Guildhall, work placement opportunities for students, loans to other museums and galleries and a more pro-active collecting strategy to ensure the collections' ongoing relevance. The service will also benefit from the NLHF funded Sounds of the South West project which will enable the team to deliver engagement and outreach events based on its digitised audio collections across 2026-2028.

### **3.3.2. To be a supporter focussed organisation**

Having procured and implemented a new Visitor Management System in 2025 further phases of this work will continue with a view to integrating it with the recently procured Customer Relationship Management System. This will give the Service the ability to systematically manage and analyse visitor data, providing valuable insights into their preferences, behaviours, and engagement patterns. Our marketing approach will evolve to tailor our offerings and communications to meet the specific needs and interests of our various audience segments.

We will continue to work closely with the Roman Baths Foundation (following the influx of new trustees), the Fashion Museum Foundation (as the project to develop the new museum gathers pace) and the Friends of Victoria Art Gallery (as the forward plan for the Gallery is developed) to increase the amount and range of support for our sites and collections.

At the end of 2025 over 60,000 BANES residents had received Discovery Cards following the scheme's relaunch in 2022. In the 26/27 financial year the service will explore different approaches to the Discovery Card scheme to ensure it is delivering the most value and impact to those who need it most whilst remaining a prudent financial investment by the Council.

### **3.3.3. To Maximise Income**

Heritage Services will seek to maximise income generating opportunities across its areas of operation.

#### ***Roman Baths***

- **Additional visitors.** The Service is budgeting for 1.005million visitors in 2026/27, an increase of around 33,000 from the forecast footfall in 2025/26.

- **Ticket Price.** Price increases planned for 2026 will raise the price for both individuals and groups at all points during the year.
- **Price structure changes.** Work will be undertaken on the potential to offer more value-led products that incentivise those who have not previously chosen to visit and/or repeat their visit to the site.
- **Additional product offering.** Following the appointment of a cultural programmes manager in early 2026, a wider range of activations will be delivered to increase the value offer available to visitors and encourage new and repeat visits.
- **Additional Marketing Resource:** We have budgeted to increase the marketing resource available to the Service both in terms of staffing and media buying to drive additional visitation.
- **Travel Trade:** We have changed the responsibilities of an existing role, made possible by changes to the Council's telephony system, to focus more on building relationships with, and marketing to, the travel trade in order to drive more inbound tourists to the Roman Baths.

### ***Victoria Art Gallery***

- Deliver a very appealing, family-friendly exhibition, 'The world of the snowman', in winter 2026.
- Use the capabilities of the new Visitor Management System to explore cross site promotion between the Roman Baths and the Gallery to try and drive more visitors from the Baths to the Gallery.

### ***Cross Service***

- We will continue to deliver our commercial event programme working internally and with external local festival organisations to deliver revenue through ticketed events. The programme will reflect key local and national events and anniversaries and will include dinners, balls, silent discos, murder mystery evenings and Christmas party nights
- Continue to maximise revenue through catering concession at the Pump Room and Roman Baths and delivering a high-quality experience for all external clients who hire the Council's heritage venues and parks for private events.

### **3.3.4. To operate efficiently and effectively as an organisation**

Following consideration of the relationship between Heritage Services and the Council over 2025, in 2026 we will consider how to improve the efficacy of the Heritage Advisory Board. This may include moving the Board to a shape and function more in-line with a traditional charity board – starting with an independent chair. The outcome envisaged is more constructive challenge to the Service on the specifics of our operations whilst also providing the Council with independent and expert quality assurance of the Service's activities.

The Service will also continue to benchmark its performance within ALVA and the Association of Cultural Enterprises (ACE) to provide assurance to the Council that the Service is delivering value for money. We will also continue with our other Visitor Experience assurance activities including VAQAS, mystery shopper and post visit surveys.

In 2026 the Service will continue to review the way in which we approach our work and realise efficiencies available to us in order to reduce our cost base where possible. This will include a review of our Operations and Facilities teams in-line with 'Being our Best' principals. Alongside this, the Service will engage in the Council's Corporate Landlord project, ensuring that the Council realises its ambition for a central overview of its estate, exploring opportunities for efficiency in the delivery of maintenance and compliance activity, whilst safeguarding the Service's ability to be agile and responsive in the management of its built assets and infrastructure.

The Collections Care and Documentation programme at the Roman Baths in 2026 focuses on improving storage, documentation and access across the collections. Key work includes the Culverhay store move, expanding public access and research use of Feeder Road, and supporting renewed interest in Keynsham archaeology through displays and archive work. As always, the Service will take an approach of continuous improvement to its collection manager with ongoing work in this area. Public-facing activity continues through display refreshes, new exhibition plans to 2027, the Spa Project, and collaborative initiatives such as the Chew Valley Hoard, alongside hosting student placements.

Conservation work at the Roman Baths in 2026 aims to establish clear baselines for the condition of key monument spaces, including observation and cleaning work in the West and East Baths, and setting priorities for the Temple Precinct. Strategic work includes feasibility planning for a 3D model of the Great Bath, updating the Conservation Action Plan, and

formalising maintenance, access and recording procedures. Conservation practice will be strengthened through staff and contractor training, improved data capture, and a cross-organisational Environmental Monitoring and Archaeological Conservation group. Environmental monitoring, flood preparedness, and conservation planning for the Minerva anniversary also feature, alongside object-based projects such as work on Keynsham material and developing a fundraising and treatment plan for the Tompion clock.

Bath Record Office will continue to develop the paper conservator role by building relationships with local heritage organisations and groups which require conservation support and thus expand this income stream. The conservator will also support other teams within Heritage Services and take on volunteers and student placements. Volunteers will continue to support a variety of collections care activities such as repackaging, cleaning, and digitisation. Alongside this work continues to transfer priority digital records into the Preservica digital preservation system to ensure long-term access.

The Service will continue to implement its Equality, Diversity and Inclusion (EDI) strategy, via the approved action plan. In 2025, all permanent employees received EDI training and the EDI working group terms of reference were reviewed. 2026 will see the implementation of the outcomes agreed as part of a second round of funding for EDI activity made available from Arts Council England via Museum Development South West. Looking ahead to 2026/27, the EDI working group will focus on increasing visibility and communication across the organisation, regularly reviewing and updating training needs, and ensuring measurable progress through clear action planning and reporting. The group will also prioritise creating safe spaces for feedback, broadening representation, and embedding EDI values into all aspects of service delivery and narrative development, ensuring our sites and collections present a fully inclusive view of the past, based on the most up-to-date research.

As in previous plans, an integral part of the strategy going forward will be ongoing investment in the Service workforce. We will continue to build an even stronger performance culture with staff engagement, wellbeing and development at its heart. This will include engaging with the new Council management training resource to develop management capability and consistency across the organisation. The Service will continue to evaluate its staffing complement and structures to ensure that it is able to deliver on the Strategic Priorities outlined in this document.

26/27 will see a review and re-casting of the Service's proposition for the Roman Baths. This will be an important pre-cursor to the wider Strategy re-casting envisaged for 2027. This work will consider the variety of activity that occurs across the Roman Baths and Pump Rooms and endeavour to bring this together under a more unified, cross-service set of organising thoughts that will sharpen the focus and efficacy of the Service's activities at our key property.

### **3.3.5 To bring benefit to B&NES, the South West and the UK**

Heritage Services will use its platform and influence to:

- Represent B&NES on the West of England Combined Authority (WECA) [Cultural Compact](#) to deliver on the WECA cultural strategy;
- Represent B&NES as an operational board member of Visit West and work with Visit West to deliver the [destination management plan](#) for the region;
- Continue to be a voice in the sector through membership of the Executive Board of the Chief Cultural and Leisure Officers Association
- Represent The Roman Baths and Pump Room as a board member for the Association of Leading Visitor Attractions;
- Work with key services across the Council to deliver B&NES's corporate strategy. By working in partnership Heritage Services can play a pivotal role in the city's economic, cultural and social future, creating increased access to some of the world's great cultural assets. It will also deliver regeneration, economic, skills, placemaking, health and wellbeing benefits across the wider region. These benefits will most effectively be realised by the execution of the Community Engagement Strategies for the Roman Baths, Fashion Museum Bath project and work of the Victoria Art Gallery and Bath Record Office Teams.
- Continue to provide opportunities for volunteering throughout the Service. Through these opportunities support and grow our volunteer cohort that support the Service deliver its objectives and enhance community wellbeing. Volunteering offers numerous benefits, including improved physical and mental health, reduced stress, and a sense of purpose. By fostering social connections and skill development,

Heritage Service contributes to the wider Council's prevention objectives, promoting healthier, more resilient communities.

### **3.3.6 To act as an environmentally sustainable and responsible organisation in everything we do**

In the last 12 months, the service has been working on refining and delivering a 3-year environmental action plan which covers 4 key goals. This plan is included as an appendix to this document. To build on works started in 2025, in 2026 the priority workstreams are as follows:

#### **1. Decarbonising operations**

- a. **Improve Building Efficiency** – optimise heating systems (radiators, heat pumps), feasibility of expanding existing heat pump system to cover more square-meters in the Roman Baths
- b. **Optimise Controls** – upgrade and fine-tune BMS for heating, air conditioning (AC), and other equipment to maximise energy performance across the service
- c. **Upgrade Equipment & Lighting** – continue rolling out efficient lighting upgrades to LEDs where possible, ensure AC unit and asset replacements are energy efficient
- d. **Reduce Operational Energy Use** – pilot project focussing on lowering out-of-hours energy consumption and collaborate with catering to cut energy demand.
- e. **Advance Sustainability** – subject to feasibility and planning, install on-site renewable electricity (solar PV) on the roof of the Clore Learning Centre.

#### **2. Improve sustainability data accuracy**

- a. **Expand carbon footprint** scope with emissions from digital and capital projects
- b. **Improve accuracy of visitor travel data** through continued partnerships within the sector, and better data from updated visitor management systems

#### **3. Empower and engage visitors, employees and suppliers**

- a. **Supplier Engagement & Data Collection** – continue to gather annual data from suppliers, with at least 60% of spend to have a carbon footprint in place
- b. **Collaborative Partnerships** – work with other museums and the Council to share resources, host workshops, and drive consistent practise and methodology across the sector.

- c. **Retail Products** – apply RAG ratings and implement selection criteria for all retail product purchases. Work with Bath Uni work placement to map and plan for potential trade-offs between products & sustainability criteria
- d. **Training & Awareness** – continue to deliver carbon literacy training to all permanent staff. Work with the curatorial team to establish a programme of activity that positively influences visitor behaviour.
- e. **Systems & Integration** – continue to work on implementing an integrated Park and Ride ticket for visitors, allowing them to commit to a more sustainable travel option at their point of purchase.

4. **Lead by example in the sector**

- a. **Achieve Recognition for Sustainability** – in 2025 the Victoria Art Gallery became a Gallery Climate Coalition member. In 2026 we will consider additional external accreditations e.g. Green Tourism, or Carbon Literate Organisations
- b. **Collaborate & Lead** – lead peer learning groups with other museums/attractions
- c. **Advocate & Educate** – Speak at external events and communicate environmental impact through collections, tours and storytelling.
- d. **Strengthen Governance & Planning** – Set up reporting structures, publish adaptation plans, and align risks across all heritage sites.
- e. **Ensure Climate Resilience** – review climate risk register quarterly, and build climate adaptation plan to ensure all sites are well adapted to changes in our climate

### **3.4. Fashion Museum Bath**

#### **3.4.1. Project overview**

The Service is progressing with the plan to establish a new Fashion Museum in Bath City Centre, in the Grade II listed Old Post Office. The project will:

- Create the only museum in the UK dedicated to fashion heritage
- Reinvigorate the Fashion Museum Collection as a relevant and vital resource for Bath and North East Somerset residents as well as domestic and international audiences.
- Create dynamic social and civic spaces accessible to all.

- Deliver a benchmark standard of environmental and economic sustainability in its delivery and impact.
- Create a transformational museum which is an agent of societal change – locally, regionally and nationally.

The project aligns with the Council's corporate vision to 'improve people's lives and its strategic priority to create a vibrant cultural life in BANCES. It is a key component in the Council's future Economic Strategy and its Joint Health and Wellbeing Strategy. The Fashion Museum will play a pivotal role in the economic, cultural, and social future of the city, preserving and creating increased access to one of the world's great museum collections as well as delivering regeneration, economic, skills, placemaking, and wellbeing benefits across Bath and North East Somerset and the wider region.

Fashion Museum Bath is an anchor element of the Milsom Quarter Masterplan. It will help 'reimagine the high street' in the city centre encouraging commercial tenants and residents to move there and making the area a great place to live, work and socialise.

The project is also a key component of the West of England Combined Authority's Growth Plan.

### ***The Museum***

The Council has acquired the Old Post Office building within the Milsom Quarter of the city. This will be the new home of the Fashion Museum with flexible exhibition spaces to display more of the collection than ever before. Dedicated spaces for learning and engagement, integrated café and retail areas will provide a shared and welcoming social space in the city centre. The Museum will also be an exemplar of sustainable retro-fit. The project will bring back to life a renovated heritage asset, creating a permanent home for this internationally significant collection.

In 2025 further design work was undertaken and RIBA III detailed design completed. We anticipate the museum to open in 2030 with construction beginning on site in 2027. An economic impact appraisal has been conducted with a Benefit Cost Ratio (BCR) which falls into the 'high' value for money category as set out in the MHCLG Appraisal Guide 2023<sup>2</sup>.

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<sup>2</sup> <https://www.gov.uk/government/publications/dluhc-appraisal-guide/dluhc-appraisal-guide>

### ***Social Value***

The aim is for the Museum is for inclusive cultural engagement – with programming and activities targeted at communities across BANES. Fashion Museum Bath has developed an Activity Plan which aligns with core Council policy. This sets the audience engagement priorities and will provide cultural, educational, health and wellbeing, skills and career development opportunities for residents, particularly those experiencing socio-economic or health inequalities, with supporting digital activity to engage audiences and build community.

The target audiences for the Fashion Museum Bath Community Engagement Programme are:

- People living with health issues in BANES
- Families with young children, in particular those facing socio-economic inequalities and poverty
- Vulnerable young people in care, those who are not in education, employment or training (NEET)
- BANES secondary school students and teachers

The project will impact the local community by:

- Being a welcoming and inclusive space for community participation and co-creation with a strong programme of events and activities that will generate a sense of belonging and civic pride.
- Welcome thousands of schoolchildren per year by providing a new cultural destination for school visits in Bath.
- Partner with Bath Spa University, Bath College and other educational institutions to develop skills and training programmes for improving pathways into the fashion industry and wider creative industries.
- Offering new apprenticeship opportunities which support upskilling and reskilling.
- Providing a range of volunteer opportunities that will suit a broad audience.
- Introducing new audiences to cultural experiences through the universally fascinating topic of fashion.
- Offering creative activities that support health and wellbeing.
- Provide free entry to B&NES residents and schools so there is universal access to these benefits.

### **3.4.2. Interim storage**

Whilst a new permanent home is created the collection is housed at Dents glovemakers, one of the UK's leading heritage fashion brands. The costs associated with this storage are built into the Plan.

### **3.4.3. Project costing and overview**

A provisional capital budget was added to the capital programme for the financial years 2025/26 to 2029/30 for Fashion Museum Renovation. The funding plan for the project is as follows:

- The Old Post Office site was acquired in 2021/22. This was funded via a repayable capital grant from the West of England Combined Authority Revolving Infrastructure Fund which is planned to be repaid from capital receipts from disposal of Corporate property assets.
- The total provisional capital budget is envisaged to be drawn from service supported borrowing funded from net admissions income, Corporate Supported Borrowing representing Council support and a fund-raising target including future grant applications.
- The Council will make a proportion of this funding available so that RIBA IV design work can continue in 26/27.
- A fundraising campaign will contribute to the remaining project costs. This will include grant applications and third-party contributions.
- A planning application was submitted in January 2026 with determination expected in May 2026.
- RIBA IV (technical design) will commence in August 2026.

## 4. Risk

The Services' strong recovery from the COVID 19 pandemic has plateaued, in line with the rest of the sector, over the last 12 months. Through entrepreneurial approaches to pricing, development of additional revenue streams and prudent cost management, the Service has continued to increase profitability and is forecasting to deliver growth in surplus from a broadly flat visitor base.

Non-English use of the audioguide remains 38% below 2019 level, with Mandarin and Japanese 54% and 58% down respectively. This highlights the extent to which the recovery of the Asian market is less established and therefore carries more risk. The strengthening of Sterling against key currencies for inbound tourism presents a risk to the delivery of inbound tourism. The risk associated with the GBP:EUR exchange rate is twofold, as well as dampening demand for inbound tourism it makes overseas holidays more affordable for a domestic market. This, coupled with the inflationary economic pressures, presents a risk to the supply of domestic tourists in 2025; specifically, that those who can afford to may choose to holiday abroad and those remaining in the UK may not be able to afford leisure spending at the same level.

The Plan assumes that there will be no new adverse impact caused by security, economic or environmental events, but it should be noted that terrorism continues to pose a risk. Potential further international uncertainty driven by geopolitical incidents also casts a shadow over the future years.

Any impact on the USA market will have an adverse impact on the Roman Baths as this is our largest overseas market. This feels particularly important in the 26/27 financial year as it is the 250<sup>th</sup> anniversary of the declaration of independence which may encourage more Americans to holiday domestically. Any economic decline, or reduction in disposable income for middle-class Americans will obviously further impact propensity to travel. Additionally the FIFA Men's World Cup in the US in the summer of 2027 will increase the price of transatlantic flights during this period.

It should be noted that the surplus for 26/27 of £13.269m is a stretching target. It requires the current decline in visitor numbers to be arrested and reversed. To achieve this, the Service will need to see a positive response to the strategies outlined in 3.3.3. as well as

growth in the inbound market from international tourists which is dependent on factors outside of the Service's control.

Heritage Services' net income is a key factor in the Council's Budget. The risks outlined on visitor numbers and consequently on income have been factored into the Council's 2026/27 budget setting process, with regards to both its budgeted contingencies and adequacy of its reserves. Actual visitor numbers in 25/26 have been used to rebase the future projections for the Service at a level which reflects the updated emerging picture, and in turn will be reflected in the Council's budget planning for future years.

There are inherent risks to Fashion Museum Bath. At this stage the risks associated with this project are commensurate with a project of this scale and ambition and no more than this. Strict project governance and a quantified risk register will manage risk.

Progress has been made on the pathway to net zero with the Service's Sustainability Manager having a demonstrable impact. However, the ability to achieve net 0 by 2030 is in question as is the level of financial commitment required to off-set the Service's remaining emissions footprint. Work will continue to understand this over 26/27.

## Appendix 1: Financial Summary

### Business Plan Summary

	Prior Year Actuals		2025/26	2026/27	Plan Years			
	2023/24 £'000	2024/25 £'000	Forecast £'000	Budget £'000	2027/28 £'000	2028/29 £'000	2029/30 £'000	2030/31 £'000
Admissions	(19,889)	(21,127)		(24,266)	(24,993)	(25,756)	(26,536)	(27,433)
Retail Sales	(2,717)	(2,746)		(2,834)	(3,100)	(3,111)	(3,123)	(3,134)
Room Hire	(656)	(628)		(703)	(731)	(752)	(695)	(703)
Catering	(427)	(397)		(475)	(490)	(505)	(520)	(536)
Other Income	(863)	(1,013)		(1,135)	(1,171)	(904)	(917)	(918)
Grants/Contributions	(97)	(97)		(28)	(12)	(12)	(12)	(12)
<b>Total Income</b>	<b>(24,649)</b>	<b>(26,008)</b>	<b>(27,374)</b>	<b>(29,441)</b>	<b>(30,498)</b>	<b>(31,040)</b>	<b>(31,802)</b>	<b>(32,735)</b>
Employee Costs	6,243	6,885		7,898	8,259	8,586	8,927	9,280
Premises Costs	1,696	1,597		1,837	1,868	1,969	2,078	2,193
Transport Costs	41	36		50	51	53	54	56
Supplies & Services	3,269	3,497		3,729	3,899	4,044	4,046	4,045
Maintenance	355	485		667	674	677	693	702
Investment	416	322		442	500	470	490	510
<b>Total Expenditure</b>	<b>12,020</b>	<b>12,822</b>	<b>14,025</b>	<b>14,625</b>	<b>15,253</b>	<b>15,800</b>	<b>16,289</b>	<b>16,788</b>
Internal Income	0	0	0	0	0	0	0	0
Recharge codes	1,511	1,538	1,589	1,555	1,723	1,708	1,999	2,424
<b>Internal Recharges</b>	<b>1,511</b>	<b>1,538</b>	<b>1,589</b>	<b>1,555</b>	<b>1,723</b>	<b>1,708</b>	<b>1,999</b>	<b>2,424</b>
<b>Contribution to Reserves</b>	<b>6</b>	<b>0</b>	<b>6</b>	<b>0</b>	<b>6</b>	<b>6</b>	<b>6</b>	<b>6</b>
<b>(Surplus) / Deficit</b>	<b>(11,112)</b>	<b>(11,648)</b>	<b>(11,754)</b>	<b>(13,261)</b>	<b>(13,515)</b>	<b>(13,525)</b>	<b>(13,508)</b>	<b>(13,517)</b>

Operating Margin	45.1%	44.8%	42.9%	45.0%	44.3%	43.6%	42.5%	41.3%
Wage %	25.3%	26.5%	28.5%	26.8%	27.1%	27.7%	28.1%	28.3%

## Appendix 2: KPI Targets

	2024/25 (actuals)	2025/26 (forecast)	2026/27 (proposed)	2027/28 (proposed)	2028/29 (proposed)	2029/30 (proposed)	2030/31 (proposed)
<b>Roman Baths visitors (000s)</b>	993	972	1,005	1,005	1,020	1,035	1,051
<b>Victoria Art Gallery visitors (000s)</b>	49	85	91	92	93	95	97
<b>World Heritage Centre visitors (000s)</b>	100	90	100	100	107	110	112
<b>Roman Baths income per visitor (£)*</b>	24.13	26.38	27.20	28.16	28.51	28.85	29.30
<b>Education visitors at Roman Baths</b>	13,895	15,796	16,200	16,500	16,500	16,500	16,500
<b>Discovery Cards Issued (000s)</b>	12,000	5000	5,500	6000	26,000**	17,000**	12,000
<b>Social media followers</b>	170,356	265,317	278,582	292,511	307,136	324,259	340,500
<b>Discovery Card holder visits (000s)</b>	19,000	19,000	19,250	19,500	19,750	20,000	20,000
<b>Net profit per Council Tax household (£)<sup>3</sup></b>	127	134	151	154	154	154	154

<sup>3</sup> Based on 87,647 Council Tax Households as of Jan 2026

## **Appendix 3: Sustainability Action Plan**

See Separate PDF

DRAFT



# Heritage Services Business Plan 26-31 Early-Stage Briefing

# Vision

This statement informs all of our work. It is the guiding principle by which we seek to bring benefit to the world:

**Learn from the past,  
understand the present,  
shape the future**



We have three overarching priorities that this Strategy will deliver on:

**1.**

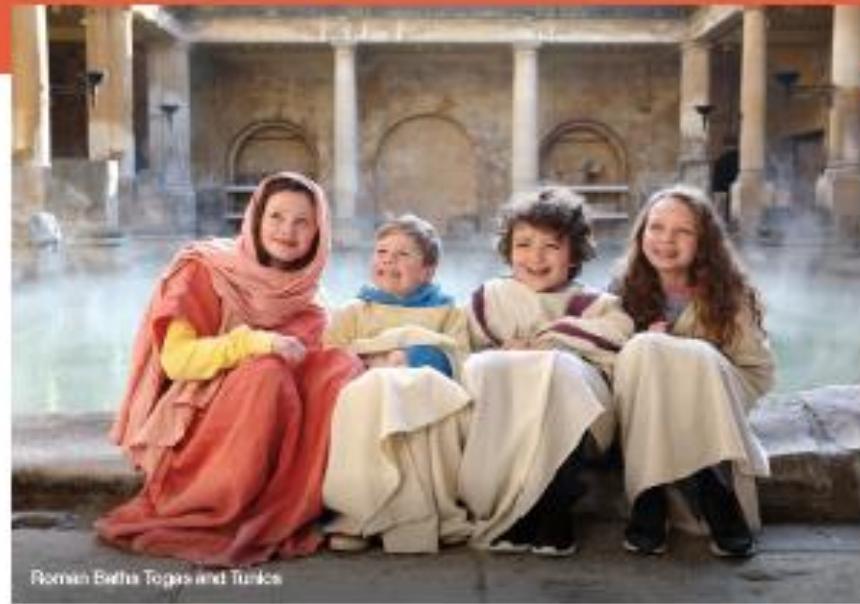
Return the service to its pre-Covid profitability

**2.**

Move the Fashion Museum

**3.**

Achieve Net Zero by 2030



# Strategic Priorities

1.

To provide maximum access to our buildings, monuments and collections to as wide an audience as possible to facilitate learning, understanding and emotional connection

2.

To be a supporter focussed organisation

3.

Maximise income

4.

To operate efficiently and effectively as an organisation

5.

To bring benefit to Bath, the South West and the UK

6.

To act as an environmentally sustainable and responsible organisation in everything we do



The Bath World Heritage Centre

Cover (clockwise from top left): The Roman Baths by torchlight, The Fashion Museum Collection, Bath Record Office and The Victoria Art Gallery.

## B&NES Heritage Services:

- The Roman Baths
- The Victoria Art Gallery
- Bath Record Office
- World Heritage Centre
- Clore Learning Centre
- What will be the world's best Fashion Museum

Page 14



- Heritage Services is a redistributive tourism business – the money from tourists is, unusually, not concentrated in a private company or charity but fed directly back to the community in which the tourism occurs
- Beyond this we also deliver social value activities which align with key Council policies rather than just supporting them through funding

2025/26



## 2025/26: Challenging Sector wide conditions met with cost saving and entrepreneurship

Heritage Services will  
return an approx £11.8m  
surplus in 25/26 (6% up on  
24/25)

This will support the most  
vulnerable people across  
BANES

- Delivered the successful Summer Lates programme for the first time
- The Victoria Art Gallery has had an excellent 125<sup>th</sup> year with 66k visitors ytd
- Developed our social value activity at the Roman Baths including: The Roman Baths Youth Forum, a monthly wellbeing group, social prescribing and key partnerships with Bath Carers Centre, Blind Veterans UK, local universities, and the Council's Resettlement Team. New collaborations included Blind Veterans UK, now a valued partner returning in 2026. Our Free School Meal initiative broadened access and attracted more schools that might not have otherwise visited, strengthening our educational outreach.
- Issued over 60,000 Discovery cards by the end of 2025 since May 2022
- Undertook the Remarkable Books exhibition using the Record Office Collection



## Key project information:



- Opening winter 2030
- 250,000 visitor per/year
- The sustainable retrofit of a grade II listed building in central Bath – The Old Post Office (and surrounding public realm)
- Regenerative catalyst to the Milsom Quarter precinct in central Bath by increasing footfall and dwell-time in the area
- Project one of the key B&NES Council investments to deliver sustainable economic growth, tackle deprivation and improve health and wellbeing outcomes



## Recent Progress:

- RIBA 3 concluded
- NLHF Development Stage Review passed
- £20m Capital allocation from B&NES
- £1.5m secured from West of England Mayoral Combined Authority
- NLHF Round 1 success - £768k secured
- ACE funding - £20k secured to further digital access to the collection
- 2X Myworld Fellowships
- Prominent inclusion of the project in the West of England Growth Strategy
- Consultation with over 4500 residents
- Dress of the Year 2024 Launched
- Planning and listed building application submitted



## **FMB Key Dates:**

- WEMCA Committee – 30<sup>th</sup> January
- NLHF Submission – February 2026 (Determined June)
- Planning Determination – May 2026
- RIBA 4 – August 2027
- Procure Contractors – May – September 2027
- Basebuild – September 2027 – May 2029
- Fit Out – May 2029 – October 2030
- Open – Winter 2030

2026/27



- £13.269m surplus
- Based on 1.005m visitors at the Roman Baths. Additional 33,000 visitors vs 25/26
- Retail £2.8m turnover
- Historic Venue Hire £703k of hire revenue + £475k of catering commission associated with events.
- Approx £1m of business rates also returned to the Council
- This makes the Roman Baths one of the most commercially successful visitor attractions in the UK



## 2026/27 Budget

### Activity to Drive Visitors

A key part of our strategy for 26/27 is to arrest the trending decline in footfall we've seen over 25/26

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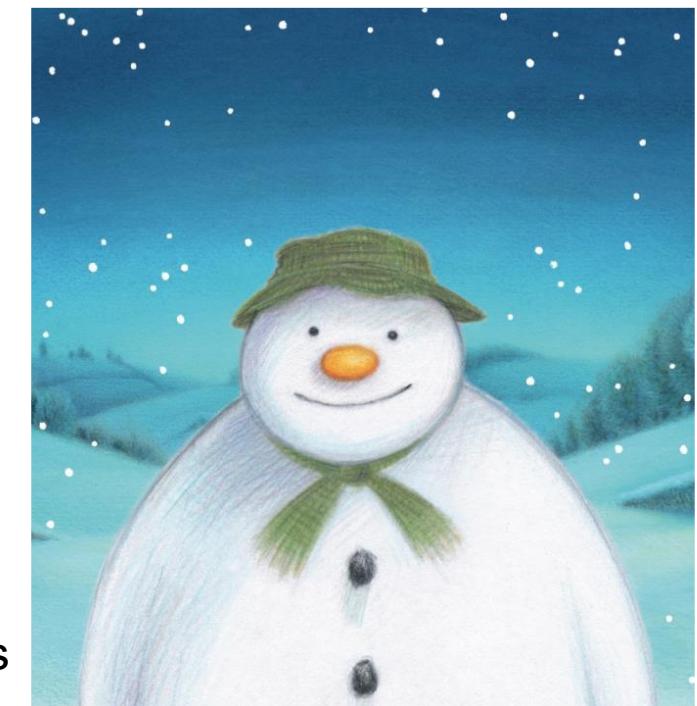
This requires investment in key activity areas

Challenges include the cost of living crisis in the UK and the weakness of key international markets including China and the prospect of a softening in demand from the US

- **Domestic Visitors:**
  - **Programming:**
    - We will invest resource in our programmed offer to drive repeat visitation and encourage new visits
    - The Roman Baths is challenging due to its limited space and historic character
  - **Value Products:**
    - There is the opportunity to create products that encourage first-time and repeat visitation.
- **International Visitors:**
  - We have redirected resource to focus on relationship building and marketing with key inbound operators.
  - There will be a renewed focus on key inbound markets including China
- **Fundraising, Marketing and Supporter Development:**
  - We have procured a CRM system provided by 'Good CRM'.
  - We are investing more money in targeted marketing campaigns across domestic and international visitors



- Social Value
  - Introduce a £1 Universal Credit ticket for non-BANES residents
  - Apply for Museum of Sanctuary at the Roman Baths
- Victoria Art Gallery:
  - Continue with the successful exhibition programme incl 'World of the Snowman'
- Research and Collections Care
  - Undertake a 3D scan of the Roman Baths
  - Extensive research into the Roman Baths Collection based on cutting edge science
- Visitor Management + CRM systems
  - Continue systems roll-out to improve business performance
- Environmental Action Plan
  - Focus on: People, Place, Heritage
  - This will include: retail procurement, fabric performance and energy generation opportunities



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# Corporate Estate Asset Management Framework

2025-2030

# Purpose of our Corporate Estate

The Corporate Estate's primary function is to enable the delivery of council services by providing safe, modern, inclusive, and efficient workplaces and public-facing facilities where staff and partners can serve residents well. This remains our non-negotiable priority.

We will protect service delivery first, while using the estate to support wider corporate objectives, priorities and outcomes provided this does not compromise statutory and priority services.



# What is the Asset Management Framework?

The Asset Management Framework is the Council's plan for how we look after and use our operational buildings and land over the next five years. It guides everyday decisions about maintenance, upgrades, sharing space, and—when the time is right—repurposing or releasing sites that we no longer need.



# How the Framework Fits Together

**The Asset Management Framework is the umbrella term for three documents:**

<b>1. Asset Management Policy:</b> <ul style="list-style-type: none"><li>a. Enduring <b>principles</b> for managing property as a corporate resource;</li><li>b. Ensuring the estate is the <b>right size</b> and fit-for-purpose;</li><li>c. Ensuring the estate is <b>efficient</b> and <b>sustainable</b>;</li><li>d. An <b>enabler</b> used to stimulate regeneration and housing;</li><li>e. Support for joint working and co-location.</li></ul>	<b>2. Asset Management Strategy:</b> <ul style="list-style-type: none"><li>a. Our approach to operating the <b>Corporate Landlord</b> model;</li><li>b. The <b>Asset Challenge</b> methodology;</li><li>c. Investment and rationalisation;</li><li>d. Compliance, lifecycle, and decarbonisation;</li><li>e. Data and KPIs.</li></ul>	<b>3. Asset Management Action Plan:</b> <ul style="list-style-type: none"><li>a. The deliverable pipeline, budgets, milestones and benefits for the year;</li><li>b. Aligned to the MTFP and Capital &amp; Investment Strategy.</li></ul>
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# Why are we doing it now?

Our estate is a powerful tool to improve people's lives: supporting the provision of and better access to services, safer public buildings, reduced running costs, and faster progress towards net-zero and nature recovery. It also helps us support new homes, good jobs, and vibrant town centres.

Operating as a Corporate Landlord is a new approach to for the Council, centralising and standardising our management of the estate and requires a strategic framework to articulate how we will operate over the coming years.

# What will be different?



Safer, more accessible buildings - tighter standards for compliance and inclusive access.



Services under one roof - more co-location hubs with partners.



Greener operation - cut energy use, decarbonise heating, add solar where suitable, protect biodiversity.



Better use of space – right-size offices and provide flexible community spaces



Clear communication - to services, for organisational assurance and through scrutiny

# Key Outcomes by 2030\*

- ✓ A safe, compliant, rightsized estate supporting modern, inclusive service delivery
- ✓ Office/admin floorspace reduction with co-location hubs in priority localities
- ✓ Maintenance backlog reduced from an estimated baseline through targeted investment and disposals
- ✓ Net-zero operations trajectory: energy intensity reduced; retained assets aligned with EPC regulations by 2030; heat decarbonised; and electricity matched by renewables
- ✓ Transparent disposals delivering annual capital receipts and reduced revenue costs, and the CAT programme offering greater community and social value
- ✓ A single system of record (Concerto) and KPI dashboards; provide organisational assurance and supports scrutiny.



# Corporate Estate Asset Management Policy

2025-2030

# Supporting Corporate Objectives

B&NES's Corporate Strategy, 2023-2027, sets a single purpose, *to improve people's lives*, and is anchored by two core policies: tackling the climate and nature emergency and giving people a bigger say.

The Corporate Strategy provides an extended outcomes framework to guide decisions, performance and spend and provides the link between our priorities and the supporting policies and strategies to deliver them.

The **Corporate Strategy** is delivered through three principles: **preparing for the future, delivering for residents, and focusing on prevention** which are translated into nine priorities:

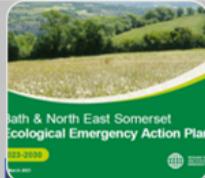


Our Corporate Estate **Asset Management Framework** articulates how the management and use of Council assets will **support the delivery of our corporate priorities**.

Our **Asset Management Policy** outlines our guiding **principles** in supporting delivery of the Councils priorities.

Our **Asset Management Strategy** outlines **how we are going to deliver** against these policy principles.

# Strategic Delivery

							
<b>Corporate Strategy</b> <ul style="list-style-type: none"><li>1. Tackling the Climate and Ecological Emergencies.</li><li>2. Giving People a Bigger Say.</li><li>3. Focusing on Prevention.</li><li>4. Delivering for Local Residents.</li><li>5. Preparing for the Future.</li></ul>	<b>Ecological Emergency Action Plan</b> <ul style="list-style-type: none"><li>1. Increase the extent of land and waterways managed positively for nature.</li><li>2. Increase the abundance and distribution of key species across B&amp;NES</li><li>3. Enable more people to access and engage with nature</li></ul>	<b>Climate Emergency Strategy</b> <ul style="list-style-type: none"><li>1. Decarbonising buildings</li><li>2. Decarbonising transport</li><li>3. Increasing Local Renewable Energy Generation</li><li>4. Becoming a Net Zero Council</li></ul>	<b>Place Prospectus</b> <ul style="list-style-type: none"><li>1. Working together with communities.</li><li>2. Creating better places.</li><li>3. Delivering a carbon neutral and nature positive economy.</li><li>4. Delivery of key regeneration projects.</li><li>5. Vacant Unit Action Project</li></ul>	<b>Land Use Planning</b> <ul style="list-style-type: none"><li>1. Responding to the climate and ecological emergencies.</li><li>2. Facilitating the goal of net zero carbon by 2030.</li><li>3. Approach to protecting and enhancing nature.</li><li>4. Maximising the delivery of housing needs – especially affordable.</li><li>5. Create opportunities for sustainable economic development.</li></ul>	<b>Heritage Services Strategy</b> <ul style="list-style-type: none"><li>1. Return the service to pre-pandemic levels.</li><li>2. Move the fashion museum.</li><li>3. Achieve net zero by 2030.</li><li>4. Provide maximum access to our buildings, monuments and collections.</li><li>5. Bring benefit to Bath, the South West and the UK.</li></ul>	<b>Housing Plan</b> <ul style="list-style-type: none"><li>1. Increasing Delivery of affordable, low cost and supported housing.</li><li>2. Development of B&amp;NES Homes Programme.</li><li>3. Housing Regulation.</li><li>4. Development of disabled adaptation and equipment services.</li><li>5. Housing options for rough sleepers and homelessness.</li></ul>	<b>Economic Strategy</b> <ul style="list-style-type: none"><li>1. Supporting a greener economy.</li><li>2. Supporting residents to thrive in work.</li><li>3. Building a diverse and resilient business base.</li><li>4. Becoming a centre for inclusive innovation.</li><li>5. Ensuring residents have access to good affordable housing.</li><li>6. Enabling all people and places to share in prosperity</li></ul>

# Corporate Estate Asset Management Policy

The Corporate Estate **Asset Management Policy** establishes **five policy pillars** through which we will manage our Corporate land and buildings (the Corporate Estate). The Asset Management Policy will remain in place for the next five years but be reviewed annually to ensure it is still relevant to the Corporate Strategy and Sustainable Communities Directorate Plan.

To deliver the five policy pillars there are certain actions and behaviours that we need to adopt relating to our land and buildings. These are set out in the following pages under each of the pillars; though not in any order of priority. It is also accepted that there will be occasions where some of these elements may appear to be in conflict. The key challenge for the Council in the use of its Corporate Estate assets, is ensuring that we maintain an appropriate balance between all of these elements as decisions around land and buildings are made.

## 1 Responsible

To plan and manage property as a corporate resource for the benefit of the people of Bath & North East Somerset.

## 2 Suitable

To provide the right property, fit for purpose, in the right place, to meet current service needs and to plan for the future.

## 3 Sustainable

To manage and maintain property effectively, efficiently and sustainably; supporting the Commercial Estate and the rationalisation of Corporate assets to meet our needs.

## 4 Enabling

To use land and buildings to stimulate economic regeneration, housing and growth; supporting local business needs and encouraging new businesses to the district and supporting communities.

## 5 Coordinate

d To promote joint working and co-location, including with our public sector partners, where it will provide benefit for service delivery and in securing efficiencies.



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# Corporate Estate Asset Management Strategy

2025-2030

# Mission

Our corporate estate will support the delivery of the Council's objectives and priorities as a single, safe and low-carbon public estate that is right-sized, compliant and fit for modern services.

# Future Impact

*Our vision is to have a joined-up public estate that is safe, accessible and low-carbon; the right buildings in the right places; better shared spaces with our partners; and a rolling, evidence-based review process so we repurpose or release what we don't need and reinvest in the services and neighbourhoods that do. Success means:*



## Safe, accessible.

Every operational building is compliant and accessible; users notice improved environments, better access and planned repairs.



## Decisions you can see and trust.

A single system of records and KPI dashboards provides organisational assurance and supports scrutiny, making choices transparent, evidence-led and repeatable.



## Backlog down, investment up.

Continued asset challenge and targeted disposals enable planned lifecycle works and decarbonisation, materially reducing the maintenance backlog.



## Right-sized estate, smarter access.

We maximise the efficiency of office/admin floorspace and deliver co-located hubs with partners, so residents access multiple services under one roof.



## Lower carbon, lower bills.

Energy intensity is reduced, where exemptions do not apply all non-domestic assets achieve an EPC B or better by 2030,  $\geq 60\%$  of heat is decarbonised and  $\geq 50\%$  of electricity is matched by renewables—cutting emissions and running costs.



## Places that work harder for people.

Repurposed and released sites unlock affordable homes, biodiverse/ecology rich managed land, vibrant centres and greener spaces; Community Asset Transfers safeguard valued facilities and grow social value.

# Our Corporate Estate as an Enabler

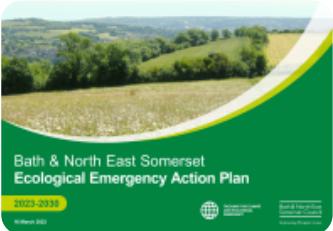
The following are examples of the ways the estate can be used as an enabler to support the delivery of wider Council priorities and objectives:

## Climate Emergency



Fabric-first retrofits; heat decarbonisation (heat pumps/networks); PV & storage; grid capacity planning; Carbon Gate at property gateways

## Ecological Emergency



Biodiversity-positive management; meadows, pollinator corridors; canopy targets; access to green space

## Health and Wellbeing



Co located hubs; inclusive design standards; community space ratios; social prescribing venues

## Housing



Support the release of assets to deliver housing; retrofit of temporary/specialist accommodation

## Economic Development



Curate workspace; meanwhile use of voids; unlock town-centre regeneration; local supplier/skills targets

## Heritage



Support the service to deliver planned maintenance and decarbonisation; reversible retrofits; coordinated museum moves and fit outs

# Operating as a Corporate Landlord

# Our Corporate Landlord

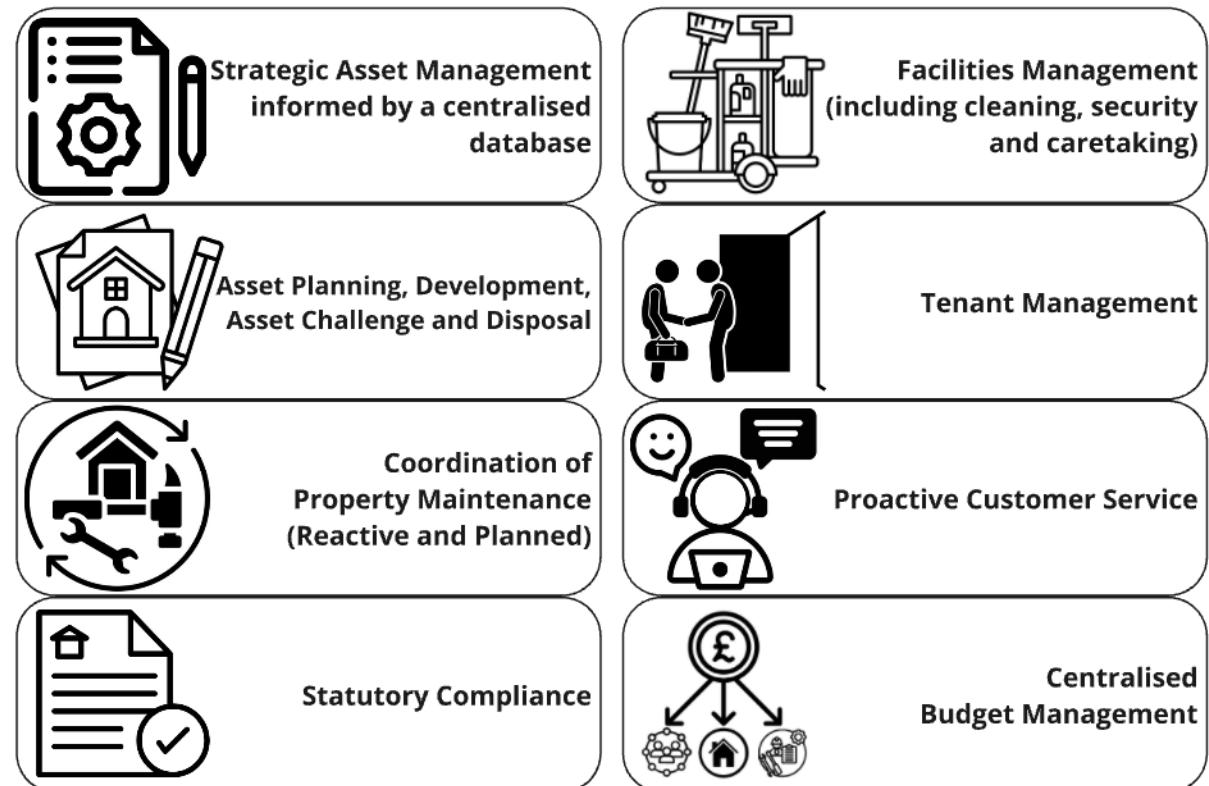
We operate a Corporate Landlord model: all land and buildings in the Corporate Estate are held and managed centrally as corporate resources. Service areas act as tenants focused on service delivery, while the Corporate Landlord plans, maintains, acquires, develops and disposes of assets across the portfolio.

Land and building decisions are taken against council-wide priorities, ensuring the right accommodation at the right cost, with clearer accountability, better utilisation and a more efficient, right-sized estate.

The terms Corporate Landlord and Corporate Estate can be used interchangeably. The Corporate Estate is the service, managing the Council's assets, through a Corporate Landlord operating model.



## Corporate Landlord Responsibilities



# Challenging Our Assets



Decisions made on how our land and buildings are used are assessed through the Asset Challenge framework. This framework is a systematic process that ensures transparency and consistency to decisions to retain, invest, repurpose, share, or dispose of our assets. Decisions are evidenced against service needs, safety/compliance, utilisation/cost, carbon and nature impact, place/access, and options appraisal.

The aim of Asset Challenge is to ensure we only hold those assets that are required and to reduce costs through a process of identifying assets that should be retained for use and/or invested in and identifying those that are surplus to requirements and therefore can be disposed of.



# Delivering the Corporate Asset Management Policy

# Our Plan on a Page

Our Asset Management Policy establishes five pillars that frame the actions and behaviours required to achieve the objectives for our corporate estate. The following is a high-level summary of how we will deliver our policy objectives:

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**Responsible**

Strengthen governance and asset challenge

Prioritise spend where it delivers the greatest public value

Improve asset intelligence and forward planning

**Suitable**

suitable, flexible accommodation that supports modern service delivery

Assure safety, security and statutory compliance across operational buildings

Plan with services and communities to optimise use and maximise social value

**Sustainable**

Prioritise planned maintenance and lifecycle investment

Optimise utilisation and occupancy through asset challenge

Reduce carbon, energy, water and waste by embedding sustainable design and delivering decarbonisation

**Enabling**

Use priority sites to enable regeneration and inclusive growth

Unlock housing delivery (including affordable homes) through land release, asset repurposing and disposals

Maintain a forward pipeline of land and opportunities

**Coordinate**

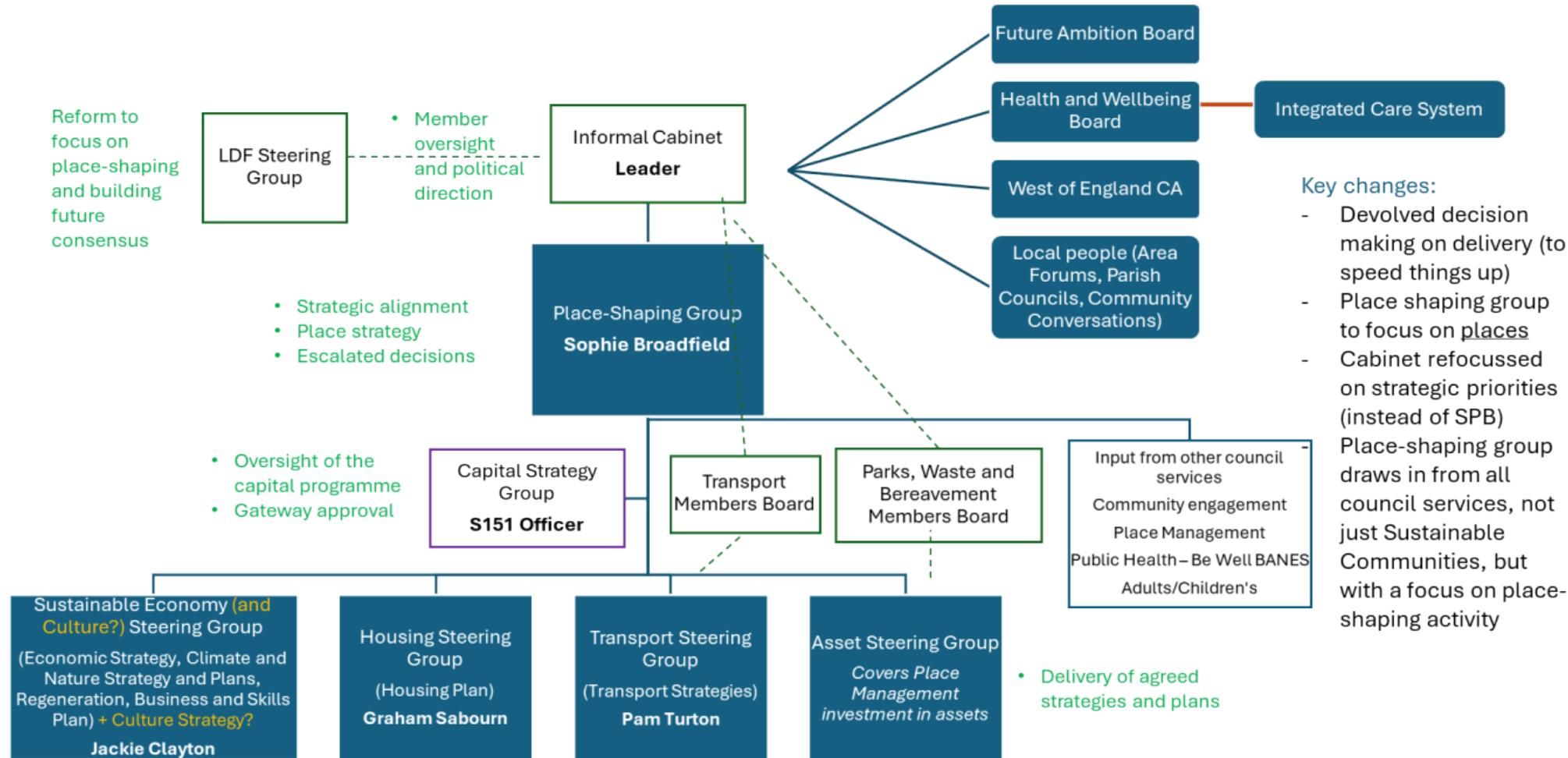
Pursue co-location and shared solutions with public sector partners where this improves service access and estate efficiency

Support integrated service delivery through joined up accommodation and hub-based provision

Align public estate activity with regional priorities

# Performance and Governance

# Governance



# Milestones

- ✓ 9 July 2025 – PSG introduction of AMF
- ✓ End July 2025 – Conclude initial draft
- ✓ Summer 2025 – Director review
- ✓ 17 Nov 2025 – SCLG
- ✓ Jan 2026 – Service Engagement
- ✓ Jan 2026 – HoS Engagement
- ✓ Jan 2026 – Portfolio Holder Briefing
- 3 Feb 2026 – Corporate PDS
- 4<sup>th</sup> Feb 2026 – PSG update
- 24<sup>th</sup> Feb 2026 – Informal Cabinet
- 12<sup>th</sup> March 2026 - Cabinet

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Bath & North East Somerset Council				
MEETING:	<b>Corporate Policy Development &amp; Scrutiny Panel</b>			
MEETING DATE:	<b>3<sup>rd</sup> February 2026</b>	EXECUTIVE FORWARD PLAN REFERENCE: <b>E</b>		
TITLE:	<b>Budget and Council Tax 2026/27 and Financial Outlook – DRAFT REPORT</b>			
WARD:	All			
<b>AN OPEN PUBLIC ITEM</b>				
<b>List of attachments to this report</b>				
<b>Annex 1: Revenue Budget 2026/27 – individual service cash limits</b>				
<b>Annex 2: (i) 2026/27 to 2028/29 Budget Savings and Income proposals &amp; (ii) 2026/27 to 2028/29 Funding Requirements.</b>				
<b>Annex 3: Draft Equalities Impact Assessment of 2026/27 Budget Proposals</b>				
<b>Annex 3: (i) Equality Impact Introduction &amp; Legal Background</b>				
<b>Annex 4: Draft Capital Programme 2026/27 to 2030/31</b>				
<b>Annex 4 (i): Draft New Capital Schemes</b>				
<b>Annex 4 (ii): Highways Maintenance Programme</b>				
<b>Annex 4 (iii): Local Active Travel Safety Programme</b>				
<b>Annex 4 (iv): Parks Play Equipment Replacement Programme</b>				
<b>Annex 4(v): IT Replacement Programme</b>				
<b>Annex 4 (vi): Community Infrastructure Levy (CIL) Allocations</b>				
<b>Annex 5: MRP Policy</b>				
<b>Annex 6: Council Pay &amp; Reward Policy 2026/27</b>				
<b>Annex 7: Advice of Monitoring Officer on the Budget Setting Process</b>				
<b>Annex 8: Fees &amp; Charges Brochure 2026/27</b>				

## 1. THE ISSUE

1.1 This report presents the Council's proposed revenue and capital budgets together with proposals for increases in Council Tax and the Adult Social Care Precept for 2026/27.

## 2. RECOMMENDATIONS

2.1 The Panel is asked to report comments to Cabinet on –

The content of this draft report and 2026/27 budget proposal, including:

- Annex 1: Draft Revenue Budget 2026/27 – individual service cash limits
- Annex 2(i): 2026/27 – 2028/29 Draft Savings and Income proposals
- Annex 2(ii): 2026/27 – 2028/29 Draft Funding Requirements

- Annex 3: Draft Equality impacts of 2026/27 Budget Proposals
- Annex 4: Draft Capital Programme 2026/27 – 2030/31 (further detail provided in Sub Annexes)
- Annex 5: Minimum Revenue Provision (MRP) Policy
- Annex 6: Council Pay & Reward Policy 2026/27
- Annex 7: Advice of the Monitoring Officer
- Annex 8: Place Management Fees and Charges 2026/27

### **3. RESOURCE IMPLICATIONS (FINANCE, PROPERTY, PEOPLE)**

3.1 The resource implications are contained within the body of the report.

### **4. STATUTORY CONSIDERATIONS AND BASIS FOR PROPOSALS**

4.1 A local authority has a statutory duty to set an annual budget and Council Tax. The advice of the Council's Monitoring Officer regarding the budget setting process is attached at Annex 7.

4.2 Members must have regard to the impact on specific groups in their decision making. The Equalities Team has reviewed savings plans to ensure that any impact the saving will have on diversity and equality has been assessed and to ensure that any issues are highlighted to members before a decision is made. The analysis is attached at Annex 3.

### **5. THE REPORT**

#### **5.1 The 2025/26 Budget Summary**

5.1.1 The Medium-Term Financial Strategy (MTFS) for Bath & North East Somerset Council (B&NES) was approved in November 2025 and outlined how the budget would be delivered over the medium to long-term. This highlighted that operating and funding the Council in the current economic environment with constrained public finances due to continued low economic growth continues to be challenging. Alongside this, there has been considerable uncertainty around the impact of the government's new mechanism for allocating funding to local government through implementation of its Fair Funding reforms. The MTFS assumed fair funding would have a significant negative impact on the Council's financial position over the medium term. 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.

5.1.2 The Government announced three year funding allocations based on the Fair Funding reforms as part of the Provisional Local Government Finance Settlement on 17<sup>th</sup> December 2025. The overall impacts across the three year period was broadly in line with the estimated impact included in the MTFS with a reduced impact in 2026/27, due to transitional phasing of impacts, and an overall reduced impact of £0.45m over the three year period. The changes are shown in the table below and have been factored into the proposed budget.

Negative Impact of Fair Funding Changes	2026/27 £m	2027/28 £m	2028/29 £m	3 yr Total £m
MTFS Estimate (November 2025)	4.00	4.00	5.00	13.00
Provisional Settlement (December 2025)	2.42	5.12	5.00	12.55
<b>Change from MTFS (November 2025)</b>	<b>(1.58)</b>	<b>1.12</b>	<b>0.00</b>	<b>(0.45)</b>

5.1.3 The Council needs to deliver a balanced budget over the term of the plan. A balanced budget means that Council one-off cash balances (reserves) are not being used to fund recurrent expenditure. The updated plan shows a balanced budget for 2026/27 with a future years budget gap from 2027/28, although this is expected to reduce to a balanced position once the impacts of income growth and further efficiencies and the developing transformation programme are factored into future budget planning. The figures include all estimates for future pay awards, pension costs, Council Tax, business rates, and Government grant. Service budgets have been updated to reflect changes in service demographic, inflation and ongoing pressures highlighted through the 2025/26 budget monitoring process which are unable to be directly mitigated on an ongoing basis. These increases in growth are partly mitigated by releasing £7.22m of the corporately held contingency which formed part of the 2025/26 base budget. This leaves contingency held within the 2026/27 budget of £2.62m.

5.1.4 The budget has been developed considering how to operate with a higher cost base and lower income levels whilst delivering the Corporate Strategy to meet our key principles and commitments. After taking account of ongoing service cost pressures and new funding requirements, the starting point for the 2026/27 budget is a funding gap of £7.24m. The proposed budget meets this funding gap in two ways:

- 1) Income generation plans of £2.59m.
- 2) Cost reduction plans of £4.65m.

5.1.5 After considering demands on services and inflationary pressures the Council's revenue budget requires £10.24m in budget growth. This is funded through increases in Council Tax, Business Rates, income, savings plans and grant adjustments. This is highlighted in more detail in section 5.2.59 of the report and supporting annexes.

5.1.6 The budget includes a recommendation that general Council Tax is increased by 2.99% in 2026/27 (an increase of £54.51 per Band D property) and the Adult Social Care Precept is increased by 2% (an increase of £36.46 per Band D property). This results in a total proposed Band D Council Tax for Bath & North East Somerset Council next year of £1,914.03 (£1,823.06 in 2025/26) an overall increase of 4.99% or £90.97 per Band D (£1.75 per week).

5.1.7 The proposed net revenue budget for Bath & North East Somerset for 2026/27 is £193.17m.

### **Corporate Strategy and the Councils' Priorities**

5.1.8 Bath & North East Somerset Council has one overriding purpose – to improve people's lives. Our [Corporate Strategy](#) provides a clear and ambitious framework for delivery. It sets out our two core policies of tackling the climate and ecological emergency and

giving people a bigger say as well as our three principles for how we will deliver - preparing for the future, delivering for local residents and focusing on prevention. It also sets out how shared outcomes will be delivered through key partnerships that the council works with such as our Future Ambition Board and Health and Wellbeing Board.

5.1.9 Our four values - bold, empowered, supportive and transparent - continue to underpin all of our work.

5.1.10 The report to cabinet in November 2025 on the [Medium-Term Financial Strategy](#) (MTFS) set out the financial framework for allocating resources across the Council which requires close alignment to the Corporate Strategy. 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.

5.1.11 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

5.1.12 The Council will also continue to work closely with the West of England Mayoral Combined Authority (MCA) to maximise the benefits to our area and communities from our membership. We will also work closely with the MCA and with the Future Ambition Board to deliver our ambitious [Economic Strategy](#) for Bath & North East Somerset, prioritising green growth, good jobs and affordable housing, and work with our health partners through the Health and Wellbeing Board to deliver our [Joint Health and Wellbeing Strategy](#).

## 5.2 **The Revenue Budget 2026/27**

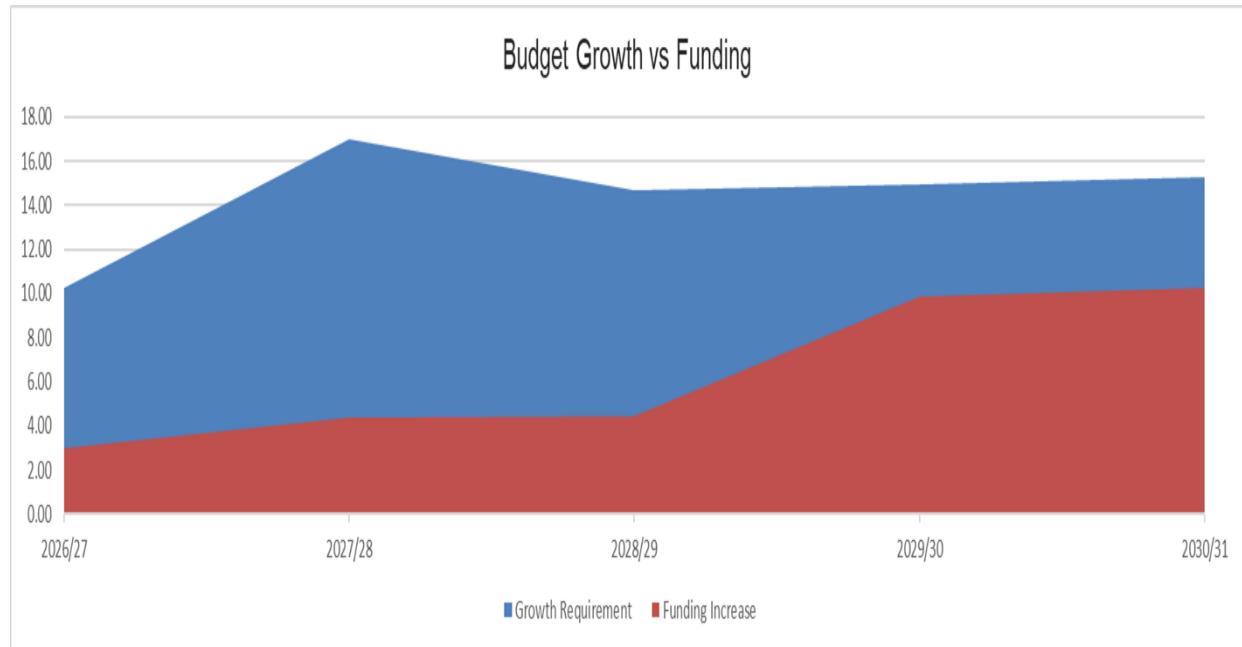
### **2025/26 Current Budget Position**

5.2.1 The Council is currently finalising its Quarter 3 (April to December) budget monitoring. The Quarter 2 (April to September) forecast identified in year budget pressures resulting in a forecast overspend position of £2.4m. Managers across the organisation continue to prioritise cost control measures to bring the budget back to a balanced position before year-end. Recurrent service budget pressures that cannot be mitigated have been incorporated into the growth requirement for 2026/27.

## The Budget and Medium-Term Financial Outlook

5.2.2 The budget summary is set out below showing the demand and funding changes over the next five years: The table and graph summarises the assumed movements in the Net Budget Requirement and Core Funding and also highlights the significant transfer of service and business rate grant funding of £38.46m received in 2025/26 that have moved into core funding as part of the fair funding grant simplification changes for 2026/27.

Budget Planning	Future years assumptions £m					Total
	2026/27	2027/28	2028/29	2029/30	2030/31	
Growth Requirement	10.24	16.96	14.65	14.93	15.30	72.09
Service & Business Rate Grants Transferred to Core Funding	38.46	0.00	0.00	0.00	0.00	38.46
<b>Total Change In Net Budget Requirement</b>	<b>48.70</b>	<b>16.96</b>	<b>14.65</b>	<b>14.93</b>	<b>15.30</b>	<b>110.56</b>
Funding Increase	3.00	4.41	4.44	9.83	10.24	31.93
Service & Business Rate Grants Transferred to Core Funding	38.46	0.00	0.00	0.00	0.00	38.46
<b>Total Change in Core Funding</b>	<b>41.46</b>	<b>4.41</b>	<b>4.44</b>	<b>9.83</b>	<b>10.24</b>	<b>70.39</b>
<b>Annual Funding gap</b>	<b>7.24</b>	<b>12.55</b>	<b>10.21</b>	<b>5.10</b>	<b>5.06</b>	<b>40.17</b>
Savings Proposals	7.24	(0.04)	(0.26)	0.15	0.15	7.24
<b>Remaining Funding Gap</b>	<b>0.00</b>	<b>12.59</b>	<b>10.47</b>	<b>4.95</b>	<b>4.91</b>	<b>32.92</b>



5.2.3 This illustrates a balanced budget for 2026/27 with a forecast budget gap of £32.92m from 2027/28 to 2030/31.

5.2.4 The budget detail, assumptions, and the future forecast is shown in the table below:

Budget Planning	Future years assumptions £m				
	2026/27	2027/28	2028/29	2029/30	2030/31
<b>Budget Requirement (Previous Year)</b>	<b>151.71</b>	<b>193.17</b>	<b>197.58</b>	<b>202.02</b>	<b>211.86</b>
Budget Adjustments (Reduced Corporate Contingency)	(7.22)	0.00	0.00	0.00	0.00
Pay & Pension	4.04	5.15	4.50	5.10	5.35
Demographic Growth	3.39	3.58	3.59	3.95	4.11
Contract Inflation	5.05	3.99	3.15	3.20	3.28
New Homes Bonus Grant	0.91	0.00	0.00	0.00	0.00
Capital Financing	1.22	2.42	2.27	1.28	1.17
Settlement grant funding	36.90	0.72	0.00	0.00	0.00
Budget pressure / rebasing	4.41	1.12	1.15	1.40	1.40
<b>Funding Requirement Sub Total</b>	<b>48.70</b>	<b>16.96</b>	<b>14.65</b>	<b>14.93</b>	<b>15.30</b>
<b>Draft Budget Before Savings</b>	<b>200.41</b>	<b>210.13</b>	<b>212.23</b>	<b>216.96</b>	<b>227.16</b>
Proposed Savings Plans	(7.24)	0.04	0.26	(0.15)	(0.15)
Estimated Savings Required	0.00	(12.59)	(10.47)	(4.95)	(4.91)
<b>Savings Requirement Sub Total</b>	<b>(7.24)</b>	<b>(12.55)</b>	<b>(10.21)</b>	<b>(5.10)</b>	<b>(5.06)</b>
<b>Budget Requirement</b>	<b>193.17</b>	<b>197.58</b>	<b>202.02</b>	<b>211.86</b>	<b>222.10</b>
<b>Funding of Budget Requirement</b>					
Council Tax	136.36	144.77	153.51	162.64	172.16
Business rates retention	55.36	52.81	48.51	49.22	49.94
Reserve transfers From	2.05	0.00	0.00	0.00	0.00
Reserve transfers (To)	(0.60)	0.00	0.00	0.00	0.00
<b>Funding of Budget Requirement Total</b>	<b>193.17</b>	<b>197.58</b>	<b>202.02</b>	<b>211.86</b>	<b>222.10</b>

5.2.5 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 2.00% in 2026/27 and future years.
- **Pension Costs** – Reduction in Employer's Pension Contributions of 3.50% with effect from 2026/27 from the triennial revaluation and the associated improvement in the funding levels of the Avon Pension 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 3.75% for treasury management cash investments with borrowing rates estimated at 5.00%. 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 is 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 Medium Term Financial Strategy (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 £1.88m transfer from the Business Rate Reserve to fund the Business Rate Collection Fund deficit carried forward, £0.17m from the financial planning reserve to fund the carried forward Council Tax Collection Fund Deficit and a transfer of £0.60m to the Revenue Budget Contingency Reserve in line with the planned replenishment of the reserve following use to mitigates the impact of Covid in prior years.

### **The Government Settlement & Fair Funding**

5.2.6 The MTFS report highlighted that this years budget process has been 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 it's "Fair Funding Review" over the Summer which detailed the direction of travel for Local Government funding and its distribution.

5.2.7 The Funding Review updates the methodology for distributing a fixed amount of funding between local authorities. The underlying data used in the grant distribution system hadn't been updated since 2013 when the Business Rate Retention system was introduced.

5.2.8 The core principles of the Fair Funding Review as set out by the 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.

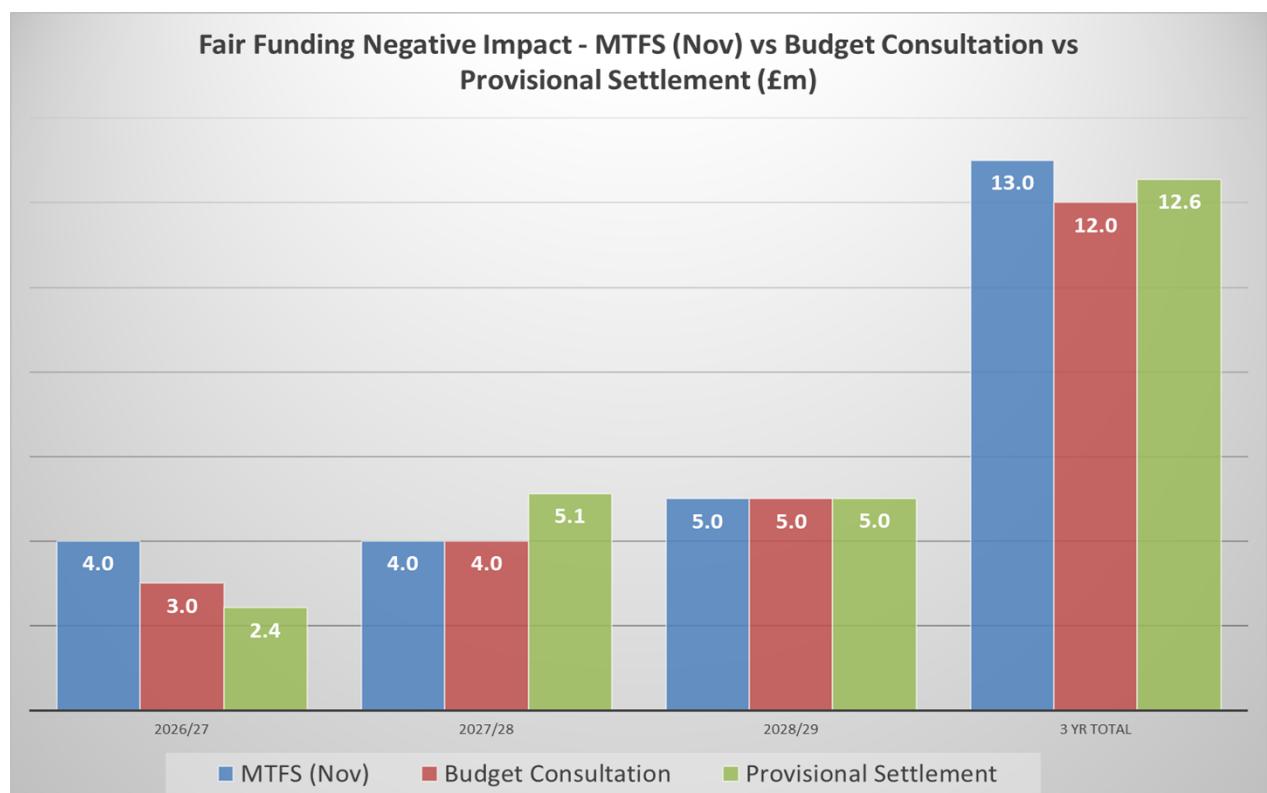
5.2.9 The Government did not provide exemplifications to show how the range of funding changes would impact on individual Councils prior to the Provisional Local Government Finance Settlement announcement on 17th December 2025. In the absence of such information the Council used modelling undertaken by sector experts alongside our own

funding information to forecast potential impacts. This uncertainty and lack of exemplifications have made financial planning extremely challenging.

5.2.10 The modelling undertaken forecast that the Council would 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.

5.2.11 For financial planning and updating the MTFS, which was previously based on a largely cash flat roll forward of grant funding, the estimated impact was for a reduction in funding at an overall level of £13m over the next 3 years. This was profiled with estimated reductions of £4m in 2026/27, £4m in 2027/28 and £5m in 2028/29. The 2026/27 estimate was revised prior to the Budget Consultation exercise in December, based on a forecasted improvement of £1m due to technical changes on the phasing in of impacts which were included in the policy statement announcement made by the government in late November.

5.2.12 The Government announced three year funding allocations based on the Fair Funding reforms as part of the Provisional Local Government Finance Settlement on 17th December 2025. The overall impacts across the three year period was broadly in line with the estimated impact included in the MTFS with a reduced impact in 2026/27, due to transitional phasing of impacts, and an overall reduced impact of £0.45m over the three year period compared to the original estimate made in the MTFS report. The changes are shown in the graph below and have been factored into the budget proposal.



## Core Spending Power

5.2.13 The Provisional Local Government Finance Settlement sets out the Councils Core Spending Power (CSP), which is the government measure of the resources available to fund service delivery. CSP consists of:

- Core Funding – Revenue Support Grant (RSG) and Retained Business Rates
- Local Authority Better Care Grant
- Government estimate of Council Tax Income
- Ring-fenced Grants (Homelessness, Rough Sleeping & Domestic Abuse and Families First Partnership)
- Transitional Protection (B&NES = £0)
- Recovery Grant (B&NES = £0)

5.2.14 For England, CSP for local government is increasing by 15.1% across the three year period covering 2026/27 to 2028/29. For the Council, the CSP is shown to increase by 8.3%, well below the England average and reflecting the negative impact of the Fair Funding changes.

5.2.15 It should be noted that CSP includes the government's estimated council tax income for each authority and this assumes the council will implement the maximum permitted council tax increase of 4.99%, a collection rate of 100% and an increase in the council tax taxbase based on the average growth in the previous four years. This method of calculation over estimates the council tax income available to the council, as the actual taxbase growth in 2026/27 and the future years forecast is lower than the four year average, due to it including the one-off increase to the taxbase achieved in 2025/26 through the introduction of Council Tax premiums for second homes and the increase in premiums on empty properties.

5.2.16 The table below shows the Government published figures for Bath & North East Somerset Council

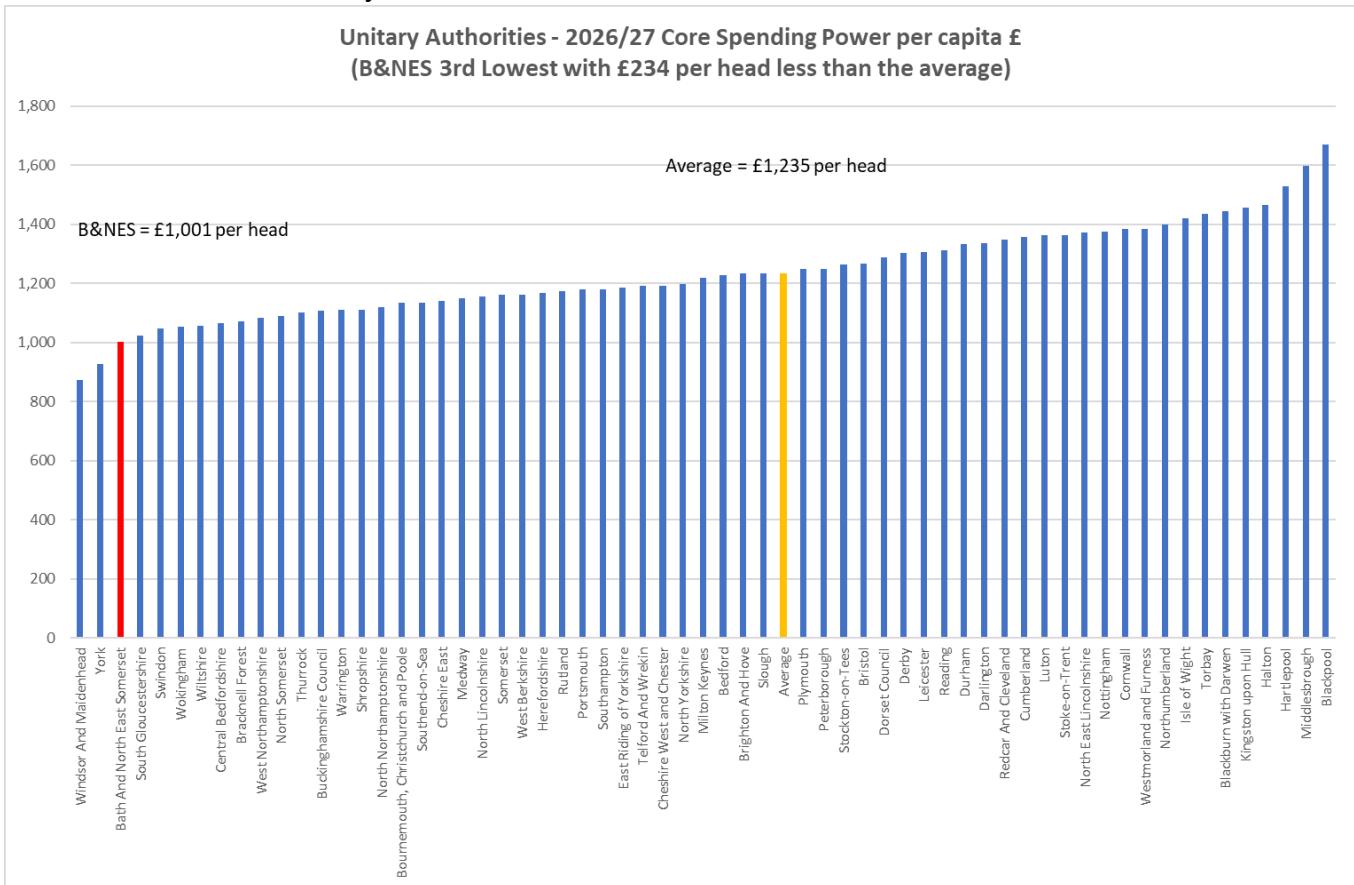
Core Spending Power - Government Published Figures	2025/26	2026/27	2027/28	2028/29
Core Spending Power (£m)	198.59	205.02	209.83	215.09
Annual Change (£m)		6.44	4.81	5.26
Annual Change %		3.2%	2.3%	2.5%
Cumulative Change since 2025/26 %		3.2%	5.7%	8.3%

5.2.17 The following tables shows the CSP figures with council tax income excluded which is more representative of the changes in government funding and highlights the negative impacts of the Fair Funding grant changes on the council, with a reduction in funding of 15.9% over the three year period to 2028/29. This continues the previous trend of increased reliance on council tax to fund rising costs and demands on local services.

Core Spending Power - Excluding Council Tax	2025/26	2026/27	2027/28	2028/29
Core Spending Power (Excluding Ctax) (£m)	69.20	67.04	62.69	58.19
Annual Change (£m)		(2.15)	(4.35)	(4.50)

Annual Change %		-3.1%	-6.5%	-7.2%
Cumulative Change since 2025/26 %		-3.1%	-9.4%	-15.9%

5.2.18 The following graph compares the overall CSP per head of population against other Unitary Authorities and shows Bath & North East Somerset Council to be the third lowest funded authority in 2026/27.



### Revenue Support Grant (RSG) and Grant Simplification

5.2.19 Revenue Support Grant forms part of the updated Fair Funding allocation and as part of the grant simplification principle, a number of unringfenced service specific grants have been rolled into RSG from 2026/27. Some of the more material grants that have been rolled in are:

- Social Care Grant
- Market Sustainability & Improvement Fund
- Employers National Insurance Contributions Grant
- New Homes Bonus
- Temporary Accommodation element of the Homelessness Prevention Grant

5.2.20 The relevant service budgets have been adjusted to reflect the transfer of income and this has led to a significant increase of £22.11m in the net revenue budget due to this technical change in treatment of grant income.

5.2.21 The total Revenue Support Grant for 2026/27 is £33.00m

5.2.22 The RSG allocated to B&NES continues to be rolled into the 100% Business Rate Pilot Scheme, with the Council retaining an equivalent amount of business rates instead of receiving a RSG payment.

### **Recovery Grant**

5.2.23 The Government has continued with the previously one-off Recovery Grant in 2026/27, worth £600m which is targeted at places the government assesses as having greater need and demand for services (using deprivation as a proxy for this) and less ability to raise income locally from Council Tax. Based on this allocation methodology the Council doesn't receive any funding through this grant.

### **New Homes Bonus**

5.2.24 The New Homes Bonus was a grant paid by central government to local councils to reflect and incentivise housing growth in their areas. This grant scheme has ceased in 2026/27 with the funding rolled into the overall financial settlement and distributed through the Fair Funding formulae.

### **Local Authority Better Care Fund Grant**

5.2.25 The 2026/27 Settlement includes the same amount of funding for the Local Authority Better Care Grant of £6.05m as received in 2025/26.

### **Better Care Fund**

5.2.26 The 10-year Health Plan announced reform to the Better Care Fund to focus on integrated services. DHSC and MHCLG will set out further detail on the approach to this reform. Where this involves any change to NHS and local authority minimum contributions to pooled funding, these changes will not be introduced before 2027/28.

5.2.27 The Council and ICB's Better Care Fund has a minimum funding contribution of £18.6m in 2026/27, a 3% uplift on 2025/26 which will ensure continuity of service delivery. The Strategy currently estimates that funding will continue at current levels with inflationary uplift given annually.

### **Children, Families and Youth Grant**

5.2.28 The Children, Families and Youth Grant is a new consolidated grant from 2026/27. The ringfenced grant is targeted at supporting children and families across England, as part of the government's national reforms under the Families First Partnership Programme. The grant also supports the Holidays, Activities and Food Programme and funds the Pupil Premium Plus for post-16 looked after children and care leavers.

5.2.29 The following table shows the grants received in 2025/26 and the consolidated funding streams for 2026/27 to 2028/29.

5.2.30 The increase in funding for 2026/27 reflects the new funding for the Families First Programme announced at the Spending Review and the Local Government Finance Policy Statement.

Children, Families and Youth Grant	2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m
Children's Social Care Prevention Grant	0.40			
Supporting Families	0.55			
<b>Families First Partnership Programme Funding</b>	<b>0.95</b>	<b>1.66</b>	<b>1.66</b>	<b>1.42</b>
Holiday Activities and Food Programme	0.47	0.48	0.46	0.46
Post-16 Pupil Premium Plus Programme	0.04	0.04	0.04	0.04
<b>Total Children, Families and Youth Grant</b>	<b>1.46</b>	<b>2.18</b>	<b>2.16</b>	<b>1.91</b>
<i>Annual Change</i>		0.72	(0.03)	(0.24)

### **Public Health Grant**

5.2.31 For 2026/27 and future years, funding from the following grants will be consolidated into the Public Health Grant.

- Current Public Health Grant
- Drug and Alcohol Treatment and Recovery Improvement Grant
- Local Stop Smoking Services and Support Grant

5.2.32 The following table shows the grants received in 2025/26 and the consolidated Public Health Grant for 2026/27 to 2028/29

Public Health Consolidated Grant	2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m
Public Health Grant	10.97			
Drug and Alcohol Treatment and Recovery Improvement Grant	1.34			
Local Stop Smoking Services and Support Grant	0.22			
<b>Consolidated Public Health Grant</b>	<b>12.52</b>	<b>12.74</b>	<b>13.05</b>	<b>13.40</b>
<i>Annual Change</i>		0.22	0.31	0.36

5.2.33 The grant continues to be ring-fenced for use on public health activity.

### **Homelessness, Rough Sleeping and Domestic Abuse Grant**

5.2.34 This is another new consolidated grant from 2026/27. The ringfenced grant is to support councils to deliver homelessness and rough sleeping services, as well as meeting their domestic abuse duties. It brings together the following funding streams into a single consolidated grant.

- The Prevention, Relief and Staffing element of the Homelessness Prevention Grant

- Rough Sleeping Prevention and Recovery Grant and Rough Sleeping Accommodation Programme funding
- The Domestic Abuse Safe Accommodation Grant

5.2.35 The following table shows the grants received in 2025/25 and the consolidated Homelessness, Rough Sleeping and Domestic Abuse Grant for 2026/27 to 2028/29.

Homelessness, Rough Sleeping and Domestic Abuse Grant	2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m
Homelessness Prevention Grant	1.23			
Homelessness Prevention Grant - Top Up	0.11			
Rough Sleeping Accommodation Programme	0.08			
Rough Sleeping Prevention and Recovery Grant	0.43			
Domestic Abuse Safe Accommodation Grant	0.40			
<b>Total HRSDA Grant</b>	<b>2.26</b>	<b>2.09</b>	<b>2.17</b>	<b>2.22</b>
<i>Annual Change</i>		(0.17)	0.08	0.04

### Crisis and Resilience Fund

5.2.36 The Crisis and Resilience Fund consolidated grant is ringfenced funding to provide preventative support to communities and assist people when faced with financial crisis. The grant brings together the following two funding streams into a single consolidated grant from April 2026.

- Household Support Fund
- Discretionary Housing Payments

5.2.37 The following table shows the grants received in 2025/25 and the consolidated Crisis and Resilience Fund Grant for 2026/27 to 2028/29.

Crisis and Resilience Grant	2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m
Household Support Fund	1.70			
Discretionary Housing Payments	0.22			
<b>Consolidated Crisis and Resilience Grant</b>	<b>1.93</b>	<b>1.61</b>	<b>1.61</b>	<b>1.58</b>
<i>Annual Change</i>		(0.32)	(0.00)	(0.03)

### Extended Producer Responsibility for Packaging Funding

5.2.38 2025/26 was 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 £2.72m, which was incorporated into the budget reflecting the cost pressures and investment made into waste services in this and previous years budgets. 2026/27 funding will be based on data submitted by the Council to the scheme administrators, and the current projection is that this will be in line with the £2.72m. The MTFS allows for a reduction in income of £0.72m, down to £2m, in 2027/28. This will be reviewed during the 2027/28 budget process to update the forecast income using updated scheme data.

## **Business Rates**

5.2.39 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.
- A Transitional Relief Scheme which phases in increases in business rate bills over three years (2026/27, 2027/28 and 2028/29) for those properties whose Rateable Value have increased significantly through the 2026 revaluation.
- The introduction of new lower business rate multipliers for Retail, Hospitality and Leisure properties with a Rateable Value below £500,000, funded by increasing the multipliers for businesses with Rateable Values of more than £500,000.

5.2.40 Each Local Authority has received a new Business Rate Baseline, Baseline Funding Level and a corresponding top-up or tariff based on updated needs assessments.

5.2.41 The impacts of the business rate reset have been included within the Fair Funding reductions referred to in the sections above. The existing section 31 grants received by the Council in 2025/26 in respect of government compensation for previously introduced business rate compensation for relief schemes (such as the Retail, Hospitality & Leisure reliefs) and the under-indexation of business rate multipliers have also been rolled into the Fair Funding redistribution. The relevant revenue budgets have been adjusted to reflect the transfer of income and this has also led to a significant increase of £16.35m in the net revenue budget due to the technical change in treatment of grant income in the same way as the simplification of service based grant funded highlighted in the Revenue Support Grant and grant simplification section above.

5.2.42 The 2026/27 provisional local government finance settlement announced the continuation of the West of England 100% Business Rate Retention Pilot Scheme.

5.2.43 As part of the proposed Budget, reasonable assumptions have been made for the estimated levels of future Business Rate income, together with making specific provisions for appeals, changes in reliefs and growth and deletions. Due to the significant system changes and the resetting of the Business Rate Retention Scheme in 2026/27, the government has increased the level at which a safety net payment is triggered to 100% of each Council's Baseline Funding Level for 2026/27.

5.2.44 The Council's projected retained business rate income for 2026/27 is £56.95m, which is forecast to be slightly below the Baseline Funding Level with a safety net payment of £0.29m bringing income back to the Baseline Funding Level of £57.24m in line with the 100% protection.

5.2.45 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.

### **2025/26 Business Rate Collection Fund Deficit**

5.2.46 The forecast for the Business Rate element of the collection fund in 2025/26 is for a deficit of £2.00m. The Council's share of the estimated deficit, after allowing for amounts due to the Avon Fire Authority and the West of England Mayoral Combined Authority, is £1.88m. This includes £1.12m from the final 2024/25 business rates collection fund outturn position. The deficit will be funded by a transfer from the Business Rate Reserve which is earmarked to smooth Business Rate income over the medium term.

### **Schools Funding**

5.2.47 Schools are funded by 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.

5.2.48 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. It is estimated that 95% of B&NES schools will have converted to academies by April 2026 and at least one other plans to convert in the coming year. This would leave only four primary schools maintained by the Local Authority.

5.2.49 With the introduction of the National Funding Formula for schools the DSG for schools (the Schools Block) was ring-fenced for schools from 2018/19 leaving it unclear as to which body was responsible for the demographic pressures being observed in the other Blocks, in particular the Special Educational Needs and Disabilities (SEND) / High Needs element of the DSG. The Government has confirmed in legislation that local authorities cannot support High Needs costs through their General Funds unless they obtain Secretary of State approval. In addition, it states that the local authority must carry forward the whole of the overspend to the schools budget in future years. This legislation is time limited and it is anticipated that further legislation will be included in DFE and Treasury guidance due to be published soon. The DFE white paper anticipated in February 2026 is anticipated to provide clarity on the plans of the DFE in transferring the responsibility of High Needs Funding from Local Authorities to the DFE.

5.2.50 The DFE invited B&NES to participate in the national DSG Safety Valve programme where the DFE require the LA to produce a recovery plan and if agreed the DFE will support the eradication of the on going cumulative deficit. An agreement was signed with the DFE in February 2023 but due to difficulties with the overall position of the plan a new plan was submitted in May 2024. In August 25 officers submitted a renewed plan which has yet to be formally agreed by the DFE and we now expect the outcome of the plans to be incorporated in the White paper proposals.

5.2.51 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.

5.2.52 We have also successfully bid for a new Special School, to be built under the free school programme. We have also bid for a new Alternative Provision school under the same programme which has also been successful. However, we are still waiting for the DFE to confirm when construction will commence.

5.2.53 As part of this agreement the DFE have agreed to make payments to the Council of £19.2m over a six-year period. To date payments of £8.1m have been received but further payments will be reliant on approval of the revised plan and the details of the white paper.

5.2.54 The underlying overspend on the DSG including the High Needs Block (having taken account of the additional payments) was £32.795m in 2024/25 and that balance was carried forward to 2025/26. The estimated forecast in 2025/26 (including the carry forward from 2024/25) is £46.574m.

5.2.55 The DFE have suspended the National Funding Formula for High Needs for 2026/27 until the publication of the White Paper. The Increase in funding to support inflation etc is therefore set at zero at present until the white papers explains how funding will be allocated.

5.2.56 Schools, through the Schools Forum, agreed to support the High Needs pressures to the full extent of their delegated powers with a contribution of 0.5% of the Schools' budget amounting to £0.8m.

### **Savings and Income Generation**

5.2.57 To deliver a balanced budget in 2026/27 savings and income generation plans total £7.24m. 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.

5.2.58 The proposals for savings and income generation are outlined in Annex 2(i).

## **Budget Funding Requirements**

5.2.59 Budget growth and additional pressures across portfolios of £10.24m have been added to ensure that the budget remains robust and to add additional budget funding to areas that require rebasing. This does not mean that savings cannot be found from these areas in future once savings opportunities are identified, but this ensures that spend and budget are aligned especially in high demand areas. Growth and pressures are outlined in Annex 2(ii).

5.2.60 The material items requiring additional funding are listed below, this illustrates some of the economic and financial challenges the Council is facing.

- Adult Services budget growth £5.51m
- Children's Services budget growth £4.07m
- Heritage Services income rebasing £1.33m

## **Children's Services Management Plan**

5.2.61 Children's services were inspected by Ofsted in 2025. The quality-of-service provision remains high, with inspectors highlighting elements of outstanding practice. However, pressures on children's social care continue to pose challenges. The service has a strong track record of delivering savings, with senior managers and practitioners balancing the best interests of the child with the need to reduce costs. Over the past 12 months, costs have been driven by:

- Complexity of needs
- Increasing cost in the numbers of children in care
- Unfavourable external market conditions in residential care and more children (than budgeted) in residential care
- Support costs for children and families with disabled children
- The use of agency staff to fulfil safeguarding duties, with costs being higher than budgeted vacant posts

5.2.62 The Council has focused on the following areas to reduce costs and deliver the best outcomes for children, young people, and their family networks. This work will continue into 2026/27 and includes:

- An enhanced Transformation programme and detailed scrutiny of all areas of activity and spend.
- Focused placements taskforce responsible for cost assurance and ensuring young people's needs are met through the most effective and sustainable means possible.
- Support for children and young people (CYP) and families on the edge of care/early help
- Reunification of CYP with family and the use of kinship arrangements
- Regular practice reviews of high-cost placements, ensuring health costs are funded
- Provision of local residential accommodation and education arrangements

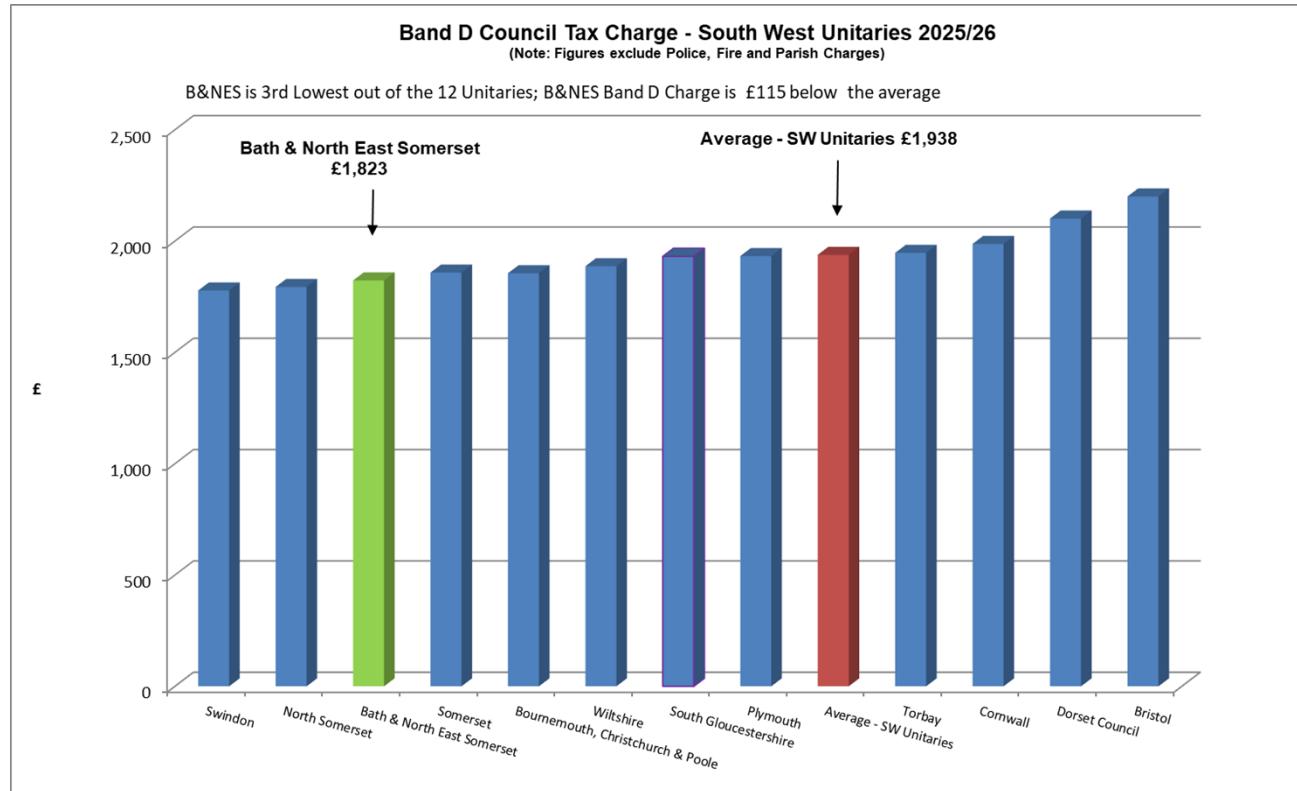
- Transitions team across adult social care, children's social care, and SEND, to support young people as they move from children's to adult services

## 5.3 Council Tax

### Band D Equivalent Council Tax

5.3.1 The Government has announced the same referendum cap of 3.00% will be in place for 2026/27. The proposal therefore within this report is to increase general Council Tax by 2.99% in 2026/27. This will increase a Band D by £54.51 for 2026/27 to £1,590.57. The overall proposed Band D Council Tax for Bath & North East Somerset Council next year, including the Adult Social Care Precept increase of 2.00%, is £1,914.03 (£1,823.06 in 2025/26) an increase of 4.99% and £90.97 per Band D (£1.75 per week). The Council Tax Base for 2026/27 is 71,327.90 Band D Equivalents, an increase of 354.04 (+0.50%) from 2025/26.

5.3.2 The diagram below shows that B&NES had the third lowest Council Tax of the South West Unitary Authorities in 2025/26:



5.3.3 As billing authority, B&NES calculates a basic level of tax based on its own spending plans, to which is added the precepts from, Adult Social Care, Avon Fire Authority, Avon and Somerset Police Authority, and any town/parish Council. The actual total of Council Tax for Bath & North East Somerset residents will be calculated once all precepting authorities have notified B&NES of their proposals to be approved at Full Council on 24th February 2026.

### Adult Social Care Precept

- 5.3.4 The Government, in recognising the continued pressures facing Adult Social Care (ASC) authorities, has allowed for a further 2.00% increase for 2026/27. The Council's plans include this for 2026/27 (this would increase the Adult Social Care Precept to £23.07m an increase of £2.70m from 2025/26) and future years.
- 5.3.5 The funding requirement for Adult Social Care before savings and grant funding is £5.5m (Annex 2ii) which will be part funded from the Adult Social Care Precept increase.

### **2025/26 Council Tax Collection Fund Surplus**

- 5.3.6 The forecast for the Council Tax element of the collection fund in 2025/26 is for a deficit of £0.200m. The Council's share of the estimated deficit, after allowing for amounts due from Avon Fire Authority and Avon & Somerset Police, is £0.166m. The Council's share of the deficit consists of the Collection Fund position carried forward from 2024/25 of £0.344m and the forecast in year surplus of £0.178m. The £0.166m one-off deficit is funded by a drawdown from the Financial Planning Reserve.

### **Estimates for Future Years Band D Council Tax**

- 5.3.7 The current Medium Term Financial Plan has factored in an annual increase of 2.99% for 2027/28 and future years for general Council Tax together with 2.00% Adult Social Care precept increases. Projections will be adjusted accordingly in line with any future referendum limits set by the new Government after the next spending review.

### **Local Council Tax Support**

- 5.3.8 The base Local Council Tax Support Scheme was approved in November 2019 and has been updated to reflect annual changes to statutory legislation and benefit rates from April 2026.
- 5.3.9 The Government have announced that from April 2026, most elements of Universal Credit will be increased by 6.2%. We are proposing to set the lowest income band in line with the standard allowance for Universal Credit for 2026 and for subsequent years. This will allow the poorest households to keep more of their benefit income and receive more support towards their council tax.

- 5.3.10 The 2026/27 Scheme is available at the following link:

[https://www.bathnes.gov.uk/sites/default/files/2026-01/Council\\_Tax\\_reduction\\_scheme\\_April\\_1\\_2026\\_to\\_March\\_31\\_2027.pdf](https://www.bathnes.gov.uk/sites/default/files/2026-01/Council_Tax_reduction_scheme_April_1_2026_to_March_31_2027.pdf)

## **5.4 West of England Mayoral Combined Authority**

- 5.4.1 The West of England Mayoral Combined Authority (MCA) works in partnership with its constituent councils to plan and deliver strategic priorities across the region, including transport, skills, housing and economic growth.

5.4.2 In 2025, the MCA approved a new 10-year Growth Strategy, which sets the long-term direction for the region. The MCA's 2026/27 budget has been developed to support the delivery of this Strategy, focusing on translating agreed priorities into delivery while maintaining financial sustainability.

5.4.3 The MCA's Revenue and Capital Budget will be approved by the West of England Combined Authority Committee on 31 January 2026. Based on current budget proposals, the following elements have been incorporated into budget assumptions.

### **Revenue Transport Levy**

5.4.4 An annual revenue transport levy reflecting the cost of core regional Integrated Transport services, including:

- Concessionary travel
- Supported bus services (delivered jointly with constituent councils)
- Real Time Information and bus service information
- Community transport
- TravelWest and Metrobus operations

5.4.5 The levy for 2026/27 is £5.724m. Levy contributions are pooled and managed regionally by the MCA. Increasing costs and demand for transport services will continue to be monitored to ensure services remain affordable within available funding.

### **Highways Maintenance Funding**

5.4.6 Through the City Region Sustainable Transport Settlement, the MCA allocates capital funding to Unitary Authorities for highways maintenance. Indicative allocation for 2026/27 is £6.997m and additional £1.968m of funding announced in December 2025. This funding supports the Council's Highways Maintenance and Local Active Travel Safety Programmes.

### **Projects and Programmes**

5.4.7 The MCA budget continues to support a range of projects and initiatives with approved budgets for 2026/27 summarised in the table below.

Project	Approved £000s
B&NES Liveable Neighbourhoods	2,772
Bath City Centre Sustainable Corridor - Phase Two	571
Bath City Centre Sustainable Corridor Phase 1	4,032
Bath Sustainable Walking & Cycling Links	4,757
CRSTS AC - Midsomer Norton & Westfield Walking, Wheeling and Cycling Links	2,297
FEAS BT - Strategic Master Planning - North Keynsham	100
FEAS CS - Bath Quays Bridge Cycle/Pedestrian Links	475
FEAS GB - Scholars Way Walking and Cycling Route	2,349
IFDI - Bath City Centre High Streets Renewal Project	146
IFEM - Somer Valley Links	5,900
IFGEISTART Phase 0	200
Maintenance Challenge Fund - Manvers Street Cleveland Bridge	2,679
<b>Total</b>	<b>26,278</b>

5.4.8 Further bids for funding may be brought forward in line with the MCA's Investment Strategy and Local Growth Assurance Framework.

5.4.9 The MCA does not have the power to raise Council Tax and therefore no precept will be requested.

5.4.10 Full details of the West of England Mayoral Combined Authority Budget proposals are available at [www.westofengland-ca.gov.uk](http://www.westofengland-ca.gov.uk)

## 5.5 Community Contribution Fund

5.5.1 The Community Contribution Fund was launched in March 2021, initially as a pilot to offer residents the chance to contribute to good causes that help local charity, community and voluntary groups to reduce health inequalities. The total amount donated since that time reached £51,413.12 as of 20<sup>th</sup> January 2026. Over 500 donations have been received, and over the last financial year, these have ranged from £5 to £150. The largest donation to date has been £5,000.

5.5.2 The scheme has been promoted through local press and on the Council's social media and website. Whilst there were more donations given in the first year, donations have continued, with a number of individuals donating more than once.

5.5.3 To date, £48,735 from the fund has been allocated to local causes.

5.5.4 In 2022, grants of up to £2,000 were awarded to 15 community organisations. A total of £25,235 was distributed. Projects included those that supported people's mental

health; provided emergency medical supplies; invested in refurbishment of community facilities; mentoring; support for families; training; group therapy and youth provision.

5.5.5 In 2023, a further 24 grants were awarded to community-run Warm Spaces that were registered with the Council. Organisations were awarded £250 to support these activities with a total of £6,000 distributed.

5.5.6 In 2024, 20 grants of £500 were awarded in support of low cost/free food projects, including those at registered Warm Spaces, with a total of £10,000 distributed.

5.5.7 In 2025, 8 local organisations received grants of either £500 or £1,000 for projects that both reduce inequality and primarily benefit people over the age of 55 with a total of £7,500. A broad range of projects have been funded – from entertainment in care homes to research relating to those living with cancer and seed funding for the new, B&NES Older People's Voice group.

5.5.8 Full details of the recipients is available on the [Council's website](#).

5.5.9 Subject to sufficient donations being received, it is recommended that the scheme continues into 2026/27.

### **Flexible Capital Receipts**

5.5.10 Flexible Capital Receipts can be used for revenue spend which results in ongoing revenue savings. Estimated usage for 2025/26 is expected to be up to £0.03m with the remaining £0.35m carried forward for use in 2026/27 as outlined in the Efficiency Strategy attached at Annex 4.

	<b>Actual Usage 2017/18 – 2024/25 £'m</b>	<b>Estimated Usage 2025/26 £'m</b>	<b>Available Balance 2026/27 £'m</b>	<b>Est. Total Usage £'m</b>
Flexible Capital Receipts	11.12	0.03	0.35	11.50

### **General Fund Un-Earmarked Reserve**

5.5.11 The General Fund Un-earmarked reserve is retained to meet the Council's key financial risks. Budget Monitoring for the period April to September 2025 estimated that Un-earmarked reserves would total £12.58m by 31<sup>st</sup> March 2026.

5.5.12 The budget risk assessment has set a range of between £12.0m and £13.2m to meet those risks. The available balance is £12.58m which is within the budget risk assessment range.

5.5.13 As set out in the Council's Financial Regulations the specific arrangements for the governance and release of reserves are delegated to the Council's Section 151 Officer in consultation with the Cabinet Member for Resources and the Chief Executive.

## 5.6 Chief Finance Officer's Report on the Robustness of the 2026/27 Budget

### Introduction

5.6.1 Under Section 25 of the Local Government Act 2003 there is a requirement for the Council's Chief Finance Officer, which for Bath & North East Somerset Council is the Director of Finance (S151 Officer), to report to Council on:

- (a) the robustness of the estimates made for the purposes of the calculations of the Budget; and
- (b) the adequacy of the proposed financial reserves.

5.6.2 Council in considering its Budget should have regard to this advice.

5.6.3 In expressing this opinion, the S151 Officer has considered the financial management arrangements that are in place, budget assumptions, levels of reserves and the financial risks facing the Council within this budget. Also, it identifies the Council's approach to budget risk management and assesses the particular risks associated with the 2026/27 budget to inform the advice.

### Robustness of Estimates

5.6.4 The Council's Medium Term Financial Strategy, presented to Cabinet on 13<sup>th</sup> November 2025, considered the national economic outlook that has informed the 2026/27 budget assumptions that are in section 5.2.8. of the report.

5.6.5 Cost and income estimates have been informed by 2025/26 Budget Monitoring and have taken into account current activity levels alongside future years projections to ensure the budget proposals are aligned to operating costs.

5.6.6 Budget sensitivity analysis in the Medium Term Financial Strategy was modelled taking into account best and worst case scenario's using budget estimates covering the fair funding and government settlement changes, service demographic and demand cost risk, and key service income budget risks, totalling with the worst case estimate a budget gap at that time of c£14.37m.

5.6.7 The budget savings requirement for 2026/27 is £7.24m, these have been through an internal review process and budget challenge session led by the Cabinet Member for Resources to ensure the robustness of the proposals that are set out in Annex 2(i).

5.6.8 In recognition of the budget risks from demand on statutory services rising above modelled levels, alongside savings delivery risk, a corporate contingency of £2.62m has been included in the budget.

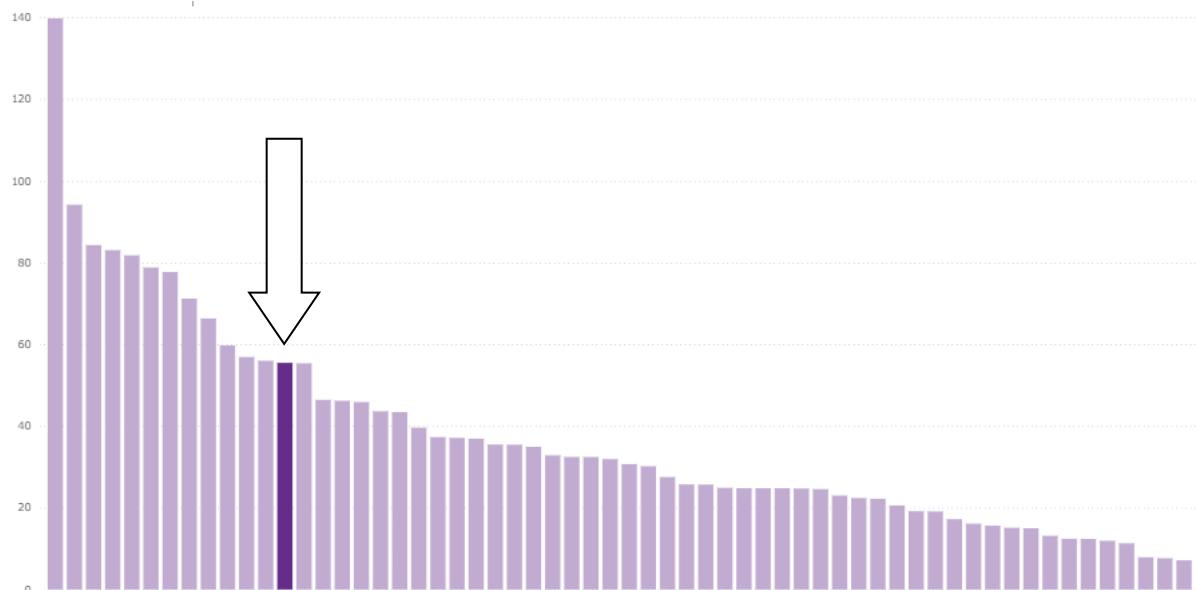
## CIPFA Financial Resilience Index

5.6.9 The CIPFA Financial Resilience Index is a comparative analytical tool intended for use by Chief Financial Officers to support good financial management. The index shows a council's position on a range of measures associated with financial risk, highlighting where additional scrutiny may be required. The 2024/25 index for Bath & North East Somerset Council as compared to other Unitary Councils is as follows:

CIPFA Financial Resilience Index		Select Authority, Indicator Group & Year to analyse by Authority Type	Authority	Indicator Group	Year																																																																								
			Bath	Primary	2024-25																																																																								
<b>Results Breakdown</b>																																																																													
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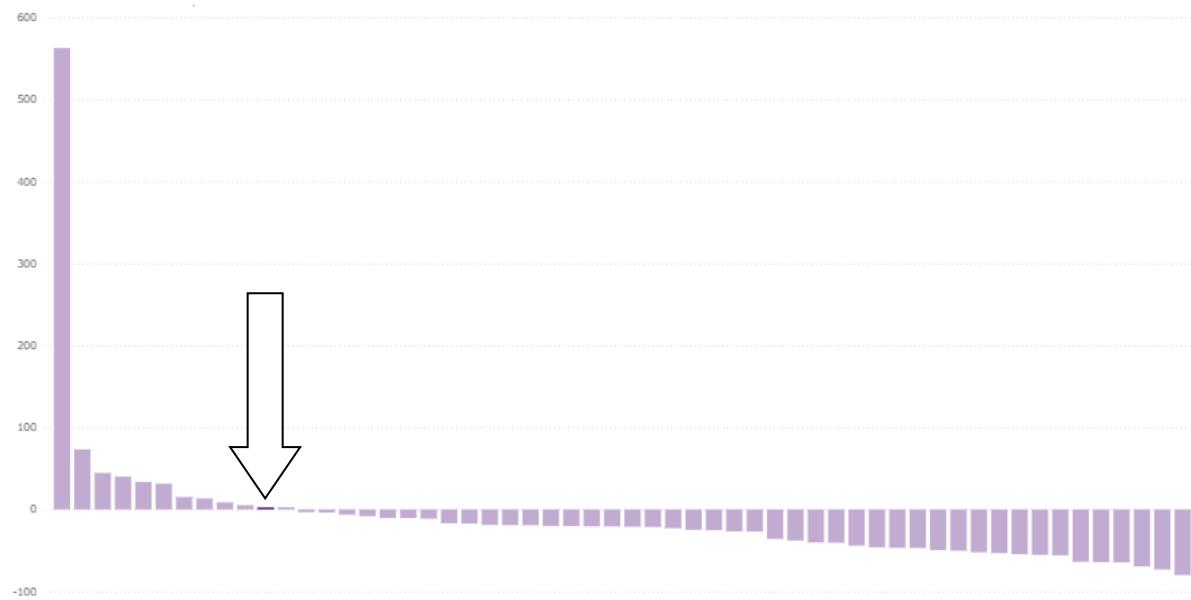
5.6.10 The majority of these indicators show the Council to be medium to low risk within the CIPFA family group of Unitary Councils.

5.6.11 The Council's reserve sustainability which compares the level of usable reserves to net revenue expenditure remains in the lower risk band, demonstrating the Council's financial sustainability. As at 31<sup>st</sup> March 2025, the level of reserves held by Bath & North East Somerset Council equated to 55.46% (53.44% as at 31<sup>st</sup> March 2024) of the Council's net revenue expenditure. The following chart shows the level of reserves of all Unitary Councils, with Bath & North East Somerset Council, highlighted as the darker coloured bar within the chart, being the 13<sup>th</sup> least exposed Unitary Council (15<sup>th</sup> as at 31<sup>st</sup> March 2024).



5.6.12 The following chart shows the percentage change in Useable Reserves (excluding Public Health Grant Reserve and School's Balances) over the last three years. For Bath

& North East Somerset Council this equates to 2.84% (as indicated by the arrow) and is considered a low risk.



5.6.13 The most significant risk highlighted within the index for the Council is Ratio of Interest Payable and Net Revenue Expenditure. This indicator value is 6.33% for 2024/25, which has increased from 4.90% for 2023/24 and reflects the increase in the reliance of external borrowing, and the associated interest costs, of funding the Council's Capital Programme. Whilst this is considered to be a Medium risk, rather than a High risk within the index, this is a risk worth noting and keeping under review.

5.6.14 The index has identified the Social Care Ratio (the cost of delivering social care in comparison to net revenue budget) as the second most significant risk for the Council. This indicator is 78.32% for 2024/25 which is a slight increase from 78.17% for 2023/24. There have been continuing increases in the cost of Children's Social Care, this has been recognised in the 2026/27 budget proposal. This report sets out the commitment to deliver the Children's Services management plan that will help put appropriate measures in place to control the rising cost of care.

### **Adequacy of Reserves**

5.6.15 The level of reserves a council should maintain is a matter of judgement. The consequence of not having adequate reserves can be significant. In the event of a serious problem or a series of events, the Council could run the risk of a deficit or be forced to cut expenditure in a damaging or arbitrary way should reserves not be available.

5.6.16 The General Fund Reserve is retained to meet the Council's key financial risks. Budget Monitoring for the period April to September 2025 estimated that this reserve would total £12.58m by 31<sup>st</sup> March 2026.

5.6.17 The budget risk assessment has set a range of between £12.0m and £13.2m to meet those risks. The available General Fund Reserve balance of £12.58m is within the

budget risk assessment range and represents 6.5% of the Net Budget Requirement. I consider this to be an adequate working balance.

5.6.18 The Council's General Fund revenue reserves, including earmarked reserves but excluding Public Health and Schools ring-fenced reserves, were £89.38m on 31<sup>st</sup> March 2025. As set out in the CIPFA Financial Resilience paragraphs above, the level and change in reserve balances is currently considered to be of low risk to the Council.

5.6.19 The Council's Statement of Accounts 2024/25 were signed off by the Council's external auditors on 29<sup>th</sup> September 2025 with an "unqualified opinion". I therefore have external assurance to rely on with regards to the level of the Council's useable reserves.

## **Risk**

5.6.20 Local Government finance continues to be a significant challenge across the country. Since 2018, there has been a significant increase in the number of 'section 114' notices, which notifies of severe financial distress, issued by Local Authorities compared to just 2 in the preceding 18 years. Moreover, local authorities are increasingly reporting concerns about their financial positions and their ability to maintain delivery of their services. In 2025/26 the Government has agreed to provide 30 councils with support to manage financial pressures via the Exceptional Financial Support process.

5.6.21 The financial crisis that local authorities are encountering comes after significant reductions in local authorities' spending power which has itself coincided with increasing demand for their services and inflationary pressures driving up costs. Ultimately, the levels of funding available to local authorities, through Council Tax, Retained Business Rates, and Government Grants have not kept pace with these pressures. Fair Funding Reform has resulted in the various formulae used in the Government's calculations for allocating funding to Local Authorities being revised for the first time in many years. Ultimately however, this process primarily results in funding being moved around the country to where the new formulae derive that it is needed most, and this has impacted negative on Bath & North East Somerset Council as set out in 5.1.2.

5.6.22 Key risks to the budget are set out further in Section 6.

## **Executive Summary of the Section 151 Officer on the budget position**

5.6.23 For 2026/27 the savings requirement is £7.24m after the inclusion of Council Tax increases. The assessment of the plans to close the gap do not require additional funds from the Financial Planning Reserve to smooth the delivery of savings in 2026/27 as the amounts proposed have been profiled to consider the delivery timeframe. To recognise risk the revenue budget has provided a £2.62m budget contingency to mitigate slippage on savings delivery as well as service demand & cost increases.

## **Consequences of Failing to Deliver a Budget**

5.6.24 If the Council is unable to produce a balanced budget or finds it cannot deliver the budget in year, the CFO (under s151 of the Local Government Act) would be required to produce a Section 114 report. (Note the conclusion under 5.7.31 of this report).

5.6.25 Section 114 of the Local Government Finance Act 1988 requires a report to all the authority's members to be made by the CFO, in consultation with the Council's Monitoring Officer and Head of Paid Service, if "the expenditure of the authority incurred (including expenditure it proposes to incur) in a financial year is likely to exceed the resources (including sums borrowed) available to it to meet that expenditure" (i.e. there is likely to be an unbalanced budget). In this event the Council must consider the report within 21 days and decide whether it agrees or disagrees with the views in the report and what action it proposes to take to bring the budget into balance. The publication of such a report starts an immediate 'prohibition period'. This means that everyone who has delegated authority to spend the Council money immediately has those powers suspended during the prohibition period, and only the CFO can authorise new commitments.

### **Report of the Director of Finance (CFO) in Respect of Statutory Duties**

5.6.26 The Budget Report sets out the Council's financial position and budget. This is the formal report and is part of a continuum of professional advice and is the culmination of a budget process in which substantial detailed work has already been carried out with Directors, Senior Managers and their teams and Members. This section provides a summary of the conclusions which are considered in more detail within this report and its appendices.

5.6.27 Risk Robustness statements have been prepared by Directors and their staff supported by appropriate finance staff reviewing pressures, priorities, savings, demographics, inflation and contractual obligations, and income generation. Each Director has completed a Robustness Statement outlining savings and service delivery risk that have been incorporated into a corporate wide assessment. In recognition of budget risks, the revenue budget has provided a £2.62m budget contingency to mitigate slippage on savings delivery as well as service demand & cost increases.

5.6.28 The budget has recognised the current and future years funding requirement with £10.24m allocated to portfolios in 2026/27 to ensure there should be sufficient funds to meet service demand and delivery costs as currently forecast. These have been reviewed on a regular basis by the Corporate Management Team and the Directors as part of the regular budget monitoring process in 2025/26.

5.6.29 The Council in 2025/26 is forecasting a deficit balance on the Dedicated Schools Grant of £46.57m at the year end due to Special Educational Needs and Disabilities placements (SEND). Whilst there is a Government statutory override in place this is not a liability on the Council's general fund budget, however it does need to be noted that if there is a change in the treatment of this deficit this would need to be incorporated into future years budget setting.

5.6.30 In the context of the overall budget the financial position continues to be challenging, but the CFO concludes that the estimates are robust, in that they have been robustly constructed.

5.6.31 With regard to the adequacy of balances, the 2026/27 planned level of the un-earmarked General Fund Reserve is £12.58m (which is within the required risk assessment range of £12.0m to £13.2m).

5.6.32 The conclusion of the CFO is that the estimates for 2026/27 are robust and the budget is lawful, levels of balances have improved and are adequate and reasonable in meeting the Council's risks.

## 5.7 **Capital Strategy, Programme and Capital Receipts 2026/27 to 2030/31**

### **Overall Capital Programme & Financing including New Capital Schemes**

5.7.1 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.

5.7.2 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.

5.7.3 The Council follows this approach through:

- Continuing to review all existing schemes and simplify, reduce, pause or stop as necessary;
- 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 replace 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.

5.7.4 The Capital Programme will retain the clear separation of schemes for **Full Approval** and those which are for **Provisional Approval**.

5.7.5 Items gaining **Full Approval** are clear to proceed to full scheme implementation and delivery, subject to appropriate project management and governance.

5.7.6 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.

5.7.7 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.

5.7.8 The capital programme is aligned with the Community Infrastructure Levy allocations agreed for the coming financial year.

5.7.9 A summary of the proposed capital programme and its financing for 2026/2027 – 2030/2031 is shown below

#### Capital Schemes for Approval

Cabinet Portfolio: Capital Schemes	Budget 2026/2027 £'m	Budget 2027/2028 £'m	Budget 2028/2029 £'m	Budget 2029/2030 £'m	Budget 2030/2031 £'m	Total £'m
Resources	39.651	38.820	22.970	4.766	0	<b>106.207</b>
Economic & Cultural Sustainable Development	18.776	10.306	24.922	0.550	0.050	<b>54.604</b>
Communications & Civic Services	1.247	0.05	0.05	0.05	0.05	<b>1.447</b>
Leader	0	0	0	0	0	<b>0</b>
Sustainable Transport Strategy	0.745	0	0	0	0	<b>0.745</b>
Built Environment, Housing & Sustainable Development	12.667	7.597	2.229	1.789	1.789	<b>26.072</b>
Adult Services	0.166	0	0.05	0	0	<b>0.216</b>
Children's Services	7.059	2.070	0	0	0	<b>9.129</b>
Sustainable BANES	2.402	0.327	0.049	0	0.044	<b>2.822</b>
Sustainable Transport Delivery	27.506	0	0	0	0	<b>27.506</b>
<b>Total</b>	<b>110.219</b>	<b>59.170</b>	<b>50.270</b>	<b>7.155</b>	<b>1.933</b>	<b>228.747</b>

#### Capital Schemes for Provisional Approval (Subject to)

Cabinet Portfolio: Capital Schemes	Budget 2026/2027 £'m	Budget 2027/2028 £'m	Budget 2028/2029 £'m	Budget 2029/2030 £'m	Budget 2030/2031 £'m	Total £'m
Resources	6.033	19.703	7.579	6.520	3.720	<b>43.555</b>

Economic & Cultural Development	28.506	5.454	16.821	9.141	3.606	<b>63.528</b>
Communication and Civic Services	1.500	0.500	0.500	0.750	0	<b>3.250</b>
Leader	0.272	0	0	0	0	<b>0.272</b>
Sustainable Transport Strategy	0.110	0	0.270	0	0	<b>0.380</b>
Built Environment, Housing & Sustainable Development	9.122	24.230	3.195	1.135	0.635	<b>38.317</b>
Adult Services	2.265	0.149	0.150	0.050	0	<b>2.614</b>
Children's Services	16.073	7.229	0	0	0	<b>23.302</b>
Sustainable BANES	11.900	1.668	1.155	1.050	1.006	<b>16.779</b>
Sustainable Transport Delivery	27.602	24.087	16.907	9.267	9.267	<b>87.130</b>
<b>Total</b>	<b>103.383</b>	<b>83.019</b>	<b>46.576</b>	<b>27.913</b>	<b>18.234</b>	<b>279.127</b>

#### Funded By

<b>Financing</b>	<b>Budget 2026/2027 £'m</b>	<b>Budget 2027/2028 £'m</b>	<b>Budget 2028/2029 £'m</b>	<b>Budget 2029/2030 £'m</b>	<b>Budget 2030/2031 £'m</b>	<b>Total £'m</b>
Grant	98.653	38.414	15.856	8.786	8.786	<b>170.495</b>
Capital Receipts/RTB	11.780	0.635	0.635	0.202	0.635	<b>13.887</b>
Revenue	3.721	0.050	0.050	0.050	0.050	<b>3.921</b>
Borrowing	86.091	102.039	80.300	26.030	10.696	<b>305.156</b>
3rd Party (inc S106 & CIL)	13.357	1.050	0.005	0	0	<b>14.413</b>
<b>Total</b>	<b>213.603</b>	<b>142.188</b>	<b>96.846</b>	<b>35.068</b>	<b>20.167</b>	<b>507.873</b>

Note 1: The figures in the tables above include re-phasing from prior years.

Note 2: Some of the figures in the above table are affected by rounding.

5.7.10 Attached at Annex 4(ii) is the Highways Maintenance Programme, at 4(iii) Local Active Travel Safety Programme, at 4(iv) Parks Play Equipment Replacement and at 4(v) IT Replacement Programme. The substitution of one scheme for another that is unable to proceed within these programmes will be allowed following consultation and approval with the Section 151 Officer, and subject of any specific provisions agreed as part of the budget approval.

## **Capital Risk Contingency**

5.7.11 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 capital programme includes a funded corporate risk contingency of £2.904m;
- 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.

5.7.12 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**

5.7.13 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 Government has issued regulations that require full Council to approve an MRP Policy in advance each year, or if revisions are proposed during the year they should be put to the Council at that time. The policy is attached at Annex 5 and is unchanged from the 2025/26 policy.

## **Community Infrastructure Levy (CIL) Spend Proposals 2026/27**

5.7.14 The allocations proposed for CIL spend are attached in Annex 4(iv). These allocations have been included in the capital programme where appropriate.

## **6. RISK MANAGEMENT**

6.1 The key risks to the budget are currently assessed as:

<b>Risk</b>	<b>Likelihood</b>	<b>Impact</b>	<b>Risk Management Update</b>
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	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 will be introduced by the government for 2026/27.  We continue to monitor arrears,

				CVAs, and liquidations with a specific reserve held to manage in-year volatility.
Changes to Government that affects funding	Policy future	Likely	High	New government policy and funding reforms that are being implemented from 2026/27 will have an impact on resourcing of Council services and priorities. The MTFS includes the impact on funding based on the provisional local government finance settlement announcement,
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 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 increase	Interest rates	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.
Pay Award		Possible	Medium	As set out in the report, the Council has assumed a Pay Award increase of 3% for 2026/27 however this has not yet been agreed and the initial claim from the NJC Unions is in excess of this allowance. Any increase in excess of 3% would be required to be met from the Contingency budget and/or reserves and this has been included within the risk assessment of the Council's reserve levels.

- 6.2 The key risks will continue to be monitored and reported through regular budget monitoring to Cabinet.
- 6.3 In addition, this report includes the Section 151 Officer's assessment of the Robustness of Estimates and Adequacy of Reserves. This assessment includes a review of the Directors' reviews of their budget, budget risks/sensitivities, and the Corporate Risk Register.

## 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 report and annexes also contain the other options that can be considered in making any recommendations.

## 9. CONSULTATION

- 9.1 An online consultation on the council's draft budget proposals took place from 12 December 2025 until 19 January 2026. The findings of the consultation will be presented to the 12<sup>th</sup> February 2026 Cabinet meeting.

<b>Contact person</b>	<p>Stuart Donnelly, Director of Finance (S151 Officer)  <a href="mailto:Stuart_Donnelly@bathnes.gov.uk">Stuart_Donnelly@bathnes.gov.uk</a></p> <p>Gary Adams, Head of Financial Management  <a href="mailto:Gary_Adams@bathnes.gov.uk">Gary_Adams@bathnes.gov.uk</a></p>
<b>Background papers</b>	<p>Medium Term Financial Strategy 2026/27-2030/31  <a href="https://democracy.bathnes.gov.uk/documents/s89332/E3661%20-%20Appendix%201%20-%20Medium%20Term%20Financial%20Strategy.pdf">https://democracy.bathnes.gov.uk/documents/s89332/E3661%20-%20Appendix%201%20-%20Medium%20Term%20Financial%20Strategy.pdf</a></p>
<p><b>Please contact the report author if you need to access this report in an alternative format</b></p>	

Annex 1: Portfolio Cash Limits 2026/27 - Proposed Revenue Budget

CABINET PORTFOLIO	Cash Limit	Service	Nov'25 Revised Cash Limits	Removal of One-offs (including one-off payments in 2025/26) + Add Feb'26 on-going technical payments	2026/27 Base Budget	Technical Adjustment - Settlement Funding	Technical Adjustment - Smarter Structures Saving Allocation	2026/27 Base Budget after technical adjustments	MTFS Funding Requirements	MTFS Savings and Income	Total 2026/27 Budget Changes	2026/27 Proposed Budget		
			£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	
Leader	1112	Housing Delivery Vehicle	(1,000)		(1,000)	(1,000)		(1,000)		(1,000)		(1,000)	(1,000)	
		<b>PORTFOLIO SUB TOTAL</b>	<b>(1,000)</b>		<b>(1,000)</b>	<b>(1,000)</b>		<b>(1,000)</b>		<b>(1,000)</b>		<b>(1,000)</b>	<b>(1,000)</b>	
Sustainable Bath & North East Somerset	1147	Parks & Open Spaces	2,510		2,510				2,510				2,457	
	1127	Environmental Monitoring (Air Pollution)	222	6	228				228				225	
	1137	Green Transformation	701	(17)	684	27		711		3,449	(11)	(11)	700	
		<b>PORTFOLIO SUB TOTAL</b>	<b>3,433</b>	<b>(11)</b>	<b>3,422</b>	<b>27</b>		<b>3,449</b>		<b>(48)</b>	<b>(19)</b>	<b>(67)</b>	<b>3,382</b>	
Resources	1101	Waste & Fleet Services	18,909		18,909				18,791		340	(378)	(38)	18,753
	1053	Council Solicitor & Democratic Services	3,446	8	3,454				3,332		233			3,565
	1040	Finance	3,434	(61)	3,374				3,292		208			3,500
	1041	Revenues & Benefits	2,340	93	2,433				2,333		(17)			2,316
	1042	Risk & Assurance Services	1,754	38	1,792				1,792		(15)			1,777
	1118	Procurement & Commissioning	406		406				406		(10)	(250)	(260)	145
	1047	Human Resources & Organisational Development	540	60	600				2,709		225			2,934
	1132	Business Change	775	5	780				780		(15)	(350)	(365)	415
	1143	Corporate Office	1,744	(94)	1,650				1,650		(29)			1,621
	1032	Information Technology	8,562	181	8,743	1	(145)		8,600		152			8,751
	1081	Commercial Estate	(12,111)	(34)	(12,145)				(12,145)		(18)			(12,163)
	1054	Hsg / Council Tax Benefits Subsidy	405		405				405					405
	1055	Capital Financing / Interest	5,476		5,476				5,476					5,476
	1056	Unfunded Pensions	1,388		1,388				1,388					1,388
	1057	Corporate Budgets incl. Capital, Audit & Bank Charges	1,379	(468)	911	18,276		19,187			(786)	(1,055)	(1,841)	17,346
		New Homes Bonus Grant	(913)		(913)	913								12
	1058	Magistrates	12		12				12		81			656
	1059	Coroners	575		575				575		5			273
	1060	Environment Agency	268		268				268		270			5,579
	1061	West of England Combined Authority Levy	5,309		5,309				5,309		623	(2,033)	(1,410)	62,748
Economic & Cultural Sustainable Development		<b>PORTFOLIO SUB TOTAL</b>	<b>43,698</b>	<b>(271)</b>	<b>43,426</b>	<b>19,191</b>		<b>62,617</b>						4,728
	1038	Corporate Estate Including R&M	4,942	21	4,964				4,724		42	(100)	(58)	(576)
	1052	Regeneration	(508)	(10)	(518)				(518)		(3)	(6)	(9)	406
	1128	Business & Skills	415		415				415					(260)
	1145	Capital Programme & Project Delivery	(260)		(260)				(260)		1,106	(25)		(13,261)
	1018	Heritage Services	(14,192)		(14,192)				(14,342)		(2)			126
	1109	World Heritage	128		128				128					
	1126	Visit Bath	(9,475)	11	(9,463)				(9,463)		1,147	(131)		(8,837)
Adult Services	Mixed	Adult Services	63,693	80	63,773	6,338	(347)	69,763			4,565	(2,715)		71,613
	1094	Public Health												79
	1036	Adult Substance Misuse (Drug Action Team)	82		82				82					294
	1019	Leisure	302		302				302					
		<b>PORTFOLIO SUB TOTAL</b>	<b>64,077</b>	<b>80</b>	<b>64,157</b>	<b>6,338</b>		<b>70,495</b>			<b>4,573</b>	<b>(2,735)</b>		<b>71,986</b>

CABINET PORTFOLIO	Cash Limit	Service	Nov'25 Revised Cash Limits	Removal of One-offs (including one-off virements in 2025/26) + Add Feb'26 on-going technical virements	2026/27 Base Budget	Technical Adjustment - Settlement Funding	Technical Adjustment - Smarter Structures Saving Allocation	2026/27 Base Budget after technical adjustments	MTFS Funding Requirements	MTFS Savings and Income	Total 2026/27 Budget Changes	2026/27 Proposed Budget
Children's Services	1076	Children, Young People & Families	22,209	55	22,265	12,752	(520)	34,496	2,360	(465)	1,895	36,392
	1116	Integrated Commissioning - CYP	1,580		1,580			1,580		(1)		1,579
	1117	Safeguarding - CYP	102	(102)								
	1077	Inclusion & Prevention	3,296	(167)	3,129			3,129				
	1078	Education Transformation	5,628	(58)	5,570	150	(80)	5,640				
	1079	Schools' Budget	(1,506)		(1,506)			(1,506)				
	PORTFOLIO SUB TOTAL			31,309	(271)	31,038	12,902	43,940	3,402	(465)	2,937	46,276
Communications & Community	1119	Emergency Planning	758	11	770		8	778				763
	1121	Events and Active Lifestyles	453	(21)	432		(12)	421				412
	1144	Park and Ride	(546)		(546)			(546)				(671)
	1148	Bereavement Services	(629)		(629)			(629)				(661)
	1122	Customer Services (including Libraries)	3,113	31	3,144		(60)	3,084				2,809
	1139	Public Protection	1,406	(16)	1,389	2	(13)	1,378				1,514
	1089	Community Safety	402	(28)	374			374				693
	1115	Registrars Service	(73)		(73)			(73)				(87)
	1044	Communications & Marketing	316	4	320			320				430
	PORTFOLIO SUB TOTAL			5,200	(18)	5,183	2	5,185	433	(339)	94	5,201
Sustainable Transport Strategy	1135	Transport Strategy	419		419		(20)	399				261
	1129	Clean Air Zone										
	1103	Transport & Parking Services - Parking	(9,150)	1	(9,149)			(9,149)				(10,346)
Sustainable Transport Delivery	PORTFOLIO SUB TOTAL			(8,732)	1	(8,731)		(8,731)	(274)	(1,060)	(1,334)	(10,085)
	1133	Network & Traffic Management	1,005		1,005		(47)	958				877
	1134	Highway Maintenance	7,157		7,157			7,157				7,329
	1142	Home to School Transport	11,435		11,435			11,435				11,648
	PORTFOLIO SUB TOTAL			19,597		19,597		19,597	469	(166)	303	19,853
Built Environment, Housing & Sustainable Development	1138	Building Control	84		84			84				55
	1106	Development Management	1,531	11	1,542			1,542				1,238
	1029	Housing	2,378	75	2,453	2	(60)	2,395				2,351
	PORTFOLIO SUB TOTAL			3,993	86	4,079	2	4,081	(82)	(295)	(377)	3,643
NET BUDGET			152,101	(393)	151,708	38,461		190,170	10,242	(7,243)	2,999	193,168

#### Sources of Funding

Council Tax  
 Retained Business Rates  
 Collection Fund Deficit (-) or Surplus (+)  
 Transfers (to) / from Reserves

129,390		129,390		129,390		7,134	136,524
22,905		22,905		38,461		(4,121)	57,244
6,925		6,925		61,366		(8,971)	(2,046)
(7,118)	(393)	(7,511)		6,925		8,957	1,446
				(7,511)			
<b>TOTAL FUNDING</b>		152,101	(393)	151,708	38,461	2,999	193,168

## Annex 2(i): 2026/27 - 2028/29 Budget Savings and Income Generation Proposals

2026/27 - 2028/29 Savings and Income Generation Proposals		2026/27 £000	2027/28 £000	2028/29 £000	Cabinet Portfolio Holder / Director	Budget Comparison £000
<b>Portfolio: Adult Services</b>						
Increase the number of reviews to ensure people have the correct care package	These proposals include an approach to reviews under the Care Act that ensure peoples needs are being met, their outcomes are being achieved and that support when needed is provided in the most cost effective way using least restrictive practices.	(450)	(50)		Cllr Alison Born / Suzanne Westhead	46,430
Recommissioning Framework	Ongoing efficient management of contracts for services and optimisation of commissioning resources.	(250)			Cllr Alison Born / Suzanne Westhead	19,614
Development of Individual Service Fund	The fund means someone can benefit from personalised support and have more control over how their budget is used for things like day-to-day activities and wellbeing. There is less burdensome administration for each person getting this type of tailored support. It can also adapt to a person's changing needs and it helps promote independence.	(200)			Cllr Alison Born / Suzanne Westhead	32,002
Increase the number of people who have access to reablement	To support people to become more independent we are looking to expand reablement services and use more technology. This approach allows for more efficient use of homecare resources. The service can be tailored to individual needs reducing the need for more intensive or long-term care.	(200)			Cllr Alison Born / Suzanne Westhead	14,307
New service for people with learning disabilities, physical disabilities and autism	There is an opportunity to positively impact people we support in B&NES for people aged 16 years old or over and who have a learning disability, physical /sensory needs, mental health need or are Autistic. The approach will be to develop short term pathways of support to maximise independence and resilience.	(300)			Cllr Alison Born / Suzanne Westhead	19,614
Young People Transitions to Adult Social Care Offer	The proposed savings in transitions to adult social care focus on more early, coordinated planning linked to education, health, and care plans, joint commissioning and pooled budgets, assigning a designated worker for continuity, promoting independence and life skills, proactive information and guidance, and early financial advice. These approaches aim to ensure seamless transitions, reduce dependency, and provide cost-effective, person-centred support.	(300)			Cllr Alison Born / Suzanne Westhead	23,571
Preventing a second fall	We will reduce the number and severity of falls of people aged 65 plus and other at-risk groups by using a range of early interventions including exercise, home assessments and medication reviews.	(200)			Cllr Alison Born / Suzanne Westhead	14,307
Income generation from provider services	Review the level of income generated from self-funders and placements commissioned by other local authorities and Integrated Care Board (ICB).	(200)	(50)		Cllr Alison Born / Suzanne Westhead	8,791
Agency Spend (Residential Services)	Continued reduction in Residential Services agency expenditure from 17.45% to 16% by reducing the cost of agency backfill across services.	(100)			Cllr Alison Born / Suzanne Westhead	8,791
Review assisted employment offer	We commission short-term assisted employment support for adults with mental health-related needs. As contracts reach their planned end dates, there are opportunities to review these in line with latest national policies and find alternative support best placed to meet people's needs.	(120)			Cllr Alison Born / Suzanne Westhead	8,552
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.	(75)			Cllr Alison Born / Suzanne Westhead	46,430
Optimising the use of Better Care Fund to protect social care expenditure on prevention services, in line with national guidance and local priorities	Commissioners will optimise the use of Better Care Fund to fund prevention services by continuing to robustly plan expenditure and ongoing monitoring of population outcomes achieved.	(320)			Cllr Alison Born / Suzanne Westhead	25,443
Royal Victoria Park Leisure Facilities	New contract in place for the operation of the leisure facilities in RVP including tennis courts, adventure golf, events spaces and café.	(20)			Cllr Alison Born / Rebecca Reynolds	292
<b>Adult Services Total</b>		<b>(2,735)</b>	<b>(100)</b>	<b>0</b>		

Annex 2(i): 2026/27 - 2028/29 Budget Savings and Income Generation Proposals

2026/27 - 2028/29 Savings and Income Generation Proposals						
Proposal Description	Proposal Detail (incl. impacts on service delivery / knock-on impact to other services)	2026/27 £000	2027/28 £000	2028/29 £000	Cabinet Portfolio Holder / Director	Budget Comparison £000
<b>Portfolio: Built Environment, Housing and Sustainable Development</b>						
Rebased Planning fee income	Increased fee income in-year is reflected in next year's income budgets	(250)			Clr Matt McCabe / Marc Cole	(2,358)
Ensure optimal deployment of S106/CIL income	Ensures that developer contributions are spent within deadlines and that projects do not use corporate borrowing unnecessarily where contributions are available.	(80)			Clr Matt McCabe / Simon Martin	N/A
Housing	This relates to a one-off reduction in the funding available for the expansion of B&NES Homes, the operating arm of B&NES Council Housing.	(25)	100		Clr Matt McCabe / Simon Martin	75
Fees and Charges	Inflationary increases in charges for Building Control and some other small areas of discretionary charges	(20)	(20)	(12)	Clr Matt McCabe / Marc Cole	N/A
<b>Built Environment, Housing and Sustainable Development Total</b>		(375)	80	(12)		
<b>Portfolio: Children's Services</b>						
Reunifications	The savings will be delivered by an increase in family reunifications and step downs from residential placements.	(390)			Clr Paul May / Jean Kelly	8,634
Reduce off contract spend	Deliver best value by continuing to manage spend efficiently and ensure services continue within budget, optimizing commissioned contracts and resources.	(75)			Clr Paul May / Jean Kelly	2,123
<b>Children's Services Total</b>		(465)	0	0		
<b>Portfolio: Communications and Community</b>						
Park and Ride fare increase from £3.70 to £4.00	The 10 single journeys carnet would increase from £14.80 to £16.00 and a group ticket from £5.50 (for 2 adults) to £6.00. Up to 5 children under 16 would continue to travel free with a fare paying adult.	(100)			Clr Manda Rigby / Chris Major	(546)
Public Protection - removal of the in house pest control service	Stop providing this charged-for service to the public.	(18)			Clr Manda Rigby / Chris Major	18
Fees and Charges	Annual increases in fees and charges across portfolio	(21)	(22)	(23)	Clr Manda Rigby / Chris Major	N/A
<i>Park and Ride</i>	<i>Reversal of previous year's saving - Updated income forecast for the Park and Ride</i>	100	100		Clr Manda Rigby / Chris Major	N/A
<b>Communications and Community Total</b>		(39)	78	(23)		
<b>Portfolio: Economic and Cultural Sustainable Development</b>						
Heritage Services - Business Plan	Increased net income currently estimated for 2027/28		(253)		Clr Paul Roper / Marc Cole	(14,192)
Increase income generation from the Guildhall	There is an opportunity to deliver more income via an increased number of event bookings if some operational changes are made to the management of the building.	(25)			Clr Paul Roper / Marc Cole	(195)
Bath Quays South Lettings	New lettings secured for Bath Quays South offices over and above previous financial projections.	(100)			Clr Paul Roper / Simon Martin	(748)
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.	(6)			Clr Paul Roper / Simon Martin	(44)
<b>Economic and Cultural Sustainable Development Total</b>		(131)	(253)	0		

**Annex 2(i): 2026/27 - 2028/29 Budget Savings and Income Generation Proposals**

2026/27 - 2028/29 Savings and Income Generation Proposals		2026/27 £000	2027/28 £000	2028/29 £000	Cabinet Portfolio Holder / Director	Budget Comparison £000
<b>Proposal Description</b>	<b>Proposal Detail (incl. impacts on service delivery / knock-on impact to other services)</b>					
<b>Portfolio: Resources</b>						
Increase in trade waste income (rebasing)	No impact to service delivery	(50)			Cllr Mark Elliot / Chirs Major	(937)
Refuse and garden waste round efficiencies	Revise routes for waste services to manage volumes more effectively and efficiently.	(170)			Cllr Mark Elliot / Chirs Major	18,908
Realise savings from exporting surplus power from Keynsham Recycling Hub Pixash from the 780KWP solar array at the facility.	Surplus power is currently available at evenings and weekends, and to some degree in daytime dependant on depot base load. Aim to maximise revenue by exporting surplus power to the grid.	(30)			Cllr Mark Elliot / Chirs Major	206
Fuel cost saving from move to electric	In relation to 6 x electric trucks due summer 2026	(36)	36		Cllr Mark Elliot / Chirs Major	1,793
Phased transition of all social and private managed housing properties to fortnightly refuse collections.	Builds on commitments made to increase recycling and includes site assessments, resident engagement, and coordination with the Business Waste team to offer any additional refuse collections at commercial rates should the housing management company require it.	(31)			Cllr Mark Elliot / Chirs Major	18,908
Fees and Charges	Annual increases in fees and charges across portfolio	(61)	(64)	(67)	Cllr Mark Elliot / Chirs Major	N/A
Streamline Capital Programme	Review the way contingency is built into both individual projects and the overall capital programme	(50)	(100)	(100)	Cllr Mark Elliot / Simon Martin	11,587
Transforming Customer Services	The council has invested in a new technology platform for customer services that will enable us to maintain high service standards while reducing back office spend.	(300)	(100)		Cllr Mark Elliot / Simon Parker	3,500
Capitalise Business Change resource	Staffing resource within the business change function will be prioritising transformation projects that will deliver financial benefits to the organisation and as such can be funded from available capital receipts	(350)	350		Cllr Mark Elliot / Cherry Bennett	780
Capital Financing	Target to reduce corporately supported borrowing (CSB) funded schemes and reprofile spend	(1,000)	500	500	Cllr Mark Elliot / Stuart Donnelly	11,587
Contract Management - Delivering Greater Value	Part of a wider programme of continued contract management improvements and will focus on the top value contracts in the Council by leveraging in greater value through improved contract management	(250)			Cllr Mark Elliot / Stuart Donnelly	36,935
Housing Borrowing Costs	<i>This relates to a one-off reduction in borrowing costs associated with the expansion of B&amp;NES Homes, the operating arm of B&amp;NES Council Housing.</i>	75			Cllr Mark Elliot / Stuart Donnelly	11,587
<b>Resources Total</b>		<b>(2,253)</b>	<b>622</b>	<b>333</b>		
<b>Portfolio: Sustainable Bath and North East Somerset</b>						
Fees and Charges	Annual increases in fees and charges across portfolio	(19)	(20)	(21)	Cllr Sarah Warren / Various	N/A
<b>Sustainable Bath and North East Somerset Total</b>		<b>(19)</b>	<b>(20)</b>	<b>(21)</b>		
<b>Portfolio: Sustainable Transport Delivery</b>						
Home to School Transport cost reduction measures	New post will ensure better management of our home to school transport service for users.	(150)	(300)		Cllr Lucy Hodge / Chris Major	11,435
Fees and Charges	Annual increases in fees and charges across portfolio	(16)	(17)	(18)	Cllr Lucy Hodge / Chris Major	N/A
<b>Sustainable Transport Delivery Total</b>		<b>(166)</b>	<b>(317)</b>	<b>(18)</b>		

Annex 2(i): 2026/27 - 2028/29 Budget Savings and Income Generation Proposals

2026/27 - 2028/29 Savings and Income Generation Proposals		2026/27 £000	2027/28 £000	2028/29 £000	Cabinet Portfolio Holder / Director	Budget Comparison £000
<b>Portfolio: Sustainable Transport Strategy</b>						
Parking income rebasing	Rebasing of increased income levels using data from on-going monitoring in 2025/26	(500)			Cllr Joel Hirst / Chris Major	(14,962)
New parking charges	Consultation-outcome dependent - including moving to a system where vehicles taking more space would be charged more than smaller vehicles.	(290)			Cllr Joel Hirst / Chris Major	(14,962)
Parking - strategic review and implementation of additional pay and display and resident parking zone schemes	This will reduce commuter parking in residential areas leading to reduced congestion and improved road safety. Potential to increase demand for Park and Ride services.	(50)	(50)		Cllr Joel Hirst / Chris Major	(14,962)
Parking – increased enforcement in line with community requests and national legislation	Reduced illegal parking in all areas; reduced congestion, improved safety. Potential to increase demand for Park and Ride services.	(50)			Cllr Joel Hirst / Chris Major	(1,446)
Parking Charges Review	Full year effect of income generated from the implementation of a parking review and emissions-based pay and display (implemented 2025/26)	(140)			Cllr Joel Hirst / Chris Major	(14,962)
Increased use of Moving Traffic Enforcement powers, including on Yellow Box Junctions.	Ensuring that all road users adhere to regulations will benefit road safety and help improve traffic flow.	(250)			Cllr Joel Hirst / Chris Major	(1,446)
Parking Reinvestment Fund	Reversal of previous year's saving - Budget saving by not spending the Reinvestment Fund in Parking Services (one-off 2025/26 only).	210			Cllr Joel Hirst / Chris Major	N/A
HGV Charging Reversal	Removal of the proposed income line from implementation of a Euro 6 HGV charge in line with the wider CAZ charges, after public consultation.	10			Cllr Joel Hirst / Chris Major	N/A
<b>Sustainable Transport Strategy Total</b>		<b>(1,060)</b>	<b>(50)</b>	<b>0</b>		
<b>Total Savings and Income Generation Proposals</b>		<b>(7,243)</b>	<b>40</b>	<b>259</b>		

## Annex 2(ii): 2026/27 - 2028/29 Budget Funding Requirements

2026/27 - 2028/29 Funding Proposals						
Proposal Description	Proposal Detail (incl. impacts on service delivery / knock-on impact to other services)	2026/27 £000	2027/28 £000	2028/29 £000	Cabinet Portfolio Holder / Director	
<b>Portfolio: Adult Services</b>						
Adult Social Care demand / demographics	Increased investment to reflect rising demand, increased costs in the market and national policy directives.	2,079	2,058	2,100	Cllr Alison Born / Suzanne Westhead	
Adult's Social Care Contract Inflation @ 4%	The local authority commission placements and packages of care for people who have been assessed under the Care Act 2014 and have an eligible care and support need. This is the estimated inflation requirement to fund associated contracts.	2,646	2,038	1,405	Cllr Alison Born / Suzanne Westhead	
Contract Inflation - Leisure Services	Annual increases in contract costs within the portfolio.	12	13	14	Cllr Alison Born / Rebecca Reynolds	
Public Health Grant Increase	Increase in ring-fenced Public Health Grant	(219)	(306)	(359)	Cllr Alison Born / Rebecca Reynolds	
Public Health Grant	Spend linked to ring-fenced Public Health Grant increase	219	306	359	Cllr Alison Born / Rebecca Reynolds	
Pay Inflation	Pay inflation is estimated at 3% per annum	932	969	1,029	Cllr Alison Born / Various	
Being Our Best Programme Pay and Grading Review	Net changes in salary budget as a result of a pay and grading review, including increment pay growth	517	355	72	Cllr Alison Born / Various	
Pensions Triennial Valuation	Reduction in employer pension on-cost % applied to salaries following revaluation of the Avon Pension Fund	(681)			Cllr Alison Born / Various	
<b>Adult Services Total</b>		<b>5,505</b>	<b>5,433</b>	<b>4,620</b>		
<b>Portfolio: Built Environment, Housing and Sustainable Development</b>						
Homelessness, Rough Sleeping and Domestic Abuse Grant Decrease	Decrease in ring-fenced Homelessness, Rough Sleeping and Domestic Abuse Grant	169	(82)	(43)	Cllr Matt McCabe / Simon Martin	
Homelessness, Rough Sleeping and Domestic Abuse Grant	Spend linked to ring-fenced Homelessness, Rough Sleeping and Domestic Abuse Grant decrease	(169)	82	43	Cllr Matt McCabe / Simon Martin	
Pay Inflation	Pay inflation is estimated at 3% per annum	159	166	176	Cllr Matt McCabe / Various	
Being Our Best Programme Pay and Grading Review	Net changes in salary budget as a result of a pay and grading review, including increment pay growth	58	46	8	Cllr Matt McCabe / Various	
Pensions Triennial Valuation	Reduction in employer pension on-cost % applied to salaries following revaluation of the Avon Pension Fund	(140)			Cllr Matt McCabe / Various	
<b>Built Environment, Housing and Sustainable Development Total</b>		<b>77</b>	<b>212</b>	<b>184</b>		

## Annex 2(ii): 2026/27 - 2028/29 Budget Funding Requirements

2026/27 - 2028/29 Funding Proposals					
Proposal Description	Proposal Detail (incl. impacts on service delivery / knock-on impact to other services)	2026/27 £000	2027/28 £000	2028/29 £000	Cabinet Portfolio Holder / Director
<b>Portfolio: Children's Services</b>					
Children's Social Care Demographics	We've assessed the existing budget growth and demographics assumptions and increased investment to reflect rising demand, increased costs in the market and national policy directives.	1,307	106	0	Cllr Paul May / Jean Kelly
Children's Social Care Contract Inflation @ 4% for 26/27	The local authority must ensure every Child Looked After has a suitable and tailored placement, fulfilling Bath and North East Somerset's (B&NES) Sufficiency Duty. This statutory duty requires B&NES to secure appropriate placements for all Children Looked After.	1,176	827	584	Cllr Paul May / Jean Kelly
SEND staffing	Continuing to invest in strengthening our Special Educational Needs and Disabilities (SEND) services. An in-year reserves request has funded additional staff who are making a difference with reduced assessment backlogs, fewer complaints and improved compliance. Maintaining this improved performance is essential for our SEND children and families and to meet rising demand.	235			Cllr Paul May / Jean Kelly
Teachers Pensions Unavoidable Cost Pressure	Backdated teachers' pension costs that are currently unbudgeted	146			Cllr Paul May / Jean Kelly
Education Income Adjustment	Historical income target which is no longer achievable	119			Cllr Paul May / Jean Kelly
Closing the gap in educational outcomes between pupils from more and less affluent backgrounds	Resource to lead and further strengthen the educational attainment gap reduction programme; and investment to sustain and strengthen projects already delivering measurable progress including Language for Life.	350			Cllr Paul May / Jean Kelly
Corporate Overhead Rebasing	Dedicated Schools Grant recovery phased over 3 years (£1m) from 2024/25 to 2026/27.	333			Cllr Paul May / Jean Kelly
Children, Families and Youth Grant Increase	Increase in ring-fenced grant income	(722)	26	242	Cllr Paul May / Jean Kelly
Children, Families and Youth Grant	Spend linked to ring-fenced Children, Families and Youth Grant increase	722	(26)	(242)	Cllr Paul May / Jean Kelly
Pay Inflation	Pay inflation is estimated at 3% per annum	671	697	740	Cllr Paul May / Jean Kelly
Being Our Best Programme Pay and Grading Review	Net changes in salary budget as a result of a pay and grading review, including increment pay growth	409	286	41	Cllr Paul May / Jean Kelly
Pensions Triennial Valuation	Reduction in employer pension on-cost % applied to salaries following revaluation of the Avon Pension Fund	(577)			Cllr Paul May / Jean Kelly
<i>Trial Youth Club Provision in Bath</i>	<i>Removal of one-off 25/26 growth - Provision of open access detached youth work in the Bath area (currently no open access provision in Bath - provision in North East Somerset is funded through parishes)</i>	(50)			Cllr Paul May / Jean Kelly
<i>Student Community Partnership (SCP) Funding</i>	<i>Removal of one-off 25/26 growth - Majority funded by the universities, this is B&amp;NES contribution to SCP funding (previously funded through Bath Neighbourhood Community Infrastructure Levy (CIL) Fund)</i>	(47)			Cllr Paul May / Jean Kelly
<b>Children's Services Total</b>		<b>4,072</b>	<b>1,916</b>	<b>1,365</b>	

## Annex 2(ii): 2026/27 - 2028/29 Budget Funding Requirements

2026/27 - 2028/29 Funding Proposals					
Proposal Description	Proposal Detail (incl. impacts on service delivery / knock-on impact to other services)	2026/27 £000	2027/28 £000	2028/29 £000	Cabinet Portfolio Holder / Director
<b>Portfolio: Community and Compliance</b>					
Licensing - reduce income target linked to statutory capped fees	Some license types have statutory fee levels that are set nationally and do not allow for full cost recovery. There is no scope to address this shortfall by setting higher discretionary fees locally so budgeted income target requires adjusting accordingly.	150			Cllr Manda Rigby / Chris Major
Sustaining statutory levels of service provision following reductions in grants from the Ministry of Justice and Police and Crime Commissioner.	Services to reduce crime, tackle antisocial behaviour, address substance misuse and support victims of domestic abuse can be maintained at statutory levels.	320			Cllr Manda Rigby / Cherry Bennett
Improving Resident and Staff Engagement	Investment in the council's core policy of listening to and working with residents to act on their concerns. This will bring engagement and communications resource into line with neighbouring authorities and the national average, driving improvements in consultation, digital marketing and internal communications.	165			Cllr Manda Rigby / Simon Parker
Libraries running costs	No inflation included in recent years putting pressure on existing budgets	50	20	22	Cllr Manda Rigby / Simon Parker
Pay Inflation	Pay inflation is estimated at 3% per annum	248	258	274	Cllr Manda Rigby / Chris Major
Being Our Best Programme Pay and Grading Review	Net changes in salary budget as a result of a pay and grading review, including increment pay growth	98	74	12	Cllr Manda Rigby / Chris Major
Pensions Triennial Valuation	Reduction in employer pension on-cost % applied to salaries following revaluation of the Avon Pension Fund	(207)			Cllr Manda Rigby / Chris Major
Contract Inflation	Contract and running costs inflation across portfolio	32	11	12	Cllr Manda Rigby / Chris Major
Community Engagement and Communications	<i>Removal of one-off 25/26 growth - Trialling new approaches to communication and engagement with residents</i>	(50)			Cllr Manda Rigby / Simon Parker
Extended Park and Ride Hours	<i>Removal of one-off 25/26 growth - Trial of increased Park and Ride service</i>	(125)			Cllr Manda Rigby / Chris Major
<b>Community and Compliance Total</b>		<b>681</b>	<b>363</b>	<b>320</b>	
<b>Portfolio: Economic and Cultural Sustainable Development</b>					
Heritage Services - reduced expected visitor numbers	There is no impact beyond the need to shape the service strategy to mitigate the market forces driving a reduction of income at the Roman Baths.	1,325			Cllr Paul Roper / Marc Cole
Remove unachievable income targets from regeneration	Income targets associated with recovery staff time from projects and additional grant income will not materialise and as such need writing out of the budget.	30			Cllr Paul Roper / Marc Cole
Pay Inflation	Pay inflation is estimated at 3% per annum	102	106	113	Cllr Paul Roper / Various
Being Our Best Programme Pay and Grading Review	Net changes in salary budget as a result of a pay and grading review, including increment pay growth	66	54	14	Cllr Paul Roper / Various
Pensions Triennial Valuation	Reduction in employer pension on-cost % applied to salaries following revaluation of the Avon Pension Fund	(306)			Cllr Paul Roper / Various
Contract Inflation	Contract and running costs inflation across portfolio	33	35	37	Cllr Paul Roper / Various
<b>Economic and Cultural Sustainable Development Total</b>		<b>1,250</b>	<b>195</b>	<b>164</b>	

## Annex 2(ii): 2026/27 - 2028/29 Budget Funding Requirements

2026/27 - 2028/29 Funding Proposals					
Proposal Description	Proposal Detail (incl. impacts on service delivery / knock-on impact to other services)	2026/27 £000	2027/28 £000	2028/29 £000	Cabinet Portfolio Holder / Director
<b>Portfolio: Resources</b>					
Director of Finance post	Additional budget required for new post	150			Cllr Mark Elliot / Simon Parker
IT Applications Replacements/Additions and Artificial Intelligence (AI) Investment	To cover the running costs of new IT systems recently implemented: - Microsoft Project for the Web - Causeway Alloy Asset Management System, for Parks & Grounds - Introducing AI capabilities to improve resident facing services	52			Cllr Mark Elliot / Simon Parker
Improved Customer Contact Technology	Replacement telephony and contact centre system with modern cloud based technology.	50			Cllr Mark Elliot / Simon Parker
ICT Contract and License Inflation	Contract and running costs inflation across department	237	249	261	Cllr Mark Elliot / Simon Parker
Legal Resources	3 x posts to meet new Children's SEND and Adults deprivation of liability demand. This allows for in-house provision, rather than reliance on more expensive external legal support	187			Cllr Mark Elliot / Simon Parker
Being Our Best Programme - Unachievable Savings	Reduction in organisation savings target	270			Cllr Mark Elliot / Cherry Bennett
Insurance Premium	Increase in annual insurance premium	60			Cllr Mark Elliot / Stuart Donnelly
Coroners - increased contribution	In respect of Fuller Inquiry regulatory requirements for mortuary security improvements and coroner staff regrading	55			Cllr Mark Elliot / Stuart Donnelly
Levies Inflation	Annual inflationary increase for corporate levies	31	138	142	Cllr Mark Elliot / Stuart Donnelly
Business Rates Revaluation	Impacts on corporate properties from revaluation & multiplier changes	185			Cllr Mark Elliot / Stuart Donnelly
Rebasing of Foster Carer & Care Leaver Council Tax Discount Costs	Additional budget to meet current demand	25			Cllr Mark Elliot / Stuart Donnelly
External Audit Fees Increase	Increase in budget required to meet statutory obligations	20			Cllr Mark Elliot / Stuart Donnelly
Crisis and Resilience Grant Increase	Increase in ring-fenced Crisis and Resilience Grant	(316)	1	32	Cllr Mark Elliot / Stuart Donnelly
Crisis and Resilience Grant	Spend linked to ring-fenced Crisis and Resilience Grant increase	316	(1)	(32)	Cllr Mark Elliot / Stuart Donnelly
WECA Transport Levy - estimated increase in contribution	Increase in levy contribution required to meet shortfall in funding to sustain existing supported bus services.	270			Cllr Mark Elliot / Stuart Donnelly
Corporate Adjustments	Corporate Base Budget Adjustments including Contingency allocation and Capital Financing	(6,628)	4,890	4,902	Cllr Mark Elliot / Stuart Donnelly
Waste Services - staffing growth required to remove budgeted vacancy factor	There is no staff turnover in waste services as any vacancies or sickness are covered by agency to ensure service delivery	255			Cllr Mark Elliot / Chris Major
Waste Services - increased running costs	Primarily increased insurance policy associated with Pixash Recycling Centre	67			Cllr Mark Elliot / Chris Major
Borrowing Costs	Inflationary increases associated with vehicle replacement	188			Cllr Mark Elliot / Chris Major
Extended Producer Responsibility (EPR)	To account for annual grant funding in the form of EPR payments within Waste Services.	(16)	716		Cllr Mark Elliot / Chris Major
Waste Services Inflation	Contract and running costs inflation across department	284	209	211	Cllr Mark Elliot / Chris Major
Pay Inflation	Pay inflation is estimated at 3% per annum	3,128	1,464	1,552	Cllr Mark Elliot / Various
Being Our Best Programme Pay and Grading Review	Net changes in salary budget as a result of a pay and grading review, including increment pay growth	570	226	47	Cllr Mark Elliot / Various
Pensions Triennial Valuation	Reduction in employer pension on-cost % applied to salaries following revaluation of the Avon Pension Fund	(1,140)			Cllr Mark Elliot / Various
Cloud IT Systems Migration	Reversal of previous year's growth - Migration of all IT Systems to Microsoft Azure Cloud Infrastructure.	(85)	(85)		Cllr Mark Elliot / Simon Parker
Increase in Clean and Green Funding	Removal of one-off 25/26 growth - Two additional demand led rapid response crews (weeds, graffiti, litter, fortnightly monitoring)	(81)			Cllr Mark Elliot / Chris Major
<b>Resources Total</b>		<b>(1,866)</b>	<b>7,807</b>	<b>7,115</b>	

## Annex 2(ii): 2026/27 - 2028/29 Budget Funding Requirements

2026/27 - 2028/29 Funding Proposals					
Proposal Description	Proposal Detail (incl. impacts on service delivery / knock-on impact to other services)	2026/27 £000	2027/28 £000	2028/29 £000	Cabinet Portfolio Holder / Director
<b>Portfolio: Sustainable Bath and North East Somerset</b>					
Pay Inflation	Pay inflation is estimated at 3% per annum	102	106	112	Cllr Sarah Warren / Various
Being Our Best Programme Pay and Grading Review	Net changes in salary budget as a result of a pay and grading review, including increment pay growth	29	29	1	Cllr Sarah Warren / Various
Pensions Triennial Valuation	Reduction in employer pension on-cost % applied to salaries following revaluation of the Avon Pension Fund	(89)			Cllr Sarah Warren / Various
Contract Inflation	Contract and running costs inflation across portfolio	12	12	13	Cllr Sarah Warren / Various
<b>Sustainable Bath and North East Somerset Total</b>		<b>54</b>	<b>147</b>	<b>126</b>	
<b>Portfolio: Sustainable Transport Delivery</b>					
Home to School Transport Contract Inflation	No contract inflation currently built into the MTFS at present	336	290	298	Cllr Lucy Hodge / Chris Major
Investment in new Business Manager Post in Home to School Transport service	Better management of home to school transport while achieving efficiencies and providing resilience.	90			Cllr Lucy Hodge / Chris Major
Highways operational costs	Growth to support increased maintenance costs of highways services.	110	142	6	Cllr Lucy Hodge / Chris Major
Pay Inflation	Pay inflation is estimated at 3% per annum	177	184	195	Cllr Lucy Hodge / Chris Major
Being Our Best Programme Pay and Grading Review	Net changes in salary budget as a result of a pay and grading review, including increment pay growth	23	14	5	Cllr Lucy Hodge / Chris Major
Pensions Triennial Valuation	Reduction in employer pension on-cost % applied to salaries following revaluation of the Avon Pension Fund	(154)			Cllr Lucy Hodge / Chris Major
Contract Inflation	Contract and running costs inflation across portfolio	104	106	107	Cllr Lucy Hodge / Chris Major
<i>Speed Indicator Signage</i>	<i>Removal of one-off 25/26 growth - 6 new vehicle activated speed signs throughout B&amp;NES</i>	(40)			Cllr Lucy Hodge / Chris Major
<b>Sustainable Transport Delivery Total</b>		<b>646</b>	<b>736</b>	<b>611</b>	
<b>Portfolio: Sustainable Transport Strategy</b>					
Remove unachievable income targets from transport strategy	Income targets associated with recovery staff time from projects and additional grant income will not materialise and as such need writing out of the budget.	50			Cllr Joel Hirst / Marc Cole
Pay Inflation	Pay inflation is estimated at 3% per annum	97	101	107	Cllr Joel Hirst / Various
Being Our Best Programme Pay and Grading Review	Net changes in salary budget as a result of a pay and grading review, including increment pay growth	24	15	1	Cllr Joel Hirst / Various
Pensions Triennial Valuation	Reduction in employer pension on-cost % applied to salaries following revaluation of the Avon Pension Fund	(80)			Cllr Joel Hirst / Various
Contract Inflation	Contract and running costs inflation across portfolio	39	39	40	Cllr Joel Hirst / Various
<i>More Enforcement Cameras</i>	<i>Removal of one-off 25/26 growth - Improvements to pedestrian and traffic safety through two new enforcement camera sites.</i>	(120)			Cllr Joel Hirst / Chris Major
<i>Car Club Delivery</i>	<i>Removal of one-off 25/26 growth - Extension to car club scheme to North East Somerset - implementation already planned for Bath</i>	(50)			Cllr Joel Hirst / Chris Major
<i>Extra Support for Subsidised Bus Services</i>	<i>Removal of one-off 25/26 growth - Extra funding for supported bus services where Bus Service Improvement Plan (BSIP) funding is not available.</i>	(50)			Cllr Joel Hirst / Marc Cole
<i>School Streets</i>	<i>Removal of one-off 25/26 growth - Increase funding to existing planned programme to deliver three School Streets in 2025/26</i>	(87)			Cllr Joel Hirst / Marc Cole
<b>Sustainable Transport Strategy Total</b>		<b>(17)</b>	<b>155</b>	<b>148</b>	
<b>Total Funding Requirements</b>		<b>10,242</b>	<b>16,964</b>	<b>14,653</b>	

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## Annex 3: Draft Equality Impacts of 2025 to 2026 Budget Proposals

The following report provides supplementary information for existing revised growth or income budget decisions or additional growth or income to the budget proposals for 2026/27.

Annex 3.1 to this report provides an introduction and legal background to this budget equality report.

### **Table of portfolio holders holding budget proposals with potential impact.**

The Proposals are presented in two sections for each service area to reflect the following:

- a. Savings and Income budget proposals
- b. Growth

### **Budget proposals that note a potential positive or negative impact on people with protected characteristics.**

<b>3. Adult Services – Cllr Alison Born</b>	<b>Page</b>
<b>Savings and Income Proposals</b>	
• Recommissioning Framework	4
• Development of Individual Service Fund	5
• Increase reablement offer	6
• Development of an Enablement Offer	7
• Transitions to Adult Social Care	8
• Prevention of a 2 <sup>nd</sup> Fall	9
• Non-renewal of assisted employment contract for mental health service	10
• Optimising Better Care Fund – Prevention Services	11
• Technology Enabled Care (existing budget proposal)	12
• Royal Victoria Park Leisure Facilities	13
• Review assisted employment offer	14

<b>Children's Services – Cllr Paul May</b>	
<b>Growth Proposals</b>	
• Addressing educational attainment inequality	15
• Potential Transport Solutions for 1. Pupils attending out of county special schools and 2. Those attending our Hospital Education Reintegration Service (HERS).	16
<b>Place Management – Cllr Joel Hirst</b>	
<b>Savings and Income Proposals</b>	
• Proposed changes to resident parking zone permit charges and car park charges for 2026	17
• Increase in parking income through additional enforcement & fee changes	18
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<b>Place Management – Cllr Manda Rigby</b>	
<b>Savings and Income Proposals</b>	
• Park and Ride fare increase	19
• Removal of Non-Statutory Services within Public Protection (Pest Control)	20
<b>Place Management – Cllr Mark Elliot</b>	
<b>Savings and Income Proposals</b>	
• Refuse and garden waste round efficiencies	21
• Phased transition of all social and private managed housing properties to fortnightly refuse collections.	22

<b>Resources – Cllr Mark Elliot</b>	
<b>Savings and Income Proposals</b>	
• Transforming Customer Services	23
<b>Resources – Cllr Manda Rigby</b>	
<b>Growth Proposals</b>	
• Sustaining statutory levels of service provision following reductions in grants from the Ministry of Justice and Police and Crime Commissioner	24

## Adult Social Care

Portfolio Holder: Cllr Alison Born

### Adult Social Care Proposal: Recommissioning Framework

The published Equality Impact Assessment is available to view on the link below:

<https://www.bathnes.gov.uk/sites/default/files/AS.S.02%20-%20Recommissioning%20Framework%20V2.pdf>

#### Precis:

This proposal will be achieved by recommissioning services for people with learning disabilities and delivering better value from contracts.

#### 2026-27 budget proposal statement:

*'The local authority arranges and manages care placements and support packages for eligible individuals under the Care Act 2014, aiming to meet statutory duties cost-effectively. Services are recommissioned at contract end, creating opportunities to optimize procurement and deliver better value'.*

#### Considerations:

- People's eligible care needs will continue to be met, guided by strength-based assessments and reviews.
- Regular data monitoring ensures that any differences in access or outcomes are identified and addressed.
- Risk of increase in complaints from existing service providers

#### Recommendation:

- Complete a detailed Equality Impact Assessment as part of the process of implementing this new price change.

Impacts	All	Age	Disability	Gender reassignment	Marriage & civil partnership	Pregnancy & maternity	Race	Religion or belief	Sex	Sexual orientation	Socio economic
Negative											
Positive	✓										

## Adult Social Care Proposal: Development of Individual Service Fund

The published Equality Impact Assessment is available to view on the link below:

<https://www.bathnes.gov.uk/sites/default/files/AS.S.03%20-%20Development%20of%20Individual%20Service%20Funds%20FINAL%20%28002%29.pdf>

### Precis:

An Individual Service Fund is a way for people to receive and manage their personal budget for care and support, where a chosen provider manages the funds and services on their behalf. This allows individuals to have control over how their support is delivered, as the provider works with them to plan activities and services that meet their specific outcomes.

### 2026-27 budget proposal statement:

*'ISFs (Individual Service Funds) offer significant cost benefits compared to traditional care packages by reducing unnecessary service hours, enabling personalised support, and promoting independence through assistive technology'.*

### Considerations:

- Empowerment model for individuals.
- Services users who have a package of care funded by ASC (1) will see no change as the financial assessment care charge is based on their income not on service delivery costs or fee levels.
- Joint working with commissioning providers and micro enterprises may not be successful.
- interlink with the budget proposals on Transitions for young people and Care Package Reviews, enablement services and technology enabled care so reliant on all of these proposals functioning as planned.
- Risk of disabled people not being able to source and manage their own packages of care.

### Recommendation:

- Complete a detailed Equality Impact Assessment as part of the process of implementing this new price change.

Impacts	All	Age	Disability	Gender reassignment	Marriage & civil partnership	Pregnancy & maternity	Race	Religion or belief	Sex	Sexual orientation	Socio economic	Care Experienced
Negative	✓											
Positive	✓											

## Adult Social Care Proposal: Increase reablement offer

The published Equality Impact Assessment is available to view on the link below:

[https://www.bathnes.gov.uk/sites/default/files/AS.S.04%20-%20Increase%20the%20Number%20of%20People%20Who%20Have%20Access%20to%20Reablement%20V2\\_0.pdf](https://www.bathnes.gov.uk/sites/default/files/AS.S.04%20-%20Increase%20the%20Number%20of%20People%20Who%20Have%20Access%20to%20Reablement%20V2_0.pdf)

### Precis:

Reablement is a service designed to help individuals regain essential skills and rebuild confidence following an illness, injury, or a stay in the hospital. In B&NES, this service is delivered by the HCRG Care Group, alongside other community health services.

Expanding reablement services and integrating technology-enabled care solutions can lead to better outcomes for individuals. This approach supports people in becoming more independent and allows for more efficient use of homecare resources. By leveraging assistive technology, the service can be tailored to individual needs reducing the need for more intensive or long-term care.

### 2026-27 budget proposal statement:

*'HCRG Care Group provide reablement service that helps individuals regain essential skills and rebuild confidence following an illness, injury, or a stay in the hospital.*

*Technology Enabled Care, such as telecare and daily living aids, helps reduce the need for in-person care while maintaining or improving outcomes'.*

### Considerations:

- Services users who have a package of care funded by ASC (1) will see no change as the financial assessment care charge is based on their income not on service delivery costs or fee levels.
- There are challenges in delivering proposals due to different timelines for scaling up B&NES technology-enabled care offer and the need to align this service with reablement and homecare.
- Multi-agency working could improve outcomes for individuals and cost less.
- Empowerment model for individuals and reduces the need for long term care, hospital admissions and early admission to care homes.
- Supports carers through a reduction in hands on care.

### Recommendation:

- Complete a detailed Equality Impact Assessment as part of the process of implementing this new price change.

Impacts	All	Age	Disability	Gender reassignment	Marriage & civil partnership	Pregnancy & maternity	Race	Religion or belief	Sex	Sexual orientation	Socio economic	Care Experienced
Negative	✓											
Positive	✓											

## Adult Social Care Proposal: Development of an Enablement Offer

The published Equality Impact Assessment is available to view on the link below:

[https://www.bathnes.gov.uk/sites/default/files/AS.S.05%20-%20Enablement%20service%20FINAL\\_0.pdf](https://www.bathnes.gov.uk/sites/default/files/AS.S.05%20-%20Enablement%20service%20FINAL_0.pdf)

### Precis:

There is an opportunity to positively impact people we support in B&NES for people aged 16 years old or over and who have a learning disability, physical /sensory needs, mental health need or are Autistic. The approach will be to develop short term pathways of support to maximise independence and resilience.

### 2026-27 budget proposal statement:

*'Enablement services focus on supporting people to be as independent as possible, for as long as possible. This empowers individuals with diverse needs (e.g., older adults, people with physical or learning disabilities, mental health conditions) to have greater choice and control over their lives, which is a key aspect of person-centred equality. People already in receipt of care will be reviewed as part of the care package statutory review process'.*

### Considerations::

- The enablement service will consider the impact of physical health, mental health or illness on a person well-being and their ability to meet their care needs.
- Empowerment model for individuals.
- Person centred approach with consideration of the ability to meet own needs.
- Risk of needs not being met and placing individuals in a position of harm.

### Recommendation:

- Complete a detailed Equality Impact Assessment as part of the process of implementing this new price change.

Impacts	All	Age	Disability	Gender reassignment	Marriage & civil partnership	Pregnancy & maternity	Race	Religion or belief	Sex	Sexual orientation	Socio economic	Care Experienced
Negative												
Positive	✓											

## Adult Social Care Proposal: Transitions to Adult Social Care

The published Equality Impact Assessment is available to view on the link below:

[https://www.bathnes.gov.uk/sites/default/files/AS.S.06%20-%20Transition%20to%20adult%20social%20care%20FINAL\\_0.pdf](https://www.bathnes.gov.uk/sites/default/files/AS.S.06%20-%20Transition%20to%20adult%20social%20care%20FINAL_0.pdf)

### Precis:

Reducing the costs of transitions from children's social care to adult social care can be achieved through a focus on early intervention, joint working between agencies, and person-centred, long-term planning. These strategies help prevent fragmented care, promote independence, and ensure cost-effective support packages are in place.

### 2026-27 budget proposal statement:

*'The proposed savings in transitions to adult social care focus on early, coordinated planning linked to Education, Health, and Care Plans, joint commissioning and pooled budgets, assigning a designated worker for continuity, promoting independence and life skills, proactive information and guidance, and early financial advice. These approaches aim to ensure seamless transitions, reduce dependency, and provide cost-effective, person-centred support'.*

### Considerations::

- There are interdependencies with the Families First Programme and the Preparing for Adulthood project. These are yet to be fully implemented.
- Risk of lack of capacity within preventative/ early help services.
- Positive action to support continuity of care.

### Recommendation:

- During implementation and through an ongoing review process proportionate equality analysis should be carried out as part of the review and implementation process.

Impacts	All	Age	Disability	Gender reassignment	Marriage & civil partnership	Pregnancy & maternity	Race	Religion or belief	Sex	Sexual orientation	Socio economic	Care Experienced
Negative	✓											
Positive		✓	✓									✓

## Adult Social Care Proposal: Prevention of a 2nd Fall

The published Equality Impact Assessment is available to view on the link below:

[https://www.bathnes.gov.uk/sites/default/files/AS.S.07%20-%20Preventing%20a%20second%20fall%20FINAL\\_1.pdf](https://www.bathnes.gov.uk/sites/default/files/AS.S.07%20-%20Preventing%20a%20second%20fall%20FINAL_1.pdf)

### Precis:

B&NES has a higher level of hospital admissions for falls than the England average. The most effective interventions for preventing a second fall are a combination of targeted strategies, primarily a multifactorial falls risk assessment and management program, with exercise as a consistently key component.

### 2026-27 budget proposal statement:

*'This proposal aims to reduce the incidence and severity of falls in individuals at risk (primarily those aged 65+ and other at-risk groups) by providing evidence-based, multifactorial interventions (e.g., exercise, home assessments, medication reviews)'.*

### Considerations:

- Data sharing arrangements and business intelligence support is required to evaluate the impact of the program.
- Reliance on the successful implementation of reablement services and technology enabled care.
- Investment is required to develop a sustainable model of falls prevention interventions this is included in the Public Health budget for investment.

### Recommendation:

- Complete a detailed Equality Impact Assessment as part of the process of implementing this new price change.

Impacts	All	Age	Disability	Gender reassignment	Marriage & civil partnership	Pregnancy & maternity	Race	Religion or belief	Sex	Sexual orientation	Socio economic	Care Experienced
Negative												
Positive		✓	✓						✓			✓

**Adult Social Care Proposal: Non-renewal of assisted employment contract for mental health service**

The published Equality Impact Assessment is available to view on the link below:

[https://www.bathnes.gov.uk/sites/default/files/AS.S.10%20-%20Non-renewal%20of%20assisted%20employment%20contract%20V2\\_0.pdf](https://www.bathnes.gov.uk/sites/default/files/AS.S.10%20-%20Non-renewal%20of%20assisted%20employment%20contract%20V2_0.pdf)

**Precis:**

This proposal will be achieved by reviewing the assisted employment services available to B&NES residents and signposting service users to alternative assisted employment services best placed to meet their needs.

**2026-27 budget proposal statement:**

*'The local authority commissions from an external organisation short term assisted employment support for adults with mental health-related needs. The council in addition to this external contract operates a Business and Skills Hub, which helps individuals overcome barriers to education and employment by offering careers advice, job search assistance, CV support, and job coaching. As contracts reach their planned end dates, there are opportunities to review the latest national policies on assisted employment and to identify alternative support options available to B&NES residents'.*

**Considerations:**

- Service users will be enabled to access alternative support that best meets their needs.
- Risk of increase in complaints from existing service users.
- Risk of lack of capacity within alternative services.
- Risk of lack of financial and staffing resources to provide suitable services and individual support.

**Recommendation:**

- Complete a detailed Equality Impact Assessment as part of the process of implementing this new price change.

Impacts	All	Age	Disability	Gender reassignment	Marriage & civil partnership	Pregnancy & maternity	Race	Religion or belief	Sex	Sexual orientation	Socio economic	Care Experienced
Negative	✓											
Positive												

## Adult Social Care Proposal: Optimising Better Care Fund – Prevention Services

The published Equality Impact Assessment is available to view on the link below:

[https://www.bathnes.gov.uk/sites/default/files/AS.S.12%20-%20Optimising%20BCF%20-%20Prevention%20Services%20V2\\_0.pdf](https://www.bathnes.gov.uk/sites/default/files/AS.S.12%20-%20Optimising%20BCF%20-%20Prevention%20Services%20V2_0.pdf)

### Precis:

Commissioners will optimise the use of Better Care Fund to fund prevention services by robustly planning expenditure and ongoing monitoring of population outcomes achieved. Focus on prevention is a national and local priority across health and social care. This plan will ensure strategic alignment of funds to council priorities and use of funds comparable to that of statistical neighbours.

### 2026-27 budget proposal statement:

*'This proposal will be achieved by optimising the use of Better Care Fund to protect social care expenditure on prevention services, in line with national guidance and local priorities..*

### Considerations::

- There is anticipated positive impact on people with protected characteristics as:
  - Working closely with internal and external stakeholders to ensure that Better Care Fund and Improved Better Care Fund is spent on service in line with local priorities.
  - This should create a positive impact for people as Better Care Fund and Improved Better Care Fund will be invested to support better independence and support.

### Recommendation:

- Complete or update a detailed Equality Impact Assessment as part of the process of implementing this new price change.

Impacts	All	Age	Disability	Gender reassignment	Marriage & civil partnership	Pregnancy & maternity	Race	Religion or belief	Sex	Sexual orientation	Socio economic
Negative											
Positive	✓										

## Adult Social Care Proposal: Technology Enabled Care

The published Equality Impact Assessment is available to view on the link below:

[https://www.bathnes.gov.uk/sites/default/files/AS02%20Budget%20Proposal%20and%20EQIA%20Technology%202025-26\\_0.pdf](https://www.bathnes.gov.uk/sites/default/files/AS02%20Budget%20Proposal%20and%20EQIA%20Technology%202025-26_0.pdf)

### Precis:

The local authority arranges and manages care placements and support packages for eligible individuals under the Care Act 2014, aiming to meet statutory duties cost-effectively. Technology Enabled Care, such as telecare and daily living aids, helps reduce the need for in-person care while maintaining or improving outcomes.

### 2025-26 budget proposal statement

*'This proposal will be achieved by using technology to reduce social care resource requirements'.*

### Considerations:

- There is anticipated positive impact on people with protected characteristics as:
  - Technology enabled care has been proven to better independence and support.
  - These are positive changes that will be managed within national frameworks and industry standards for technology enabled care.
- The success of
- Risks of low take up of technology enabled care.
- 

### Recommendation:

- During implementation and through an ongoing review process proportionate equality analysis should be carried out as part of the review and implementation process.

Impacts	All	Age	Disability	Gender reassignment	Marriage & civil partnership	Pregnancy & maternity	Race	Religion or belief	Sex	Sexual orientation	Socio economic	Care Experienced
Negative												
Positive	✓											

**Public Health Proposal: Royal Victoria Park (RVP) Leisure Facilities Contract**

The published Equality Impact Assessment is available to view on the link below:

[https://www.bathnes.gov.uk/sites/default/files/PH.S.01%20-%20RVP%20Leisure%20Facilities\\_0.pdf](https://www.bathnes.gov.uk/sites/default/files/PH.S.01%20-%20RVP%20Leisure%20Facilities_0.pdf)

**Precis:**

New 20 years contract procured and in place for RVP Leisure Facilities (tennis, adventure golf, café and event space). Increase usage and improved facilities.

Other outcomes: 1. Improved facilities for residents

2. Third party investment in buildings and leisure facilities including cafe.

3. Improved access for disabled residents

4. Reduction in carbon footprint of the site with ambition to reach net zero.

5. Increased opportunities for increased health and wellbeing.

**2026-27 budget proposal statement:**

*'New contract has encouraged investment in facilities, better health and wellbeing outcomes for residents to tackle health inequalities, and increased income to be generated from the site linked to a 20-year business plan and lease'.*

**Considerations:**

- Risk of undeliverable outcomes will be mitigated against through contract monitoring processes.
- The aim is to provide a more inclusive provision that is responsive to the needs of all in the community.
- Length of contract may allow for long term positive impact.
- Length of contract could also be a risk if the provision is not carefully monitored and deliverable outcomes are not met.

**Recommendation:**

- Complete a detailed Equality Impact Assessment as part of the process to demonstrate consideration for people with protected characteristics.
- Carry out inclusive consultation.

Impacts	All	Age	Disability	Gender reassignment	Marriage & civil partnership	Pregnancy & maternity	Race	Religion or belief	Sex	Sexual orientation	Socio economic
Negative	✓										
Positive	✓										

## Children's Services

### Portfolio Holder: Cllr Paul May

#### Children and Young People Proposal: Addressing educational attainment inequality-Growth

The published Equality Impact Assessment is available to view on the link below:

[https://www.bathnes.gov.uk/sites/default/files/CS.G.04%20-%20Educational%20Attainment%20Growth\\_0.pdf](https://www.bathnes.gov.uk/sites/default/files/CS.G.04%20-%20Educational%20Attainment%20Growth_0.pdf)

#### Precis:

Addressing the attainment gap is a shared responsibility. We have an important role in leading a whole-systems approach to addressing the attainment gap; addressing the root causes across council services, coordinating place-based action with partners, and aligning resources. Aim of the programme of work:

- for our children that are defined as disadvantaged to have improved educational outcomes in KS2 reading, writing, and maths that are at least in line with national performance.
- to narrow the gap between the KS4 results of our young people defined as disadvantaged and their non-disadvantaged peers, by improving the results of disadvantaged pupils.

#### 2026-27 budget proposal statement:

*'Budget growth will sustain and programmes and projects already delivering measurable progress, and specifically Language for Life and Action Learning sets with education settings. 'Language for Life' is an evidence-based, multi-agency programme that upskills early years educators to improve children's communication and language outcomes - a key driver of long-term educational outcomes'.*

#### Considerations:

- By embedding equality at every stage of the process, this budget proposal ensures that disadvantaged children receive high-quality, focussed and equitable support.
- High risk of continuing disadvantage for vulnerable children if this budget proposal is not approved.
- Young people eligible for free school meals and from an ethnic minority group are disproportionately represented with low attainment outcomes in B&NES.

#### Recommendation:

- Review and update the detailed Equality Impact Assessment as an ongoing process to consider the impact of service delivery for young people with protected characteristics

Impacts	All	Age	Disability	Gender reassignment	Marriage & civil partnership	Pregnancy & maternity	Race	Religion or belief	Sex	Sexual orientation	Socio economic	Care Experienced
Negative												

Positive	✓	✓	✓			✓			✓	

**Children and Young People Proposal:** Potential Transport Solutions for 1. Pupils attending out of county special schools and 2. Those attending our Hospital Education Reintegration Service (HERS).

The published Equality Impact Assessment is available to view on the link below:

[https://www.bathnes.gov.uk/sites/default/files/CS.G.03%20-%20Home%20to%20School%20Transport%20new%20post\\_0.pdf](https://www.bathnes.gov.uk/sites/default/files/CS.G.03%20-%20Home%20to%20School%20Transport%20new%20post_0.pdf)

**Precis:** To investigate if we can deliver savings on:

1. The current cost of transporting pupils out of area special schools in single taxis by providing a bespoke mentoring service to take over this role.
2. The current cost of transporting pupils to our HERS provision at Abbot Alphege School if the service delivers this in-house rather than using the B&NES HTST service.

#### **2026-27 budget proposal statement**

*'Children and young people (CYP) will have specialist mentors that transport them to school rather than collection by taxi drivers with guide escorts. This could provide a cost effective and supportive journey to school ensuring CYP arrive regulated and ready to learn, supporting placements longer term and ensuring high attendance.*

*2. Students in HERS having differing medical needs which dictate the hours of education they can tolerate. The proposal is to replace the use of separate taxis with a single minibus operated by the provider. The logistics are complicated however, and the timetable would need to be adjusted to allow for multiple trips during the day and throughout the week'.*

#### **Considerations:**

- Risk of no available local providers.
- Vulnerable younger people with SEND will not have transport and may miss education, in turn lowering their outcomes.
- Children, young people and their families may find the transition challenging especially when a positive relationship has formed with current provider
- Children, young people and their families may find this model of guide escorts more supportive and safer.
- Further cost and availability analysis is required to ensure this proposal meets the intended outcome

#### **Recommendation:**

- A robust equality action plan and review schedule should be undertaken.
- Carry out inclusive consultation.

Impacts	All	Age	Disability	Gender reassignment	Marriage & civil partnership	Pregnancy & maternity	Race	Religion or belief	Sex	Sexual orientation	Socio economic	Care Experienced
Negative		✓	✓									
Positive		✓	✓								✓	✓

## Place Management

Portfolio holder: Cllr Joel Hirst

### Sustainable Transport Proposal: Proposed changes to resident parking zone permit charges and car park charges for 2026

The published Equality Impact Assessment is available to view on the link below:

[https://www.bathnes.gov.uk/sites/default/files/PM.S.01%20-%20Parking%20-%202026%20proposals%20incl%20Size\\_0.pdf](https://www.bathnes.gov.uk/sites/default/files/PM.S.01%20-%20Parking%20-%202026%20proposals%20incl%20Size_0.pdf)

#### Precis:

Increase to resident parking zone permit charges and car park charges for 2026.

#### 2026-27 budget proposal statement

*'Proposal is to introduce an additional charge, or discount, based on vehicle size for resident permits where larger vehicles pay a proportionally higher charge, and a review of car parking charges in Bath Hill East car park (Keynsham) the 24hour charge across Bath Park and Rides for those not using the bus service'.*

#### Considerations:

- Families with larger cars are likely to have higher emissions-based cars (ethnic minority groups, religion/belief, children and young people may all be impacted by increased costs).
- People on maternity/paternity leave may have reduced income and could be negatively impacted.
- Disabled people with a blue badge may benefit from reduced parking and improved accessibility in narrow residential streets.
- Women may be disproportionately disadvantaged as there is national acknowledgment of gender pay gaps.
- May displace or disadvantage many people with protected characteristics into residential areas that are not covered by a resident parking scheme.
- Positive: Improved air quality for all residents.

#### Recommendation:

- Complete a detailed Equality Impact Assessment with a review/update schedule
- Consider the cumulative impact re cost of access for residents particularly to the above-mentioned groups of people with protected characteristics.
- Consider knock-on effects.
- Carry out inclusive consultation

Impacts	All	Age	Disability	Gender reassignment	Marriage & civil partnership	Pregnancy & maternity	Race	Religion or belief	Sex	Sexual orientation	Socio economic	Care Experienced
Negative	✓		✓									
Positive			✓									

### **Sustainable Transport Proposal: Increase in parking income through additional enforcement & fee changes**

The published Equality Impact Assessment is available to view on the link below:

[https://www.bathnes.gov.uk/sites/default/files/PM.S.02.03%20-%20Parking%20-%20P%26D%2C%20RPZs%20%26%20enforcement\\_0.pdf](https://www.bathnes.gov.uk/sites/default/files/PM.S.02.03%20-%20Parking%20-%20P%26D%2C%20RPZs%20%26%20enforcement_0.pdf)

**Precis:** This will reduce commuter parking in residential areas leading to reduced congestion and improved road safety. Potential to increase demand for Park & Ride services.

#### **2026-27 budget proposal statement**

*'Proposal is to review and implement changes to P&D and extend RPZs across Bath. To implement enforcement of pavement parking and general increase in enforcement. Increased PCN charge. Partly dependent on government review of pavement parking and increasing PCN fees'.*

#### **Considerations:**

- Protected groups on lower incomes may be adversely impacted (socio-economic, pregnant/maternity, women, younger or older people, ethnic minority groups, disabled, care experienced).
- Disabled people and new parents may benefit from a reduction in commuter parking and improved accessibility in narrow residential streets.
- Wider implications for the economy as people may choose to go elsewhere.
- Schemes will progress where a clear case can be demonstrated and where resources exist

#### **Recommendation:**

- Complete and review a detailed Equality Impact Assessment considering where people with protected characteristics may be more impacted than others.
- Carry out inclusive consultation.
- Consider knock-on effects.

Impacts	All	Age	Disability	Gender reassignment	Marriage & civil partnership	Pregnancy & maternity	Race	Religion or belief	Sex	Sexual orientation	Socio economic	Care Experienced
Negative		✓	✓			✓	✓		✓		✓	✓
Positive												

**Sustainable Transport Proposal: Increase in income through enforcement of yellow box markings and other traffic restrictions**

The published Equality Impact Assessment is available to view on the link below:

<https://www.bathnes.gov.uk/sites/default/files/PM.S.11%20-%20Yellow%20Box%20Enforcement.pdf>

**Precis:** Increased use of Moving Traffic Enforcement powers, including on Yellow Box Junctions.

**2026-27 budget proposal statement**

*'Proposal is to enforce a number of movement traffic restrictions where contravention by motor vehicles causes congestion or road safety issues, such as yellow box markings'.*

**Considerations:**

- Enforcement tools like moving traffic camera can inadvertently discriminate against disabled people unless reasonable adjustments (e.g., accessible signage, warning notifications, exemptions) are made.
- Enforcement or traffic restrictions near health facilities, places of worship, education settings or care homes could pose indirect discrimination by disproportionately affecting certain groups.
- Protected groups on lower incomes may be adversely impacted (socio-economic, pregnant/maternity, women, younger or older people, ethnic minority groups, disabled, care experienced).
- Risk of reputational damage
- This proposal is an extension to the current arrangement of enforcing bus lanes.

**Recommendation:**

- Review and update the detailed Equality Impact Assessment considering where people with protected characteristics may be more impacted than others (see below).
- Consider knock-on effects.

Impacts	All	Age	Disability	Gender reassignment	Marriage & civil partnership	Pregnancy & maternity	Race	Religion or belief	Sex	Sexual orientation	Socio economic	Care Experienced
Negative	✓											
Positive												

## Place Management

### Portfolio Holder – Manda Rigby

#### Sustainable Transport Proposal: Park and Ride fare increase

The published Equality Impact Assessment is available to view on the link below:

[https://www.bathnes.gov.uk/sites/default/files/PM.S.04%20-%20Park%20and%20Ride%20Fees%202026.27\\_0.pdf](https://www.bathnes.gov.uk/sites/default/files/PM.S.04%20-%20Park%20and%20Ride%20Fees%202026.27_0.pdf)

**Precis:** Park and Ride fare increase from £3.70 to £4.00

#### 2026-27 budget proposal statement

*'Proposal is to increase the standard Park & Ride fare from £3.70 for a return journey to £4.00 or approximately 7.5%. The 10 single journeys carnet would increase from £14.80 to £16.00 and a group ticket from £5.50 (for 2 adults) to £6.00. Up to 5 children under 16 would continue to travel free with a fare paying adult. Proposal could also include option to increase fares by contractual inflation, CPI (or other measure) annually, rounded up to the nearest 10p in future years as standard. However, this has not been modelled at this time'.*

#### Considerations:

- Protected groups on lower incomes may be adversely impacted (socio-economic, pregnant/maternity, women, younger or older people, ethnic minority groups, disabled, care experienced).
- Potential for reduced passenger usage which may have a wider impact on the economy.
- Wider implications for the economy as people may choose to go elsewhere

#### Recommendation:

- Complete and review a detailed Equality Impact Assessment considering where people with protected characteristics may be more impacted than others.
- Carry out inclusive consultation.
- Consider knock-on effects.

Impacts	All	Age	Disability	Gender reassignment	Marriage & civil partnership	Pregnancy & maternity	Race	Religion or belief	Sex	Sexual orientation	Socio economic	Care Experienced
Negative		✓	✓			✓	✓		✓		✓	✓
Positive												

**Proposal: Removal of Non-Statutory Services within Public Protection (Pest Control)**

The published Equality Impact Assessment is available to view on the link below:

<https://www.bathnes.gov.uk/sites/default/files/PM.S.06%20-%20Public%20Protection%20-%20Removal%20of%20Non-Statutory%20Functions.pdf>

**Precis:** Stop providing this charged-for service to the public.

**2026-27 budget proposal statement**

*'The proposed removal of selected non-statutory services within Public Protection will reduce the Council's capacity to provide discretionary interventions that support community safety, environmental quality, and public health'.*

**Considerations:**

- Increased risk for community safety, environmental quality, and public health for all protected groups.
- Vulnerable residents may be disproportionately affected. Change could be confusing or stressful, particularly for those who are neurodivergent or have dementia and rely on routine.

**Recommendation:**

- Review and implement inclusive communication methods.
- Consider knock-on effects on wider services.

Impacts	All	Age	Disability	Gender reassignment	Marriage & civil partnership	Pregnancy & maternity	Race	Religion or belief	Sex	Sexual orientation	Socio economic	Care Experienced
Negative	✓											
Positive												

## Place Management

Portfolio Holder: Cllr Mark Elliot

### Waste and Recycling Proposal: Refuse and garden waste round efficiencies

The published Equality Impact Assessment is available to view on the link below:

<https://www.bathnes.gov.uk/sites/default/files/PM.S.08%20-%20Refuse%20and%20Garden%20Waste%20Round%20Efficiencies.pdf>

**Precis:** Revise routes for waste services to manage volumes more effectively and efficiently.

### 2026-27 budget proposal statement

*'Currently, refuse, recycling, and garden waste collections for residents are scheduled on the same day. Since not all households use the paid garden waste service, having collections on the same day causes uneven workloads during the week in urban areas, making some days busier than others. This scheduling can lead to increased disruptions during periods of high demand, such as in the summer. By reorganising the district's collection zones, the service aims to improve overall efficiency. The proposed changes would result in more evenly distributed routes and balanced workloads, while still ensuring that all residents receive their refuse, recycling, and garden waste collections on the same day in 26/27. Any changes to collection days would be clearly communicated in advance'.*

### Considerations:

- Clear communication with residents on day changes, and website / IT form updates would be required.
- Vulnerable residents may be disproportionately affected. Change could be confusing or stressful, particularly for those who are neurodivergent or have dementia and rely on routine.
- Disabled residents can request assisted collection.
- May improve access to pavements for disabled, older/younger people and new parents.

### Recommendation:

- Review and update the detailed Equality Impact Assessment before, during and following implementation to monitor and mitigate against adverse impacts.
- Accessible needs and alternative formats for communication should be provided on request or where a need is already known.

Impacts	All	Age	Disability	Gender reassignment	Marriage & civil partnership	Pregnancy & maternity	Race	Religion or belief	Sex	Sexual orientation	Socio economic	Care Experienced
Negative												
Positive	✓											

**Waste and Recycling Proposal: Phased transition of all social and private managed housing properties to fortnightly refuse collections.**

The published Equality Impact Assessment is available to view on the link below:

[https://www.bathnes.gov.uk/sites/default/files/PM.S.05%20-%20Transition%20remaining%20communal%20bin%20stores%20to%20fortnightly%20residual%20waste%20collections\\_0.pdf](https://www.bathnes.gov.uk/sites/default/files/PM.S.05%20-%20Transition%20remaining%20communal%20bin%20stores%20to%20fortnightly%20residual%20waste%20collections_0.pdf)

**Precis:** Transition remaining communal bin stores to fortnightly residual waste collections.

**2026-27 budget proposal statement**

*'Phased transition of all social and private housing managed properties to fortnightly refuse collections, with increased recycling provision as needed'*

**Considerations:**

- Most Curo managed properties transitioned to fortnightly refuse collections in 25/26. The remaining work is for around 90 blocks of premises under differing housing management agencies using shared bin stores
- The waste project team and business waste team will work together to deliver a comprehensive residents engagement programme to support this change and improve recycling rates.
- Vulnerable residents may be disproportionately affected. Change could be confusing or stressful, particularly for those who are neurodivergent or have dementia and rely on routine.
- Disabled residents can request assisted collection.
- May improve access to pavements for disabled, older/younger people and new parents.

**Recommendation:**

- Complete a detailed proportionate Equality Impact Assessment.
- Accessible needs and alternative formats for communication should be provided on request or where a need is already known.

Impacts	All	Age	Disability	Gender reassignment	Marriage & civil partnership	Pregnancy & maternity	Race	Religion or belief	Sex	Sexual orientation	Socio economic	Care Experienced
Negative												
Positive	✓											

## Resources

### Portfolio Holder: Mark Elliot

#### Technology Proposal: Transforming Customer Services

The published Equality Impact Assessment is available to view on the link below:

<https://www.bathnes.gov.uk/sites/default/files/RS.S.01%20-%20Improving%20Communications%202026%20Budget.pdf>

**Precis:** Improving Customer Communications Project. This proposal will deliver an improved and more consistent service for our residents

#### 2026-27 budget proposal statement

*'This is a phased implementation of a new communications platform with the intended outcome being a significantly improved experience for residents and service users. The platform has been implemented and Phase 1 rollout completed in September 2025.'*

#### Considerations:

- Next phases include more self-service options for residents to reduce staff demand
- For all equality areas, employees will require training and may need individual support to move towards a multi-communication channel service.
- The project offers improvements in communication means and accessibility options for all residents, visitors and staff including SignVideo for BSL users and translation services.

#### Recommendation:

- Implement strategies to improve equality, diversity and inclusion across the service.
- Continue to embed equality analysis throughout service delivery.
- Accessible training and ongoing equality related training for all staff.

Impacts	All	Age	Disability	Gender reassignment	Marriage & civil partnership	Pregnancy & maternity	Race	Religion or belief	Sex	Sexual orientation	Socio economic	Care Experienced
Negative												
Positive	✓											

## Resources

### Portfolio Holder: Cllr Manda Rigby

**Community Safety Proposal:** Sustaining statutory levels of service provision following reductions in grants from the Ministry of Justice and Police and Crime Commissioner.

The published Equality Impact Assessment is available to view on the link below:

<https://www.bathnes.gov.uk/sites/default/files/RS.G.01%20-%20Community%20Safety%20growth%20items.pdf>

**Precis:** Services to reduce crime, tackle antisocial behaviour, address substance misuse and support victims of domestic abuse can be maintained at statutory levels.

#### 2026-27 budget proposal statement:

*'This proposal seeks to increase staffing within Community Safety and to backfill the financial loss of Community Safety related grants. It will ensure delivery of statutory services (crime reduction, domestic abuse support, Anti-Social Behaviour enforcement, youth violence prevention) and critical preventative services (domestic abuse perpetrator programmes, youth substance misuse support, specialist Independent Domestic Abuse Advisors (IDVAs), and data analysis)'.*

#### Considerations:

- Without this growth, statutory duties under the Crime and Disorder Act risk being compromised, domestic abuse support services could be affected, and preventative programmes for young people and perpetrators could cease.
- Positive action to continue and develop services for vulnerable protected groups including: women & girls, LGBTQ+, young, pregnant, care experienced, ethnically diverse and disabled people, and for those living in rural areas and or people living in poverty.
- Enabling current and emerging strategies to be delivered in B&NES for example Violence against Women and Girls.

#### Recommendation:

- Continue to embed equality analysis throughout service delivery.

Impacts	All	Age	Disability	Gender reassignment	Marriage & civil partnership	Pregnancy & maternity	Race	Religion or belief	Sex	Sexual orientation	Socio economic	Care Experienced
Negative												
Positive	✓											

## **Additional Protected Characteristics as adopted by B&NES:**

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.

These additional Protected Characteristics are not evident on this report any significant positive or negative impacts would have been made clear.

## **Appendix 1**

### **1 Briefing note for elected members on equality in financial decision making**

- a. The Equality Act 2010 makes it unlawful to discriminate against an individual because of certain personal characteristics ('protected characteristics').
- b. The Act requires that equality issues are considered by public bodies as part of decision making, especially where services are reduced or redesigned.
- c. The Public Sector Equality Duty (PSED) requires us to have due regard of the need to:
  - eliminate discrimination,
  - advance equality of opportunity and
  - foster good relations between different people.
- d. The questions below are intended to assist PDS panels to scrutinise the proposals from an equality perspective.

### **2 For each new draft proposal**

- a. Are panel members clear that this proposal has been considered from an equality perspective?
- b. Do we know what the impact will be on the most vulnerable people?
- c. Are there any potential unintended impacts or "knock-on" effects and consequences - e.g. on partners, residents or other services?
- d. Have we consulted people and listened to what they have told us about this?
- e. During the implementation of the proposal – how will we continue to check for unintended effects on particular groups of people?
- f. Will there be room for discretion if during the implementation we discover that the change of service disproportionately disadvantages some people?
- g. Considering all the proposals together, what will the cumulative impact be, and will adverse impacts fall disproportionately on specific protected groups?
- h. What have we learnt about equality impacts following the implementation of last years' proposals?

### 3 What course of action does the EqIA suggest? Is it justifiable?

- a. There are four possible outcomes of an EqIA, more than one may apply to a single proposal:
  - *No major change required*: no potential for discrimination or adverse impact and all opportunities to advance equality have been taken.
  - *Adjustments to mitigate the issues identified*: will the proposed adjustments remove the barriers identified?
  - *Continue despite having identified some potential for adverse impacts or missed opportunities to advance equality*: the justification should be included in the assessment and should be in line with the duty to have 'due regard'. For the most important relevant policies, compelling reasons will be needed. You should consider whether there are sufficient plans to reduce the negative impact and/or plans to monitor the actual impact.
  - *Stop and rethink*: when an assessment shows actual or potential unlawful discrimination

## **Annex 3.1**

### **Equality impact introduction and legal background to the 2026 - 2027 budget proposals**

#### **1. Introduction and legal background**

- a. This report outlines how the impacts of the Council's budget proposals are being considered within the context of the Equality Act 2010<sup>1</sup> The Act makes it unlawful to discriminate directly or indirectly against an individual because of certain personal characteristics ('protected characteristics'). The Act also requires that equality issues are considered by public bodies as part of decision making, especially where services are reduced or redesigned.
- b. Failure to undertake proportionate Equality Analysis (Equality Impact Assessment) could present risks of legal challenge to the Council for failing to pay due regard to its Public Sector Equality Duty<sup>2</sup>. Courts have held that a local authority has to show they have consciously addressed their mind to the duty and actively considered any new plan or policy in light of the potential impact it may have on particular protected groups.

#### **2. Bath and North East Somerset background**

- a. The results of the Census 2021 have been collated and presented via the Strategic Evidence Base: <https://www.bathnes.gov.uk/strategic-evidence> this is available for public access.
- b. Bath and North East Somerset is a diverse area which includes the City of Bath as well as vibrant towns, villages and rural communities. The latest population [2021 United Kingdom Census](#) shows there is an estimated 193,400 residents in B&NES an increase of 9.9% since 2011.
- c. Bath & North East Somerset Council covers approximately 135 square miles. Bath is the largest urban settlement in the area, acting as the commercial and recreational centre of the district. It is home to just over 50% of the B&NES population and is a UNESCO World Heritage Site.
- d. The Ethnicity data from the 2021 Census informs us that 85.6 % (165,409) of people in B&NES identify as White British, compared with 90.1% in 2011. The next largest ethnic group is White Other with 5.75% (11,114) of the population. There is an increase of people from all ethnic categories apart from Black, Black British, Caribbean. The area has become more diverse since 2011 with 8.6% of people from a variety of ethnic groups including from the following groups:
  - Chinese (2089 people) 1%
  - Other Asian (1876 people) 0.9%
  - Asian (Indian): (1787 people) 0.9%
  - Mixed white and Asian (1846 people) 0.9%

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<sup>1</sup> <https://www.legislation.gov.uk/ukpga/2010/15/contents>

<sup>2</sup> <https://www.legislation.gov.uk/ksi/2011/2260/contents/made>

<sup>3</sup> <https://www.bathnes.gov.uk/document-and-policy-library/strategic-evidence-base-population-and-demography>

- Mixed white and Caribbean (1505 people) 0.7%
- Black Caribbean (672 people) 0.3%
- Black British African (980 people)

e. The 9.9% increase in the size of the population (from an estimated 176,016) to an estimated 193,400 is higher than the overall increase for England (6.6%) and the South West (7.8%). This growth has come from a combination of increasing student numbers at the two Universities and an increasing number of new housing developments.

f. As of 2021, B&NES is the 11th most densely populated local authority in the South West; since 2011 there has been a 17.5% increase in people aged 65 years and over in B&NES, lower than the national increase of 20.1%. We have also seen an increase of 8.2% in people aged 15-64 years and an increase of 7.6% in children under 15 years.

g. The 2021 Census data indicates that 16.5% (31,778) of people in B&NES identify as Disabled.

h. Despite being an area with generally good health and low crime, there is significant disparity within the area. Compared with the most affluent communities in the area, the most deprived communities experience a range of inequalities and poorer life outcomes. Bath and North East Somerset is ranked 269 out of 317 Local Authorities in England for overall deprivation, making it one of the least deprived in the country, however two areas are within the most deprived 10% nationally.

### **3. Actions to date**

- a. As part of the Council's budget equality analysis process, Directors (and their officers with delegated responsibilities) have considered their proposals from an equality perspective. Where available, these have been set out in a 2026/27 budget proposal template, with the high-level intentions outlined. The proposals describe what service redesign is being proposed and should identify if there will be impacts upon residents, employees and/or people who use our services.
- b. This document highlights those individual proposals where Directors have identified a potential impact, either positive or negative on residents, employees and or service users.
- c. This process aims to highlight if any of individual proposals have the potential to have significant equality impacts, and if so, what actions, if any, could be taken to mitigate any unexpected or unintentional impacts. It also aims to identify where multiple proposals may create a cumulative impact.

### **4. Equality scrutiny process**

- a. The 2026/27 budget proposals have been made available for public consultation from 12 December 2025 until 19 January 2026.
- b. Proposals will be scrutinised by the Corporate Policy Development and Scrutiny Panel on 3 February, before going to Cabinet and Council.
- c. The final budget proposals for 2026 to 2027, which will be considered by Cabinet on 12 February and Full Council on 24 February, will also reflect any other changes to the

council's finances, including the level of central government funding, which should now be confirmed.

The detailed budget proposals will be drawn up and presented for consideration by councillors at the following meetings:

- d. Children, Adults, Health and Wellbeing Policy Development and Scrutiny Panel on 19 January 2026
- e. Corporate Policy Development and Scrutiny Panel on 3 February 2026
- f. Climate Emergency and Sustainability Policy Development and Scrutiny Panel on 22 January 2026

## **5. Savings proposals for 2026/27**

- a. Across the Council, every attempt has been made to achieve efficiencies through service redesign, with minimum reduction in frontline services.
- b. It should be noted that a number of proposals refer and rely on income generation. This in itself has the potential to increase pressure on stretched teams and have indirect impacts to other parts of the service, particularly should the income generation not be realised.
- c. Regarding any equality impacts on staff, the council's Human Resources policies and procedures ensure there is full consultation and consideration of staffing matters and that employment-related equality issues are fully considered.

## **6. Detailed equality analysis**

- a. The details of how the proposals approved through the budget setting process will be implemented will follow in due course. It is recommended that a comprehensive and detailed equality analysis is carried out on some of the proposals as they are taken forward. This will help to ensure that opportunities to promote equality are identified, and any possible negative impacts or barriers for particular groups are considered, and where possible, mitigated.
- b. As above, regarding equality impacts on staff, the Council's Human Resources policies and procedures ensure there is full consultation and consideration of staffing matters and that employment-related equality issues are fully considered. Therefore, the focus here is largely on impacts upon service delivery and service users.
- c. The process has highlighted a number of proposals where there is a possibility of negative impact upon certain groups of people with protected characteristics and/or opportunities to promote equality. Each item is accompanied by an appropriate recommendation based on information available at time of drafting.
- d. The selected budget proposals, considerations and recommendations are listed in the attached document and are grouped in order of portfolio holder.

## **7. Cumulative impacts**

- a. Budget proposals have the potential to impact on people across the full range of protected characteristics. In addition, whilst considerations of socio-economic status are not a requirement of the Equality Act public sector duty, the impact of cost of living increases and other financial pressures is an important focus for the Council and its partners.
- b. Financial decisions need to be made with consideration for the unintended effects of budget proposals. The cumulative impact identifies that people may be affected multiple times, by different policies and service changes. i.e. the impact of all the proposals affecting Disabled people should be viewed together rather than only through the lens of an individual proposal.

## **8. The socio-economic context**

- a. It should be noted that the council aims to ensure that services were protected from reductions as much as possible during this budget setting process. However, with year-on-year savings we must balance the Public Sector Equality duty to have 'due regard' and the longer term effects on frontline services that provide support to vulnerable service users as well as those with protected characteristics, particularly those people who may be less able to cope with service changes.
- b. Services users and residents are facing changes from services other than the council, in Bath & North East Somerset this includes some proposals for significant changes to parking and transport costs. We are mindful that the council budget setting process forms only one part of the challenges that will face our residents over the coming years relating to the economic insecurity.
- c. Although socio-economic status is not a protected characteristic, this report notes that even relatively modest cost increases for services can have a substantial impact on the lives of households with low income. These households can often be more reliant on a range of public services; the cumulative impacts of multiple small cuts, increases in charges, travel times or costs can represent a significant barrier to accessing services for those on low incomes. This can impact on some peoples' ability/availability for work, thus keeping them in a cycle of limited opportunity to increase the household income.
- d. Ongoing tightening of eligibility thresholds for example for some health and social care provision, sometimes reducing to statutory provision only may cause unexpected consequences for other services, voluntary and community organisations where capacity is already stretched.

## **9. Care-Experienced Context**

- a. The council recognises care-experienced people as an additional protected group who may face persistent disadvantages throughout their lives. In line with corporate parenting responsibilities, we aim to ensure that services accessed by care-experienced children, young people and adults are carefully assessed for impacts during the budget-setting process.

- b. Care-experienced residents often rely more heavily on a range of public, community and early-intervention services. Even relatively small increases in service costs or reductions in support can have a significant cumulative impact on their wellbeing, stability, financial security and access to education, training and employment. Many care-experienced people have limited family networks to rely on, and therefore unexpected changes—such as increased travel costs, changes to the process of transitioning from children’s to adult services or a change in service provider may create barriers to maintaining independence and achieving positive life outcomes.

## **10. Council-wide mitigating action**

- a. Bath and North East Somerset Council is committed to addressing any potential negative impacts on people with protected characteristics.
- b. Responsible officers will carry out proportionate equality analysis including equality impact assessment to ensure they have demonstrated due regard to the requirements of the Equality Act 2010. Any consultation carried out on these will aim to reach a variety of people including and especially those who are likely to use the service and who may be affected by any changes.
- c. They will undertake regular review of equality analysis and will update documentation as new information becomes available. Responsible officers will ensure that monitoring and analysis is carried out during implementation of proposals; this will be used to identify and develop further mitigations for any unexpected consequences of service changes, particularly responding to cumulative impacts of multiple service changes. Individuals and groups who use services will be encouraged to give feedback on the revised services.
- d. Impacts identified throughout the process along with any monitoring information will be available to inform the following year’s budget process.

**11. Where specific protected characteristics have been highlighted in initial screening:**

**Religion and Belief**

The Equality Act 2010 states you must not be discriminated against because:

- you are (or are not) of a particular religion
- you hold (or do not hold) a particular philosophical belief
- someone thinks you are of a particular religion or hold a particular belief (this is known as discrimination by perception)
- you are connected to someone who has a religion or belief (this is known as discrimination by association) In the Equality Act religion or belief can mean any religion, for example an organised religion like Christianity, Judaism, Islam or Buddhism, or a smaller religion like Rastafarianism or Paganism, as long as it has a clear structure and belief system. The Equality Act also covers non-belief or a lack of religion or belief.

**Potential equality impact:**

- **Place Management:** Residents Parking Zones
- **Place Management:** Parking charges (Pay & Display, Residents parking permits)
- **Place Management:** Park & Ride cost increases
- **Resources:** Community Safety

Across the Budget proposals the initial impact assessments have highlighted potential impacts on individuals in relation to religion and belief especially for emissions-based parking charges which may adversely impact larger families and people accessing their chosen place of worship or meeting place.

<b>Age</b>	<p>The Equality Act 2010 states that you must not be discriminated against because:</p> <ul style="list-style-type: none"> <li>• you are (or are not) a certain age or in a certain age group</li> <li>• someone thinks you are (or are not) a specific age or age group, this is known as discrimination by perception</li> <li>• you are connected to someone of a specific age or age group, this is known as discrimination by association</li> </ul>
<b>Potential equality impact:</b>	
<ul style="list-style-type: none"> <li>➤ <b>Adult Services:</b> Individual Service Fund</li> <li>➤ <b>Adult Services:</b> Technology Enabled Care</li> <li>➤ <b>Adult Services:</b> Reablement</li> <li>➤ <b>Adult Services:</b> Enablement</li> <li>➤ <b>Adult Services:</b> Transitions</li> <li>➤ <b>Adult Services:</b> Preventing a 2<sup>nd</sup> Fall</li> <li>➤ <b>Adult Services:</b> Assisted Employment</li> <li>➤ <b>Adult Services:</b> Better Care Fund</li> <li>➤ <b>Adult Services:</b> Leisure Facilities</li> <li>➤ <b>Children and Young People:</b> Home to School Transport</li> <li>➤ <b>Children and Young People:</b> Education Outcomes</li> </ul>	<ul style="list-style-type: none"> <li>➤ <b>Resources:</b> Community Safety</li> <li>➤ <b>Place Management:</b></li> <li>➤ <b>Place Management:</b></li> <li>➤ <b>Place Management:</b></li> <li>➤ <b>Place Management:</b> Park &amp; Ride cost increases</li> <li>➤ <b>Place Management:</b> Refuse and Garden Waste Round Efficiencies</li> <li>➤ <b>Place Management:</b> enforcement of traffic</li> </ul>
<p>Many people who rely on access to public services will either be children and young people or elderly who also have low socio-economic status. The cumulative impact of multiple changes to service delivery and increased fares is likely to disadvantage younger and older people.</p>	<p>The individual service EqIAs will address these issues and will develop mitigations as the proposals are developed and will review these during implementation.</p>

## Sex

The Equality Act 2010 states you must not be discriminated against because:

- you are (or are not) a particular sex
- someone thinks you are the opposite sex (this is known as discrimination by perception)
- you are connected to someone of a particular sex (this is known as discrimination by association) In the Equality Act, sex can mean either male or female, or a group of people like men or boys, or women or girls.

## Potential equality impact:

- **Adult Services:** Transitions
- **Adult Services:** Preventing a 2<sup>nd</sup> Fall
- **Adult Services:** Leisure Facilities
- **Place Management:** Residents Parking Zones
- **Place Management:** Parking charges (Pay & Display, Residents parking permits)
- **Place Management:** Park & Ride cost increases
- **Resources:** Community Safety

Across the Budget proposals the initial impact assessments have highlighted potential impacts on individuals in relation to sex. Data informs us that boys are more likely to be looked after children.

The increase in parking charges could disadvantage people based on their sex, women may feel vulnerable if they cannot access safe spaces to park.

The individual service EqIAs will address these issues and will develop mitigations as the proposals are developed and will review these during implementation.

## Gender Reassignment

The Equality Act 2010 states that you must not be discriminated against because you are transsexual, when your gender identity is different from the gender assigned to you when you were born.

### Potential equality impact:

- **Adult Services:** Leisure Facilities
- **Public Health:** RVP Leisure Facilities
- **Place Management:** Residents Parking Zones
- **Place Management:** Parking charges (Pay & Display, Residents parking permits)
- **Resources:** Community Safety
- **Resources** Improving Customer Communications

Across the Budget proposals the initial impact assessments have highlighted potential impacts on individuals in relation to gender reassignment especially for the impact on mental and physical health and wellbeing.

The individual service EqIAs will address these issues and will develop mitigations as the proposals are developed and will review these during implementation.

## Marriage/Civil Partnership

The Equality Act states you must not be discriminated against in employment because you are married or in a civil partnership. In the Equality Act marriage and civil partnership means someone who is legally married or in a civil partnership. Marriage can either be between a man and a woman, or between partners of the same sex. Civil partnership is between partners of the same sex or opposite sex. People do not have this characteristic if they are:

- single
- living with someone as a couple neither married nor civil partners
- engaged to be married but not married
- divorced or a person whose civil partnership has been dissolved

### Potential equality impact:

Across the Budget proposals the initial impact assessments have not highlighted any negative impacts on individuals in relation to marriage or civil partnership

## Pregnancy & Maternity

Pregnancy is the condition of being pregnant or expecting a baby. Maternity refers to the period after the birth and is linked to maternity leave in the employment context. In the non-work context, protection against maternity discrimination is for 26 weeks after giving birth, and this includes treating a woman unfavourably because she is breastfeeding.

### Potential equality impact:

- **Adult Services:** Leisure Facilities
- **Public Health:** Public Health, health improvement
- **Place Management:** Residents Parking Zones
- **Place Management:** Parking charges (Pay & Display, Residents parking permits)
- **Place Management:** Park & Ride cost increases
- **Resources:** Community Safety

The individual service EqIAs will address these issues and will develop mitigations as the proposals are developed and will review these during implementation.

## Sexual orientation

The Equality Act 2010 states you must not be discriminated against because:

- you are heterosexual, gay, lesbian or bisexual
- someone thinks you have a particular sexual orientation (this is known as discrimination by perception)
- you are connected to someone who has a particular sexual orientation (this is known as discrimination by association) In the Equality Act, sexual orientation includes how you choose to express your sexual orientation, such as through your appearance or the places you visit.

### Potential equality impact:

- **Children and Young People:** Home to School Transport
- **Resources:** Community Safety
- **Resources** Improving Customer Communications

The individual service EqIAs will address these issues and will develop mitigations as the proposals are developed and will review these during implementation.

<b>Race/Ethnicity</b>
The Equality Act 2010 states you must not be discriminated against because of your race. In the Equality Act, race can mean your colour, or your nationality (including your citizenship). It can also mean your ethnic or national origins, which may not be the same as your current nationality.
<b>Potential equality impact:</b>
<ul style="list-style-type: none"> <li>➢ <b>Adult Services:</b> Reablement</li> <li>➢ <b>Children and Young People:</b> Education Outcomes</li> <li>➢ <b>Place Management:</b> Residents Parking Zones</li> <li>➢ <b>Place Management:</b> Parking charges (Pay &amp; Display, Residents parking permits)</li> <li>➢ <b>Place Management:</b> Park &amp; Ride cost increases</li> <li>➢ <b>Place Management:</b> Enforcement of traffic</li> <li>➢ <b>Resources:</b> Community Safety</li> <li>➢ <b>Resources</b> Improving Customer Communications</li> </ul>

There are risks that people may be disadvantaged due to their ethnicity, in particular with emissions-based parking charges. Ethnic minorities are more likely to be on lower incomes and have larger families so may not have access to compliant cars. Foreign cars will be charged at the highest rate due to a lack of data sharing structures.

## Disability

The Equality Act 2010 states that you must not be discriminated against because:

- you have a disability
- someone thinks you have a disability (this is known as discrimination by perception)
- you are connected to someone with a Disabled person (this is known as discrimination by association) It is not unlawful discrimination to treat a disabled person more favourably than a non-disabled person.

In the Equality Act a disability means a physical or a mental condition which has a substantial and long-term impact on your ability to do normal day to day activities. You are covered by the Equality Act if you have a progressive condition like HIV, cancer or multiple sclerosis, even if you are currently able to carry out normal day to day activities. You are protected as soon as you are diagnosed with a progressive condition. You are also covered by the Equality Act if you had a disability in the past.

## Potential equality impact:

<ul style="list-style-type: none"><li>➤ <b>Adult Services:</b> Individual Service Fund</li><li>➤ <b>Adult Services:</b> Reablement</li><li>➤ <b>Adult Services:</b> Enablement</li><li>➤ <b>Adult Services:</b> Transitions</li><li>➤ <b>Adult Services:</b> Preventing a 2<sup>nd</sup> Fall</li><li>➤ <b>Adult Services:</b> Assisted Employment</li><li>➤ <b>Adult Services:</b> Technology Enabled Care</li><li>➤ <b>Adult Services:</b> Better Care Fund</li><li>➤ <b>Adult Services:</b> Leisure Facilities</li><li>➤ <b>Children and Young People:</b> Education Outcomes</li><li>➤ <b>Children and Young People:</b> Home to School Transport</li></ul>	<ul style="list-style-type: none"><li>➤ <b>Place Management:</b> Residents Parking Zones</li><li>➤ <b>Place Management:</b> Parking charges (Pay &amp; Display, Residents parking permits)</li><li>➤ <b>Place Management:</b> Park &amp; Ride cost increases</li><li>➤ <b>Place Management:</b> Public Protection Control</li><li>➤ <b>Place Management:</b> Refuse and Garden Waste Round Efficiencies</li><li>➤ <b>Place Management:</b> enforcement of traffic</li><li>➤ <b>Resources:</b> Community Safety</li><li>➤ <b>Resources:</b> Improving Customer Communications</li></ul>
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There is a risk that proposals redesigning service delivery may impact on Disabled people including children and young people with special educational needs and disabilities. Not all Disabled people are blue badge holders but require ease of access to facilities including parking spaces. Cumulative impact of increased costs may result in disadvantage.

Specific equality analysis for proposals before and during implementation will address and mitigate where possible; ongoing monitoring will inform these mitigations.

## **12. Recommendations for implementation of accepted budget proposals**

The following recommendations should be considered (as appropriate), to ensure that equality issues continue to be considered during the implementation stages.

**a. Full or proportionate equality impact assessments / equality analysis.**

This should be carried out on all proposals where initial reviews have revealed likely impacts upon particular groups of people due to their protected characteristics. EqIAs must be carried out at a formative stage so that the assessment is an integral part of the development of a proposal, not a later justification of a policy that has already been adopted. The assessment should form part of the proposal and should be considered before making the decision.

This enables the Council to demonstrate it has taken due regard to equality issues and has thoroughly considered how to meet the requirements of the Public Sector Equality Duty. The Council's Equality Impact Assessment template can be found on the Council's [EIA web pages](#), and support is available from the Equality Team in carrying out the assessments. Completed EIAs should be published on this web page.

**b. Inclusive consultation.**

Where consultation is required, it is vital that a diverse range of people are encouraged to take part. This will help to identify any additional equality impacts that may need to be addressed and mitigated where possible. A variety of methods should be used to access consultees with varying protected characteristics. The Independent Equality Advisory Group can be used as a consultative body, and will provide further guidance on likely impacts, and ways of mitigating these.

**c. Clear and transparent communication.**

It is important to ensure that the communication and publicity strategies about service changes are accessible to disabled people (for example, people with visual impairment or learning disability) and to those for whom English is an additional language. The Council has a commissioned interpreting and translation service to assist with this.

**d. Including equality issues within commissioning specifications.**

Where proposals include commissioning or recommissioning external providers, detailed equality requirements in line with public sector equality duty should be built into contract specifications. This will ensure that best practice relating to equality in delivery of services is continued and improved upon when delivered by external partners.

**e. Workforce training and development.**

A number of the budget proposals are dependent upon the ability of officers to recognise opportunities to advance equality (for example, within commissioning, or by targeting services towards those who are most vulnerable). It is also important that

officers are aware of, and sensitive to, the particular needs of different groups of people. Equality training is available as part of the Corporate Training programme, and bespoke training can be arranged by the Council's Equality Team.

**f. Ongoing monitoring.**

Where services are subject to redesign, equality monitoring should be carried out to help identify if the service is operating as intended, if it is reaching and meeting the needs of our most vulnerable communities, and if there are any unforeseen impacts that need to be addressed. (In this instance the EqIA should be updated).

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	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000
<b>Full Approval</b>												
<b>Resources</b>												
Capital Contingency	2,852	2,852	2,777	0	660	53	0	0	0	0	53	2,904
Cleveland Pools Grant	0	0	10	10	0	10	0	0	0	0	10	10
Commercial Asset Re-Investment	4,025	4,025	6,327	2,302	0	5,915	0	0	0	0	5,915	9,940
Commercial Estate Fire Safety Works	660	1,168	2,452	1,792	500	2,835	0	0	0	0	2,835	4,003
Commercial Estate Refurbishment Programme	3,285	3,285	5,948	2,663	15	2,678	0	0	0	0	2,678	5,963
Flexible Use of Capital Receipts (Transformation)	35	11,150	385	350	0	350	0	0	0	0	350	11,500
IT Asset Refresh	487	487	487	0	15	15	0	0	0	0	15	502
Litter Bin Replacement Programme	40	40	40	0	0	20	20	20	0	0	60	100
Neighbourhood Services Vehicles	1,690	1,690	7,728	6,038	0	6,038	0	0	0	0	6,038	7,728
Orange Grove	113	634	919	806	-806	0	0	0	0	0	0	634
Property Company Investment - Council (Loan): Developments	1,000	24,773	3,816	2,816	6,873	15,300	38,800	22,950	4,766	0	81,816	106,589
Waste Depot Relocation	0	7,265	158	158	0	158	0	0	0	0	158	7,423
Waste Infrastructure Modernisation	1,794	2,383	6,048	4,254	0	6,186	0	0	0	0	6,186	8,569
Waste Welfare Facilities	15	189	109	94	0	94	0	0	0	0	94	283
<b>Subtotal Full Approval - Resources</b>	<b>15,996</b>	<b>59,940</b>	<b>37,203</b>	<b>21,282</b>	<b>7,257</b>	<b>39,651</b>	<b>38,820</b>	<b>22,970</b>	<b>4,766</b>	<b>0</b>	<b>106,207</b>	<b>166,147</b>
<b>Provisional Approval</b>												
<b>Resources</b>												
Commercial Asset Re-Investment	0	0	0	0	0	0	3,000	3,000	0	0	6,000	6,000
Commercial Estate Planned Maintenance Programme	0	0	355	0	0	500	500	500	500	500	2,500	2,500
Commercial Estate Refurbishment Programme	0	0	-78	0	982	2,404	1,515	1,515	1,515	1,515	8,464	8,464
Corporate Offices Furniture	0	0	0	0	15	15	15	15	15	15	75	75
Decarbonisation - Electric Vehicle Charging Infrastructure	0	0	0	0	550	550	550	0	0	0	1,100	1,100
IT Asset Refresh	0	0	907	858	0	609	1,347	1,527	1,463	572	5,518	5,518
Litter Bin Replacement Programme	0	0	0	0	0	0	0	0	20	20	40	40
Neighbourhood Services Vehicles	0	0	240	240	176	1,721	12,776	1,022	3,007	1,098	19,623	19,623
Property Company Investment	0	0	0	0	-7,389	0	0	0	0	0	0	0
Waste Container Replacements	0	0	0	0	235	235	0	0	0	0	235	235
<b>Subtotal Provisional Approval - Resources</b>	<b>0</b>	<b>0</b>	<b>1,424</b>	<b>1,098</b>	<b>-5,431</b>	<b>6,033</b>	<b>19,703</b>	<b>7,579</b>	<b>6,520</b>	<b>3,720</b>	<b>43,555</b>	<b>43,555</b>

Capital Scheme	Forecast Outturn 2025/26	Actual / Forecast Spend all years to 2025/26	Total Budget 2025/26	Rephasing from 25/26 into FY	New Budget Request 2026/27	Total Budget 2026/2027	Total Budget 2027/28	Total Budget 2028/29	Total Budget 2029/30	Total Budget 2030/2031	Total Cost 5 Years	Overall Project Total
	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000
<b>Full Approval</b>												
<b>Economic &amp; Cultural Sustainable Development</b>												
Bath Central Riverside	15	73	57	42	0	42	0	0	0	0	42	115
Bath City Centre Renewal Programme	641	1,429	1,128	487	0	487	0	0	0	0	487	1,916
Bath Quays North	612	10,598	1,358	746	0	746	6,217	24,872	500	0	32,335	42,933
Corporate Estate Decarbonisation Programme	255	255	346	91	0	105	246	0	0	0	351	606
Corporate Estate Planned Maintenance	3,033	3,033	5,567	2,535	790	3,625	2,829	0	0	0	6,454	9,486
Digital B&NES	22	2,122	306	284	0	284	0	0	0	0	284	2,406
Equality Act Works	0	0	40	40	0	90	50	50	50	50	290	290
Estate Rationalisation	500	558	802	302	0	2,052	0	0	0	0	2,052	2,610
Fashion Museum Renovation	1,700	1,700	1,923	223	0	223	0	0	0	0	223	1,923
Grand Parade & Undercroft	10	121	117	107	0	107	0	0	0	0	107	228
Guildhall Roof Refurbishment	50	50	190	140	0	2,986	964	0	0	0	3,950	4,000
Heritage Collections Centre	-135	55	380	515	0	515	0	0	0	0	515	570
Heritage Infrastructure Development	258	258	284	26	0	26	0	0	0	0	26	284
Heritage Services Retail System	62	292	100	38	0	38	0	0	0	0	38	330
Keynsham High Street Renewal Programme	2,356	6,610	2,362	6	0	6	0	0	0	0	6	6,616
Local Centres Renewal Programme	5	80	72	67	0	67	0	0	0	0	67	147
Midsomer Norton High Street Renewal Programme	200	3,664	357	157	0	187	0	0	0	0	187	3,850
Milsom Quarter Masterplan Delivery	337	633	613	276	0	276	0	0	0	0	276	909
Radstock Road Depot - Community Equipment Store	50	50	300	250	0	250	0	0	0	0	250	300
Somer Valley Enterprise Zone - Infrastructure	2,248	4,892	8,897	6,649	0	6,649	0	0	0	0	6,649	11,540
York Street Vaults Phase 2	5	1,127	24	19	0	19	0	0	0	0	19	1,146
<b>Subtotal Full Approval - Economic &amp; Cultural Sustainable Development</b>	<b>12,225</b>	<b>37,601</b>	<b>25,221</b>	<b>12,996</b>	<b>790</b>	<b>18,776</b>	<b>10,306</b>	<b>24,922</b>	<b>550</b>	<b>50</b>	<b>54,604</b>	<b>92,205</b>
<b>Provisional Approval</b>												
<b>Economic &amp; Cultural Sustainable Development</b>												
Corporate Estate Decarbonisation Programme	0	0	0	0	0	1,000	1,000	1,000	750	0	3,750	3,750
Corporate Estate Planned Maintenance	0	0	0	0	-2,700	0	261	3,090	3,090	3,090	9,531	9,531
Fashion Museum Renovation	0	0	0	0	0	307	1,693	12,215	4,785	0	19,000	19,000
Heritage Collections Centre	0	0	750	750	0	750	0	0	0	0	750	750
Heritage Infrastructure Development	0	0	830	830	0	516	516	516	516	516	2,580	2,580
Radial Gate Business Case and Design	0	0	0	0	1,850	1,850	0	0	0	0	1,850	1,850
Refurb of Roman Baths Shop	0	0	100	100	0	100	0	0	0	0	100	100
Somer Valley Enterprise Zone - Infrastructure	0	0	17,915	17,915	0	23,333	634	0	0	0	23,967	23,967
West / Bath Stall Street Vaults Repair	0	0	0	0	650	650	1,350	0	0	0	2,000	2,000
<b>Subtotal Provisional Approval - Economic &amp; Cultural Sustainable Development</b>	<b>0</b>	<b>0</b>	<b>19,594</b>	<b>19,594</b>	<b>-200</b>	<b>28,506</b>	<b>5,454</b>	<b>16,821</b>	<b>9,141</b>	<b>3,606</b>	<b>63,528</b>	<b>63,528</b>

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	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000
<b>Full Approval</b>												
<b>Communications &amp; Civic Services</b>												
Bath Christmas Market	32	32	50	0	0	50	50	50	50	50	250	282
CCTV Camera Replacement	426	936	521	95	0	95	0	0	0	0	95	1,031
Haycombe Cremator	398	398	398	0	0	1,102	0	0	0	0	1,102	1,500
<b>Subtotal Full Approval - Communications &amp; Civic Services</b>	<b>856</b>	<b>1,366</b>	<b>969</b>	<b>95</b>	<b>0</b>	<b>1,247</b>	<b>50</b>	<b>50</b>	<b>50</b>	<b>50</b>	<b>1,447</b>	<b>2,813</b>
<b>Provisional Approval</b>												
<b>Communications &amp; Civic Services</b>												
Haycombe Cemetery Expansion	0	0	0	0	0	750	500	500	750	0	2,500	2,500
Haycombe Crematorium	0	0	15	15	-15	0	0	0	0	0	0	0
Lansdown P&R Extension	0	0	240	240	0	240	0	0	0	0	240	240
P&R Security	0	0	110	110	0	110	0	0	0	0	110	110
Park & Ride Site Improvements	0	0	400	400	0	400	0	0	0	0	400	400
<b>Subtotal Provisional Approval - Communications &amp; Civic Services</b>	<b>0</b>	<b>0</b>	<b>765</b>	<b>765</b>	<b>-15</b>	<b>1,500</b>	<b>500</b>	<b>500</b>	<b>750</b>	<b>0</b>	<b>3,250</b>	<b>3,250</b>
<b>Full Approval</b>												
<b>Leader</b>												
Leader-none												
<b>Provisional Approval</b>												
<b>Leader</b>												
Bath Neighbourhood CIL	0	0	272	272	0	272	0	0	0	0	272	272
<b>Subtotal Provisional Approval - Leader</b>	<b>0</b>	<b>0</b>	<b>272</b>	<b>272</b>	<b>0</b>	<b>272</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>272</b>	<b>272</b>
<b>Full Approval</b>												
<b>Sustainable Transport Strategy</b>												
Active Travel Prescribing Project	6	78	73	67	0	67	0	0	0	0	67	145
Office for Low Emission Vehicles (OLEV) Bid -GULW	65	1,567	293	228	0	228	0	0	0	0	228	1,795
Resident Parking Zone	339	339	339	0	0	450	0	0	0	0	450	789
<b>Subtotal Full Approval - Sustainable Transport Strategy</b>	<b>410</b>	<b>1,984</b>	<b>705</b>	<b>295</b>	<b>0</b>	<b>745</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>745</b>	<b>2,728</b>
<b>Provisional Approval</b>												
<b>Sustainable Transport Strategy</b>												
Car Park Security	0	0	110	110	0	110	0	0	0	0	110	110
Parking Body Worn Video Cameras for Civil Enforcement Officers	0	0	0	0	0	0	0	70	0	0	70	70
Parking Enforcement Hand Held Computer Terminal Replacement	0	0	0	0	0	0	0	100	0	0	100	100
Parking Radio System Replacement	0	0	0	0	0	0	0	100	0	0	100	100
<b>Subtotal Provisional Approval - Sustainable Transport Strategy</b>	<b>0</b>	<b>0</b>	<b>110</b>	<b>110</b>	<b>0</b>	<b>110</b>	<b>0</b>	<b>270</b>	<b>0</b>	<b>0</b>	<b>380</b>	<b>380</b>

Capital Scheme	Forecast Outturn 2025/26	Actual / Forecast Spend all years to 2025/26	Total Budget 2025/26	Rephasing from 25/26 into FY	New Budget Request 2026/27	Total Budget 2026/2027	Total Budget 2027/28	Total Budget 2028/29	Total Budget 2029/30	Total Budget 2030/2031	Total Cost 5 Years	Overall Project Total
	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000
<b>Full Approval</b>												
<b>Built Environment, Housing &amp; Sustainable Development</b>												
Affordable Housing (Enabling)	145	145	212	67	0	67	0	0	0	0	67	212
BWR Phase 2	17,115	40,581	18,560	1,445	0	2,512	0	0	0	0	2,512	43,093
Disabled Facilities Grant	1,684	1,684	2,284	600	0	2,389	1,789	1,789	1,789	1,789	9,546	11,229
Englishcombe Lane Supported Housing	275	974	371	96	0	3,658	5,808	440	0	0	9,906	10,880
B&NES Homes/Housing Delivery F&D	78	2,640	578	500	0	500	0	0	0	0	500	3,140
North Keynsham SDL - External Fees	107	6,233	199	92	0	92	0	0	0	0	92	6,325
Local Authority Housing Fund (Ukrainian/Afghan homes)	924	4,525	1,181	257	0	257	0	0	0	0	257	4,782
Social Rent Programme (Phase 1 of BANES Homes)	3,176	9,698	4,661	1,485	0	2,985	0	0	0	0	2,985	12,683
Supported Housing Scheme	390	1,944	598	208	0	208	0	0	0	0	208	2,151
<b>Subtotal Full Approval - Built Environment, Housing &amp; Sustainable Development</b>	<b>23,894</b>	<b>68,425</b>	<b>28,643</b>	<b>4,749</b>	<b>0</b>	<b>12,667</b>	<b>7,597</b>	<b>2,229</b>	<b>1,789</b>	<b>1,789</b>	<b>26,072</b>	<b>94,497</b>
<b>Provisional Approval</b>												
<b>Built Environment, Housing &amp; Sustainable Development</b>												
Affordable Housing (Enabling)	0	0	1,191	1,066	-640	1,245	635	635	635	635	3,785	3,785
Housing Delivery Initiation Fund	0	0	1,000	1,000	640	1,640	0	0	0	0	1,640	1,640
Phase 2 of BANES Homes (it was Council House Building Programme)	0	0	0	0	0	2,568	12,432	0	0	0	15,000	15,000
Supported Housing Scheme (Englishcombe Lane and saving initiative)	0	0	4,490	4,490	0	3,669	11,163	2,560	500	0	17,892	17,892
<b>Subtotal Provisional Approval - Built Environment &amp; Sustainable Development</b>	<b>0</b>	<b>0</b>	<b>6,681</b>	<b>6,556</b>	<b>0</b>	<b>9,122</b>	<b>24,230</b>	<b>3,195</b>	<b>1,135</b>	<b>635</b>	<b>38,317</b>	<b>38,317</b>
<b>Full Approval</b>												
<b>Adult Services</b>												
Community Resource Centre Capital Investment	20	20	37	17	0	17	0	0	0	0	17	37
Community Resource Centre Equipment Replacement	15	15	43	28	0	148	0	50	0	0	198	213
<b>Subtotal Full Approval - Adult Services</b>	<b>35</b>	<b>35</b>	<b>81</b>	<b>46</b>	<b>0</b>	<b>166</b>	<b>0</b>	<b>50</b>	<b>0</b>	<b>0</b>	<b>216</b>	<b>251</b>
<b>Provisional Approval</b>												
<b>Adult Services</b>												
Adults Day Services Equipment Replacement	0	0	30	0	0	30	30	30	30	0	120	120
Best Start Family Hubs	0	0	0	0	67	67	69	70	0	0	206	206
Community Resource Centre Equipment Replacement	0	0	50	0	0	50	50	50	20	0	170	170
Leisure - Commercialisation of Parks	0	0	32	32	0	32	0	0	0	0	32	32
Odd Down Sports Ground and Other Leisure Feasibility	0	0	1,205	1,205	881	2,086	0	0	0	0	2,086	2,086
<b>Subtotal Provisional Approval - Adult Services</b>	<b>0</b>	<b>0</b>	<b>1,317</b>	<b>1,237</b>	<b>948</b>	<b>2,265</b>	<b>149</b>	<b>150</b>	<b>50</b>	<b>0</b>	<b>2,614</b>	<b>2,614</b>

Capital Scheme	Forecast Outturn 2025/26	Actual / Forecast Spend all years to 2025/26	Total Budget 2025/26	Rephasing from 25/26 into FY	New Budget Request 2026/27	Total Budget 2026/2027	Total Budget 2027/28	Total Budget 2028/29	Total Budget 2029/30	Total Budget 2030/2031	Total Cost 5 Years	Overall Project Total
	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000
<b>Full Approval</b>												
<b>Children's Services</b>												
Basic Needs - School Improvement / Expansion	3,129	3,129	3,229	100	0	100	0	0	0	0	100	3,229
Culverhay SEND project	171	202	171	0	1,781	1,781	0	0	0	0	1,781	1,983
Early Years Premises Improvements	100	420	140	40	0	40	0	0	0	0	40	460
Schools Capital Maintenance Schemes	1,435	1,435	2,002	566	0	566	0	0	0	0	566	2,002
SEND (Special Education Needs & Disability) Capital Programme	1,792	1,792	3,262	1,470	-1,281	571	59	0	0	0	630	2,422
Small Residential Unit - New Residential & Day School - Charlton House	668	816	4,668	4,000	0	4,000	2,011	0	0	0	6,011	6,827
<b>Subtotal Full Approval - Children's Services</b>	<b>7,295</b>	<b>7,794</b>	<b>13,472</b>	<b>6,177</b>	<b>500</b>	<b>7,059</b>	<b>2,070</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>9,129</b>	<b>16,923</b>
<b>Provisional Approval</b>												
<b>Children's Services</b>												
Basic Needs - School Improvement / Expansion	0	0	13,731	13,531	-5,800	12,189	6,000	0	0	0	18,189	18,189
Foster Care Building Grants	0	0	0	0	250	250	250	0	0	0	500	500
Schools Capital Maintenance Schemes	0	0	1,018	1,018	-518	1,135	518	0	0	0	1,653	1,653
Special Education Needs & Disability (SEND) Education Provision	0	0	1,672	1,000	-500	2,500	461	0	0	0	2,961	2,961
<b>Subtotal Provisional Approval - Children's Services</b>	<b>0</b>	<b>0</b>	<b>16,421</b>	<b>15,549</b>	<b>-6,568</b>	<b>16,073</b>	<b>7,229</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>23,302</b>	<b>23,302</b>

Capital Scheme	Forecast Outturn 2025/26	Actual / Forecast Spend all years to 2025/26	Total Budget 2025/26	Rephasing from 25/26 into FY	New Budget Request 2026/27	Total Budget 2026/2027	Total Budget 2027/28	Total Budget 2028/29	Total Budget 2029/30	Total Budget 2030/2031	Total Cost 5 Years	Overall Project Total
	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000
<b>Full Approval</b>												
<b>Sustainable BANES</b>												
Bath River Line	1,221	1,497	1,721	500	79	579	0	0	0	0	579	2,076
Bathscape	131	391	161	30	0	30	0	0	0	0	30	421
Green Infrastructure	0	0	0	0	0	0	270	0	0	0	270	270
Keynsham Memorial Park	20	127	266	246	0	246	0	0	0	0	246	373
Parks Equipment Replacement Programme	0	0	0	0.405	0	0.405	0	0	0	0	0	0
Parks Improvements	472	472	1,022	551	0	551	0	0	0	0	551	1,022
Play Area Refurbishment / Equipment	391	391	431	40	360	400	0	0	0	0	400	791
Renewable Energy Development Fund	42	42	336	294	0	294	0	0	0	0	294	336
Somer Valley Rediscovered	687	728	729	43	0	43	0	0	0	0	43	770
Tree Planting	52	52	188	136	0	188	49	49	0	44	330	382
Waterspace Connected	0	720	119	119	-79	72	8	0	0	0	80	800
<b>Subtotal Full Approval - Sustainable BANES</b>	<b>3,016</b>	<b>4,419</b>	<b>4,975</b>	<b>1,959</b>	<b>360</b>	<b>2,402</b>	<b>327</b>	<b>49</b>	<b>0</b>	<b>44</b>	<b>2,822</b>	<b>7,241</b>
<b>Provisional Approval</b>												
<b>Sustainable BANES</b>												
Air Quality Management Area and AQ Monitors	0	0	0	0	0	174	0	0	0	0	174	174
Bath River Line	0	0	3,601	3,601	0	3,601	0	0	0	0	3,601	3,601
Bath Spa Water Supply Machinery replacement/refurbishment	0	0	0	0	20	20	0	0	0	0	20	20
Better Mooring Project	0	0	350	350	377	777	197	135	0	0	1,109	1,109
Biodiversity Net Gain – BNG	0	0	90	90	-20	70	0	0	0	0	70	70
Landscape City	0	0	350	350	-300	50	0	0	0	0	50	50
Keynsham Memorial Park	0	0	50	50	0	50	0	0	0	0	50	50
Parks Equipment Replacement Programme	0	0	188	188	0	209	21	21	21	21	293	293
Parks Improvements	0	0	84	84	0	84	0	0	0	0	84	84
Play Area Refurbishment / Equipment	0	0	350	0	-350	0	360	360	360	360	1,440	1,440
Parks For All Programme	0	0	0	0	75	75	0	0	0	0	75	75
Parks Pulse Programme	0	0	0	0	75	75	75	75	75	75	375	375
Renewable Energy Development Fund	0	0	1,455	1,455	0	1,955	500	500	500	500	3,955	3,955
Renewable energy in B&NES	0	0	250	250	0	300	50	50	50	50	500	500
Tree Planting	0	0	0	0	0	0	0	14	44	0	58	58
Tree Planting/Doubling Woodland Cover	0	0	125	125	-125	50	0	0	0	0	50	50
Waterspace Connected	0	0	2,350	2,350	0	4,210	465	0	0	0	4,675	4,675
Wellsway Sports Pitch	0	0	0	0	200	200	0	0	0	0	200	200
<b>Subtotal Provisional Approval - Sustainable BANES</b>	<b>0</b>	<b>0</b>	<b>9,243</b>	<b>8,893</b>	<b>-48</b>	<b>11,900</b>	<b>1,668</b>	<b>1,155</b>	<b>1,050</b>	<b>1,006</b>	<b>16,779</b>	<b>16,779</b>

Capital Scheme	Forecast Outturn 2025/26	Actual / Forecast Spend all years to 2025/26	Total Budget 2025/26	Rephasing from 25/26 into FY	New Budget Request 2026/27	Total Budget 2026/2027	Total Budget 2027/28	Total Budget 2028/29	Total Budget 2029/30	Total Budget 2030/2031	Total Cost 5 Years	Overall Project Total
	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000
<b>Full Approval</b>												
<b>Sustainable Transport Delivery</b>												
ATF5:Clapton Road and Redfield Road Pedestrian Improvements	30	30	67	37	0	470	0	0	0	0	470	500
CAZ - Clean Air Zone	458	14,804	827	369	0	369	0	0	0	0	369	15,173
CRSTS Bath City Centre (BCC)	1,591	1,699	3,007	1,416	0	4,506	0	0	0	0	4,506	6,205
CRSTS Cycling and Walking - Bath Quays Links	2,082	2,082	2,686	604	0	1,767	0	0	0	0	1,767	3,849
CRSTS Liveable Neighbourhoods	2,513	6,019	3,217	704	0	3,605	0	0	0	0	3,605	9,624
CRSTS Manvers Street Remediation	1,282	1,952	4,260	2,978	0	2,978	0	0	0	0	2,978	4,930
Highways Maintenance Block	10,096	10,096	10,379	283	9,549	9,833	0	0	0	0	9,833	19,928
Highways S106 Projects	1	1	193	193	0	193	0	0	0	0	193	194
Local Active Travel Safety Programme (LATS)	2,769	2,769	3,457	689	2,922	3,610	0	0	0	0	3,610	6,379
London Road Modification	15	164	51	36	0	36	0	0	0	0	36	200
School Streets project	110	110	250	140	0	140	0	0	0	0	140	250
<b>Subtotal Full Approval - Sustainable Transport Delivery</b>	<b>20,946</b>	<b>39,726</b>	<b>28,393</b>	<b>7,447</b>	<b>12,471</b>	<b>27,506</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>27,506</b>	<b>67,232</b>
<b>Provisional Approval</b>												
<b>Sustainable Transport Delivery</b>												
ANPR Enforcement Camera Replacement	0	0	0	0	0	0	0	640	0	0	640	640
CRSTS - Midsomer Norton & Westfield, Walking, Wheeling & Cycling Links	0	0	1,250	1,250	1,047	2,297	0	0	0	0	2,297	2,297
CRSTS Bath City Centre (BCC)	0	0	0	0	571	571	0	0	0	0	571	571
CRSTS Bath Sustainable Walking & Cycling Links (BSWCL)	0	0	514	514	80	2,980	8,820	0	0	0	11,800	11,800
CRSTS Liveable Neighbourhoods	0	0	1,271	1,271	-900	371	0	0	0	0	371	371
CRSTS Manvers Street Remediation	0	0	70	70	0	70	0	0	0	0	70	70
CRSTS Somer Valley Links (SVL)	0	0	5,300	5,300	-10,100	5,000	6,000	7,000	0	0	18,000	18,000
Highways Maintenance Block - Provisional	0	0	0	0	-7,834	0	8,069	8,069	8,069	8,069	32,276	32,276
Local Active Travel Safety Programme (LATS)	0	0	0	0	-2,363	0	1,198	1,198	1,198	1,198	4,792	4,792
Sustainable Transport Initiatives CRSTS	0	0	1,721	1,721	0	16,313	0	0	0	0	16,313	16,313
<b>Subtotal Provisional Approval - Sustainable Transport Delivery</b>	<b>0</b>	<b>0</b>	<b>10,126</b>	<b>10,126</b>	<b>-19,499</b>	<b>27,602</b>	<b>24,087</b>	<b>16,907</b>	<b>9,267</b>	<b>9,267</b>	<b>87,130</b>	<b>87,130</b>
<b>TOTAL CAPITAL SCHEME BUDGET</b>	<b>84,671</b>	<b>221,289</b>	<b>205,613</b>	<b>119,246</b>	<b>-9,434</b>	<b>213,603</b>	<b>142,188</b>	<b>96,846</b>	<b>35,068</b>	<b>20,167</b>	<b>507,873</b>	<b>729,162</b>

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New Capital Proposals							Annex 4(i)
	26/27 Budget (£'000)	27/28 Budget (£'000)	28/29 Budget (£'000)	29/30 Budget (£'000)	30/31 Budget (£'000)	5 year Total (£'000)	Description
<b>Corporate Supported Borrowing</b>							
Radial Gate Business Case and Design	1,850					1,850	To advance proposals for this asset at end of life.
Commercial Estate Fire Safety Works	500					500	Further works required and revised tenant recovery assumptions.
West / Bath Stall Street Vaults Repair	650	1,350				2,000	Works to re-instate highway without traffic restrictions.
Decarbonisation - Electric Vehicle Charging Infrastructure	550	550				1,100	To advance infrastructure ahead of new electric waste fleet.
Neighbourhood Services Vehicles		1,000		600	200	1,800	Revision to costings for electric waste fleet.
Better Moorings Programme	63	197	135			395	New programme for safety measures to Pulteney Moorings.
Better Moorings Programme	314					314	Uplift to Mead Lane Moorings Project cost
Parks Pulse Programme	75	75	75	75	75	375	New programme for installation of outdoor exercise equipment across B&NES parks.
Parks For All Programme	75					75	For a baseline audit of Parks & Play Assets to inform future investment.
Culverhay SEND project	200					200	Provisional sum to allow site masterplanning
Wellsway Sports Pitch	200					200	Funding, along with the School and Football Federation, for a 3G pitch for community use.
IT Asset Refresh		260	934	879	27	2,100	Revised programme of replacements, including laptops.
Corporate Offices Furniture	15	15	15	15	15	75	New replacement programme for Council Offices.
Bath River Line	79					79	Uplift to complete phases 1a, b & c. from Waterspace Connected.
Waterspace Connected	(79)					(79)	See above
Housing Delivery Initiation Fund	640					640	Relocate for wider use across all housing need.
Affordable Housing (Enabling)	(640)					(640)	See above
Local Active Travel Safety Programme (LATS)	488					488	Re-allocation of funding to allow completion of programme.
Highways Maintenance Block	(488)					(488)	See above
Corporate Estate Planned Maintenance	90	90	90	90	3,090	3,450	Inflation provision and uplift of year 5 programme.
Highways Maintenance Block	235	235	235	235	2,235	3,175	Inflation provision and uplift of year 5 programme.
Play Area Refurbishment / Equipment	10	10	10	10	360	400	Inflation provision and uplift of year 5 programme.
Commercial Estate Refurbishment Programme	15	15	15	15	515	575	Inflation provision and uplift of year 5 programme.
Local Active Travel Safety Programme (LATS)	71	35	35	35	35	211	Inflation provision (on WEMCA settlement).
IT Asset Refresh	15	15	15	15	515	575	Inflation Provision and Uplift of Year 5 programme.
Equality Act Works					50	50	Uplift for year 5 of programme.
Renewable energy in B&NES					50	50	Uplift for year 5 of programme.
Litter Bin Replacement Programme					20	20	Uplift for year 5 of programme.
Tree Planting					44	44	Uplift for year 5 of programme.
<b>Developer CIL (Community Infrastructure Levy)</b>							
Green Infrastructure	(95)	275				180	Various projects including Chew Valley Reconnected, Keynsham Memorial Park Weir, Waterspace Connected, Biodiversity Net Gain, Trees and Woodland and Somer Valley Rediscovered. 26/27 rephased
Haycombe Cemetery Expansion	330					330	Use of CIL on this community project to replacement of borrowing for budget saving - see below.
Waste Infrastructure Modernisation	330					330	Use of CIL on this community project to replacement of borrowing for budget saving - see below.
<b>Grant Adjustments</b>							
CRSTS - Midsomer Norton & Westfield, Walking, Wheeling & Cycling L	1,047					1,047	Alignment to business case submission to WEMCA.
CRSTS Bath City Centre (BCC) Provisional	571					571	Alignment to business case submission to WEMCA.
CRSTS Cycling and Walking - Bath Quays Links	2,980	8,820				11,800	Alignment to business case submission to WEMCA.
CRSTS Liveable Neighbourhoods	(900)					(900)	Alignment to business case submission to WEMCA.
CRSTS Somer Valley Links (SVL)	(10,100)	6,000	7,000			2,900	Alignment to business case submission to WEMCA.
Best Start Family Hubs	67	69	70			206	DfE grant for Hubs to support children and their families.
Culverhay SEND project	1,581					1,581	Use of SEND funding for next stages including demolition.
Basic Needs - School Improvement / Expansion	(5,800)	6,000				200	Rephase and rebase of block grant
Special Education Needs & Disability (SEND) Education Provision	(1,781)					(1,781)	Rephase and rebase of block grant, including to Culverhay above.
Schools' Capital Maintenance Schemes	(518)	518				0	Rephase and rebase of block grant.

New Capital Proposals							Annex 4(i)
	26/27 Budget (£'000)	27/28 Budget (£'000)	28/29 Budget (£'000)	29/30 Budget (£'000)	30/31 Budget (£'000)	5 year Total (£'000)	Description
Landscape City	(250)					(250)	Rebase of grant assumptions.
Tree Planting/Doubling Woodland Cover	(100)	(50)	(50)			(200)	Rebase of grant assumptions.
Highways Maintenance	1,968				5834	7,802	2026/27 allocation of DFT Pot Hole grant funding and Extension of programme into 5th year on current settlement.
Disabled Facilities Grants					1789	1,789	Extension of programme into 5th year on current settlement.
Local Active Travel Safety Programme (LATS)					1163	1,163	Extension of programme into 5th year on current settlement.
Service Supporting Borrowing/Revenue/Other							
Odd Down Sports Ground and Other Leisure	881					881	Improvements to increase usage and revenues.
Foster Care Building Adaptations	250	250				500	Financial assistance to increase local foster care places.
Waste Container Replacements	235					235	Replacement of end of life recycling bags and boxes.
Commercial Estate Refurbishment Programme	982				500	1,482	Increase to allow business case development & uplift for year 5 of programme.
Commercial Estate Planned Maintenance Programme					1,000	1,000	Uplift for year 5 of programme.
Neighbourhood Services Vehicles	176	452	41	127	898	1,694	Alignment to expected replacements.
Property Company Investment	(516)	2,800	(50)	(2,234)		0	Alignment to Aequus Business Plan.
Bath Spa Water Supply Machinery replacement/refurbishment	20					20	Project to inform future need.
Small Residential Unit		660				660	Small Residential Unit will use contract savings to repay new project borrowing.
Renewable Energy Development Fund					500		Uplift for year 5 of programme.
Affordable Housing					635		Uplift for year 5 of programme.
Heritage Infrastructure Development				50	350		Uplift for year 5 of programme, correction to year 4.
Bath Christmas Market					50	50	Uplift for year 5 of programme.
<b>Total Additional Programme</b>	<b>(3,713)</b>	<b>29,640</b>	<b>8,570</b>	<b>(138)</b>	<b>18,415</b>	<b>52,773</b>	
Capital Review Adjustments (All Funding)							
Haycombe Cemetery Expansion	(330)					(330)	Funding Switch to reduce borrowing costs from use of CIL.
Haycombe Crematorium	(15)					(15)	Funding no longer required.
Waste Infrastructure Modernisation	(330)					(330)	Funding Switch to reduce borrowing costs from use of CIL.
Corporate Estate Planned Maintenance	(2,000)					(2,000)	Reduction to reflect removal of slippage from programme to re-align with revised delivery.
Property Improvement - Orange Grove Structural Works	(806)					(806)	Project currently paused and future options are being considered.
Bath Quays North			(10,237)			(10,237)	Current proposals no longer envisage works funded by developers contribution.
<b>Total Review Adjustments</b>	<b>(3,481)</b>	<b>0</b>	<b>(10,237)</b>	<b>0</b>	<b>0</b>	<b>(13,718)</b>	

2026/27 Highways Maintenance Programme			Annex 4(ii)
Description	Measurement	Budget (£'000)	
<b>Street Lighting Programme</b>		<b>No. of units</b>	
Bathaston & Shockerwick - Eagle Park, Elmhurst Estate, Fosse Lane, High Street, Muddy Lane, Seven Acre Lane, West View Road.	30	50	
Bathwick Ward (Bath) - Claverton Down Road, Norwood Avenue.	21	46	
Farmborough - Bell Close, Bridge Gardens, Manor Gardens, The Mead.	18	27	
High Littleton & Hallatrow - Hallatrow Hill, Wells Road.	14	12	
Keynsham - Chelmer Grove, Clyde Avenue, Dartmouth Walk, Durham Grove, Highfield Road, Kenilworth Close, Kennet Road, Mayfields, Oakfield Road, Orwell Drive, Walden Road, Wellsway, Windrush Road.	68	125	
Lyncombe Ward (Bath) - Midford Road.	7	15	
Midsomer Norton & Radstock - Bath Old Road, Bryant Avenue, Church Hill, Church Square, Fosseway Gardens, Gladstone Street, Haydon Hill, Mendip Way, Millards Hill, Pows Orchard, Queens Road, The Leaze, Waterside Crescent, Waterside Road, West Road.	65	85	
Oldfield Ward (Bath) - Cotswold Road, Footpaths Durley Park, Footpaths Moorlands Estate, Hayden Close, King Edward Road, Shaftesbury Road.	16	29	
Paulton - Alexandra Park, Ashleigh Close, Bloomfield Lane, Old Mills North Access Road.	20	33	
Peasedown St John & Carlingcott - Footpath Eckweek Gardens to Beacon Field, French Close, Frenchfield Road, Keel's Hill, Red Post Court, Wellow Lane, Wellow Mead.	35	59	
Rosewarr Close (Twerton & Whiteway), Footpath The Glebe to Lippiatt Lane (Timsbury), Hill View (Timsbury)	41	69	
Whitchurch - Footpath St Nicholas Court, St Nicholas Road, St Nicholas Road, Staunton Fields.	7	11	
Various - Heritage LED Conversions (Energy Savings)	40	92	
<b>Street Lighting Sub Total</b>		<b>382</b>	<b>650</b>
<b>Highway Structures Programme</b>		<b>No.</b>	
Structure Inspection and Remedial Works Programme	NA	130	
Structures Special Assessment Programme	NA	150	
Bridge Parapet and Pedestrian Railing Improvements	NA	100	
Cleveland Bridge Ongoing Monitoring and Signage		125	
Cleveland Bridge Fail Safe Bearing Installation		450	
Avon Valley Bridge Bearing Replacement - Detailed Design	1	75	
Grovesnor Footbridge Phase 2 - Construction		250	
<b>Highway Structures Sub Total</b>		<b>1</b>	<b>1,280</b>
<b>Highway Drainage Programme</b>			
Local Flood Risk Management Strategy Update		100	
Highway Drainage Extensive Investigation Works, Various Locations		200	
A39 Bath Rd, Hobbs Wall, Farmborough. Drainage Improvement.		50	
A368 Compton Martin Rd, West Harptree. Drainage Improvement.		40	
A367 Fosseway/Crossways Lane, Dunkerton. Drainage Improvement		50	
B3115 Meadgate West, Camerton. Drainage Improvement		50	
Dunkerton Lane, Combe Hay. Drainage Improvement		35	
Woppard Lane, Whitchurch. Drainage Improvement		30	
North Wick. Drainage Improvement		40	
Stockwood Lane, Whitchurch. Drainage Improvement.		25	
Marsh Lane, Farrington Gurney. Drainage Improvement.		20	
Hungerford Road, Bath. Partnership scheme with Wessex Water		10	
<b>Highway Drainage Sub Total</b>		<b>650</b>	
<b>Carriageway Resurfacing &amp; Major Re-Construction</b>		<b>SQM</b>	
Cranmore Place, Lymington Green & Fullers Way - Odd Down	5,521	300	
Penn Hill Road & Anchor Road - Weston	2,925	165	
West Lea Road - Weston	1,404	165	
South Lea Road - Weston	1,389	160	
Fox Hill - Combe Down	2,674	100	
Dunster Road - Keynsham	2,156	225	
B3110 Midford Road - Midford	3,644	225	
A4175 Bristol Road - Keynsham	2,556	200	
Weatherly Avenue - Odd Down	946	100	
Charlton Road - Keynsham	2,243	200	
St James Parade & James Street West - Bath City Centre	1,969	225	
Triangle North & Stanley Road West - Oldfield Park	2,651	200	
Rock Road - Keynsham	1,206	170	
Lays Drive (Part) - Keynsham	3,591	165	
Sladebrook Road & Lytton Gardens - Southdown	4,604	300	

<b>2026/27 Highways Maintenance Programme</b>			Annex 4(ii)
Lansdown View - Southdown	1,914	110	
Haycombe Drive Phase 1 - Whiteway	4,600	325	
Highland Road - Twerton	574	45	
Woollard Lane - Whitchurch	9,069	700	
Frys Bottom - Chelwood	6,600	250	
Moorledge Road - Chew Magna	7,500	300	
Winter Weather Impact Resilience Fund - Sites to be confirmed		277	
	<b>Carriageway Resurfacing Sub Total</b>	<b>45,993</b>	<b>4,907</b>
<b>Carriageway Micro Asphalt Surface Treatment Programme</b>		<b>SQM</b>	
Eckweek Ln, Eckweek Rd, Eckweek Gdns & North Meadows - Peasedown St John	8,828	210	
Frankland Close - Weston	2,555	85	
Paulmont Rise - Temple Cloud	2,310	75	
Calton Gardens - Lyncombe	1,780	60	
Manor Road & Manor Park - Radstock	7,231	170	
	<b>Carriageway Micro Asphalt Surface Treatment Programme Sub Total</b>	<b>22,704</b>	<b>600</b>
<b>Footway Programmes</b>			
<b>Paving Programme</b>		<b>SQM</b>	
Marlborough Buildings - Kingsmead	200	300	
Bathwick Hill (Adjacent Tesco Store) - Bathwick	250	200	
<b>Asphalt Concrete Programme</b>			
Triangle North & Stanley Road West - Oldfield Park	1000	100	
Smallcombe Close - Clandown	350	20	
Glebe Walk, Keynsham	400	23	
St. John's Road, Timsbury	870	50	
Lippiatt Lane, Timsbury	916	52	
Roundhill Park - Southdown	700	60	
Roweacres - Southdown	550	45	
Apsley Road - Newbridge	850	75	
Winter Weather Impact Resilience Fund - Sites to be confirmed		25	
	<b>Footway Programme Sub Total</b>	<b>3,986</b>	<b>950</b>
<b>Other Programmes</b>			
Planned Road Marking Improvement Programme		160	
Spray Injection Patching Programme		225	
Mastic Asphalt Patching Programme		227	
	<b>Other Programmes Sub Total</b>	<b>612</b>	
	<b>*PROGRAMME 2026/27 OVERALL TOTAL</b>		<b>9,649</b>

Local Active Travel Safety Programme 2026/27		
Description		Budget £'000
<b>Local Safety Schemes</b>		
Anti-Skid Surfacing		15
Collision Investigation and Prevention (CIP)		15
Vehicle Activated Signs improvement programme		25
Ralph Allen Drive Pillar		100
Chew Valley Lake collision investigation and prevention		30
Minor safety improvements		30
	<b>Local Safety Schemes Sub Total</b>	<b>215</b>
<b>Public Transport</b>		
A37 near B3130 Belluton junction, Pensford - crossing facility to improve access to bus stops		100
Improvements to bus stops		10
	<b>Public Transport Sub Total</b>	<b>110</b>
<b>Managing Congestion</b>		
Area Parking Review		75
Year 4 of 5 year programme to replace traffic signal equipment		45
Improvements to HGV restriction signs in Bath (year 2 of 2)		10
	<b>Managing Congestion Sub Total</b>	<b>130</b>
<b>Cycle Signs and Parking Stands</b>		
Cycle parking & signs		15
	<b>Cycle Signs and Parking Stands Sub Total</b>	<b>15</b>
<b>Pedestrian Schemes</b>		
Aids to mobility and footway improvements		40
Public Rights of Way		80
St Keyna Primary School, Keynsham - enhancements to pedestrian crossing (Charlton Rd)		61
Weston Lane, Bath - zebra crossing near King Edward's School		50
A368 Wick Road, Bishop Sutton - zebra crossing at primary school		101
A37 Camley surgery pedestrian crossing		120
North Road, Timsbury - pedestrian safety improvements including Lansdown View junction, speed tables and speed limit changes		80
St John's Road, Bathwick - pedestrian safety improvements		138
Safe crossing place for walking route to Moorlands School, Bath		60
Upper Bloomfield Road, Bath - crossing and dropped kerb to improve pedestrian route to local shops		100
A362, Farrington Gurney - signalised crossing near Manor Farm		101
Weston Lane, near Montrose Cottages, Bath - safety improvements		70
A368, Bishop Sutton - footway between Redlands Lane and tennis club		130
Avon Mill Lane, Keynsham - zebra crossing at entrance to Memorial Park		80
St Saviour's Road, Lambridge, Bath - build-out to aid crossing at Spa Lane		20
A367 Wells Road at Elm Tree Avenue, Westfield - footway and crossing improvements		80
Kilmersdon Road, Radstock - new crossing and speed reduction measures		165
Pedestrian signal improvements (existing sites)		240
City centre mobility improvements		50
	<b>Pedestrian Schemes Sub Total</b>	<b>1,766</b>
<b>Traffic Management Schemes</b>		
Speed limits:		130

Local Active Travel Safety Programme 2026/27		
Description		Budget £'000
20mph limits: Bath: Lansdown Road (north of St Stephen's Church), Newbridge Hill (between Oldfield School and Chelsea Road), Newbridge Road (between Old Newbridge Road and Upper Bristol Road), North Road/Bradford Road (between Ralph Allen Drive and Midford Road), London Road (between A46 roundabout and Gloucester Road and Bathavon North) Radstock: Kilmersdon Road (between Haydon Gate and Meadow View) Mendip: West Harptree, Bristol Road (B3114) to junction past Blue Bowl Inn Westfield: Cobblers Way Timsbury: Loves Hill/Timsbury Bottom 30mph to 20mph, Priors Hill 60mph to 20mph Farmborough: Feasibility study of rural lane speed limits potential for 20mph Pensford: 20mph on A37 within the village Stanton Drew: Bromley Road Chew Valley: Newtown 20mph Other speed limits: Keynsham: Durley Hill 40mph to 30mph		
Old Newbridge Hill/Newbridge Road/Newbridge Hill area, Bath - safety improvements	80	
Junction Road, Bath - Traffic calming measures (potential raised table)	50	
Church Hill/Dark Lane junction, Freshford - no through road using bollards (TRO)	15	
Charlcombe Lane, Charlcombe - 'access only' TRO	5	
Sion Road southbound, Bath - traffic calming measures	50	
Charlton Road (between Longmead Road and Lockingwell Road), Keynsham - speed reducing measures	100	
Timsbury Road between Farmborough and Timsbury - detailed design and land agreement	30	
Combe End, Radstock - speed table	45	
<b>Traffic Management Schemes Sub Total</b>		<b>505</b>
<b>Miscellaneous</b>		
Joint Local Transport Plan (JLTP) Monitoring, Equipment and National Highways and Transport (NHT) survey	15	
Programme Management	60	
Legacy/Remedial works - previous years schemes	26	
Scholars Way remedial work	80	
<b>Miscellaneous Sub Total</b>		<b>181</b>
<b>PROGRAMME 2026/27 OVERALL TOTAL</b>		<b>2,922</b>

Details	Budget £'000	
<b>Funding Source</b>		
Grant - Integrated Transport Block settlement	1,163	
Reallocated from Highways Maintenance Block 2025-26 carry forward Fully Approved		
Corporate Supported Borrowing for Temple Cloud (TC1098)	100	
Corporate Supported Borrowing	1,588	
Corporate Supported Borrowing Inflation Contingency	71	
<b>PROGRAMME 2026/27 OVERALL TOTAL</b>		<b>2,922</b>

Annex 4(iv)

<b>Parks Play Equipment Replacement Programme 2026/27</b>	
<b>Description</b>	<b>Budget £'000</b>
<b>Play Area Refurbishment</b>	
Vandyck Avenue Play Area (Keynsham)	45
Corston View Play Area (Bath)	35
Manor Copse (Radstock)	40
Woodborough Road (Radstock)	45
Royal Victoria Park	15
Lymore Gardens	45
Moorlands	19
	<b>Play Area Refurbishment Sub Total</b>
	<b>244</b>
<b>Health &amp; Safety (H&amp;S) Equipment Repair &amp; Replacement</b>	
Play Equipment - Reduction to 2025/26 carry forward balance to realign £10k to Moorlands and £45k to Lymore Gardens	-54
Furniture	15
	<b>H&amp;S Equipment Repair &amp; Replacement</b>
	<b>-39</b>
<b>Programme &amp; Project Management</b>	
Programme & Project Management	110
	<b>Programme &amp; Project Management</b>
	<b>110</b>
<b>Contingency</b>	
Contingency	35
	<b>Contingency</b>
	<b>35</b>
	<b>PROGRAMME 2026/27 OVERALL TOTAL</b>
	<b>350</b>

<b>Details</b>	<b>Budget £'000</b>
<b>Funding Source</b>	
Corporate Supported Borrowing	350
	<b>PROGRAMME 2026/27 OVERALL TOTAL</b>
	<b>350</b>

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<b>IT Replacement Programme 2026/27</b>	
<b>Description</b>	<b>Budget £'000</b>
<b><u>Computer Hardware Replacement</u></b>	
Laptops	160
Desktops	0
Monitors	35
Peripherals & Other Equipment	45
	<b>26/27 Computer Hardware Replacement</b>
	<b>240</b>
<b><u>Meeting Room &amp; Corporate Wifi Replacement</u></b>	
Meeting Room Equipment	30
Condeco & Visitor Management System	50
CCTV Network & Wifi Equipment	10
	<b>26/27 Meeting Room &amp; Corporate Wifi Replacement</b>
	<b>90</b>
<b><u>Mobile Equipment Replacement</u></b>	
Mobile Phones	100
Mobile Tablets	0
	<b>26/27 Mobile Equipment Replacement</b>
	<b>100</b>
<b><u>Other Costs</u></b>	
Staffing	100
Contingency	94
	<b>26/27 Other Costs</b>
	<b>194</b>
	<b>PROGRAMME 26/27 OVERALL TOTAL</b>
	<b>624</b>

<b>Details</b>	<b>Budget £'000</b>
<b><u>Funding Source</u></b>	
Corporate Supported Borrowing (including Inflation)	624
	<b>PROGRAMME 2026/27 OVERALL TOTAL</b>
	<b>624</b>

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## **COMMUNITY INFRASTRUCTURE LEVY (CIL) ALLOCATIONS 2026/27**

### **1. INTRODUCTION**

Strategic CIL income available for spending in the financial year 2026/27 is forecast to be around £1.5m.

CIL funding will make an important contribution to fulfilling the Core Strategy requirement that new development must be properly aligned with infrastructure. It also makes a significant contribution to the Council's Capital Programme.

In addition, it is anticipated that local communities will receive around £0.25m of income for local spending through Parishes or the Bath Advisory Board.

### **2. CIL SPENDING PRINCIPLES**

The Council's principles underpinning decisions on spending of CIL funds are:

- CIL regulations require that funding can only be spent on Infrastructure;
- Priority is given to infrastructure in the Infrastructure Delivery Plan (IDP) which is critical to support planned growth;
- Spend should be aligned with the Council's Capital Programme, where revenue budget is being proposed this is typically for early stage feasibility work;
- Decisions are made annually but based on a longer-term programme of spend to ensure a co-ordinated approach;
- Spend should take account of the location of developments where CIL is generated;
- Strategic and Local CIL spend should be aligned where it is beneficial.

### **3. CIL SPENDING PRIORITIES FOR 2026/27**

Based on the CIL Spend Principles above, the infrastructure projects to be funded by CIL in 2026/27 are summarised in Table 1 below, some of which are additions to on-going projects. The need to focus on infrastructure which addresses the Climate & Ecological Emergency concerns has been given greater priority across all the categories, so it does not appear as a separate item. Table 2 illustrates changes to previous allocations.

Should further amendments for 2026/27 be required these will then be approved by the Executive Director of Sustainable Communities in consultation with the Cabinet Member for Resources.

The Capital Programme has been updated to include CIL funding.

### **4. PRIOR YEAR RE-ALLOCATION**

CIL previously allocated has been realigned as part of programme reviews is summarised in Table 2. The Capital Programme has been updated to show these changes.

**Table 1: CIL Spend projects 2026/27**

Infrastructure Item	Allocation (£)	Commentary
Flood Risk Management	<b>500,000</b>	
Bath Quays Flood Defences	500,000	Council to repay WECA £0.5m p.a., in line with terms of Revolving Infrastructure Fund Agreement for Bath Quays Flood Defence Scheme.
Green Infrastructure	<b>350,000</b>	
Bathscape area Green Infrastructure Improvements	25,000	Contribution to the existing project which entails improving access from the city to countryside and delivering nature recovery network.
Bath River Line Green Infrastructure	50,000	Contribution to deliver access and biodiversity improvements from East of Bath to City Centre.
Landscape City	45,000	To support WECA GRF funded Landscape City project, extends into countryside access into urban areas delivering nature recovery.
Somer Valley Rediscovered	25,000	A further contribution to the Somer Valley Rediscovered Project, WECA GRF funded, which aims to improve biodiversity on 5 key sites located along the Wellow Brook and its tributaries.
Keynsham Memorial Park Weir Removal	25,000	This is for early stage works with funding for the main project being prepared for 2025/26 budget setting. This is recognised as a priority project by Bristol Avon River Trust, WECA, and contributions from the other parties. B&NES own the weir which has large silt build up and restricts fish movement. Bristol Water have committed £840,000 through the WIENP to support weir removal/modifying to improve the water course and address flood risk.

Waterspace Green Infrastructure Programme Improvements	25,000	A contribution towards projects, to access grant funding to deliver access and biodiversity improvements 3.4km stretch of river between Keynsham Lock and Hanham Lock.
Bio-diversity Net Gain (BNG) Pathfinders	25,000	Development of Council owned sites to prepare for BNG requirements for new development through the planning system. We will create natural sites and carry out land management. (£30k revenue budget, £20k provisional capital budget)
Nature Recovery Maintenance	50,000	Ecological Emergency Action Plan identified bringing council owned Sites of Nature Conservation Interest into good ecological status. This also links across to Local Plan. Sites include Roundhill Park, Charlcombe, Springfield Quarry and habitat management work. (Revenue budget)  BNG Pathfinder and Nature Recovery Maintenance asks are being pulled together to support the delivery of 30by30 Nature Recovery.
Tree Planting/Doubling Woodland Cover	80,000	Delivering the Cabinet commitment to double tree coverage by 2050 in line with the Forest of Avon Plan. (£45k revenue budget, £50k provisional capital budget)
Waste	<b>330,000</b>	
Waste Infrastructure Modernisation	330,000	Development of enhanced facilities for Council Recycling and cleansing operations, in part to allow the housing construction to commence at former Midland Road site. CIL use will replace need for Council borrowing.
Community	<b>330,000</b>	
Haycombe Cemetery	330,000	Haycombe has approximately 7 years of burial space remaining available, with plots for faith groups further restricted. The Council owns a 10-acre field directly behind the Crematorium being brought forward the expansion of provision. CIL will replace need for Council borrowing.
<b>TOTAL</b>	<b>1,510,000</b>	

Table 2: CIL Reallocations from previous years

Infrastructure Item	Allocation (£)	Commentary
Healthcare Projects to Increase Clinical Capacity	(57,000)	Combe Down Surgery completed below budget and works proposed at St Michaels Surgery did not proceed.
<b>TOTAL</b>	<b>(57,000)</b>	

**Minimum Revenue Provision (MRP) Policy – 2026/27****Overview**

The Council is required to annually set aside revenue funds for the prudential repayment of outstanding capital borrowing in accordance with provisions set out in CIPFA's Prudential Code and the Statutory Guidance on Minimum Revenue Provision (MRP) issued by the Government. The setting aside of revenue funds for the future repayment of outstanding borrowing is referred to as a Minimum Revenue Provision (MRP) charge. The Council is also allowed to make additional voluntary payments if required.

As part of the regulatory framework, Council is required to approve its Minimum Revenue Provision (MRP) Policy annually.

The MRP Policy, in accordance with proper practice, considers outstanding capital borrowing to be the Council's Capital Financing Requirement (CFR) rather than external loans taken out to finance capital expenditure. Accordingly, any reference in this Policy to the repayment of capital borrowing relates to the setting aside of resources to reflect movements within the Council's CFR rather than to the physical repayment of external debt.

In April 2024, the Government published a new Statutory Instrument with amended Statutory Guidance on MRP, which applies to accounting periods from 2025/26 onwards. The main intent of the changes was to make explicit that capital receipts may not be used in place of the revenue charge and that excluding debt associated with certain types of assets is not allowed.

**MRP Methodology**

Provision for the repayment of outstanding capital borrowing will generally be made in accordance with guidance and regulations to reflect the estimated life over which the capital assets acquired are anticipated to provide useful economic benefit. However, this may be adjusted on an individual asset by asset basis depending on the specific circumstances. The Council's statutory Section 151 officer will, as necessary determine individual asset lives for MRP purposes (in accordance with the overriding requirement to allow for the prudent provision for repayment of debt).

Of the four standardised methods set out as examples in the statutory regulations for the calculation of MRP, the Council has adopted the "Asset Life Method - Annuity" as the one which best allows for the prudent repayment of capital borrowing over the life of individual capital assets. MRP is the principal element for the repayment of borrowing. The annuity is the repayment profile determined by the useful life of the asset and an appropriate interest rate. For capital expenditure incurred before 1<sup>st</sup> April 2008, MRP will be determined as the principal repayment on a 50 year annuity with an annual interest rate equal to 2% which will fully finance this element of the CFR within 50 years, incorporating an "Adjustment A" of £38.8m.

For unsupported capital expenditure incurred after 31<sup>st</sup> March 2008, MRP will be determined by charging the expenditure over the expected useful life of the relevant asset as the principal repayment on an annuity with an annual interest rate equal to the average relevant PWLB rate for the year of expenditure, starting in the year after the asset becomes operational. MRP on purchases of freehold land will be charged over 50 years. MRP on expenditure not related to fixed assets but which has been capitalised by regulation or direction will be charged over 20 years.

Assets under construction, including regeneration sites undergoing development, which have yet to fully deliver their expected benefits will not be subject to MRP charges to the Council's Revenue Budget until such time as they become operational for a full accounting year. Accordingly, on becoming operational, the charge for MRP will not commence until the following financial year.

Any prior error or change in assumption as to expected future asset life may be adjusted for in the current (or future) financial year, subject to any constraints on such adjustment as set out in the Prudential Code or Statutory Regulations.

Whilst the above sets out the Council's general MRP principles and Policy, a number of specific instances and circumstances require separate treatment with regard to MRP in order to ensure the charge to revenue is both prudent for the repayment of debt and accurately reflects the economic benefits being realised. These are set out below.

### **Specific MRP Cases**

For assets acquired by finance leases or the Private Finance Initiative [and for the transferred debt from Avon County Council], MRP will be determined as being equal to the element of the rent or charge that goes to write down the balance sheet liability.

Where former operating leases have been brought onto the balance sheet due to the adoption of the International Financing Reporting Standard (IFRS) 16 Leases accounting standard, and the asset values have been adjusted for accruals, prepayments, premiums and/or incentives, then the annual MRP charges will be adjusted so that the total charge to revenue remains unaffected by the new standard.

For capital expenditure loans to third parties that are repaid in annual or more frequent instalments of principal, the Council will make nil MRP unless (a) the loan is an investment for commercial purposes and no repayment was received in year or (b) an expected credit loss was recognised or increased in-year, but will instead apply the capital receipts arising from principal repayments to reduce the capital financing requirement instead. In years where there is no principal repayment, MRP will be charged in accordance with the MRP policy for the assets funded by the loan, including where appropriate, delaying MRP until the year after the assets become operational.

Sufficient MRP will be charged to ensure that the outstanding Capital Financing Requirement (CFR) on the loan is no higher than the principal amount outstanding less the expected credit loss. This option was proposed by the Government in its MRP consultation and in the Council's view is consistent with the current regulations.

Subject to affordability and the sustainability of the Budget and Medium Term Financial Strategy (MTFS), the Council's Section 151 Officer will continue to explore opportunities for the earlier reduction of outstanding debt for the General Fund, and where appropriate and subject to available resources, reserve the power to make supplementary MRP contributions over and above the minimum previously determined as prudent, where longer term financial benefits may be derived.

### **Capital Receipts**

Capital receipts may ordinarily be applied to fund capital expenditure or be set aside for the repayment of debt. An exemption currently applies until 31<sup>st</sup> March 2030 (an extension from 31<sup>st</sup> March 2025 was announced as part of the Local Government Finance Policy Statement on 28<sup>th</sup> November 2024) which allows capital receipts to be used to fund revenue expenditure which generates future and ongoing savings and service transformation – referred to as the Flexible Use of Capital Receipts.

The Council's Section 151 Officer will apply General Fund capital receipts so as to optimise the benefit to the Revenue Account whilst being mindful of the long term need to prudently repay capital debt.

To the above end, all capital receipts (unless statutorily or contractually ring-fenced to specific purposes) will be applied to their most beneficial purpose. Where capital receipts are applied to repay debt, such repayments will be applied against the remaining borrowing identified on an asset-by-asset basis and the MRP liability adjusted accordingly.

### **MRP Overpayments**

Under the MRP guidance, any charges made in excess of the statutory MRP are known as voluntary revenue provision (VRP). VRP can be reclaimed in later years if deemed necessary or prudent. In order for these amounts to be reclaimed for use in the budget, this Policy must disclose the cumulative overpayment made each year. There is currently no expectation that any VRP contributions will be made in the period 2025/26-2028/29.

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## **Annex 6 - Bath and North East Somerset Council Pay and Reward Policy 2026/27**

### **Introduction**

1. This document sets out the Pay and Reward Policy for Bath & North East Somerset Council (B&NES) for the period 1<sup>st</sup> April 2026 to 31<sup>st</sup> March 2027. It provides a clear and transparent policy to the public demonstrating accountability and value for money with regards to decisions on pay and reward for council staff.
2. The Council's pay arrangements reflect the need to attract, retain and motivate skilled employees to ensure high levels of performance. The policy recognises flexibility which is essential in delivering a diverse range of services and is underpinned by principles of fairness and equality.
3. In accordance with the requirements of Section 38 of the Localism Act 2011 and of the Revised Guidance and the associated statutory guidance set out in the Openness and Accountability in Local Pay: Guidance and Supplementary Guidance under section 40 of the Localism Act (February 2012 & 2013), together with the Local Government Transparency Code 2015 from the Department for Communities and Local Government, the Council is required to publish a Pay Policy Statement for each financial year detailing:
  - a) The Council's definition of senior posts
  - b) The Council's definition of lowest paid employees
  - c) The reasons for adopting these definitions
  - d) The relationship between the remuneration of senior posts and that of the lowest paid employees
4. In accordance with provisions of the Localism Act, the requirement to publish a Pay Policy Statement does not extend to schools and therefore this policy does not include school based employees.

### **Definitions**

5. The Council's senior posts are defined as:
  - Chief Executive (Head of Paid Service\*)
  - Executive Director Operations
  - Director of Public Health\*
  - Executive Director Resources
  - Head of Legal & Democratic Services (Monitoring Officer\*)
  - Director of Children and Education (DCS\*)
  - Director of Adult Social Care (DASS\*)
  - Director of People & Change
  - Executive Director Sustainable Communities
  - Director of Assurance, Risk and Pensions
  - Director of Finance (S151 Officer)

- Director of Place Management
- Director of Capital Delivery & Housing
- Director of Education, Inclusion and Children's Safeguarding

6. The Council's deputies to statutory officers are defined as:

- Head of Financial Management
- Director of Education, Inclusion and Children's Safeguarding
- Head of Legal Services

7. The term 'lowest paid employee' refers to those employees in substantive full time employment at the lowest scale point of the Council's published pay scale.

## **Principles**

8. Bath & North East Somerset Council values all its employees and aims to apply a consistent and fair approach to pay and benefits in line with the following principles:

- To work within financial constraints and use those limited funds in the most effective way to support the Council in the provision of quality cost effective services and its workforce needs
- To aim for consistency and fairness in the processes used to manage pay and benefits, as appropriate to service delivery and in line with its commitment to remaining within the framework of the relevant national pay and conditions agreements
- To promote an equal pay agenda by ensuring that pay and job evaluation systems and processes meet legislative requirements and to actively work towards reducing any unjustified pay gaps on the grounds of gender or ethnicity
- To ensure that pay and benefits processes and policies are transparent and accessible to all employees
- To be clear about the recognition and reward of performance, whether at whole organisation, service, team or individual level
- To support a flexible approach to the acceptance of changes to tasks, duties and responsibilities by employees and allow for flexibility between posts.
- To enable the Council to attract and retain its employees and in order to do so, respond to situations where market forces dictate the necessity to apply supplements to established salaries.
- To retain a core set of benefits for all employees.

## **Responsibility for Pay and Reward Decisions**

9. The Council's Pay and Reward Policy incorporates the statutory provisions of the Localism Act (2011) in relation to pay policy statements. Approval of this statement and of any amendments to it is therefore a matter for Full Council and cannot be delegated to any sub-committee.

10. All policy matters relating to the Council's role as an employer including pay under section 112 of the Local Government Act, 1972 are delegated to the Employment Committee. The Restructuring Implementation Committee recommends appointments to the posts of Chief Executive (Head of Paid Service), Section 151 Officer, and Monitoring Officer to the Council who determine the decision. The Head of Paid Service has delegated authority to make appointments to Director posts subject to there being no objection to the appointment being lodged by a cabinet member.

11. Managers should be aware of their delegated levels of authority. Delegations for decisions on pay cannot be further delegated below these levels:

<b>Decision</b>	<b>Delegated Level of Authority</b>
Starting salary for Chief Executive (Head of Paid Services), Section 151 Officer and Monitoring Officer	Full Council
Starting salary for Executive Directors and Directors	Head of Paid Service
Performance related pay increases for Chief Executive	Leader and Deputy Leaders of the Council in consultation with the Director of People & Change
Performance related pay/progression increases for Executive Directors and Directors	Head of Paid Service with oversight from the Director of People & Change
Market supplements for any post of Head of Service and below	Corporate Management Team
Recruitment and retention payments for any post below Director level where it is not possible to recruit and retain categories of staff	Corporate Management Team
Honorarium payments for any post	Director in consultation with Human Resources
Individual grading including regrading	Head of Service in consultation with Human Resources
Planned overtime payments	Head of Service in consultation with Human Resources

12. The Director of People & Change is responsible for ensuring that the Council's Job Evaluation Scheme and pay processes have been applied. Human Resources is responsible for overseeing any decision on pay to ensure that they are made in accordance with the delegated authority levels and are compliant with the terms of the Pay and Reward Policy.

### **Basic Pay**

13. The job role and its accountability in the overall context of the Council's services and responsibilities is evaluated using the HAY job evaluation scheme which is based on objective criteria and free from discriminatory bias.

14. All job roles are evaluated using this scheme including senior management appointments as well as Chief Officers and their Deputies.

15. Job roles are paid according to the terms of the relevant national agreements on pay and conditions of service.

### **Pay on Appointment**

16. Staff are normally appointed at the bottom scale point of the grade at which the post has been evaluated.

17. Managers have discretion to appoint at a higher scale point within the grade band if the appointee can demonstrate that they are currently earning more than the minimum salary for the grade or there are other extenuating circumstances such as difficulties in attracting suitable applicants.

### **Pay Review Dates**

18. Grade progression (i.e. movement from a lower to a higher salary scale point (scp) within a grade where applicable) takes place on 1<sup>st</sup> April of each year until the highest scp in the grade is reached. Grade progression is subject to satisfactory performance (and may be withheld if performance is unsatisfactory) and a minimum of 6 months' service in the grade.

### **Re-employment of Former Local Government Employees**

19. The Council retains sufficient flexibility in its response to the re-employment of former local government employees to enable it to respond appropriately to the particular circumstances. It ensures that an open and fair selection process takes place before any appointment is confirmed. 'Merit' is the sole criteria for engagement.

20. The Council does not normally re-engage any B&NES employee that has taken voluntary redundancy for a period of 2 years after the date of redundancy.

### **Use of consultants, Contractors and Temporary 'Agency' Workers**

21. Ordinarily, staff will be engaged directly by the council as employees but on an exceptional basis, where particular circumstances deem it necessary, people may be engaged under 'contracts for services' as consultants or contractors or on an 'agency basis'. When this situation arises, the council will give detailed prior consideration to the benefit of doing so and that the overriding need to ensure value for money is achieved, including the need to ensure no one is inappropriately enabled to achieve a more favourable position in respect of their tax liabilities ('tax avoidance') than might otherwise apply. The Council will therefore have proper regard to this principle in applying the His Majesty's Revenue and Customs (HMRC) test for tax status under the Off Payroll Working provisions for any interim 'off-payroll' engagements.

## **Equal Pay**

22. The Council is committed to the principle of equal pay for all posts of the same size and value and has implemented the national 'single status' agreement. In order to put its commitment to equal pay into practice, the Council:

- regularly reviews its pay grade and salaries for all current staff and starting pay for new staff in line with the Equality Act 2010, Equality and Human Rights Commission guidance and the council's Equality Policy.
- informs employees of how these practices work and how their own pay is determined.
- provides training and guidance for managers and supervisory staff involved in decisions about pay and benefits.
- regularly monitors pay and grading data and statistics
- publishes pay equality data as statutorily required

23. The Council published its 2024 Gender and Ethnicity Pay Gap in 2025. The report sets out the overall difference between men and women's pay in the council. This is known as the gender pay gap and is a measure of any difference in pay between the mean average and median earnings of men and women. This is then expressed as a percentage of male earnings. The council employs proportionately more women (62.5%) than men (37.5%) and with a greater number working part-time and/or in administrative roles, there is a median gender pay gap across the organisation of -0.2% as at March 2024.

24. This was the third year that the Council has produced an Ethnicity Pay Gap report. The report sets out the overall difference between the average earnings of employees who self-identify as white and the average earnings of employees who self-identify as any other ethnicity group. The median average hourly rate of pay of employees self identifying as white is £16.24 per hour. For employees self identifying as Asian the median hourly rate was £15.41 which is a gap - £0.07. For employees self-identifying as black the median hourly rate was £16.68 which is a gap of £1.06. For employees self-identifying as mixed ethnicity the median hourly rate was £16.61 which is a gap of £1.18. For employees self-identifying as other ethnicity the median hourly rate £17.23 was which is a gap of £0.37.

## **Senior Pay**

25. The remuneration of the Chief Executive and senior officer appointments in the Council (see Annex 1) is set across five pay bands. Levels of pay are periodically benchmarked against similar posts in a wide range of public and not for profit sector organisations.

26. Any increases in pay rates will normally be in line with those negotiated nationally by Joint Negotiating Committees (JNCs) for Chief Executives and Chief Officers respectively. The pay policy, whilst agreed in advance of the financial year to which it relates, can be amended during the course of the year to incorporate a pay award negotiated nationally or for other reasons.

27. Any change to the spot salary for Executive Directors or Directors is subject to satisfactorily meeting performance criteria agreed in advance with the Chief Executive and Executive Directors, as appropriate (with oversight from the Director of People & Change). Any increase is paid from 1 April subject to 12 months' service in that pay band and the maximum not being exceeded.
28. This is no provision for the Council to pay any bonuses, charges, fees or benefits in kind to senior employees or any other employees other than relocation allowances and expenses necessarily incurred in the performance of their duties. This provision is kept under review.
29. The Council has agreed that the Chief Executive undertakes the role of Returning Officer in respect of all elections. The Returning Officer is an officer of the Council who is appointed under the Representation of the People Act 1983. Whilst appointed by the Council, the role of the Returning Officer is one which involves and incurs personal responsibility and accountability and is statutorily separate from their duties as an employee of the Council. As Returning Officer, they are paid a separate allowance for each election for which they are responsible.

### **Pay Ratios Within the Council**

30. The relationship between the rate of pay for the lowest paid council employee and that of the Council's Chief Officers is determined by the processes used for determining pay and grading structures as set out in this Pay and Reward Policy.
31. The 'lowest paid' persons employed under a contract of employment with the council are employed at spinal point 1 of the National Joint Council (NJC) payscale which is £24,796 and £12.85 per hour as at 1 April 2025<sup>1</sup>. The relationship between the rate of pay for the "lowest paid" employees and the council's Chief Officers is regulated by the processes used for determining pay and grading structures as set out in this Pay and Reward Policy. The salary utilised for the Chief Officer calculations of all the pay multiple data is £113,918 and for the Chief Executive it is £175,000.
32. The Council employs apprentices who are not included within the definition of 'lowest paid employees' as they are not employed under contracts of employment.
33. As part of its commitment to pay transparency and following the recommendations of the Hutton "Review of Fair Pay in the Public Sector" (2011), the Council publishes information on pay ratios on an annual basis. The information for 2026/27 is as follows:

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<sup>1</sup> At the time of writing national pay negotiations for 2026 are also on-going and the final pay award is unknown at the time of writing.

Multiple of Salary	Ratio
• the multiple between the annual salary of the lowest paid Council employee and the Chief Executive (full-time equivalent basis) as a ratio	1:7
• the multiple between the annual salary of the lowest paid Council employee and the average Chief Officer (full-time equivalent basis) as a ratio	1:4
• the multiple between median earning of Council employees and the Chief Executive (full-time equivalent basis) as a ratio	1:5
• the multiple between median earning of Council employees and the average Chief Officer (full-time equivalent basis) as a ratio	1:3

34. Bath & North East Somerset Council does not currently have a policy of maintaining or reaching a specific ratio of pay multiple between the Chief Executive and that of the median earner.

## Employee Benefits

35. In addition to an employee's salary, the Council offers a comprehensive range of benefits designed to enhance the work life balance of our employees. The current benefits include:

- the Local Government / Teachers'/National Health Service (NHS) Pension Schemes as applicable
- generous annual leave entitlements in addition to bank holiday entitlement
- the option to purchase additional annual leave and/or take unpaid leave
- a wide range of learning and development opportunities
- flexible working arrangements
- employee wellbeing schemes, including access to Occupational Health and an Employee Assistance Programme through Health Assured
- childcare vouchers
- cycle-to-work scheme
- car benefit scheme
- discounted gym and leisure membership
- use of the Vivup scheme to provide retail discounts
- staff social club
- MOT testing with reduced rates for staff

## Termination Payments

36. Proposed voluntary redundancy packages in excess of £100,000 (this threshold includes [but is not limited to] any proposals in respect of salary to be paid in lieu, redundancy compensation, pension benefits and holiday pay as appropriate) and any special severance packages in excess of £20,000 are referred to the Restructuring Implementation Committee for consideration.

37. Senior staff are not differentiated from other members of staff in terms of remuneration on resignation or termination. The Council's general arrangements for severance and scheme for discretionary payments apply to all employees.

### **Working with Trade Unions**

38. The Council will endeavour to maintain a joint working approach with its recognised Trade Unions and will work closely with them on pay related matters. There has been consultation with representatives of the recognised Trade Unions during the development of this Pay and Reward Policy. Collective bargaining processes will be followed as appropriate for any proposed changes to pay and/or allowances.

### **Publication**

39. The Council's approach to the publication of and access to information on the remuneration of Chief Officers is to include it on its public website as part of its requirements within the Accounts and Audit (England) Regulations 2011 and in accordance with the Code of Recommended Practice for Local Authorities on Data Transparency. A copy of the Pay Policy Statement is published on the Council's website: [www.bathnes.gov.uk/services/jobs/](http://www.bathnes.gov.uk/services/jobs/)

40. For further information on the Council's pay policy please contact the Council's Human Resource Service email: [HR\\_Payroll@bathnes.gov.uk](mailto:HR_Payroll@bathnes.gov.uk) Tel: 01225 395146

## Annex 1 – Senior Officer Remuneration

For the purposes of this statement, senior officer means 'chief officers' as defined within S38 of the Localism Act. The posts falling within the statutory definition are set out below together with salaries effective from 1 April 2026<sup>2</sup>:

### Chief Executive (Head of Paid Service)

The salary for the post is £175,000 per annum. Additional payments will be made for Returning Officer duties in respect of any elections. The Returning Officer fees are determined by Statutory Instrument and paid by the Cabinet Office for all National and European elections, rather than by the Council. The duties of the Returning Officer are detailed in paragraph 7 above.

### Executive Director

The salary for all three Executive Director roles is in the range of £122,807 - £144,480 per annum. The salary is a fixed point.

### Directors and Deputies to Statutory Officers

Pay Band	Roles	Number
Director II (JNC): £113,918 - £126,737	<ul style="list-style-type: none"><li>• Adult Social Care</li><li>• Children &amp; Education</li><li>• Place Management</li><li>• Assurance, Risk &amp; Pensions</li></ul>	4
Director I (JNC): £99,198 - £111,172	<ul style="list-style-type: none"><li>• Education, Inclusion and Children's Safeguarding</li><li>• Public Health &amp; Prevention</li><li>• Capital Delivery &amp; Housing</li><li>• People &amp; Change</li><li>• Finance</li></ul>	5
Grade 14 (NJC): £84,855 - £92,185	<ul style="list-style-type: none"><li>• Head of Financial Management</li><li>• Head of Legal &amp; Democratic Services</li></ul>	2
Grade 13 (NJC): £69,664 - £78,424	<ul style="list-style-type: none"><li>• Head of Legal Services</li></ul>	1

<sup>2</sup> At the time of writing national pay negotiations for 2026 are on-going and the final pay award is unknown at the time of writing.

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## **Annex 7 – Monitoring Officer Advice on Setting the Budget**

### **1 INTRODUCTION**

This appendix sets out, in some detail, Members' individual responsibilities to set a legal budget and how Members should approach the task. It also reminds Members about the rules concerning pecuniary and other interests.

### **2 LEGAL REQUIREMENTS**

Section 31A of the Local Government Finance Act 1992 requires budget calculations to be made before 11th March, but they are not invalid merely because they are made on or after 11th March. Nevertheless, delay in setting the Council Tax would have significant legal and financial consequences.

### **3. PROCESS FOR AGREEING THE BUDGET & CONSIDERING ALTERNATIVE BUDGET**

The Cabinet has the responsibility to prepare and propose a draft Budget to Council for its approval.

The Cabinet have formulated a budget proposal and Council Tax recommendation for the Council meeting on 24 February 2026. Such budget proposal may either take the form of a composite proposal or may include agreed core proposals and options for allocating parts of the budget.

The Council has two options available to it at the budget setting meeting. It can object to specific parts of the proposals and if it does so, must require the Leader on behalf of Cabinet to reconsider its proposals. The Council is required to give the Cabinet reason(s) why it considers those proposal(s) should be changed and it is then for the Cabinet to consider those proposed changes and the reasons put forward. Alternatively, it is open to the Council to accept the budget in its proposed form at the meeting, in which case no further action is necessary.

Council may then determine the budget on the basis of the Cabinet's recommendations, plus any insignificant changes adopted as amendments at the Council meeting.

### **ALTERNATIVE PROPOSALS**

Any alternative budget proposals must be finalised and submitted to the Section 151 Officer at least 3 working days before the day of the meeting – so by 5pm Wednesday for the following Tuesday's budget meeting.

If alternative proposals to those contained in this report are moved at the budget setting meeting, the Chief Finance Officer will need to consider if the estimates or proposed financial reserves contained in this report are

affected and whether a further report (which may be oral) is required under section 25 of the Local Government Act 2003.

If the Chief Finance Officer is unable to report on the estimates or the reserves because of the lateness of the alternative proposals, then he will **not** be able to comply with this statutory requirement.

The Constitution provides that the meeting itself (on advice from the Chief Executive) will decide whether any amendment to the budget proposals is of such significance as to amount to an “objection” to the budget to require reconsideration by the Cabinet.

If a significant proposal is accepted on a vote at Council (from those proposals notified at the Cabinet meeting), this stands as a formal objection within the terms of the law and will be referred to the Leader to secure consideration by the Cabinet and report back to the Council meeting on 5<sup>th</sup> March 2026.

When the Cabinet has considered the objections, it is required to put its proposals (which may or may not be revised) back to the Council Meeting. If the Cabinet does not agree with Council’s views on a proposed change, it is required to state why and the Council can then take those reasons into account, along with its original thoughts as to why the change was desirable. At the meeting, it is open to Council to take such decision as it sees fit on any variation from the budget as originally proposed that has been the subject of consideration under the process outlined above.

#### **4. FAILURE TO AGREE A BUDGET**

This renders the Council vulnerable to judicial review proceedings because legislation requires the Council to set the Council Tax.

It also renders Councillors individually liable for failure to fulfil fiduciary duties. The obligation to make a lawful budget each year is shared equally by each individual Member. In discharging that obligation, Members owe a fiduciary duty to the Council Taxpayer.

#### **5. FIDUCIARY DUTY**

The Budget must not include expenditure on items which would fall outside the Council’s powers. Expenditure on lawful items must be prudent, and any forecasts or assumptions such as rates of interest or inflation must themselves be rational.

Power to spend money must be exercised in good faith for the purpose for which they are conferred, and any ulterior motives risk a finding of illegality. In determining the Council’s overall budget requirement, Members are bound to have regard to the level of Council Tax necessary to sustain it. The interests of the Council Taxpayer must be balanced against those of the various service recipients.

Setting a budget is not the same as deciding what expenditure will in fact be incurred. To budget for expenditure is to estimate likely expenditure and/or make financial provision for such expenditure. In setting the budget, commitments are being entered which will have an impact on future years. Some commitments may change in future years, such as staff numbers which are capable of upward or downward adjustment at any time. Other commitments impose upon the Council future obligations which are binding and cannot be adjusted, such as loan charges to pay for capital schemes. For some specific proposals within the overall Budgetary framework, Cabinet decisions have already been made. For some other proposals, subject to relevant consultation where necessary, decisions by the Cabinet will need to be made, especially where the making of such a decision would result or would be likely to result in the permanent closure of a facility used by the public or a permanent and significant reduction in the level of services or facilities provided to the public other than where such closure or reduction in service is considered necessary by the relevant strategic director for reasons of health and safety.

Only relevant and lawful factors may be considered, and irrelevant factors must be ignored.

A Member who votes in accordance with the decision of his or her political group but who does so after considering the relevant factors and professional advice will be acting within the law. Party loyalty and party policy are capable of being relevant considerations for the individual member provided they properly exercise discretion and do not blindly follow the party line without considering the relevant factors and professional advice.

## **6. CODE OF CONDUCT CONSIDERATIONS**

Finally, under the Bath & North East Somerset Council Member Code of Conduct, members are required when reaching decisions to have regard to relevant advice from the Chief Finance Officer and the Monitoring Officer (the Chief Legal Officer). If the Council should fail to set a budget at all or fail to set a lawful budget, contrary to the advice of these two officers there may be a breach of the Code by individual members if it can be demonstrated that they have not had proper regard to the advice given.

## **DISCLOSABLE PECUNIARY INTERESTS**

Members are reminded to consider whether they have a Disclosable Pecuniary Interest (DPI) or, Other Registerable Interest (ORI) or, Non-Registerable Interest (NRI) in the setting of the council's budget. If a member has a relevant interest they must disclose the interest at the meeting, subject to the provisions in the Code in respect of sensitive interests. If the interest is a Disclosable Pecuniary Interest as set out in the Bath & North East Somerset Council Members Code of Conduct) the member may not participate in the discussions or vote on the matter, although if the interest is an Other Registerable Interest (ORI) or Non

Registerable Interest (NRI), the member may remain for the purposes of making representations or asking questions as a member of the public could but must not vote or take part in the debate.

Members should seek early advice to avoid any confusion on the night of the meeting if they consider they have a relevant interest.

### **Dispensations**

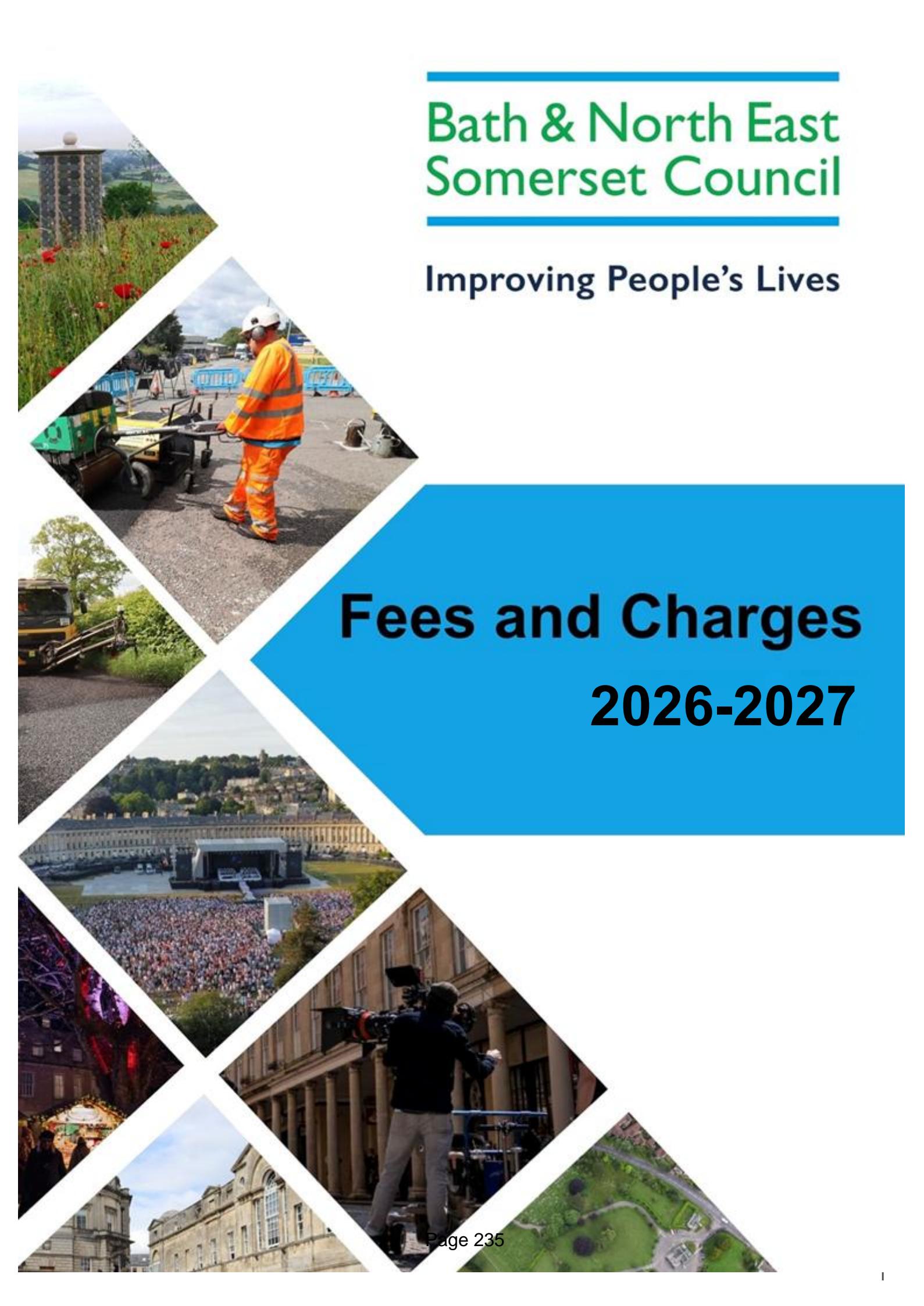
The Council's Monitoring Officer may, on written request from a Member, grant a dispensation to relieve the applicant from the restrictions on participation and voting.

Dispensation may be granted if:

- Without the dispensation the number of persons prohibited from participating would be so great a proportion to impede the effectiveness of the meeting.
- The representation of different political groups would be affected and likely to alter the likely outcome of any voting at the meeting.
- Granting the dispensation is in the interests of persons living in the area.
- Every Member of the Council's Cabinet would be precluded from participating in the meeting; -
- It is appropriate to grant a dispensation.

A dispensation will mean that the Member to whom it is granted can speak and vote on a matter in which they have a relevant interest.

**Michael Hewitt, Head of Legal & Democratic Services (Monitoring Officer)**



**Bath & North East  
Somerset Council**

**Improving People's Lives**

# **Fees and Charges 2026-2027**

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# Bereavement



# Ashes - Gardens

Including Replacement, Repainting, Cleaning

Englishcombe & Valley View Gardens - New Plot	Charge
Englishcombe/Valley View Garden*	£1,841.00
Interment Fee	£283.00
Interment Fee following cremation elsewhere	£350.00

Sunset Walk - New Plot	Charge
Sunset Walk	£1,638.00
Interment Fee	£283.00
Interment Fee following cremation elsewhere	£350.00

Pergola Garden - New Plot	Charge
Pergola Garden*	£1,486.00
Interment Fee	£283.00
Interment Fee following cremation elsewhere	£350.00

Sanctum Vaults - New Vault	Charge
Sanctum 2000 Vault* Above ground vault for up to 2 ashes placements	£2,000.00
Sanctum Family Vault* Above ground vault for up to 4 ashes placements	£4,000.00
Placement Fee (first placement fee included)	£103.00

Circle Gardens - New Plot	Charge
Circle Garden*	£1,638.00
Interment Fee	£283.00
Interment Fee following cremation elsewhere	£350.00

\* denotes VAT included

Added Inscription/Interment with Repaint - All Gardens (except where indicated)	Charge
Added Inscription (per Character)*	£5.50
Repainting of an Englishcombe/Valley View/Alpine/Pergola/New Conifer/Old Conifer/Heather Garden Stone* (in addition to an added inscription only)	£185.00
Interment Fee	£283.00
Interment Fee following cremation elsewhere	£350.00

**Please note: Some areas of Bereavement Services involve third party providers and therefore, prices are subject to change.**

Replacement Memorial/Interment - All Gardens	Charge
Replacement Memorial * (including up to 60 characters)	Price on Request
Added Inscription (per Character)*	£5.50
Interment Fee	£269.00
Interment Fee following cremation elsewhere	£350.00
Administration Fee for processing Garden buy-back	£60.00

Optional Extras	Charge
Extra letters over 60 characters (each)* (Applicable to all new & replacement memorials)	£5.50
Repainting of an Englishcombe/Valley View/Alpine/Pergola/New Conifer/Old Conifer/Heather Garden Stone* (in addition to an added inscription only)	£185.00
Photo plaque*	£294.00
Simple rose or cross design on stone (same colour as lettering)*	£175.00
Complex design on stone - i.e. Service Badges/colour motifs*	£236.00
Rose tile*	£175.00
Provision of in-house Celebrant for Interment of Cremated Remains (subject to availability)	£70.00
Saturday ashes Supplement for shrubberies / scatterings (subject to staff availability)	£161.00
Saturday ashes supplement for graves or gardens (subject to staff availability)	£250.00

**\* denotes VAT included**

Repaint Only - All Gardens (except where indicated)	Charge
Repaint only of a Englishcombe/Valley View/Alpine/Pergola/New Conifer/Old Conifer/Heather Garden Stone* (no added inscription)	£277.00
Cleaning of a Peace Garden Stone	Charge
Clean only*	£296.00

**\* denotes VAT included**

# Burials

## Burial Including Transfers, Searches, Grave Maintenance

Exclusive Right of Interment	Babies up to and including 23 weeks gestation	Children from 24 weeks gestation up to and including 17 years	18+ years Deceased or Owner is Resident of BANES	18+ years Deceased or Owner is Non Resident of BANES
Standard Grave 30 years		£1,235.00 (zero charge to family. To be claimed via Child Funeral Fund)	£1,235.00	£2,470.00
Standard Grave 50 years	N/A	£2,052.00	£2,052.00	£4,105.00
Standard Grave 75 years	N/A	£2,579.00	£2,579.00	£5,038.00
Standard Grave 99 years	N/A	£2,971.00	£2,971.00	£5,943.00
Vault Grave (incl interment fee) 50 years	N/A	£4,003.00	£4,003.00	£8,007.00
Vault Grave (incl interment fee) 75 years	N/A	£5,747.00	£5,747.00	£11,495.00
Vault Grave (incl interment fee) 99 years	N/A	£6,141.00	£6,141.00	£12,283.00
Additional 20 years to existing term (excluding vault graves)	N/A	£817.00	£817.00	£1,635.00
New baby grave in designated area	£0.00	N/A	N/A	N/A

Graves for children up to and including age 16 years will be in a designated area unless the family wish to purchase the Exclusive Right of Interment in a priVATE grave.

Full Burial Interment Fee	Babies up to and including 23 weeks gestation	Children from 24 weeks gestation up to and including 17 years	18+ years Deceased or Owner is Resident or Non Resident of BANES
Interment fee for single depth	£0.00	£422.00 (zero charge to family. To be claimed via Child Funeral Fund)	£941.00
Interment fee for double depth (where achievable)	N/A	£526.00 (zero charge to family. To be claimed via Child Funeral Fund)	£1,160.00

\* denotes VAT included

Burial Extras	Charge
Use of Hilltop Chapel per 45-minute slot	£349.00
Celebrancy provided by our in-house celebrant	£230.00
Celebrancy provided by our in-house celebrant – double slot	£279.00
Late arrival and over run of time slot penalty	From £150.00
Tree and plaque for green burial grave*	£439.00
Cancellation fee once digging of any grave has commenced	£438.00
Full Exhumation (based on individual assessments of the grave)	£3,944.00
Ashes Exhumation (based on individual assessments of the grave)	£289.00

Prepurchase Exclusive Right of Interment in Full Burial Graves	Purchaser is Resident of BANES	Purchaser is Non Resident of BANES
Prepurchase Standard Grave 30 years	£1,844.00	£3,689.00
Prepurchase Standard Grave 50 years	£3,072.00	£6,142.00
Prepurchase Standard Grave 75 years	£3,599.00	£7,195.00
Prepurchase Standard Grave 99 years	£3,992.00	£7,983.00
Prepurchase Vault Grave incl interment fee 50 years	£6,028.00	£12,055.00
Prepurchase Vault Grave incl interment fee 75 years	£6,398.00	£12,795.00
Prepurchase Vault Grave incl interment fee 99 years	£6,659.00	£13,320.00
Additional 20 years to existing term (excluding vault graves)	£1,228.00	£2,453.00
Administration Fee for processing Grave buy-back	£120.00	£120.00

Transfer of Ownership of Right of Interment	Charge
Simple i.e. probate to executors	£80.00
Standard - paperwork	£120.00
Complex i.e. onward transfer required	£195.00
Express Service - paperwork to be drawn up within 3 days	plus £69.00

\* denotes VAT included

Searches	Charge
Tracing fees (per name)*	£56.00
Mapping only of a known grave number (closed burial grounds)	£32.00
Marking a traced grave in any cemetery*	£56.00

\* denotes VAT included

# Cremations

## Cremation & Media

Direct Cremations - Orchard Entrance	Charge		
Unattended Direct Cremation (the deceased to be brought into our care through The Orchard entrance without anyone attending other than the funeral director). 0830hrs - 1600hrs at half hourly intervals	£399.00		
Attended Direct Cremation - to witness - maximum of 6 mourners (the deceased to be brought into our care through The Orchard entrance). 0830hrs - 1600hrs at half hourly intervals - maximum of 10 minutes	£485.00		
Valley & Hilltop Chapel	Babies up to and including 23 weeks gestation	Children from 24 weeks gestation up to and including 17 years	18+ years
45 minute early morning service 9.00am	N/A	N/A	£974.00
45 minute price sensitive service 10.00 a.m.	£0.00	£463.00 (Zero charge to family. To be claimed via Child Funeral Fund)	£1,079.00
45 minute standard service 11.00 am, 12.00 pm, 1.00pm, 2.00 pm, 3.00 pm, 4.00pm.	£0.00	£585.00 (Zero charge to family. To be claimed via Child Funeral Fund)	£1,266.00

### The cremation fee includes:

- a. Medical referees fee.
- b. Certificate of cremation.
- c. Provision of organ (not organist)
- d. Provision of Obitus System
- e. Scattering of remains on communal area - unwitnessed (Note: a charge will apply to FD's returning ashes after 6 months - See extras below).
- f. Recycling of metals through a national scheme with profits going to charity.
- g. Abatement of mercury from emissions.
- h. Facility to accept large coffins.
- i. Provision of biodegradable container as required.

Cremation Extras	Charge
Use of the Valley Chapel (following a service in the Hilltop Chapel)	£514.00
Extended use of Valley Chapel per time slot (per 45 mins subject to availability)	£514.00
Extended use of Hilltop Chapel per time slot (per 45mins subject to availability)	£349.00
Celebrancy provided by our in-house celebrant	£230.00
Celebrancy provided by our in-house celebrant – double slot	£279.00
Saturday Supplement (subject to staff availability)	£514.00
Bringing the deceased into our care prior to a cremation	£25.00
Storage of remains (six months free of charge - remains held longer than this period will incur a monthly charge)	£62.00
Postage of remains to address in UK*	from £88.00
Ashes being returned by Funeral Directors after 6 months to inter/scatter in a communal area unwitnessed	each £60.00
Late arrival and over run of time slot penalty	From £150.00
Duplicate Cremation Certificate	£14.00

## Media Charges

Cremation Extras	Charge
Live Web Cast + 28 day Downloadable	£71.00
Keepsake Copy of Webcast (DVD/Blu-ray/USB stick/CD) (First copy £71 thereafter £32 per copy)	£71.00
Single Photo Tribute (additional photos £14)	£0.00
Basic slideshow (up to 25 photos shown on loop with simple transitions. This does not include music)	£69.00
Music slideshow (up to 25 photos set to music with fade transitions)	£86.00
Additional 25 Photos for any Slideshow or Pro Tribute)	£29.00
Digital downloadable Recording of a Pro Tribute	£71.00
Digital Downloadable Recording of a Pro Visual Tribute	£71.00
Family-Made Video Checking (checking and preparation of video supplied by family or third party (played once at a time)	£34.00
Obitus Extra Work - for either adding video to a Pro Tribute, revisions, late fee, or major departure from a standard product	£34.00

\* denotes VAT included

# Ashes

## Cremated Remains

Including Crem Plots for 4, Scatterings, Green Ashes Burial, Caskets & Urns

Exclusive Right of Interment - Cremated Remains Plots	Deceased or Owner is a Resident of BANES	Deceased or Owner is non Resident of BANES
Cremation Plot for 4 (for 30 years)	£634.00	£1,264.00
Cremation Plot for 4 (for 50 years)	£1,028.00	£2,054.00
Cremation Plot for 4 (for 75 years)	£1,292.00	£2,580.00
Cremation Plot for 4 (for 99 years)	£1,486.00	£2,972.00
Additional 20 years to existing term	£395.00	£791.00

Interment Options - Cremated Remains	Charge
Witnessed interment in a shrubbery or scattering in The Grassland (to be arranged and paid by applicant of cremation)	£103.00
Interment of remains in a shrubbery following cremation elsewhere (to be arranged and paid by applicant of cremation)	£182.00
Scattering of remains on The Grassland following cremation elsewhere (to be arranged and paid by applicant of cremation)	£182.00
Cremated remains interment (PriVATE Grave/Garden plot) open cemetery	£283.00
Cremated remains interment (PriVATE Grave/Garden plot) closed cemetery	£384.00
Cremated remains interment (PriVATE Grave/Garden Plot) following cremation elsewhere open cemetery	£368.00
Cremated remains interment (PriVATE Grave/Garden Plot) following cremation elsewhere closed cemetery	£469.00
Cremated remains interment at full burial depth open cemetery	£565.00
Cremated remains interment at full burial depth closed cemetery	£767.00
Additional cremated remains to be interred or scattered simultaneously in the same plot	£60.00
Additional Cremated remains to be interred or scattered simultaneously in the same plot following cremation elsewhere	£101.00
Administration fee for returned cremated remains to be interred or scattered at our convenience	£60.00
Provision of in-house Celebrant for interment of cremated remains	£70.00
Saturday Supplement for graves or gardens (subject to staff availability)	£242.00
Saturday supplement for shrubberies / scatterings (subject to staff availability)	£169.00

Pre-Purchase Exclusive Right of Interment in Cremated Remains Plots	Deceased or Owner is a Resident of BANES	Deceased or Owner is a non Resident of BANES
Prepurchase Cremation Plot for 4 (for 30 years)	£939.00	£1,876.00
Prepurchase Cremation Plot for 4 (for 50 years)	£1,608.00	£3,216.00
Prepurchase Cremation Plot for 4 (for 75 years)	£1,872.00	£3,743.00
Prepurchase Cremation Plot for 4 (for 99 years)	£2,069.00	£4,135.00
Additional 20 years to existing term excl vault graves	£669.00	£1,341.00

Cremated Remains - Scatterings	Charge
The Meadow or Glade scattering	£182.00
Additional cremated remains to be scattered on The Meadow or Glade following cremation elsewhere	£262.00
The Meadow or Glade plaque* (on 25-year lease)	£304.00
Choice of motif on The Meadow or The Glade plaque*	£94.00
Additional lease of 25 years for The Meadow or Glade plaque on expiry of previous lease	£153.00
The Glade Mushroom Plaque	£304.00

Cremated Remains - Green Burial	Charge
Coppice, Locksbrook and Haycombe Other* (plus interment)	£1,187.00
Additional Plaque*	£283.00

Caskets/Urns <small>(Third party provider prices subject to change)</small>	Charge
Light & Dark Oak Caskets	£115.00
Scatter Tube - full size	£39.00
Scatter Tube - keep sake	£11.00
Brass Urns* - full size	£189.00
Brass Urns* - keep sake	£56.00
Sanctum 2000 full size urn (grey or white)	£189.00
3" Hand Held Heart*	£63.00
5" Keep Sake Heart*	£106.00
Wooden Keep Sake Heart – including inscription on front	£85.00
Wooden Keep Sake Heart – additional inscription on the reverse	£9.00

Ashes Into Glass	Charge
Jewellery & Paperweights	(As per brochure)
Yarwood Memorial Products	Charge
Urns, Keepsakes & Jewellery	(As per brochure)

**\* denotes VAT included**

# Memorials

## Memorials Only

Babies	Charge
Baby Vase Blocks including plaque and inscription	£594.00
Butterfly Baby Shrubbery metal plaque	£135.00
Old Babies Section - White Marble Shrubbery Memorial* (including up to 20 characters)	£469.00
Old Babies Section - Extra letters over 20 characters* (each)	£4.00
Butterfly Section Tower plaques*	£243.00
Forest Friends Frieze – Memorial butterfly incl wording	£103.00

Benches	Charge
Eco Bench of Remembrance (25 year lease period) - including a bronze plaque*	£1,618.00
Extra plaque for Eco Bench of Remembrance until end of lease period*	£298.00
Additional 25 year lease of Eco Bench at expiry of previous lease	£810.00
One off clean of Wooden Bench of Remembrance*	£178.00
Additional 10 year lease of wooden bench on expiry of previous lease	£810.00
Granite Backed Bench of Remembrance (25 year lease period) - including a granite plaque*	£1,844.00
Additional 25 year lease of backed granite bench at expiry of previous lease	£922.00
Granite Backless Bench of Remembrance (25 year lease period) - including a granite plaque*	£1,540.00
Additional 25 year lease of backless granite bench at expiry of previous lease	£770.00
Motif on granite bench plaque	£178.00
Photo plaque on granite bench plaque	£170.00
Extra plaque for Granite Backed & Backless Bench of Remembrance until end of lease period*	£243.00

Book of Remembrance Memory Tree	Charge
Leaf on Book of Remembrance Memory Tree (10 year lease)	£161.00
Additional 10 year lease on Leaf on Book of Remembrance Memory Tree	£81.00
Willow Memory Tree	Charge
Granite Leaf on Willow Memory Tree (10 year lease)	£161.00
Additional 10 year lease on Leaf on Willow Memory Tree	£81.00
Memorial Wall Plaques and Sweetheart Leaves	Charge
Memorial Wall Plaques*	£357.00
Extra letters over 60 characters on inscription*	£5.50
Repainting of a Memorial Wall plaque inscription	£100.00
Sweetheart Leaf with 25 year lease including inscription	£95.00
Saddlestone	Charge
Additional Inscription (per letter)*	£5.50
Repainting of a Saddlestone* <b>(in addition to an added inscription only)</b>	£186.00
Repaint only of a single Saddlestone (no added inscription)	£186.00
Repaint only of a double Saddlestone* <b>(no added inscription)</b>	£299.00

Shrubbies	Charge
Shrubbery Plaques 1 to 28*	£250.00
Shrubbery 31 - 32 Kerb Plaques (25 year lease)	£384.00
Photo Plaque for Kerb Plaque	£128.00
Motif on Kerb Plaque	£105.00
Replacement Shrubbery Memorial Stone* (includes up to 60 characters)	£1,329.00
Extra letters over 60 characters on Shrubbery Stone inscription* (each)	£5.50
Additional Inscription (per letter)* (each)	£5.50
Repainting of a Shrubbery Stone* <b>(in addition to an added inscription only)</b>	£186.00
Repaint <b>only</b> of a Shrubbery Stone* <b>(no added inscription)</b>	£278.00

Tree of Remembrance	Charge
Tree of Remembrance for a 25 year period*	£833.00
Additional lease of Tree of Remembrance for 25 years on expiry of previous lease	£416.00
Tree of Remembrance - additional plaque until end of lease*	£283.00

Miscellaneous	Charge
Photo plaque on Shrubbery Stone*	£295.00
Simple rose or cross design on Shrubbery Stone (same colour as lettering)*	£169.00
Complex design on Shrubbery Stone - i.e. Service Badges/colour motifs*	£239.00
Rose tile for Shrubbery Stone or Saddlestone*	£169.00
Temporary grave marker for full graves or cremation plots (where not already included in the interment fee)	£44.00
Aluminium flower container (gold or silver topped)*	£15.00
Aluminium flower container Lid only for Kerb Block*	£5.00

\* denotes VAT included

## Memorial Permits

Memorial Fees	Charge
New Memorial - Lawn, Traditional, Vault & Cremated Remains Sections	£298.00
New Memorial - Babies Sections (for children aged from 24 weeks gestation and up to and including 17 years old this can be claimed via the Child Funeral Fund if within 6 months of funeral)	£155.00
New Memorial - Pets Section*	£155.00
Added Inscription	£155.00
Added Memorial	£155.00
Replacement Memorial	£155.00
All Other Work (i.e. cleaning/renoVATION etc.)	£0 charge
Duplicate Permit (to replace lost original)	£28.00

\* denotes VAT included

## Book of Remembrance & Memorial Cards

Book of Remembrance & Memorial Cards	Charges
2-line entry*	£155.00
5-line entry*	£196.00
8-line entry*	£257.00
Simple designs i.e. flowers*	£74.00
Complex design i.e. service badges/heraldic designs*	£130.00

\* denotes VAT included

## Pets (incl Pet Book of Remembrance)

Pet Burials and Ashes	Charges
1st Interment incl Exclusive Right of Burial (for 30 years)*	£499.00
2nd Interment* (for older plots only - check previous burial record)	£257.00
Pet coffin – extra small*	£197.00
Pet Coffin – Small	£223.00
Pet coffin - medium*	£239.00
Pet coffin - large*	£273.00
Memorial boulder for cremated remains (incl first interment)	£594.00
Cremated remains including plaque*	£230.00
Re-opening for ashes*	£110.00
Prepurchase of Right of Interment for 30 years*	£771.00
Renewal of Exclusive Right of Interment (per unit of 10 years)*	£163.00

Pet Book of Remembrance	Charges
2-line entry*	£155.00
5-line entry*	£196.00
Simple designs i.e. flowers*	£74.00
Complex design i.e. animal*	£130.00

\* denotes VAT included

## Memorial Permits

New Memorial or Gardens development	Charges
New Memorial	£POA
New Garden	£POA

# Public Protection



# Dog Warden

Service	2026/27	Notes
Stray dogs 1 to 3 days kenneling	£184.00 VAT exempt	per recovery plus any veterinary expenses and/or any other associated fees
Stray dogs 4 to 7 days kenneling	£351 VAT exempt	per recovery plus any veterinary expenses and/or any other associated fees
Returned Stray dog charge without kenneling fee	£124	

## Environmental Protection fees

Service	2026/27	Notes
Contaminated land advice	£98.00	per hour, +VAT

## Food Safety Fees

### Training Courses

Service	2026/27	Notes
RSPH Level 2 Award in Identifying and Controlling Allergy risks	£95.00	Includes VAT
Exam re-sit fee	£50.00	Includes VAT

### Food Hygiene

Service	2026/27	Notes
Safer Food Better Business Pack	£21.00	VAT exempt
Safer Food Better Business - additional Diary Sheets	£13.00	VAT exempt
Production of health / export certificates	£98.00	Per hour. VAT exempt

# Food & Trading Standards Business Support

## Business Audit and Support

Service	2026/27	Notes
Business Audit & Support	£293.00	Includes VAT
Additional advice and consultancy - hourly rate	£98.00	Includes VAT
Bite Size - half an hour advice	£49.00	Includes VAT
FHRS Rescore -business request visit	£208.00	VAT exempt

## Primary Authority

**Option 1** - An agreement using standard contract terms with a fixed set up fee and annual renewable fee. Advice is then charged at an hourly rate

Service	2026/27	Notes
Initial set up fee and 3 hours advice	£676	VAT exempt
Annual Renewal fee including 3 hours advice	£432	VAT exempt
Advice and Consultancy- Hourly rate	£98	VAT exempt

**Option 2** - An agreement using standard contract terms and a fixed minimum amount of hourly advice, set up fee and an annual renewal fee.

Service	2026/27	Notes
Initial Set-up fee and 17 hours of advice or consultation - valid for 12 months	£2,006.00	VAT exempt
Annual Renewal Fee - including 17 hours of advice and consultation - valid for 12 months	£1,762.00	VAT exempt
Additional advice and consultancy - hourly rate	£98.00	VAT exempt

## Travelling to premises outside of B&NES

Service	2026/27	Notes
Either - hourly rate + mileage charge or public transport costs and accommodation - with prior agreement as appropriate	£98.00+0.45/mile	VAT exempt
Verification Sampling Costs - by Public Analyst and provision of test certificates	charged at cost	

# Local Authority Pollution Prevention & Control Charges (Set by DEFRA) (Part B)

## Initial Application

Service	2026/27	Notes
Standard Process (includes solvent emission activities)	£1,650. Where an application is for a combined Part B and waste application, add an extra £310.	Outside the Scope of VAT
Additional Fee for Operating without a Permit (Standard Process)	£1,188	Outside the Scope of VAT
Reduced fee activities - Dry Cleaners & PVR I	£155. Where an application is for a combined Part B and waste application, add an extra £310.	Outside the Scope of VAT
PVR I & II (combined)	£257. Where an application is for a combined Part B and waste application, add an extra £310.	Outside the Scope of VAT
Vehicle Refinishers and other reduced fee activities	£362. Where an application is for a combined Part B and waste application, add an extra £310.	Outside the Scope of VAT
Additional Fee for Operating without a Permit (Reduced Fee Activities)	£71	Outside the Scope of VAT
Mobile Plant - for 1st and 2nd permit (for mobile plant not using simplified permits)	£1,650. Where an application is for a combined Part B and waste application, add an extra £310.	Outside the Scope of VAT
Mobile Plant - for 3rd, 4th, 5th, 6th and 7th permit (for mobile plant not using simplified permits)	£985. Where an application is for a combined Part B and waste application, add an extra £310.	Outside the Scope of VAT
Mobile Plant - for 8th and each subsequent permit (for mobile plant not using simplified permits)	£498. Where an application is for a combined Part B and waste application, add an extra £310.	Outside the Scope of VAT

# Annual Subsistence Fees

Service	2026/27	Notes
Standard Process – Low risk	£772 (+£104)*	Outside the Scope of VAT
Standard Process – Medium risk	£1,161 (+£156)*	Outside the Scope of VAT
Standard Process – High risk	£1,747 (+£207)*	Outside the Scope of VAT
PVR I & Dry Cleaners – Low risk	£79	Outside the Scope of VAT
PVR I & Dry Cleaners – Medium risk	£158	Outside the Scope of VAT
PVR I & Dry Cleaners – High risk	£237	Outside the Scope of VAT
PVR I & II combined – Low risk	£113	Outside the Scope of VAT
PVR I & II combined – Medium risk	£226	Outside the Scope of VAT
PVR I & II combined – High risk	£341	Outside the Scope of VAT
Vehicle Refinishers & other reduced fee activities – Low risk	£228	Outside the Scope of VAT
Vehicle Refinishers & other reduced fee activities – Medium risk	£365	Outside the Scope of VAT
Vehicle Refinishers & other reduced fee activities – High risk	£548	Outside the Scope of VAT
Mobile Plant – Low risk - 1st and 2nd standard permit	£626	Outside the Scope of VAT
Mobile Plant – Medium risk - 1st and 2 <sup>nd</sup> standard permit	£1,034	Outside the Scope of VAT
Mobile Plant – High risk - 1st and 2 <sup>nd</sup> standard permit	£1,551	Outside the Scope of VAT
Mobile Plant – Low risk - 3rd to 7th standard permit	£385	Outside the Scope of VAT
Mobile Plant – Medium risk - 3rd to 7 <sup>th</sup> standard permit	£617	Outside the Scope of VAT
Mobile Plant – High risk - 3rd to 7th standard permit	£924	Outside the Scope of VAT
Mobile Plant - Low risk - 8th and subsequent standard permit	£198	Outside the Scope of VAT
Mobile Plant – Medium risk - 8th and subsequent standard permit	£314	Outside the Scope of VAT
Mobile Plant – High risk - 8th and subsequent standard permit	£473	Outside the Scope of VAT
Late Payment Fee**	£52	Outside the Scope of VAT
Payment in instalments	£38	Outside the Scope of VAT

\*Additional amounts in brackets must be charged where the permit subsistence fee is for a combined Part B and waste installation

\*\*Applies when an invoice remains unpaid for 89 weeks from the date of issue

## Transfer and Surrender

Service	2026/27	Notes
Standard Process - Transfer	£169	Outside the Scope of VAT
Standard Process - Partial transfer	£497	Outside the Scope of VAT
Surrender - all Part B activities	£FOC	
Reduced fee activities - Transfer	£FOC	
Reduced fee activities – Partial transfer	£47	Outside the Scope of VAT
Temporary transfer for mobile plant - First transfer	£53	Outside the Scope of VAT
Temporary transfer for mobile plant - Repeat transfer	£FOC	
Temporary transfer for mobile plant - Following enforcement	£53	Outside the Scope of VAT

Substantial Change	2026/27	Notes
Standard Process	£1,050	Outside the Scope of VAT
Reduced fee activities	£102.00	Outside the Scope of VAT
Standard Process where the substantial change results in a new PPC activity	£1,650	Outside the Scope of VAT

## Copy of Public Register

Service	2026/27	Notes
Basic	£10.00	
Detailed	£100.00	

# Local Authority Integrated Pollution Prevention & Control Charges (Set by DEFRA) (Part A2 & SWIP)

Service	2026/27	Notes
Initial Application	£3,363	Outside the Scope of VAT
Additional fee for operating without a permit	£1,188	Outside the Scope of VAT
Annual Subsistence Fee – Low risk*	£1,343	Outside the Scope of VAT
Annual Subsistence Fee – Medium risk*	£1,507	Outside the Scope of VAT
Annual Subsistence Fee – High risk*	£2,230	Outside the Scope of VAT
Variation	£1,368	Outside the Scope of VAT
Substantial Variation (where 9(2)(a) or 9(2)(b) of the scheme applies)	£3,363	Outside the Scope of VAT
Transfer	£235	Outside the Scope of VAT
Partial transfer	£698	Outside the Scope of VAT
Surrender	£698	Outside the Scope of VAT
Late Payment Fee**	£52	Outside the Scope of VAT
Payment in instalments	£38	Outside the Scope of VAT

\*Additional £104 fee applies where reporting under the UK-PRTR is required

\*\*Applies when an invoice remains unpaid for 8 weeks from the date of issue

## Copy of Public Register

Service	2026/27	Notes
Basic	£10.00	
Detailed	£100.00	

# Private Water Supply Charges

Service	2026/27	Notes
Risk Assessment (site & desk based)	£98 per hour	Outside the Scope of VAT
Sampling (each visit)	£98 per hour	Outside the Scope of VAT - sampling analysis costs to be added
Investigation	£98 per hour	Outside the Scope of VAT
Granting an authorisation	£98 per hour	Outside the Scope of VAT
Analysing a sample - Taken under regulations 8 or 10	£POA	as charged by analysing laboratory
Analysing a sample - Taken during Group A monitoring	£POA	as charged by analysing laboratory
Analysing a sample - Taken during Group B monitoring	£POA	as charged by analysing laboratory

# Pest Control Charges

## Commercial Pest

Service	2026/27	Notes
Rats	£427	includes VAT
Mice	£427	includes VAT
Additional visit for rodents	£154	includes VAT
Wasps/Hornets' nest	£166	includes VAT
additional wasp nest (at time of treatment)	£66	includes VAT
Bedbugs, Fleas and Carpet Moths 1-2 rooms (Initial assessment and 1 treatment)	£395	includes VAT
Bedbugs, Fleas and Carpet Moths 3-4 rooms (Initial assessment and 1 treatment)	£540	includes VAT
Bedbugs, Fleas and Carpet Moths 5 rooms (Initial assessment and 1 treatment)	£694	includes VAT
Bedbugs, Fleas and Carpet Moths 6-10 rooms (Initial assessment and 1 treatment)	£1310	includes VAT
Additional visit Bedbugs, Fleas and Carpet Moths 1-2 rooms (normal business hours)	£309	includes VAT
Additional visit Bedbugs, Fleas and Carpet Moths 3-4 rooms (normal business hours)	£463	includes VAT
Additional visit Bedbugs, Fleas and Carpet Moths 5 rooms (normal business hours)	£617	includes VAT
Additional visit Bedbugs, Fleas and Carpet Moths 6-10 rooms (normal business hours)	£1234	includes VAT
Ants (2 visits within 4 weeks of the initial visit)	£231	includes VAT
Cockroaches (initial Assessment & 2 visits)	£231	includes VAT
Cockroaches (additional site visits)	£107	includes VAT
Cluster Flies - (per attic)	£161	includes VAT
Commercial Contract prices	£77	includes VAT

## Domestic Pest

Service	2026/27	Notes
Rats (up to 3 visits)	£209/£105	Incl VAT. Lower figure is for households on means tested benefit
Mice (up to 3 visits)	£209/£105	Incl VAT. Lower figure is for households on means tested benefit
Wasps/Hornet nest (1 visit)	£128/£81	Incl VAT. Lower figure is for households on means tested benefit
Additional nest (at time of treatment)	£39/£39	Incl VAT. Lower figure is for households on means tested benefit
Cockroaches (up to 3 visits)	£231/£116	Incl VAT. Lower figure is for households on means tested benefit
Cluster Flies	£154/£77	Incl VAT. Lower figure is for households on means tested benefit
Bedbugs, Fleas and Carpet Moths 1-2 rooms (Initial assessment and 1 treatment)	£231/£116	Incl VAT. Lower figure is for households on means tested benefit
Bedbugs, Fleas and Carpet Moths 3-4 rooms (Initial assessment and 1 treatment)	£385/£193	Incl VAT. Lower figure is for households on means tested benefit
Bedbugs, Fleas and Carpet Moths 5 rooms (Initial assessment and 1 treatment)	£540/£270	Incl VAT. Lower figure is for households on means tested benefit
Bedbugs, Fleas and Carpet Moths 6-10 rooms (Initial assessment and 1 treatment)	£694/£347	Incl VAT. Lower figure is for households on means tested benefit
Additional visit Bedbugs, Fleas and Carpet Moths 1-2 rooms (normal business hours)	£154/£77	Incl VAT. Lower figure is for households on means tested benefit
Additional visit Bedbugs, Fleas and Carpet Moths 3-4 rooms (normal business hours)	£309/£154	Incl VAT. Lower figure is for households on means tested benefit
Additional visit Bedbugs, Fleas and Carpet Moths 5 rooms (normal business hours)	£463/£231	Incl VAT. Lower figure is for households on means tested benefit
Additional visit Bedbugs, Fleas and Carpet Moths 6-10 rooms (normal business hours)	£617/309	Incl VAT. Lower figure is for households on means tested benefit
Call out fee if no treatment takes place	£77/£77	Incl VAT.
Missed appointment	£77/77	Incl VAT.
Out of hours charge (per hour per officer)	£107/£107	Incl VAT.
Administration charge for late cancellation	£77/£77	Incl VAT.
Administration charge for cancellation	£39/£39	Incl VAT.

# Trading Standards Fees

## Metrology

Please note that some charges may require the addition of VAT. Check with officers prior to work being undertaken.

Charges for BATH & NORTH EAST SOMERSET COUNCIL Trading Standards

Licence or Service	Guide Time (hrs)	Charge
Weighbridge Operators Certificate		£75 (VAT exempt)
Petrol Pump Verification		£185.00 (+VAT) per officer per hour

## Explosives - New Application

Storage between 0 and 250kg	Set by statutory instrument and subject to change
1 year	£119.00
2 years	£154.00
3 years	£190.00
4 years	£226.00
5 years	£260.00

## Explosives - Renewal

Storage between 0 and 250kg	Set by statutory instrument and subject to change
1 year	£59.00
2 years	£94.00
3 years	£132.00
4 years	£166.00
5 years	£202.00

## Explosives - New Application

Storage between 250kg and 2000kg	Set by statutory instrument and subject to change
1 year	£202.00
2 years	£266.00
3 years	£333.00
4 years	£409.00
5 years	£463.00

## Explosives - Renewal

Storage between 0 and 250kg and 2000kg	Set by statutory instrument and subject to change
1 year	£94.00
2 years	£161.00
3 years	£226.00
4 years	£291.00
5 years	£357.00

Licence Activity	Statutory fee	2026/27
Fireworks (Set Periods) - New	Yes	banded on size (please see Trading Standards Explosives fees)
Fireworks (Set Periods) - Renewal	Yes	banded on size (please see Trading Standards Explosives fees)
Fireworks (All Year) - New	No	£500.00
Fireworks (All Year) - Renewal	No	£500.00
Fireworks (All Year) - Maintenance	No	£7.00
Petroleum Storage Certificate - Applications	Yes	banded on size (please see Petroleum Storage fees below)

An explosives licence is required to store fireworks and sell them in set periods (Bonfire Night, New Year's Eve, Chinese New Year, and Diwali). Anyone wishing to sell fireworks outside these periods must have an explosives licence and also a year round Fireworks licence.

## Miscellaneous fees

Set by statutory instrument	
Vary Name & Address	£40.00
Transfer Licence	£40.00
Replacement Licence	£40.00
Other variation	£98.00 per officer per hour

## Petroleum Storage

Petroleum Storage Licence	Charge
Storage up to 2,500 litres	£48.00
Storage between 2,500 and 50,000 litres	£66.00
Storage over 50,000 litres	£137.00
Supply of information on Petroleum storage sites.	£98.00 per officer per hour

## Trading Standards Buy with Confidence fees

Buy with Confidence membership - Existing Members pre-April 2016. All prices excluding VAT

Buy with Confidence Membership (existing members)	Charge
Sole trader - No employees	£160
1-5 employees	£270
6-15 employees	£325
16+ employees	£420

## Buy with Confidence Membership - National Scheme

New Members from 01/04/2016. All prices excluding VAT

Buy with Confidence categories	Charge
Initial Application Fee	Dependent on size £159; £220; £277. Price On Application
1-5 employees	£295
6-20 employees	£440
21-50 employees	£585
50+ employees	POA

# Licensing Charges

## Animals

Licence Activity	Statutory fee	2026/27
New	No	£805.00
Renewal	No	£461.00
Maintenance (Annual Fee)	No	£284.00
Variation	No	£207.00
DWA - New	No	£572.00
DWA - Maintenance (Annual Fee)	No	£216.00
Zoo - New	No	£1,887.00
Zoo - Renewal	No	£1,669.00
Zoo - Maintenance	No	£873.00
All - Replacement Licence	No	£12
All - Pre-Application Advice	No	£183 + VAT
All - Checking Service	No	£49 + VAT

# Gambling

Licence Activity	Statutory fee	2026/27
Club Machines - New	Yes	£200.00
Club Machines - Variation	Yes	£100.00
Club Machines - Transfer	Yes	£25.00
Club Machines - Change of Name	Yes	£25.00
Club Machines - Copy of Permit	Yes	£15.00
Club Machines - Maintenance	Yes	£50.00
Lottery - Applications	Yes	£40.00
Lottery - Maintenance (Annual Fee)	Yes	£20.00
Premises - New	No	£427.00
Premises - Variation	No	£427.00
Premises - Transfer	No	£266.00
Premises - Maintenance (Annual Fee)	No	£564.00
Pub Machines – New (Permit)	Yes	£150.00
Pub Machines – New (Notification)	Yes	£50.00
Pub Machines - Variation	Yes	£100.00
Pub Machines - Transfer	Yes	£25.00
Pub Machines - Change of Name	Yes	£25.00
Pub Machines - Copy of Permit	Yes	£15.00
Pub Machines - Maintenance-Permits	Yes	£50.00
Occasional Use Licence	Yes	£0.00
Temporary Use Licence	No	£141.00
All - Pre-Application Advice	No	£183.00 + VAT
All - Checking Service	No	£49.00 + VAT

Licence Activity	Statutory fee	2026/27
Premises - New	Yes	banded on size - please request charge
Premises - Variation	Yes	banded on size - please request charge
Premises - Transfer	Yes	£23.00
Premises - DPS Variation	Yes	£23.00
Premises - DPS Removal	Yes	£23.00
Premises - Minor Variation	Yes	£89.00
Premises - Change of Details	Yes	£10.50
Premises - Replacement Licence	Yes	£10.50
Premises - Provisional Statement	Yes	£315.00
Premises - Notification of Interest	Yes	£21.00
Premises - Interim Authority Notice	Yes	£23.00
Premises - Maintenance (Annual Fee)	Yes	banded on size - please request charge
Premises - Pre-Application Advice	No	£183.00 + VAT
Premises - Checking Service	No	£49.00 + VAT
Club - New	Yes	banded on size - please request charge
Club - Variation	Yes	banded on size - please request charge
Club - Change of Details	Yes	£10.50
Club - Replacement Certificate	Yes	£10.50
Club - Notification of Interest	Yes	£21.00
Club - Interim Authority Notice	Yes	£23.00
Club - Maintenance (Annual Fee)	Yes	banded on size - please request charge
Club - Pre-Application Advice	No	£183.00 + VAT
Club - Checking Service	No	£49.00 + VAT
Personal - New	Yes	£37.00
Personal - Change of Details	Yes	£10.50
Personal - Replacement Licence	Yes	£10.50
Personal - Pre-Application Advice	No	£183.00 + VAT
Personal - Checking Service	No	£49.00 + VAT
Temporary Event Notice (TEN) - New	Yes	£21.00
TEN - Replacement	Yes	£10.50
TEN - Pre-Application Advice	No	£183.00 + VAT
TEN - Checking Service	No	£49.00 + VAT

## Pavement Licence

Licence Activity	Statutory fee	2026/27
Application	No	£500.00
Renewal	No	£350
Replacement Licence	No	£12
Pre-Application Advice	No	£183.00 + VAT
Checking Service	No	£49.00 + VAT

## Amenities on the Highway

Licence Activity	Statutory fee	2026/27
Application	No	£217.00
Maintenance	No	£259
Transfer	No	£62
Replacement Permit	No	£10.50
Pre-Application Advice	No	£183.00 + VAT
Checking Service	No	£49.00 + VAT

## Street Trading

Licence Activity	Statutory fee	2026/27
Individual Trader - New (including consultation)	No	£581.00
Individual Trader - Renewal	No	£49.00
Individual Trader - Maintenance	No	£3,474.00
Individual Trader - Variation	No	£97.00
Individual Trader - Consultation	No	£194.00
Market Organiser - New	No	£581.00
Market Organiser - Renewal	No	£49.00
Market Organiser - Maintenance	No	£3,631.00
Market Organiser - Variation	No	£97.00
Market Organiser - Consultation	No	£194.00
Christmas Market - New	No	£475.00
Christmas Market - Renewal	No	£49.00
Christmas Market - Maintenance	No	£7554.00
Christmas Market - Variation	No	£97.00
Christmas Market - Consultation	No	£194.00
Busker - New	No	£94.00
Busker - Renewal	No	£48.00
Mobile Artist - New	No	£94.00
Mobile Artist - Renewal	No	£48.00
All - Badge Fee	No	£14.00
All - Replacement Licence	No	£14.00
All - Pre-Application Advice	No	£183.00 +VAT
All - Checking Service	No	£49.00 + VAT

## Taxi Drivers

Licence Activity	Statutory fee	2026/27
New	No	£615.00
Renewal	No	£517.00
Knowledge Test –New Applicants	No	£97.00
Language Test	No	£131.00
Knowledge Retest	No	£97.00
Paper DBS	No	£123.00
Replacement Licence	No	£12.00
Pre-Application Advice	No	£183.00 + VAT
Checking Service	No	£49.00 + VAT

## Taxi Vehicles (inc. Operators)

Licence Activity	Statutory fee	2026/27
HC - New (Zone 1)	No	£94.00
HC - New (Zone 2)	No	£77.00
HC - Renewal (Zone 1)	No	£237.00
HC - Renewal (Zone 2)	No	£204.00
HC - Change of Vehicle	No	£77.00
HC - Proprietorship Transfer	No	£40.00

Licence Activity	Statutory fee	2026/27
HC - Roof Sign	No	£147.00
HC - Replacement Licence	No	£12.00
HC - Pre-Application Advice	No	£183.00 +VAT
HC - Checking Service	No	£49.00 +VAT
PH - New	No	£77.00
PH - Renewal	No	£178.00
PH - Change of Vehicle	No	£77.00
PH - Proprietorship Transfer	No	£40.00
PH - Roof Sign	No	£88.00
PH - Replacement Licence	No	£12.00
PH - Pre-Application Advice	No	£183.00 +VAT
PH - Checking Service	No	£49.00 +VAT
Operator - New	No	£449.00
Operator - Renewal	No	£509.00
Operator - Replacement Licence	No	£12.00
Operator - Pre-Application Advice	No	£183.00 +VAT
Operator - Checking Service	No	£49.00 +VAT

## Other Licences

Licence Activity	Statutory fee	2026/27
Charity - House to House	Yes	£0.00
Charity - Street Collections	Yes	£0.00
Hypnotism - Applications	No	£97.00
Hypnotism - Maintenance	No	£49.00
Film Classification - Applications	No	£97 per hour or part thereof
Piercing (Personal) - Applications	No	£189.00
Piercing (Premises) - Applications	No	£516.00
Promotional Pitches	No	£88.00
Scrap Metal - New	No	£225.00
Scrap Metal - Renewal	No	£225.00
Scrap Metal - Variation	No	£225.00
Scrap Metal - Change of Details	No	£12.00
Scrap Metal - Maintenance	No	£277.00
Sex - New	No	£1,937.00
Sex - Renewal	No	£136.00
Sex - Maintenance	No	£291.00
All - Replacement Licence	No	£12.00
All - Pre-Application Advice	No	£183.00 +VAT
All - Checking Service	No	£49.00 +VAT

## Other Fees

Licence Activity	Statutory fee	2026/27
Business Advice and Support (Pre-App)	No	£183.00 + VAT
Checking Service	No	£49.00 + VAT
Replacement Licence	No	£12.00
Office Administration Fee for late payments etc.	No	£97.00

# Business Waste Collection Service



# Bin Costs

## Business Waste Prices (No VAT)

### Recycling materials: Paper & cardboard (mixed or separated)

Container	2026/27
240 litre wheeled bin	£6.40
360 litre wheeled bin	£6.72
660 litre wheeled bin	£8.30
1100 litre wheeled bin	£11.81
Sack (minimum order 20)	£2.63
Stickers for cardboard bundles (minimum order 20)	£2.63

### Recycling Materials: Cans & Plastics (mixed or separated)

Container	2026/27
240 litre wheeled bin	£6.40
360 litre wheeled bin	£6.72
660 litre wheeled bin	£8.30
1100 litre wheeled bin	£11.81
Sack (minimum order 20)	£2.63

### Recycling Materials: Glass bottles & Jars

Container	2026/27
240 litre wheeled bin	£6.40
360 litre wheeled bin	£6.72

## Recycling Materials: Food

Container	2026/27
140 litre wheeled bin	£11.45

## Rubbish/General Waste

Container	2026/27
240 litre wheeled bin	£9.82
360 litre wheeled bin	£11.50
660 litre wheeled bin	£19.90
1100 litre wheeled bin	£26.72
Sack (minimum order 50)	£3.78

# Waste



# Garden waste collection service

Description of Service	2026/27
Garden waste bin annual charge	£75.00
Garden waste bin delivery	£11.35
Garden waste sack (each)	£5.09

# Large Item collection service

Description of Service	2026/27
Collection of 1-3 items	£41.97
Collection of 4-6 items	£73.38
Collection of 7-10 items	£91.52

A 50% discount is given on the above prices for those residents in receipt of Council Tax Benefit, Housing Benefit, Personal Independence Payment (PIP), or you are a student in full time education, living in off-campus student accommodation with a council tax exemption.

# Replacement black wheeled bin

Description of Service	2026/27
Replacement of lost, stolen, vandalised or misused black wheeled bins	£28.07

# Charges for new developments

Description of Service Container – standard Kerbside service	2026/27
55L Recycling Box	£6.91
23L Food waste outside container	£4.94
5L Food waste indoor kitchen caddy	£1.73
140L General waste wheeled bin	£16.72
140L General waste Reusable Recycling Bag	£3.22
70L General waste Reusable Recycling Bag	£2.98
91L Reusable recycling bag for card	£1.87
Description of Service Container – communal recycling bin facilities	2026/27
360l bin	£40.25
240l bin	£20.58
140l Food Bin	£43.61
5l food waste indoor kitchen caddy	£1.73
Delivery cost to new build developments	2026/27
Delivery cost of containers to single household	£11.35
Delivery cost of multiple containers in bulk to developer	£45.40

## Business waste clinical waste sacks

Historical Service no longer available to new customers

Description of Service	2026/27
Clinical waste sack	£3.15

# Rubble & soil above free limits

Description of Service	2026/27
Charge to residents for depositing rubble/soil at the transfer station above the permitted recycling centre free limit per tonne (No minimum charge)	£75.60
Description of Service Recycling Centre – Extra Building Waste Charges	2026/27
Building waste (soil, rubble, hardcore, ceramic tiles) per 50L bag	£5.36
Ceramic toilet and cistern	£5.52
Ceramic sink and stand	£5.52
Plasterboard (including plaster and gypsum related products) per 50L bag	£6.08
Plasterboard sheet up to 180cm by 90 cm	£6.94
Half sheet of plasterboard up to 90 cm	£3.47

# Public weighbridge facility

Description of Service	2026/27
All Vehicles	£13.87

# Business waste transfer station charges\*

Description of Service	2026/27
Unsorted commercial waste (C&I) - loose & compacted, construction and demolition waste per tonne	£206.64
Unsorted commercial waste (C&I) - loose & compacted, construction and demolition waste minimum charge 0.5 tonne	£103.32
Source sorted recyclables (timber, wood, garden waste) per tonne	£81.90
Source sorted recyclables (timber, wood, garden waste) per tonne. Minimum charge per load 0.5 tonne	£40.95
Unsorted recyclables	£89.88
Unsorted recyclables minimum charge 0.5 tonne	£44.94
Plasterboard	£176.40
Plasterboard Minimum charge 0.5 tonne	£88.20
Mixed inert waste (soil and hardcore)	£75.60
Mixed inert waste (soil and hardcore) Minimum charge 0.5 tonne	£37.80
Loads containing upholstered domestic seating	£315.00
Loads containing upholstered domestic seating minimum charge 0.05 tonne	£157.50
Mattress all sizes	£18.90
New business waste recycling streams	£POA

\*Transfer station charges may change throughout the year due to market conditions.

# Community & Compliance



# Events on Council Owned Land

## Land hire – Heritage, prime location and other parks

	Cost 26/27	Cost 27/28
Royal Crescent Lower Lawn	£6,208.00	£6,519.00
PEAK Commercial (Heritage Parks and prime city centre location) Royal Victoria Park, Parade Gardens, Sydney Gardens, Queen Square	£2,142.00	£2,250.00
OFF-PEAK Commercial (Heritage Parks and prime city centre location) Royal Victoria Park, Parade Gardens, Sydney Gardens, Queen Square	£1,607.00	£1688.00
PEAK Charity (Heritage Parks and prime city centre location) 50% of the new commercial hire rate	£1,071.50	£1,125.00
OFF-PEAK Charity (Heritage Parks and prime city centre location) 50% of the new commercial hire rate	£803.50	£844.00
Commercial (All other parks and open spaces in B&NES, eg Henrietta Park, Alexandra Park, , Firs Field, Brickfields Park, Green Park, Kensington Meadows, Lansdown, Keynsham Memorial Park)	£779.00	£818.00
Charity (All other parks and open spaces in B&NES)	£390.00	£409.00

Land Hire rates above are exclusive of VAT, VAT status will be confirmed on application submission.

## Other costs

	Cost 26/27	Cost 27/28
Boules bookings per terrain (Queen Square, Sydney Gardens)	£37.00 +VAT	£39.00 +VAT
Boules Clubs bookings unlimited use - 12 months	£841.50 +VAT	£884.00 +VAT
Fitness Trainer Fees, unlimited use - 12 months	£1,09.80	£1,060.80
Fitness Trainer Fees, unlimited use - 6 months	£758.40	£796.80
Fitness Trainer Fees, unlimited use - 3 months	£505.20	£530.40
Fitness Trainer Fees, Administration Fee per renewal	£138.60	£146.40
Forest Schools	£45.60 admin plus £10.20 per session or £169.20 per annum	£48.00 admin plus £10.80 per session or £177.60 per annum
Power (utilities electricity/gas) per day excluding VAT	£34.00	£36.00
Power (utilities electricity/gas) per day including VAT	£40.80	£43.20
Water (per day if not meter read) per day excluding VAT	£34.00	£36.00
Water (per day if not meter read) per day including VAT	£40.80	£43.20
Damage Deposit Bond	£500-£5,000	£500-£5,000
Council Officer requiring to attend an Event	£148.80 per hour	£156.00 per hour
Event Administration Fee – Standard Event	£138.60	£146.40
Event Administration Fee for Major Event	£278.40	£292.80
Event Administration Fee - Multiple Standard Events within one financial year	£278.40	£292.80

For utilities, VAT will follow the main supply of land, either exempt or standard rate. VAT status will be confirmed on application submission.

## Events - Suspension of parking spaces

See also Suspension of Parking Spaces, page 67.

Suspension of Parking spaces	Location	Cost per day/bay
Single or first space	All zones and areas	POA
Each additional space and/or day	Central zone and Zone 1	POA
Each additional space and/or day	All other zones and areas	POA

# Filming on Council Owned Land

Non-refundable admin fee for filming on the highway	Cost 26/27
Crew size 1 to 10 People	£90.00 +VAT
Crew size 11 to 19 People	£167.00 +VAT
Crew size 20+ People	POA

Non-refundable admin fee for filming in a park or open space	Cost 26/27
Crew size 1 to 10 People	£138.00 +VAT
Crew size 11+ People	POA
Admin fee for arranging drone filming	£138.00 +VAT

## Other Fees

Service	Cost 26/27
Recces	£138.00 +VAT
Officer in attendance	£138.00 +VAT

## Filming - Suspension of parking spaces

Suspension of Parking spaces	Location	Cost per day/bay
Single or first space	All zones and areas	POA
Each additional space and/or day	Central zone and Zone 1	POA
Each additional space and/or day	All other zones and areas	POA

NB – Suspension of parking spaces is for filming locations and essential vehicles only.

## Location Fees

Area	Cost 26/27
Unit Base - Lansdown Playing Fields North - Car Park only	£555.00 +VAT
Unit Base - Lansdown Playing Fields North - Car Park plus field	£802.00 +VAT
Roman Baths and Guildhall	POA
Culverhay School	POA

## Emergency Planning/CCTV

Service	Cost 26/27	Cost 27/28
CCTV Requests from Insurance Companies	£92.00	£97.00
Emergency Planning/Event Multi-Agency Control Room	£1020.00	£1,100.00
Emergency Planning/Event Exercise Planning/Delivery	POA	POA

# Bath Christmas Market

Catering & Bar Fees (all pitches are subject to planning):

Location and pitch type	Cost 2026/2027
<b>Milsom Street:</b>	
Large Catering Chalet	POA
Mobile Catering Vehicle (under 5m in length)	£8,558.00 18 days +VAT
Mobile Catering Pitch (cart/bike)	£5,670.00 18 days +VAT
<b>Stall Street:</b>	
Bar Vehicle Pitch	POA + VAT
<b>Union Street:</b>	
Small Catering Pitch (3m x 3m)	£6,405.00 18 days +VAT
<b>Bath Street:</b>	
Large Catering Chalet	POA
Mobile Catering Pitch (cart/bike)	£5,670.00 18 days +VAT
<b>Hot Bath Street</b>	
Mobile Catering Vehicle (under 5m in length)	£8,558.00 18 days +VAT
<b>Abbeygate Street:</b>	
Mobile Catering Pitch (cart/bike)	£5,670.00 18 days +VAT
<b>Kingston Parade:</b>	
Large Catering Chalet	POA
Medium Catering Chalet	POA
Mobile Catering Pitch (cart/bike)	£5,670.00 18 days +VAT
<b>Abbey Green:</b>	
Medium Catering Chalet	POA
<b>Orange Grove</b>	
Mobile Catering Pitch (cart/bike)	£5,670.00 18 days +VAT
<b>Guildhall</b>	
Pitch Only (3m x 3m)	£3,500.00 18 days +VAT
<b>Swallow Street</b>	
Mobile Catering Pitch (cart/bike)	£5,670.00 18 days +VAT

## All areas Additional Temporary Power (for catering):

Service	Cost 2026/2027
16amp single phase supply	£180 plus VAT for 18 days
32amp single phase supply	£270 plus VAT for 18 days

## Retail Chalets and on-site services:

Description of Service	Cost 2026/2027
All areas PAT testing	£7 per item +VAT
All areas heater hire	£90.00 for 18 days +VAT (£5 per day)
All areas storage space (x1 palette)	£150 +VAT
Fridge space hire (free x1 palette for catering units)	£150 +VAT

## Stallholder Pitch Request Fee:

Description of Service	Cost 2026/2027
Zone 1	£250 +VAT
Zone 2	£200 +VAT
Zone 3	£150 +VAT

## Stallholder Fees (all pitches are subject to planning)

Description of Service	Cost 2026/2027
Zone 1: Corner Chalet	£5,145.00 +VAT for 18 days
Zone 1: Countertop Chalet	£4,200.00 +VAT for 18 days
Zone 1: Barn Door Chalet	£4,200.00 +VAT for 18 days
Zone 2: Corner Chalet	£4,778.00 +VAT for 18 days
Zone 2: Countertop Chalet	£3,780.00 +VAT for 18 days
Zone 2: Barn Door Chalet	£3,780.00 +VAT for 18 days
Zone 3: Barn Door Chalet	£2,436.00 +VAT for 18 days
Short Term Let Barn Door Chalet 7 days	£1,634.00 +VAT for 7 days
Short Term Lets Barn Door Chalet 11 days	£2,567.00 +VAT for 11 days
Small business carts all zones: Monday to Thursday	£165.00 + VAT for 4 days
Small business carts all zones: Friday to Sunday	£200.00 +VAT for 3 days

## Managed coach drop off/pick up and parking

(Charge per visit per vehicle)	Monday/ Tuesday	Wednesday/Thursday/ Friday	Saturday/ Sunday
Minibus (Up to 24 seats)	£30.00	£40.00	£45.00
Coach (25 to 53 seats)	£70.00	£85.00	£95.00
Coach (54+ seats)	£100.00	£120.00	£145.00

## Other costs

Service	Cost 2026/27
Rides and Attractions	£4,376.00 +VAT
Sponsorship and funding contributions	POA
Online advertising and web sales	POA

# Clean Air Zone



# Clean Air Zone

Vehicle class	Cost 26/27
PHGV	£100.00
Trucks and Lorries (N2 & N3)	£100.00
Taxis (M1 & M2)	£9.00
Buses and coaches (M3)	£100.00
Minibuses (M2)	£9.00
Van, light goods vehicle, pick-ups and some campervans and four-by-fours (N1)	£9.00

Only applicable to non-compliant vehicles. Motorists can check and confirm if charges apply here: [https://vehiclecheck.drive-clean-air-zone.service.gov.uk/vehicle\\_checkers/enter\\_details](https://vehiclecheck.drive-clean-air-zone.service.gov.uk/vehicle_checkers/enter_details)

# Highways Commuted Sums



# Highways Commuted Sums

Feature	Units	2026/27
High Friction or Coloured Surfacing	Square Metre	£117.97
Knee rail fencing	Linear Metre	£36.90
SuDS Each Site specific quotation	Each	Site specific quotation
Soakaways	Each	£7,380.75
Petrol & Oil interceptors	Each	£7,380.75
Combined kerb drainage systems	Linear Metre	£22.13
Trees	Each	£452.77
Structures	Each	Site specific quotation (120 years)
Illuminated street furniture	Each	£575.69
Signalised 3 arm junction connected to Fibre	Each	£152,957.49
Signalised 3 arm junction connected to 4G	Each	£146,618.55
Signalised Junction with more than 3 arms	Each	Priced individually
Signalised crossing connected to Fibre	Each	£69,409.60
Signalised crossing connected to 4G	Each	£73,982.62
Zebra Crossing	Each	£38,968.97
Zebra Crossing with Anti Skid	Each	£56,653.06
Street Light	Each	£3,101.33
ANPR and CCTV systems	Each	Site specific quotation (120 years)
Bollards	Each	Site specific quotation (120 years)

# Highways Delivery



# Network Management

## Permanent Traffic Regulation Orders

Service	Cost 26/27
Permanent minor Traffic Regulation Orders for developers	£5,477.73
Permanent standard Traffic Regulation Orders for developers	£6,847.16
Permanent Complex Traffic Regulation Orders for developers	£10,955.47
Priority TRO for developers	Add 25% to above fees
H markings	£332.29
H markings - additional cost for use of different road marking in winter months	Add 25% to fee above

## Street Works Permit Fees

Service	Cost 26/27
Major (Provisional Advance Authorisation) - category 0, 1 & 2 & all traffic sensitive streets	£95.00
Major (Provisional Advance Authorisation) - category 3 & 4 & all non-traffic sensitive streets	£62.00
Major - category 0, 1 & 2 & all traffic sensitive streets	£193.00
Major - category 3 & 4 & all non-traffic sensitive streets	£101.00
Standard - category 0, 1 & 2 & all traffic sensitive streets	£117.00
Standard - category 3 & 4 & all non-traffic sensitive streets	£58.00
Minor - category 0, 1 & 2 & all traffic sensitive streets	£59.00
Minor - category 3 & 4 & all non-traffic sensitive streets	£30.00
Immediate - category 0, 1 & 2 & all traffic sensitive streets	£54.00
Immediate - category 3 & 4 & all non-traffic sensitive streets	£26.00
Permit variation - category 0, 1 & 2 & all traffic sensitive streets	£45.00
Permit variation - category 3 & 4 & all non-traffic sensitive streets	£35.00

## Temporary Traffic Regulation Notices

Service	Cost 26/27
Section 14 Road Closure Notice (planned works) - fees & adverts	£1753
Section 14 Road Closure Notice (planned works) - late submission fee	£337.39
Section 14 Road Closure Notice (planned works) - amendment fee	£134.48
Section 16a Street Closures 1 to 6 roads - fee & advert charge	£208.80
Section 16a Street Closure more than 6 roads - fee & advert charge	£410.53
Community Street Party	Free of charge
Playing Out Scheme	Free of charge
Emergency Notice	£311.43
Town Police Clauses Act Street Closures (processions, crowds etc.)	£212.34
Town Police Clauses Act Street Closures (processions, crowds etc.) – Charity charge	£153.25

## Traffic signals

Service	Cost 26/27
Permanent Traffic Signal switch on/off	£749.25
Permanent Traffic Signals switch on/off - Out of hours charge	£899.10
Out of hours are 18:00- 08:00 weekdays, or weekends	(20% additional charge)
Traffic Information on one VMS sign per day	£63.70
Temporary multi-way traffic signals application - non-utility company applicant	£206.44
Temporary multi-way signals - design advice (all applicants)	£62.53

## Road Safety

Service	Cost 26/27
Supply of personal injury collision data to third parties	£240.00
Road safety audits for external clients	£995.00

## Streetworks and Events

Service	Cost 26/27
NRSWA sample inspections	£50 Statutory Fee
NRSWA Section 50 licences (new apparatus in the highway)	£649.43
NRSWA Section 50 licences (new apparatus in the highway) - retrospective licence	£166.43
NRSWA Section 50 licences (maintenance apparatus in the highway)	£471.55
NRSWA Section 171 licences (excavation in the highway)	£344.65
NRSWA Section 74 over-run charges	variable
NRSWA Oversail licences	£275.00
NRSWA Oversail licences - (under 5 days notice) New (non-refundable)	£310.00
NRSWA Oversail licences - Retrospective - (non-refundable)	£550.00
NRSWA Oversail Licence Emergency Fee	£66.15
Road Space Booking Application	£38.50
Temporary two-way signals application	£50.72

## Raising Statutory Permits

NRSWA Raising Statutory Permits	Cost 26/27
NRSWA Section 72 Defects	£120.00
NRSWA Fixed Penalty Notice	£240.00
NRSWA Fixed Penalty Notice (discount fee if paid early)	£160.00
NRSWA Fixed Penalty Notice Regulation 19 (working without a permit)	£1,000
NRSWA Fixed Penalty Notice Regulation 19 (working without a permit, discounted if paid early)	£600

NB. The above are statutory fees

## Streetworks and Events - Street Works Co-ordination Notice

Cost per road affected by a commercial event's road closure or diversion route	Cost 26/27
Temporary direction sign approval fee up to 5 signs	£55.13
Temporary direction sign approval fee up to 10 signs	£82.69
Temporary direction sign approval fee 11 plus signs	£110.25
Temporary direction sign removal per sign	£11.03

## Streetworks and Events – Other fees

Service	Cost 26/27
Traffic Management Plans	Actual Costs
A bus stop closure or pair with 5 plus working days notice plus £10 per additional stop	£92.01
A bus stop closure or pair with less than 5 working days notice plus £10 per additional stop	£176.40
Bus stop closure amendment fee	£17.69

# Suspension of Parking Spaces

VAT may apply where activities occur within council car parks or where on street activities are linked to a wider event.

The council reserves the right not to accept a request for a new booking or to extend or otherwise modify an existing booking.

location	Cost per day/bay		
	Day 1-13	Day 14-27	Day 28 and over
Single or first space	£60.10 standing charge		
Additional charge for each extra space (Total charge is POA)	Central Zone and Zone 1	£35.62	£39.18
			£42.74
Additional charge for each extra space (Total charge is POA)	All other zones and areas	£12.24	£13.47
			£14.69

## Suspension of Parking spaces – Short Notice additional charges

Additional flat rate charge
<b>Short Notice Charge – Level 1</b> New request made within 2-5 working days of start date
£150.26 Flat rate charge per request
<b>Short Notice Charge – Level 2</b> New request made within 6-9 working days of start date
£90.15 Flat rate charge per request
<b>Short Notice Charge – Level 3</b> New request for residential house move only, made within 2-5 working days of start date. Maximum of two bays for one day only.
£60.10 Flat rate charge per request

## Suspension of Parking spaces - Additional Suspension charges that may also apply.

	Additional charge
Extension of a booking - charges calculated at the appropriate day/bay rate starting from the last day of the original booking.  An administration charge may also apply.	See additional charge for each extra space - £POA
<b>Administration charge – Level A1.</b>  Extend an existing booking where signs are already in place, due to expire within 2-5 working days	£150.26 Flat rate charge per request
<b>Administration charge – Level A2.</b>  Extend an existing booking where signs are already in place, due to expire within 6-9 working days	£90.15 Flat rate charge per request
<b>Administration charge – Level A3.</b>  Extend an existing booking where signs are already in place, due to expire in 10 or more working days	£60.10 Flat rate charge per request
<b>Administration charge – Level B1.</b>  Amend an existing booking where signs are not yet in place and the start date is within 5 working days	£90.15 Flat rate charge per request
<b>Administration charge – Level B2.</b>  Amend an existing booking where signs are not yet in place and the start date is within 6-9 working days	£60.10 Flat rate charge per request

## Blue Badge Application

Charge only applies when an application is successful.

Service	2026/27
Application for a Blue Badge	£10.00
NB This charge is set nationally	

# Highway Maintenance

Service	Cost 26/27
Skip Licence (over 5 days notice)- New (non refundable)	£92.12
Skip Licence (under 5 days notice - New (non refundable)	£130.95
Skip Licence - Renewal (non refundable)	£75.50
Skip Licence - Retrospective (non refundable)	£155.72
Skip Licence – Retrospective Renewal (non refundable)	£234.75
Scaffold / Hoarding Licence (over 5 days notice)- New (non refundable)	£94.37
Scaffold / Hoarding Licence (under 5 days notice) - New (non refundable)	£134.48
Scaffold/Hoarding Emergency Fee	£66.07
Scaffold / Hoarding Licence - Renewal (non refundable)	£57.80
Scaffold / Hoarding Licence - Retrospective (non refundable)	£188.75
Scaffold / Hoarding Licence – Retrospective Renewal (non refundable)	£267.78
Cherry Picker/Mobile Crane Licence (over 5 days notice) - (non refundable)	£151.07
Cherry Picker/Mobile Crane Licence (under 5 days notice) - (non refundable)	£117.97
Cherry Picker/Mobile Crane Licence - Retrospective (non refundable)	£155.72
Building Materials and Container on Highway Licence (over 5 days notice) - (non refundable)	£78.94
Building Materials and Container on Highway Licence (under 5 days notice) - (non refundable)	£117.97
Building Materials/Container on Highway Licence - Renewal (non refundable)	£57.81
Building Materials/Container on Highway Licence - Retrospective (non refundable)	£155.72
Building Materials/Container on Highway Licence – Retrospective Renewal (non refundable)	£234.75
Chase Fee	£14.15 per reminder
Safety Inspections	£64.88 per inspection
Banner on Highway Licence - New (non refundable)	£79.15
Footway Crossing Licence - New (non refundable)	£205.26
Footway Crossing Licence - Retrospective (non refundable)	£205.26
Duplicate Letter confirming Approval of Footway Crossing	£33.03

Service	Cost 26/27
Traffic Survey Equipment on the Highway (non refundable)	£92.01
Additional Site Inspection by Highway Inspector	£44.82
s116 Highways Stopping Up	£3,805.63
Landowner Deposits - primary land	£277.23
Landowner Deposits - additional land	£35.40
Public Path Orders (Highway Act)	£4,794.20
Public Path Orders (Town & Country Planning Act)	£6,463.44
Local Search	£49.55
PROW Maps	£14.15
Section 14 PROW Closure Order (planned works) - fees & adverts	£1,753.00
Section 14 PROW Closure Order (planned works) - late submission fee	£337.39
Section 14 PROW Closure Order (planned works) - amendment fee	£133.31
Section 14 TTRO Closure by order - SofS extension	£1,753.00
Section 14 PROW Closure Notice (emergency works) – fees	£311.43

## Land Drainage Consent for work on Ordinary Watercourses

Service	Cost 26/27
Temporary and Permanent works	£58.99

## Street Lighting

Service	Cost 26/27
Permanent Relocation	£2,410.08
Temporary relocate and reinstall	£2,410.08
Trenching per metre	£132.12
Shield to Street light	£110.89

# Transport Planning

## Traffic Surveys

Service	2026/27
Temporary Automatic Traffic Counts (Radar)	£250.00
Temporary Automatic Traffic Counts (Pneumatic Tube)	£270.00
Handheld Radar Speed Survey Per Hour	£120.00
Video Survey Without Analysis	£250.00
Bespoke Data Analysis Per Hour	£50.00
Other Surveys Including Manual Enumeration	Cost + Processing Fee

## Traffic Surveys – Processing Fee

Total Cost of Survey Components	Processing fee
Below £5000	20% of Total Cost of Survey Components
£5,000 to £10,000	15% of Total Cost of Survey Components
Above £10,000	12.5% of Total Cost of Survey Components

## Supply of Existing Data Manual Classified Counts

Service	2026/27
Manual Data - One peak period	£123.59
Manual Data - Two peak period	£164.03
Manual Data - 12 Hour Classified	£232.57
ATC Data – One week	£200.00
ATC Data – AADT	£200.00

# Traffic Modelling

Service	2026/27
Use of existing traffic models	Cost plus 30%

# Highways Adoption Agreement & Dedication Fees

Fees for Highway Adoption & Dedication Agreements under Section 38, 228 and 278 Highways Act 1980

Initial Bond Value, based on ECW +20%	Fee %	Fee (£Minimum)	<u>Deposit (£)</u>
£0 to £30,000	15.00%	£5,421	£5,421
£30,000 to £75,000	13.00%	£7,831	£5,421
£75,001 to £130,000	11.00%	£10,842	£5,421
£130,001 to £325,000	9.00%	£24,782	£10,842
£325,001 to £650,000	8.00%	£48,189	£16,263
Over 651,000	7.00%	£101,311	£27,105

Fees for Min or Works Section 278 Agreements under Highways Act 1980

2026/27	
Estimated cost of works less than £30,000	Standard fee of £5,421
Estimated cost of works more than £30,000 and up to £50,000	Standard fee of £7,831

# Parks



## Grounds Maintenance

2026/27

Grounds maintenance (range of grass cutting, strimming, shrubbery maintenance, leafing)	POA
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Japanese knotweed/ Giant Hogweed invasive plant treatments	POA
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## Arboricultural services

2026/27

Tree surgery work i.e felling and tree maintenance	POA
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Consultation services - tree condition and BS5 837 inspections and reports	POA
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School Tree inspections - senior	£314
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School Tree inspections - primary/infant	£148
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## Play Team

2026/27

Parish Council Annual Play Area Inspection	£130
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Parish Council Operational Play Area Inspection (min. 1 visit; max 4 visits per year)	£101 per visit
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## Allotment Charges

2026/27

Allotment annual charge per 25 sqm	£18.15
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Allotment annual water charge per plot	£9.00
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Allotment key deposit	£10.00
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## Sport and Parks hire rates

Fees for Hot Air Balloons Launches from BANES sites. All purchases valid for current financial year only.

2026/27	
Licence for Non Commercial Club valid to 31 <sup>st</sup> March 2027.	£562.28pa
Licence for Commercial Club	£POA
Licence for small balloons (up to and including 105,000 ft3) valid to 31 <sup>st</sup> March 2027.	£37.80 per launch
Licence for large balloons (greater than a 105,000 ft3) valid to 31 <sup>st</sup> March 2027.	£46.20 per launch

Fees quoted exclude VAT.

- Fee applicable for any of the named launch sites owned by BANES: RVP, Weston Rec, Pennyquick Park and Kensington Meadows.
- Applicant to estimate number of launches in a year and payment to be made in advance.
- If an operator finds that they are short of flights they can purchase more, valid until 31<sup>st</sup> March, but must make this additional payment in advance.

## Parks Concessions

2026/27	
Parks Pitch 7 day Licence (per calendar month) - shorter periods pro rata	£331
Note: Other Fees may apply depending on location and type of concession and utilities will be recharged where applicable	
All other parks concession licences/ leases	Tender process only

## Sponsorships

2026/27	
Bench sponsorship (10 years) - Heritage Park Bench. Other bench types will be POA	£2,000
Bench plaque (on an existing bench)	£POA
3D Bed	£POA
Flowerbeds	£POA
Roundabout sponsorship	£POA

## Horticultural Excellence

2026/27

Hanging basket 18 inch with our watering service	£157.50
Hanging basket 18 inch without watering service	£81.00
Window Box 90cm with our watering Service	£153.30
Window Box 90cm without our watering Service	£81.00
Window Box 120 cm with our watering service	£197.40
Window Box 120 cm without watering service	£93.45

## Sydney Gardens Community Pavilion

2026/27

Commercial (price per hour)	£22.50
Concession (price per hour)	£POA

## Other charges

Other	2026/27
Land access licence arrangement	£80.00
Land use charge (contractor use of space/hire charge per day)	£POA

# Transport



Description of Service	2026/27	Notes
Taxi Inspections	£60.00	Inc VAT
Taxi Meter Test	£24.00	Inc VAT
Taxi Inspection and MOT	£92.00	Inc VAT
Taxi Inspection /MOT and Meter Test	£114.00	Inc VAT
Internal workshop hourly rate (NHS, charities schools only)	£72.34	Exc VAT
MOT Class I (Motorcycles <200cc)	£29.65	No VAT
MOT Class II (Motorcycles >200cc)	£29.65	No VAT
MOT Class IV (Cars & Motorcaravans)	£54.85	No VAT
MOT Class V (Private Passengers 13-16 Passengers Seats)	£59.55	No VAT
MOT Class VII (Goods vehicles >3.5t)	£58.60	No VAT
MOT PSV Test 9-22 Passengers	£187.00	Inc VAT
MOT PSV Test 23+ Passengers	£212.00	Inc VAT
MOT PSV Re-Test 9-22 Passengers (up to 14 Days)	£84.00	Inc VAT
MOT PSV Re-Test 23+ Passengers (up to 14 Days)	£101.00	Inc VAT
MOT PSV Part Paid Re-Test (Next Day)	£37.00	Inc VAT
MOT HGV Motor Vehicle Test 2 Axle	£157	Inc VAT
MOT HGV Motor Vehicle Test 3 Axle	£179	Inc VAT
MOT HGV Motor Vehicle 4+ Axles	£203	Inc VAT
MOT HGV Motor Vehicle Re-Test 2 Axle (up to 14 Days)	£65.00	Inc VAT
MOT HGV Motor Vehicle Re-Test 3 Axle (up to 14 Days)	£79.00	Inc VAT
MOT HGV Motor Vehicle Re-Test 4+ Axles (up to 14 Days)	£95.00	Inc VAT
MOT HGV Vehicle Part Paid (Next Day)	£38.00	Inc VAT
MOT HGV Trailer 1 Axle	£89.00	Inc VAT
MOT HGV Trailer 2 Axle	Page 313	£102.00
		Inc VAT

Description of Service	2026/27	Notes
MOT HGV Trailer 3+ Axles	£112.00	Inc VAT
MOT HGV Trailer 1 Axle Re-Test (up to 14 Days)	£48.00	Inc VAT
MOT HGV Trailer 2 Axle Re-Test (up to 14 Days)	£55.00	Inc VAT
MOT HGV Trailer 3+ Axle Re-Test (up to 14 Days)	£66.00	Inc VAT
MOT HGV Trailer Part Paid Re-Test (Next Day)	£32.00	Inc VAT

## CORPORATE POLICY DEVELOPMENT AND SCRUTINY PANEL

This Forward Plan lists all the items coming to the Panel over the next few months.

Inevitably, some of the published information may change; Government guidance recognises that the plan is a best assessment, at the time of publication, of anticipated decision making. The online Forward Plan is updated regularly and can be seen on the Council's website at:

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<http://democracy.bathnes.gov.uk/mgPlansHome.aspx?bcr=1>

The Forward Plan demonstrates the Council's commitment to openness and participation in decision making. It assists the Panel in planning their input to policy formulation and development, and in reviewing the work of the Cabinet.

*Should you wish to make representations, please contact the report author or, Democratic Services (). A formal agenda will be issued 5 clear working days before the meeting.*

*Agenda papers can be inspected on the Council's website.*

Ref Date	Decision Maker/s	Title	Report Author Contact	Director Lead
<b>3RD FEBRUARY 2026</b>				
3 Feb 2026	<b>Corporate Policy Development and Scrutiny Panel</b>	<b>Corporate Estate Asset Management Framework 2025-2030</b>		
3 Feb 2026	<b>Corporate Policy Development and Scrutiny Panel</b>	<b>Heritage Services Business Plan</b>		
3 Feb 2026 12 Feb 2026 24 Feb 2026 E3662	<b>Corporate Policy Development and Scrutiny Panel</b>  <b>Cabinet</b>  <b>Council</b>	<b>Budget and Council Tax 2026/27 and Financial Outlook</b>	Gary Adams Tel: 01225 477107	Executive Director - Resources  Director of Finance (S151 Officer)
<b>17TH MARCH 2026</b>				
17 Mar 2026	<b>Corporate Policy Development and Scrutiny Panel</b>	<b>Aequus Full Year Update</b>	Simon Martin Tel: 01225 477407	Executive Director - Sustainable Communities

Ref Date	Decision Maker/s	Title	Report Author Contact	Director Lead
3 Feb 2026	<b>Corporate Policy Development and Scrutiny Panel</b>	Library IT System Update		Executive Director - Chief Operating Officer
<b>12TH MAY 2026</b>				
<b>7TH JULY 2026</b>				
<b>29TH SEPTEMBER 2026</b>				
<b>17TH NOVEMBER 2026</b>				
<b>FUTURE ITEMS</b>				
Page 317	<b>Corporate Policy Development and Scrutiny Panel</b>	Commercial Property Update	Richard Long Tel: 01225 477075	Executive Director - Resources
	<b>Corporate Policy Development and Scrutiny Panel</b>	Annual Complaints Performance & Service Improvements Report	David Langman Tel: 01225 477013	Executive Director - Chief Operating Officer
The Forward Plan is administered by <b>DEMOCRATIC SERVICES</b> : <a href="mailto:Democratic_Services@bathnes.gov.uk">Democratic_Services@bathnes.gov.uk</a>				

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