

Executive Cabinet

Thursday, 10th October 2024, 6.30 pm
Council Chamber, Town Hall, Chorley, and YouTube

Agenda

Apologies for absence

1 Declarations of Any Interests

Members are reminded of their responsibility to declare any pecuniary interest in respect of matters contained in this agenda.

If you have a pecuniary interest you must withdraw from the meeting. Normally you should leave the room before the business starts to be discussed. You do, however, have the same right to speak as a member of the public and may remain in the room to enable you to exercise that right and then leave immediately. In either case you must not seek to improperly influence a decision on the matter.

2 Minutes of meeting Thursday, 11 July 2024 of Executive Cabinet

(Pages 5 - 8)

3 Public Questions

Members of the public who have requested the opportunity to ask a question(s) on an item(s) on the agenda will have three minutes to put their question(s) to the respective Executive Member(s). Each member of the public will be allowed to ask one short supplementary question.

Item of Deputy Executive Leader and Executive Member (Resources) (Introduced by Councillor Peter Wilson)

4 2024/25 Corporate Budget Monitoring Report and Reserves for the 4 months to 31st July 2024

(Pages 9 - 26)

To receive and consider the report of the Director of Finance.

5 2024/25 Corporate Capital Programme and Balance Sheet Monitoring Report Outturn Position for the four months to the 31st July 2024

(Pages 27 - 38)

To receive and consider the report of the Director of Finance.

6 Chorley Quarter One Performance Monitoring Report 2024-25

(Pages 39 - 60)

To receive and consider the report of the Director of Change and Delivery.

**Item of Executive Member (Customer, Streetscene and Environment)
(Introduced by Councillor Adrian Lowe)**

7 Policy for managing unreasonable customer behaviour

(Pages 61 - 82)

To receive and consider the report of the Director of Customer and Digital.

8 Exclusion of the Public and Press

To consider the exclusion of the press and public for the following items of business on the ground that it involves the likely disclosure of exempt information as defined in Paragraph 3 of Part 1 of Schedule 12A to the Local Government Act 1972.

By Virtue of Paragraph 3: Information relating to the financial or business affairs of any particular person (including the authority holding that information)
Condition:

Information is not exempt if it is required to be registered under-
The Companies Act 1985

The Friendly Societies Act 1974

The Friendly Societies Act 1992

The Industrial and Provident Societies Acts 1965 to 1978

The Building Societies Act 1986 (recorded in the public file of any building society, within the meaning of the Act)

The Charities Act 1993

Information is exempt to the extent that, in all the circumstances of the case, the public interest in maintaining the exemption outweighs the public interest in disclosing the information.

Information is not exempt if it relates to proposed development for which the local planning authority may grant itself planning permission pursuant to Regulation 3 of the Town & Country Planning General Regulations 1992(a).

Item of Executive Leader and Executive Member (Economic Development and Public Service Reform) (Introduced by Councillor Alistair Bradley)

9 Procurement of Statutory Compliance, Maintenance and Minor Works Framework

(Pages 83 - 88)

To receive and consider the report of the Director of Planning and Property.

**Item of Executive Member (Customer, Streetscene and Environment)
(Introduced by Councillor Adrian Lowe)**

10 Approval for the contract award procedure and evaluation criteria for the procurement of: 1) Tipper vans and plant machinery for Streetscene 2) Trade waste services for council buildings 3) Depot waste services

(Pages 89 - 94)

To receive and consider the report of the Director of Customer and Digital.

11 Supply of household wheeled bins

(Pages 95 -
104)

To receive and consider the report of the Director of Customer and Digital.

12 **Any urgent business previously agreed with the Chair**

Chris Sinnott
Chief Executive

Electronic agendas sent to Members of the Executive Cabinet Councillor Alistair Bradley (Chair), Councillor Peter Wilson (Vice-Chair) and Councillors Beverley Murray, Terry Howarth, Alistair Morwood, Margaret France and Adrian Lowe.

If you need this information in a different format, such as larger print or translation, please get in touch on 515151 or chorley.gov.uk

[To view the procedure for public questions/ speaking click here and scroll to page 119](#)

[To view the procedure for “call-in” of Executive Decisions click here](#)

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Minutes of **Executive Cabinet**

Meeting date **Thursday, 11 July 2024**

Members present: Councillor Alistair Bradley (Executive Leader), Councillor Peter Wilson (Deputy Executive Leader) and Councillors Beverley Murray, Terry Howarth, Alistair Morwood, Margaret France and Adrian Lowe

Observers present: Councillors Michelle Beach, Gordon France, Danny Gee, Alex Hilton and Joan Williamson and (attending virtually) Councillors Craige Southern, Kim Snape and Hasina Khan

Officers: Chris Sinnott (Chief Executive), Sarah Bullock (Deputy Chief Executive), Chris Moister (Director (Governance)), Caroline Wolfenden (Director of Change and Delivery), Gayle Wootton (Director of Planning and Property), Louise Mattinson (Director (Finance)), Hollie Walmsley (Head of People, Policy and Partnerships) and Ben Storey (Democratic and Member Services Officer)

Other Members: Councillor Michelle Beach, Gordon France, Danny Gee, Alex Hilton and Joan Williamson

12 Declarations of Any Interests

There were no declarations of any interests.

13 Minutes of meeting Thursday, 13 June 2024 of Executive Cabinet

Resolved: that the minutes of the Executive Cabinet meeting held 13 June 2024 be confirmed as a correct record for signing by the Executive Leader.

14 Public Questions

There were no public questions.

15 Productivity Plan

The Executive Leader and Cabinet Member (Economic Development and Public Service Reform) presented the report of the Deputy Chief Executive which sought the endorsement of the Executive Cabinet for the Chorley Productivity Plan to be submitted to the Department of Levelling Up, Housing and Communities, as required as part of the last Local Government Financial Settlement.

We welcomed the report and approved its submission.

Resolved:

To endorse the Chorley Productivity Plan (at Appendix 1) and agree that it can be submitted to the Department of Levelling Up, Housing and Communities.

Reasons for recommendations

The recommendation ensures that Chorley Council meets the request of Simon Hoare MP, detailed in his letter of April 2024 (Appendix 2).

Other options considered and rejected

Not applicable – all local authorities have been asked to submit a Productivity Plan. Following the announcement of a general election, this requirement was checked and it remained the case that submission of Productivity Plans should take place by 19 July 2024.

16 Exclusion of the Public and Press

Resolved: that the press and public be excluded from the meeting for the following item of business on the grounds that it involves the disclosure of exempt information as defined by paragraph 3 of Part 1 of schedule 12A to the Local Government Act 1972.

17 Property Valuations Tender

The Deputy Executive Leader and Cabinet Member (Resources) presented the confidential report of the Director of Finance which sought approval to undertake a joint procurement exercise with South Ribble Borough Council, in respect of asset valuation services for the purposes of financial accounts completion and insurance information.

Resolved:

- 1. To approve the procurement strategy as outlined in this report.**
- 2. To approve the proposed evaluation criteria for the contract.**
- 3. To delegate authority to the Executive Member (Resources) to award the contract to the successful bidder identified through the procurement process.**

Reasons for recommendations

The Council requires asset valuations for the purpose of completion of its accounts. It is also proposed to ask for valuations as supporting evidence for insurance purposes to improve the accuracy of cover procured. It is proposed to enter into a three year arrangement, with an option to extend for a further two years, to allow for consistency of relationship and information flows.

Other options considered and rejected

To use in house valuations. Given the considerable resource required, and within the specific time frames mandated by DLUHC to complete and publish audited statutory accounts, this was rejected.

18 Gillett Playing Fields Procurement Methodology

The Cabinet Member (Planning and Development) presented the confidential report of the Director of Planning and Property which sought approval for the proposed methodology to procure three elements in relation to improvement works at Gillet Playing Fields, delivery of cricket pitch improvements, creation of a football pitch and construction of a new changing pavilion.

As referenced within the report, the omission of the social value evaluation criteria with regards to the football pitch creation contract was highlighted to members, due to the specialism of contractors required to undertake the work and them being based in various parts of the country.

Resolved:

- 1. To approve that the cricket pitch contract will be procured as a medium value exercise with contract award to be approved by the Executive Member (Planning and Development) by Executive Member Decision.**
- 2. To approve the proposed procurement methodologies and evaluation criteria for the high value contract to create a new football pitch comprising a single stage open tender with suitability questionnaire / quality element and the use of the Joint Contracts Tribunal (JCT) intermediate works contract.**
- 3. To approve the omission of the social value evaluation criteria from the football pitch creation contract.**
- 4. To approve the proposed procurement methodologies and evaluation criteria for the high value contract to construct a new changing pavilion comprising a single stage open tender with suitability questionnaire / quality element / social value assessment and the use of the JCT standard form of building contract.**
- 5. To approve the delegation of contract award for both the football pitch creation and pavilion construction contracts to the Executive Member (Planning and Development) by Executive Member Decision.**

Reasons for recommendations

All funding is in receipt to deliver the cricket pitch improvement contract and approval to spend the money was given by Executive cabinet on 14 May 2024. There is a degree of urgency with this contract as the works are required to start in August 2024 in order to be complete and ready to play by the start of the cricket season in May 2025.

All funding is in receipt to deliver the football pitch creation contract and approval to spend the money was given by Executive cabinet on 14 May 2024. It is proposed that this work this will commence on site in March 2025 allowing a full year to establish before being ready to play in August 2026.

Some funding required to deliver the pavilion contract is still pending (and subject to receipt of S106 funding), with an unconfirmed timescale for receipt, therefore the pavilion contract will only be tendered once this funding is in place and detailed timescales cannot be confirmed at this stage.

It is felt that the nature of the football pitch creation procurement exercise would be unlikely to realise sufficient social value to justify the standard minimum evaluation weighting in respect of Social Value.

Other options considered and rejected

Procuring the contracts in aggregate was considered. However, there is a need to urgently start the cricket pitch works in August 2024 to allow uninterrupted use of the pitch by Chorley Cricket Club during the cricket season. There is also a complex funding picture with some Section 106 funding in receipt and some pending therefore a flexible approach to deliver the works as separate contracts is required.

Evaluating the tenders on the basis of 100% cost was considered, however, in order to attract quality contractors with a good track record for delivery of similar schemes, a quality element was included.

19 Any urgent business previously agreed with the Chair

There was no urgent business.

Chair

Date

Report of	Meeting	Date
Director (Finance) (Introduced by Executive Member (Resources))	Executive Cabinet	10/10/2024

2024/25 Corporate Budget Monitoring Report and Reserves for the 4 months to 31st July 2024

Is this report confidential?	No
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Is this decision key?	No
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Purpose of the Report

1. This report sets out the provisional outturn for revenue and reserves forecast for 2024/25 for the Council, based on the position as at 31st July 2024.

Recommendations to Executive Cabinet

2. To note the 2024/25 forecast outturn for revenue and reserves, based on the position at 31st July 2024.
3. To note the virements made to and from the revenue budget during the period, as detailed in **Appendix 2** of the report.

Reasons for recommendations

4. To ensure the Council's budgetary targets are achieved.

Other options considered and rejected

5. None, it is a requirement to report quarterly on the Revenue Budget monitoring and Reserves.

Executive summary

6. Based on the position at 31st July 2024, the forecast outturn is for an overspend of £0,215m, as detailed in **Appendix 1**. The most significant factor within this overspend is related to the ongoing income pressures at Market Walk as detailed below and in the outturn report presented to cabinet in June 2024. A cautious approach has been taken to income forecast and these will be revised in year as updates occur.
7. The Council's Medium-Term Financial Strategy approved in February 2024, reported that the minimum level of General Fund Reserves should be maintained at £4,0m to cushion against any potential, future financial risks that may face the Council.
8. Based on the above forecast outturn overspend, the level of General Fund balances as at 31st March 2025 will be £3,877m, however we will monitor the position during the year and report to members accordingly.

Corporate priorities

The report relates to the following corporate priorities:

Housing where residents can live well	A green and sustainable borough
An enterprising economy with vibrant local centres in urban and rural areas	Healthy, safe, and engaged communities

Background to the report

9. The current net revenue budget for 2024/25 is £16,839m.
10. **Appendix 3** provides further information about the specific earmarked reserves that the Council holds at 31st July 2024.

Current Outturn Position – Revenue

11. The forecast revenue outturn, based on the position at 31st July 2024, shows a provisional overspend against the Council's budgets of £0,215m. A breakdown of this by department within the various directorates is detailed in **Appendix 1**, and the movement on reserves and reserve balances, are outlined in **Appendix 3**. The main variances by directorate are detailed below;

12. Variations from Budget

Directorate	Budget 2024/25 £'000	Forecast Outturn 2024/25 at 31st July 2024 £'000	Variance (Under)/ Overspend £'000
Property	967	1,044	77
Communities and Leisure	2,944	2,873	(71)
Customer and Digital	8,061	7,990	(71)
Planning	907	959	52
Policy and Governance	6,380	6,341	(39)
Major Projects	(5,408)	(5,168)	240
Financing and Other Budgets	2,988	3,015	27
Total Net Expenditure	16,839	17,054	215
Funding	Budget 2024/25 £'000	Forecast Outturn 2024/25 at 31st July 2024 £'000	Variance (Under)/ Overspend £'000
Council Tax	(8,058)	(8,058)	0
Business Rates	(6,870)	(6,870)	0
Funding Guarantee	(1,624)	(1,623)	1
New Homes Bonus	(141)	(141)	0
Revenue Support Grant	(127)	(127)	0
Services Grant	(19)	(20)	(1)
Total Funding	(16,839)	(16,839)	0
Net Outturn	0	215	215

13. The National Employers pay has not been agreed for 2024/25, however a provision of 5% pay award have been included in the base budget.
14. The utilities costs are broadly in line with the budgets for 2024/25 compared to 2023/24 due to the reduction in price as of April 2024, however some variances noted below are due to budget issues or other reason which will be explained under each directorate.
15. Explanation of key variances by Directorate are as follows:
16. **Property – forecast £77k overspend**

The key variances to note are:

- £11k net underspend on staffing costs across the directorate. The underspend is mainly due to vacant posts within CCTV (104k) and increased shared services recharges, that is partially offsetting use of agency staff cost (£80k) within Property Services. The figure also reflects a reduction in the level of Service Level Agreement income from Chorley Leisure Ltd and South Ribble Leisure Ltd (£17k combined) given the reduction in services provided.
- £84k overspend on utility costs for Car Parks and some vacant units. EV charging points at Market Walk are currently not chargeable resulting in a £52k forecast overspend. Work is ongoing to replace the current chargers which may reduce this forecast if it takes place before 31st March 2025.
- £21k increase in income within Property directorate in relation to overachieved car park and Market income compared to budget.
- £16k overspend on external contractors which includes processing costs for car park income and enforcement activity.
- £9k net overspend relating to various small variances within the directorate.
- Bus Station – A payment of £650k was received from LCC as part of the handover of the bus station. This £650k has been retained within ear-marked reserves to be utilised on improvement and maintenance work on the bus station. £78,244 of this reserve has been utilised during 2023/24 on this work and a further forecasted cost of £238,120 will be utilised for the works in 2024/25 leaving the remaining reserves balance of £333,636 in reserves. Work is ongoing to develop the budget model and understand possible costs and income streams.

17. **Communities and Leisure – forecast £71k underspend**

The key variances to note are:

- £65k net underspend on staffing costs across the directorate compared to budget. The underspend is mainly due to various vacant posts within Communities and Housing including agency staff cost within Public Protection Team. The staffing forecast includes assumptions that the vacant posts will be filled following the Communities and Housing Service reviews.
- £15k net overspend on temporary accommodation compared to budget following an inspection in a block of flats which will involve an emergency prohibition notice resulting in additional cost of temporary accommodation.

- £31k of unbudgeted Housing Benefit income relating to claims made by service users following support provided by the Housing Team.
- £10k overspend on Professional fees including Public Health funerals within the Neighbourhoods.
- The Communities and Leisure directorate is carrying forward various significant grants into 2024/25, including grants received in year, totalling £744k (Homes for Ukraine £268k, Asylum Dispersal £237k and UKRSP/Syrian Refugee £239k). The actual grants likely to be utilised in 2024/25 amounts to £119k, leaving grant balances carried forward to 2025/26 of £625k.

18. **Customer and Digital – forecast £71k underspend**

The key variances to note are:

- £26k net underspend on staffing costs across the directorate. This is mainly due to the savings achieved from Shared Head of Service post and Digital Services staff vacancies. This also includes the recently approved Shared Streetscene and Waste Services Phase 2 structure.
- £29k overspend on non-staffing Digital Services expenditure due to various IT costs such as computer software purchases, annual licences, maintenance, security and support services. Majority of the overspend reflects inflationary pressures following retender exercises, as contracts have expired.
- £48k underspend compared to budget across waste and recycling contracts. This will be monitored in year alongside performance on the waste contract and potential further inflationary pressures.
- £11k overspend on hired vehicle used for household waste bin deliveries. In view of ongoing need for this type of vehicle options are being explored for future procurement.
- £5k forecast overspend on LCC clinical waste collection costs.
- £17k forecast additional income for Land Charges as Land Registry have put back to 2025/26 collection the Local Land Charges element of the income. Chorley Council will continue to collect this element for 2024/25.
- £25k underspend relating to various other smaller variances across the directorate.

19. **Planning – forecast £52k overspend**

The key variances to note are:

- £60k net underspend on staffing costs across the directorate compared to the budget for 2024/25. This is mainly due to staffing vacancies within Enforcement Services and Building Control and Planning Services offset by the use of agency staff (£178k).
- £41k forecast overspend on legal fees, statutory notices, and refunds applied within the Planning Services budget.

- £8k reduction in the level of income compared to budget on pre-plan applications, which has shown a slight improvement in collection of income in 2024/25 compared to 2023/24, however the target income level has yet to recover.
- £10k reduction in external contractors cost compared to budget for Allotments and Nature Reserves.
- £61k reduction in Building Control plan fees and Inspection income partly due to a vacant post within Building Control as noted above which is having an impact on income and the position should improve as staff are in place.
- £12k overspend relating to various smaller variances within the directorate.

20. Policy and Governance – forecast £39k underspend

The key variances to note are:

- £149k net underspend on staffing across the directorate compared to the budget for 2024/25. The underspend is primarily due to vacant posts within Corporate Admin Team (£26k) and Corporate Policy & Partnership Team (£138k) and the timing of vacant posts being filled within Shared Financial Services (£45k) including shared services recharges. These underspends are offset by agency staff costs within the Legal and Procurement team.
- £20k forecasted overspend in relation to the members allowance as an assumption of 5% salary uplift has been applied for 2024/25 based on the agreed previous years percentage uplift.
- £26k net overspend forecasted for utilities in Council buildings. The overspend is significantly less compared to 2023/24 due to the reduction in prices as of April 2024. This cost is partly offset by the increase in the costs recovered from the Astley Park Coach House tenant.
- £14k forecast increase in non-domestic rates compared to budget for Chorley Town Hall and Union Street offices.
- £35k forecasted net overspend relating to Chorley Flower show against a budget provision of £73k. The forecasted level of income is similar to 2023/24. There are some uncertainties in the level of expenditure.
- £27k net increase in costs over the amount budgeted within Human Resources due to the PAYE settlement agreements paid over to HMRC relating to the tax on employee benefits, together with additional IT software annual licence costs and general subscriptions.
- £10k overspend relating to the subsidised bus services partly due to the under accrual of the final quarter in 2023/24.
- £30k underspend relating to unused consultancy and events budget within Business Engagement Teams as UKSPF funds are being utilised.
- £22k underspend on General Insurance due to unbudgeted income from Chorley Leisure.

- £12k overspend on non-staffing costs compared to budget within the Finance Team partly due to increase in Apprentice Levy cost (£7k) and reduction in non-staffing recharge income.
- £18k net overspend relating to various other small variances within the directorate.

21. Major Projects – forecast £240k overspend

Further details of the major projects, including Market Walk, Strawberry Fields, the industrial units at Strawberry Meadows and the Extra Care schemes at Tatton Gardens and Primrose Gardens, are outlined in **Appendix 4**.

The key variances to note are:

- £291k forecast overspend on the Market Walk investment - this includes;
 - £13k underspend on staffing due to a vacant post within market walk
 - £7k forecast increase in electricity costs;
 - £29k forecast increase in repairs and maintenance costs.
 - £310k net under-recovery of rent, service charge income and insurance recharges compared to budget. This figure includes an under-recovery of rental income of £167k, due to vacant units, zero forecast for a tenant, as well as a £143k under recovery of service charge income due to management fee caps, temporarily void units and, following negotiation on some tenancies, the exclusion of some elements of service charges from the agreed tenancy agreements, such as seasonal decorations;
 - £10k underspend for window cleaning and pest control compared to budget;
 - £32k underspend on various small variances;
- £20k forecast overspend for Primrose Retirement Living - this includes;
 - £15k overspend on staffing, mainly due to an additional part-time post over and above the budgeted establishment.
 - £60k overspend on repairs and maintenance, largely due to security repair work and general reactive repairs and maintenance;
 - £15k overspend on security services;
 - £57k net increase in service charge, rental income and hire of rooms and commercial tenants;
 - £13k underspend on various small variances;
- £35k forecast overspend for Strawberry Meadows - this includes;
 - £23k reduced rental income due to a vacant unit and agreement of stepped rents compared to budget;
 - £12k overspend on electricity (related to vacant units) and water costs including salting and gritting expenses;
- £40k forecast over recovery of income from Chorley BC Property Ltd in respect in of Logistics House.
- £80k forecast underspend for Tatton Gardens - this includes;
 - £24k forecast increase in on electricity costs;
 - £110k over-recovery of rent and service charge income on the residential properties compared to budget;
 - £12k overspend on income compared to budget due to a recently vacated commercial unit;
 - £7k overspend on security costs compared to budget;

- £13k net underspend relating to various small variances across several budget lines;
- £14k forecast overspend for Strawberry Fields - this includes;
 - £31k overspend on staffing due to the provision of staff cover
 - £66k overspend on reactive and planned maintenance;
 - £73k net increase in rental income from offices, meeting rooms, hot desks, pods, and from service charges, compared to budget. 96% of the offices are occupied and this equates to 97% of the floor space;
 - £10k overspend on non-domestic rates, offset by a £14k underspend on internet charges due to reduced monthly costs;
 - £6k net underspend relating to various small variances across several budget lines;

22. **Financing and Other Budgets – forecast £27k overspend**

- This includes a £290k overspend on interest payable due to interest rates being higher than anticipated.
- Interest receivable is over-recovered against the budget by £330k due to interest rates higher than anticipated.
- £43k overspend on the Minimum Revenue Provision as a result of changes made after the budget was set for the mix of funding used to finance some capital schemes in 2023/24, and also to reflect the slippage in the capital programme in 2023/24 as reported to Executive Cabinet in the 2023/24 Revenue Outturn Report in June 2024.
- There is a small overspend of £4k due to Council Tax overpayment income not being achieved.
- £20k increase in compensatory added years pension payment compared to budget due to the inflationary uplift paid on pensions.

Other supporting information

23. Further information in respect of the variations noted above can be found as follows:

Appendix 4 – Property - Major Projects

24. **Planned Reserves movement**

- Reserves transactions have been reflected in the relevant service area.

General Fund Resources and Balances

25. The Council's Medium-Term Financial Strategy reported that the minimum level of general fund reserves should be maintained at £4,0m to cushion against any potential, future financial risks that may face the Council.
26. The forecast level of general fund balances as at 31st March 2025 based on the detail covered in this report will be £3,877m, however we will monitor the position during the year and report to members accordingly.

27. As detailed at **Appendix 3**, as at 1 April 2024 the Council held a £4,092m in General Fund reserves to manage budget risks not covered by earmarked reserves or provisions within the budget. The forecast outturn for 2024/25 identifies that the General Fund closing balance will be £3,877m as detailed below:

Movement in General Fund Reserve

Summary of Movement in General Reserves	£'m
General Fund Reserves at 1 st April 2024	(4,092)
Forecast 2023/24 outturn revenue budget (surplus) / deficit	0,215
General Fund Reserve Closing Balance at 31 March 2025	(3,877)

28. **Appendix 3** provides further information about the specific earmarked reserves and provisions available for use throughout 2024/25.

Movement in Earmarked Reserves

29. Taking account of the adjustments highlighted in **Appendix 3**, the level of Earmarked reserves held for discretionary use by the Council at 31 March 2025 is £5,116m compared to a balance of £6,091m at 31 March 2024.

Summary of Movement in Earmarked Reserves	£'m
Earmarked Reserves at 1 st April 2024	(6,091)
Transfers (to)/from Earmarked Reserves	
Use of revenue reserves for Capital Financing	0,321
Use of other specific Earmarked Reserves	0,654
Earmarked Reserves Closing Balance at 31st March 2025	(5,116)

30. The £0,654m use of other specific Earmarked Reserves shown in the table above includes the following items:

- £46k use of Climate Change reserves.
- £69k use of Apprentices and Graduates reserves.
- £74k use of Income Generation reserves.
- £30k use of Civica Property Management reserve.
- £19k use of Social Prescribing reserves.
- £117k use of Refugee/Asylum Seekers Funding reserve.
- £238k use of Bus Station – Transition of service reserves.
- £36k use of Handyman reserves.
- The remainder of the movements are various, smaller adjustments related to revenue spending.

31. The use of earmarked reserves shown in the table above is reflected in the revenue budget monitoring position detailed in this report.

Climate change and air quality

32. The work noted in this report does not impact the climate change and sustainability targets of the Councils Green Agenda and all environmental considerations are in place.

Equality and diversity

33. Equality and diversity implications are considered within the budgets approved by the Council as at 27th February 2024.

Risk

34. The report refers to the monitoring and refinement of the 2024/25 revenue budget forecast over the course of the year. Inflation, uncertainty around funding and interest rates changes have all contributed to the risk and volatility in the forecasting over the 12 month period. The risks have been and will continue to be managed through budget monitoring and reporting going forward.

Comments of the Statutory Finance Officer

35. The financial implications are contained within this report.

Comments of the Monitoring Officer

36. There are no concerns with this report from the Monitoring Officers perspective.

Background documents

There are no background papers to this report.

Appendices

Appendix 1 – Revenue 2024/25 - position as at 31st July 2024

Appendix 2 – Revenue Budget Movements at 31st July 2024

Appendix 3 – 2024/25 Reserves Programme position at 31st July 2024

Appendix 4 – 2024/25 Major Projects position at 31st July 2024

Report Author:	Email:	Telephone:	Date:
Hemangini Chevli (Senior Management Accountant), Neil Halton (Head of Finance)	Hemangini.Chevli@chorley.gov.uk, gail.halton@chorley.gov.uk, Neil.Halton@chorley.gov.uk	01257 515151	21/08/24

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APPENDIX 1

Revenue 2024/25 - Forecast based on position as at 31st July 2024

Directorate	Department / Section	Original Budget	Budget at 31st July 2024	Forecast Outturn based on position at 31st July 2024	Variance (Under)/ Overspend
		£'000	£'000	£'000	£'000
Property	Facilities Management	240	240	248	8
	Income Generation	-	-	-	-
	Markets & Town Centre	229	229	204	(25)
	Property Services	453	453	561	109
	Housing Accommodation	(30)	(30)	(48)	(18)
	Major Projects Team	76	76	79	3
Property Total		967	967	1,044	77
Communities and Leisure	Communities	855	855	795	(60)
	Director - Communities	173	173	171	(2)
	Housing & Public Protection	1,148	1,148	1,139	(9)
	Leisure	768	768	768	-
Communities and Leisure Total		2,944	2,944	2,873	(71)
Customer & Digital	Customer Transformation	1,853	1,853	1,799	(54)
	Digital Services	1,518	1,518	1,514	(4)
	Waste & Streetscene Services	4,550	4,690	4,678	(12)
Customer & Digital Total		7,921	8,061	7,990	(71)
Planning	Enforcement Services	480	341	315	(25)
	Planning Services	10	10	117	108
	Spatial Planning	557	557	526	(31)
Planning Total		1,046	907	959	52
Policy and Governance	Chief Executives Office	540	540	541	2
	Communications & Events	826	826	906	80
	Director - Governance	92	92	92	(0)
	Legal and Governance	2,678	2,678	2,732	54
	Performance & Partnerships	884	884	765	(119)
	Shared Financial Services	992	992	959	(33)
	Transformation Management	41	41	45	3
	Transition Fund	85	85	95	10

Directorate	Department / Section	Original Budget	Budget at 31st July 2024	Forecast Outturn based on position at 31st July 2024	Variance (Under)/ Overspend
		£'000	£'000	£'000	£'000
	Economic Growth	242	242	206	(36)
Policy and Governance Total		6,380	6,380	6,341	(39)
Major Projects	Investment Properties	(53)	(53)	(53)	-
	Market Walk	(1,853)	(1,853)	(1,562)	291
	Primrose Gardens Retirement Living	(360)	(360)	(340)	20
	Strawberry Meadows	(700)	(700)	(664)	36
	Chorley BC Property Ltd (TVS)	(1,794)	(1,794)	(1,834)	(40)
	Tatton Gardens	(302)	(302)	(382)	(80)
	Strawberry Fields	(347)	(347)	(333)	14
Major Projects Total		(5,408)	(5,408)	(5,168)	240
Financing and Other Budgets	Customer Transformation	(576)	(576)	(577)	(0)
	Financing	3,950	3,950	3,953	3
	Pensions Account	218	218	238	20
	Corporate	(603)	(603)	(599)	4
Financing and Other Budgets Total		2,988	2,988	3,015	27
Funding	Collection Fund	(14,928)	(14,928)	(14,928)	-
	New Homes Bonus	(141)	(141)	(141)	-
	Government Grants	(146)	(146)	(147)	(1)
	Funding Guarantee	(1,624)	(1,624)	(1,623)	1
Funding Total		(16,839)	(16,839)	(16,839)	0
Net (Surplus) / Deficit		0	0	215	215

APPENDIX 2

Revenue 2024/25 - Position as at 31st July 2024

Directorate	Property £'000	Communities and Leisure £'000	Customer and Digital £'000	Planning £'000	Policy and Governance £'000	Major Projects £'000	Financing/Other Budgets £'000	Funding £'000	TOTAL £'000
Budget approved by Council 27th Feb 2024	967	2,944	7,921	1,046	6,380	(5,408)	2,988	(16,839)	0
<i>Transfers between directorates</i>									
Realignment of budgets following Terms and Conditions review			139	(139)					0
									0
									0
									0
<i>Realignment of budgets following Management changes</i>									
									0
									0
<i>Transfers (to)/from Earmarked reserves</i>									
									0
									0
<i>Transfers (to)/from General Fund reserves</i>									
									0
									0
									0
Revised Budget as at 31st July 2024	967	2,944	8,060	907	6,380	(5,408)	2,988	(16,839)	0

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APPENDIX 3

2024/25 Forecast Reserves position as at 31st July 2024

Reserves	Opening Balance 1st April 2024 £000s	Forecasted Movements				Forecast Balance 31st March 2025 £000s
		Capital Financing £000s	Movement between Reserves £000s	Transfers from Reserves £000s	Transfers to Reserves £000s	
General Fund Balance	(4,092)	-		215		(3,877)
Corporate Reserves						
Delivery of the Transformation and Savings Programme Reserve	(424)			5		(419)
Capital and Repairs and Maintenance Reserves	(336)	(10)				(346)
Climate Change Reserves	(498)	331		46		(121)
Support for Apprentices, Graduates, Training Posts	(142)			69		(73)
Investment in Play & Open Space Across the Borough	(77)					(77)
Budget Equalisation Reserve	(951)					(951)
Market Walk - Asset Management	(11)					(11)
Income Generation Reserve	(125)			74		(51)
Business Investment for Growth (BIG) Grants	(262)					(262)
Choose Chorley Grants	(148)					(148)
Retail Grants Programme	(154)					(154)
Civica Property Management	(65)			30		(34)
Social Prescribing	(78)			19		(59)
Refugees/Asylum Seekers Funding	(662)			117		(545)
Customer & Digital	(246)					(246)
Planning Appeal Costs	(163)			13		(149)
Elections	(97)					(97)
Bus Station - Transition of service	(572)			238		(334)
Logistics House Income Equalisation Reserve	(450)					(450)
Collection Fund Surplus/Deficit Adjustment Reserve	(500)					(500)
Local Plan Reserve	(85)					(85)
Handyman Reserve	(41)			36		(5)
Reserves used in Year						
Mayoral Charities	(6)			6		-
Total Earmarked Reserves	(6,091)	321	-	654	-	(5,116)
Total Reserves - General and Earmarked	(10,183)	321	-	869	-	(8,993)

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APPENDIX 4

Major Projects 2024/25 - Forecast based on the position as at 31st July 2024

Market Walk

	2024/25 Budget £000s	2024/25 Forecast £000s	2024/25 Variance £000s
Rental Income	(1,800)	(1,634)	167
Service Charge Operational budget	485	465	(19)
Service Charge Income	(538)	(394)	143
Net Income (excluding financing)	(1,853)	(1,562)	291
Financing Costs	915	915	-
Net Income (including financing)	(939)	(648)	291

Strawberry Meadows

	2024/25 Budget £000s	2024/25 Forecast £000s	2024/25 Variance £000s
Rental Income	(750)	(727)	23
Operational Costs (excluding financing)	50	63	13
Net Budget/Income (excluding financing)	(700)	(664)	36
Financing Costs	390	390	-
Net Budget (including financing)	(310)	(274)	36

Strawberry Fields

	2024/25 Budget £000s	2024/25 Forecast £000s	2024/25 Variance £000s
Rental Income	(816)	(888)	(73)
Operational Costs (excluding financing)	469	555	86
Net Budget/Income (excluding financing)	(347)	(333)	14
Financing Costs	168	168	-
Net Budget (including financing)	(178)	(165)	14

Primrose

	2024/25 Budget £000s	2024/25 Forecast £000s	2024/25 Variance £000s
Rental Income	(775)	(833)	(57)
Operational Costs (excluding financing)	416	493	77
Net Income (excluding financing)	(360)	(340)	20
Financing Costs	-	-	-
Net Income (including financing)	(360)	(340)	20

Tatton Gardens

	2024/25 Budget £000s	2024/25 Forecast £000s	2024/25 Variance £000s
Rental Income	(767)	(868)	(101)
Operational Costs (excluding financing)	465	486	21
Net Income (excluding financing)	(302)	(382)	(80)
Financing Costs	247	247	-
Net Income (including financing)	(55)	(135)	(80)

Chorley BC Property Ltd (TVS)

	2024/25 Budget £000s	2024/25 Forecast £000s	2024/25 Variance £000s
Rental Income	(1,794)	(1,834)	(40.000)
Operational Costs (excluding financing)	-	-	-
Net Income (excluding financing)	(1,794)	(1,834)	(40)
Financing Costs	1,211	1,211	-
Net Income (including financing)	(583)	(623)	(40)

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Report of	Meeting	Date
Director (Finance) (Introduced by Executive Member (Resources))	Executive Cabinet	10/10/2024

Is this report confidential?	No
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Is this decision key?	No
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2024/25 Corporate Capital Programme and Balance Sheet Monitoring Report Outturn Position for the four months to the 31st July 2024

Purpose of the Report

1. To report the outturn financial position of the Council in respect of the capital programme at 31st July 2024, highlighting key issues and explaining key variances, and to provide an overview of various elements of the Council’s Balance Sheet at 31st July 2024

Recommendations to Executive Cabinet

2. To approve the revised capital programme, attached at **Appendix A**, which includes an amendment to the programme for this quarter of £40,541m, as detailed at point 12 of this report.
3. To note the variations to the programme (which are detailed by scheme at **Appendix B** and referenced within the body of the report).
4. To note the position in the Balance Sheet monitoring section of the report, in respect of cash, investment and loan balances, and debtors, as at 31st July 2024.

Reasons for recommendations

5. To ensure the Council’s Capital Programme is monitored effectively.

Other options considered and rejected

6. None, it is a requirement to report quarterly on the Capital and Balance Sheet budget monitoring.

Corporate priorities

7. The report relates to the following corporate priorities:

Housing where residents live well	A green and sustainable Borough
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An enterprising economy with vibrant local centres in urban and rural areas	Healthy, safe, and engaged communities
--	---

Background to the report

- 8. The Capital Budget for 2024/25 was set at £19,448m by Council in February 2024. This was decreased following approval of the 2024/25 outturn to £15.253m.
- 9. Following the changes detailed in this report, the total programme now stands at £16,152m the details of which are shown in **Appendix B**.

Section A: Capital Programme

Key issues

- 10. The total cost of the Council’s capital investment programme for 2024/25 has increased since the 2023/24 outturn report approved by Cabinet, **from £15,253m to £16.152m** as at 31st July 2024. The change reflects variations approved since the last report, along with those contained within this report. A summary of the total costs of the programme, and the funding of this, is detailed at **Appendix A**.
- 11. The breakdown of the net increase in the programme of **£0,899m** is detailed in **Appendix B**. The net variation includes those variations approved since the previous monitoring report and variations in respect of the reprofiling of budgets within the existing programme net increase.
- 12. Budget variations approved since the last monitoring report have resulted in a total increase of **£40,541m** to the capital programme. The table below details the changes.

Table 1: Approved budget changes since the last monitoring report

Scheme Name	Increase / (Reduction) 2024/25 £'000	Increase / (Reduction) 2025/26 and future years £'000	Virement From	Virement To	Approved by	Date approved
An Enterprising Economy With Vibrant Local Centres In Urban and Local Areas						
Public Realm Town Centre			(871)		Council	16/07/2024
Levelling up	3,667	35,096		871	Council	16/07/2024
Green And Sustainable Borough						
Food waste Collections - Vehilces		818			Council	16/07/2024
Food waste Collections - waste containers		738			Council	16/07/2024
Housing Where Residents Live Well						
Play, Recreation and Open Space Projects	6	36			This report	12/08/2024
All seasons leisure centre -Installiations of PV Panels, add. Metering and software	182				Council	16/07/2024
Total	3,854	36,687	(871)	871		

13. A re-profiling of budgets from 2024/25 to future years has been undertaken. The total movement of budgets from 2024/25 amounts to **£2,955m**. The movements are shown in Appendix B and explanations are contained in the major variations section that follows.

14. **Table 2: Slippage and reprofiling across years**

Scheme Name	Slippage and reprofiling of budget (to)/from future years £'000
An Enterprising Economy With Vibrant Local Centres In Urban and Local Areas	
Chapel St and Surrounding Public Realm	(1,297)
Town Hall and White Hart Works	(200)
Levelling up :Relocation of Bengal Street	(1,000)
Green And Sustainable Borough	
Chorley Health Centre	(250)
Healthy, Safe and Engaged Communitites	
Astley/Astley Cottage	(208)
Total	(2,955)

As at 31st July 2024 the actual capital expenditure across the programme was £1,124,104

Major variations in the 2024/25 Capital Programme since the previous report

An Enterprising Economy with Vibrant Local Centres in Urban and Local Areas

- 15. Public Realm Town centre- virement of a budget of £871k which forms part of the Levelling Up match funding.
- 16. Levelling up fund- £38,762m increase in capital budget taking the overall budget to £44,480m. This included the acceptance of a £20m Levelling up grant. The budget was approved at Council meeting in July 2024. The monies will used to deliver a significant town centre regeneration across various sites in the town centre.
- 17. Chapel Street external redecoration and surrounding public realm- £1,297m has been moved into future years and will be spent in conjunction with redevelopment of the Town Centre.
- 18. Town Hall and White Hart Works – £200k budget has been moved into future years to recognise the timing of the potential future town hall developments

19. Relocation of Bengal Street- £1m has been moved into future years as part of the Levelling up fund. It is anticipated the majority of the expenditure for the project will occur in 2025/26

Green and sustainable borough

20. Food waste vehicles – £818k budget funded by grant from Defra was approved at Council in July 2024 this is to fund the purchase of new waste vehicles. An additional request for £322k to Defra has been made due to a shortfall in funds. The requirement for the new vehicles is part of the Government's plan to provide weekly household food waste collections by 1st April 2026.
21. Food waste containers - £364k grant from Defra for the purchase of new food waste containers was approved at Council in July 2024. An additional request for £52k has been made to Defra to cover the shortfall in funds. The containers will be given to local residents as part of the Governments pledge to collect weekly household food waste. There is an expected shortfall in funding of £373k from the government to fund the acquisition of the waste vehicles and containers.
22. Chorley Health Centre- £250k has been moved into 2025/26. This grant is funded by CIL and has been in the programme for a number of years awaiting development by the NHS.

Housing Where Residents Live Well

23. Play and Open Spaces- Increase in budget to £36k to reflect various increases funded via S.106.
24. All seasons Leisure Centre- £182k capital grant from Sports England Swimming Pool Support Fund was approved at Council in July 2024. The grant will be spent on the installation of photovoltaic (PV) panels, metering and monitoring software at the Leisure Centre. This will allow for precise tracking and management of energy consumption and will work towards the Council's aim of becoming net carbon zero by 2030.

Health, Safe and Engaged Communities

25. Astley Hall / Astley Cottage- £208k is to be carried forward to the 2025/26 budget. The provision of this monies is to provide match funding in respect of preserving and restoring the West Wing. Due to the property being a listed building completion of any work to the property requires listed building consent which can be a lengthy process to ensure that the building correctly repaired for the future generations to enjoy.

Section B: Balance Sheet Monitoring

Overview

26. Strong balance sheet management assists in the effective use and the control over the Council's asset and liabilities. Key assets comprise of the Council's tangible fixed assets, debtors, investments and bank balances, and key liabilities include long and short-term borrowing, creditors, and reserves.

Non-current Assets

27. Tangible, non-current assets include property, plant and equipment held by the Council for use in the production or supply of goods and services, for rental to others or for administrative purposes. One fifth of all assets are re-valued every year, and annual reviews are undertaken to establish whether any impairment or other adjustments need to be applied. New assets and enhancements to existing assets are managed through the Capital Programme as reported in **Appendices A and B**.

Borrowing and Investments

28. Long-term borrowing requirements flow from the capital programme. Regular dialogue and meetings take place between the Director of Finance, her staff and the Council's independent Treasury Consultants, Link Treasury Services, and options for optimising treasury management activities are actively reviewed.

29. Both short and long-term borrowing interest rates have risen over the last few years following increases in the Bank of England Base Rate from 0.1% in April 2020 up to the rate of 5.25%. The current rate of interest is 5% per the Bank of England. Interest rates on investments have also increased in response to this. The key variances compared to budget are a £290k forecast overspend on debt interest payable, as borrowing has been deferred due to higher-than-expected interest rates meaning shorter term borrowing has been necessary. However, because of these cash balances interest and investment income is forecast to over-recover against the budget by £320k. There is also an overspend on the Minimum Revenue Provision (MRP) budget of £44k due to the differences in the mix of funding used to fund the capital programme in 2023/24.

	Original Budget 2024/25 £000s	Forecast Outturn at 31st July 2024 £000s
Interest and Investment Income	(170)	(500)
Debt Interest Payable	2,476	2,766
Minimum Revenue Provision (MRP)	1,643	1,687
Total Net Borrowing Costs	3,949	3,953

30. The current borrowing and investment position, compared to the position at the same point last year, is as per the table below.

	As at 31st July 2024	As at 31st July 2023
Short term borrowing	£15,757m	£11,731m
Long term borrowing	£64,347m	£66,094m
Total Borrowing	£80,104m	£77.825m
Investments made by the Council	£3m	£5m
Cash Balances Held	£3,861m	£6,661m

Debtors

31. The Council has a corporate debt policy as well as other specific policies for the management of debt in the key areas of council tax, business rates and housing benefit overpayments. The table below summarises the collection performance of the various

debts and the total outstanding debt in the respective areas as at 31st July 2024. The table also shows the corresponding level of debt at the same point in the last financial year.

	Position as at 31st July 2024 £000s	Position as at 31st July 2023 £000s
Council Tax		
Expected Council Tax Collectable in 24/25 (23/24)	87,182	82,678
Current year balance outstanding	52,079	49,095
Previous years balance outstanding	6,177	5,018
Total Council Tax balance outstanding	58,256	54,113
Collection Rates Current Year	36.72%	37.05%
Business Rates		
Expected Business Rates Collectable in 24/25 (23/24)	28,769	25,826
Current year balance outstanding	16,977	16,010
Previous years balance outstanding	1,526	1,332
Total Business Rates balance outstanding	18,503	17,342
Collection Rates Current Year	37.51%	32.73%
Housing Benefit		
Overpayment balances outstanding	790	869
Sundry Debtors		
Balance Outstanding – General*	294	486
Balance Outstanding – Commercial*	1,129	1,151

32. Business rate collection has seen an improvement on previous years with an increase in collection rates. This brings collection rates back in line with levels that would be anticipated at this stage of the year.
33. In respect of the figures above, the Council's share represents 9% of Council Tax income and 40% of Business Rates income.
34. The Sundry Debtors figure reflects the position compared to the same period last year. As debt ages, the provision required increases, as the likelihood of non-payment also increase the longer that debt is outstanding. In 2023/24 there were significant increases to the bad provision to ensure that all potential bad debts were covered. There is no proposed increase in bad debt provision at quarter one.

Climate change and air quality

35. The work noted in this report does not impact the climate change and sustainability targets of the Councils Green Agenda and all environmental considerations are in place.

Equality and diversity

36. Equality and diversity implications are considered within the budgets approved by Council as at February 2024.

Risk

37. Risks are broadly addressed in the body of the report however it is important to note that although the headline rate of inflation has decreased, we need to continue to closely monitor the impact of this on an individual project basis and any budget changes reported when necessary.

38. As noted in point 33 above, the risks around non-payment of debt can be significant. As a general policy, the accounts include a provision for bad debts that is calculated based upon age. However, where additional information is available on specific debts, the policy is adapted accordingly.

Comments of the Statutory Finance Officer

39. The financial implications are contained within the body of this report

Comments of the Monitoring Officer

40. No comment.

Background documents

There are no background papers to this report.

Appendices

Appendix A – Capital Programme Summary

Appendix B – Scheme Variations

Report Author:	Email:	Telephone:	Date:
Neil Halton (Head of Finance)	Neil.halton@chorley.gov.uk	01257 515151	21/08/2024
Gail Halton (Senior Management Accountant)	Gail.halton@chorley.gov.uk		21/08/2024

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Table 1 - Forecast Capital Expenditure	Budget 2024/25 Approved at Council Feb 2024	Budget 2024/25 Approved by Cabinet for Outturn 2023/24	Slippage and reprofiling of budget (to)/from future years	Quarter 1 2024/25 Variations	Revised Budget 2024/25 as at 31st July 2024	Budget 2025/26 and Future Years Approved at Council Feb 2024	Budget 2024/25 and Future Years Approved by Cabinet for Outturn 2023/24	Slippage and reprofiling of budgets (to)/from 2024/25	Quarter 1 2024/25 Variations	Revised Budget 2025/26 and Future Years as at 31st July 2024
	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000

COSTS

An Enterprising Economy With Vibrant Local Centres In Urban and Local Areas	12,180	8,504	(2,497)	3,666	9,673	1,252	6,449	2,497	35,096	44,042
Green And Sustainable Borough	1,788	1,303	(250)	-	1,053	-	1,800	250	1,556	3,606
Housing Where Residents Live Well	5,480	5,232	-	188	5,420	1,750	3,999	-	36	4,035
Healthy, Safe and Engaged Communities	-	215	(208)	-	7	-	-	208	-	208
Total Forecast Expenditure	19,448	15,253	(2,955)	3,854	16,152	3,002	12,248	2,955	36,687	51,890

RESOURCES

Disabled Facilities Grants	975	929	-	-	929	1,549	1,550	-	-	1,550
Brownfield Release Fund	900	1,077	-	-	1,077	-	-	-	650	650
Levelling Up	-	-	-	4,706	4,706	-	-	-	15,294	15,294
Rural Prosperity Fund	400	400	-	-	400	-	-	-	-	-
UK Shared Prosperity Fund	-	534	-	-	534	-	-	-	-	-
Defra Food Waste	-	-	-	-	-	-	-	-	1,184	1,184
Other Grants	285	292	-	(104)	188	-	-	-	-	-
Total Grants	2,560	3,233	-	4,602	7,835	1,549	1,550	-	17,129	18,678
External Contributions	-	-	-	-	-	-	-	-	-	-
Capital Receipts	7,400	4,910	(4,866)	-	45	-	2,531	4,866	17,839	25,236
Community Infrastructure Levy (CIL)	1,127	1,770	(250)	-	1,521	-	-	250	0	250
Reserves and Revenue	70	279	42	-	321	-	-	(42)	42	-
Section 106	829	1,501	(50)	6	1,457	-	696	50	(15)	731
Unsupported Borrowing	7,462	3,558	2,168	(754)	4,973	1,452	7,471	(2,168)	1,692	6,995
Total Forecast Resources	19,448	15,253	(2,955)	3,854	16,152	3,002	12,248	2,955	36,687	51,890

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2024/25 Capital Programme - Scheme Variations as 31st July 2024

APPENDIX B

Scheme Name	Budget 2024/25 Approved at Council Feb 2024 £'000	Budget 2024/25 Approved by Cabinet for Outturn 2023/24 £'000	Slippage and reprofiling of budget (to)/from future years £'000	Quarter 1 2024/25 Variations £'000	Revised Budget 2024/25 as at 31st July 2024 £'000	Budget 2025/26 and Future Years Approved at Council Feb 2024 £'000	Budget 2025/26 and Future Years Approved by Cabinet for Outturn 2023/24 £'000	Slippage and reprofiling of budgets (to)/from 2024/25 £'000	Quarter 1 2024/25 Variations £'000	Revised Budget 2025/26 and Future Years as at 31st July 2024 £'000
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An Enterprising Economy With Vibrant Local Centres In Urban and Local Areas

Strawberry Meadows Development	100	225			225
Asset Improvements	300	319			319
Buckshaw Village Rail Station	696				-
Chapel St and Surrounding Public Realm	2,697	1,297	(1,297)		-
Chorley Bus Station	-	445			445
Chapel Street		83			83
Euxton Private development - retail units		50			50
Astley Village Nursery and Retail Units		149			149
Chorley Borough Service Centres	500	500			500
Strawberry Fields	-	50			50
Market Walk Extension	70	70			70
Markets - Works to Existing Market		0			0
Public Realm Town Centre	2,869	369			369
Town Hall and White Hart Works	1,110	643	(200)		443
Levelling up	2,650	2,966	(1,000)	3,666	5,633
Queens Road Car Park		82			82
Unit Above Iceland	70	94			94
Woodlands Development Site	1,118	1,161			1,161
	12,180	8,504	(2,497)	3,666	9,673

Green And Sustainable Borough

Chorley Health Centre	250	250	(250)		-
Delivering Green Agenda	-	331		-	331

	652	652	-	-	652
	600	600	-	-	600
	-	696	-	-	696
	-	1,500	1,297	-	2,797
		-	-	-	-
		-	-	-	-
		-	-	-	-
		-	-	-	-
		-	-	-	-
		-	-	-	-
		-	-	-	-
		-	-	-	-
		-	-	-	-
		-	-	-	-
		-	-	-	-
		-	-	-	-
		-	-	-	-
		-	-	-	-
		-	-	-	-
		-	-	-	-
		-	-	-	-
		-	-	-	-
	1,252	6,449	2,497	35,096	44,042

	-	-	250		250
	-	-	-	-	-

Town Hall Decarbonisation	1,538	338			338
Health Hub - Whittle Surgery					-
Fleet Replacement		300			300
ICT Mobile Devices, Citrix, CCTV, Software and Cloud	-	84			84
Food waste Collections - Vehicules					-
Food waste Collections - waste containers					-
	1,788	1,303	(250)	-	1,053

	-	1,200	-	-	1,200
					-
		600			600
	-		-	-	-
				818	818
				738	738
	-	1,800	250	1,556	3,606

Housing Where Residents Live Well

Chorley Adaptation Grant (Formerly DFG)	975	929			929
Land for Tree Planting	-	-			-
Leisure Centres - capital works and maintenance	180	228			228
Leisure Centres Improvements	1,650	1,653			1,653
Play, Recreation and Open Space Projects	-	1,427		6	1,433
Properties for Refugees	375	457			457
Purchase of Affordable Housing	2,000				-
Birkacre Reservoir		150			150
Chorley Lodge	300	338			338
Tatton	-	49			49
All seasons leisure centre -Installiations of PV Panels, add. Metering and software				182	182
	5,480	5,232	-	188	5,420

	1,550	1,549	-	-	1,549
	-	(0)	-		(0)
	200	200	-	-	200
	-		-		-
	-		-	36	36
	-	2,000	-		2,000
	-	-	-		-
		250	-		250
	-		-		-
	-		-		-
					-
	1,750	3,999	-	36	4,035

Healthy, Safe and Engaged Communitites

Astley/Astley Cottage	-	208	(208)		-
Westway Playing Fields Sports Campus	-	7			7
	-	215	(208)	-	7
					-
Total	19,448	15,253	(2,955)	3,854	16,152

	-	-	208	-	208
	-	-	-	-	-
	-	-	208	-	208
					-
	3,002	12,248	2,955	36,687	51,890



Report of	Meeting	Date
Chief Executive (Introduced by Executive Member (Resources))	Executive Cabinet (Overview and Scrutiny Performance Panel)	Thursday, 1 October 2024 (24 October 2024)

Chorley Quarter One Performance Monitoring Report 2024-25

Is this report confidential?	No
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Is this decision key?	No
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Purpose of the Report

1. This monitoring report sets out the performance against the delivery of the Corporate Strategy during the first quarter of 2024/25, covering 1 April 2024 to 30 June 2024.

Recommendations to Executive Cabinet

2. That the report be noted.

Recommendations to Overview and Scrutiny

3. The Committee is asked to challenge performance and make appropriate recommendations.

Reasons for recommendations

4. To ensure the effective performance monitoring of the Corporate Strategy and safeguard its delivery across 2024/25.

Other options considered and rejected

5. No other options have been considered or rejected. This is because the report does not present any items for decision.

Executive summary

6. The Corporate Strategy was approved in November 2023 setting out a refreshed programme that incorporated new priorities and performance measures. This report provides an update on the progress achieved at the end of quarter one in the 2024/25 financial year and reflects delivery between April and June 2024.
7. Overall performance of the Corporate Strategy projects is good, with one project (5%) now complete and 15 projects (79%) rated green, meaning they are progressing

according to schedule. Three projects (16%) have been rated amber, which provides an early warning sign of potential delays, and action plans for these projects are contained within the report.

- 8. Performance of the Corporate Strategy indicators and key service delivery measures continue to be closely monitored, with 71% of Corporate Strategy measures and 83% of key service delivery measures performing on or above target or within the 5% threshold.
- 9. Corporate priorities
- 10. The report relates to the following corporate priorities:

Housing where residents can live well	A green and sustainable borough
An enterprising economy with vibrant local centres in urban and rural areas	Healthy, safe and engaged communities

Background to the report

- 11. The Corporate Strategy is the key strategic document for the authority and includes performance indicators and projects that focus on delivering the Council’s four priorities.
- 12. The Corporate Strategy was approved by the Council in November 2023 and includes 19 corporate projects. This includes projects with a focus on the delivery of large-scale ambitious schemes that will have a significant impact on local outcomes and ensuring that Chorley is in the best possible position for the future.
- 13. Key performance measures for each service have been set so that targets remain challenging and reflective of the Council’s ambitions. These are reviewed annually as part of the service level business planning process.

Housing where residents can live well

Our commitments:



- Deliver affordable and energy efficient housing,
- Strive for good quality housing for all,
- Work with partners supporting new ways to prevent homelessness,
- Support our most vulnerable residents.

Delivering our Commitments in Quarter One

14. To ensure that the council is proactive in ensuring that everyone in the borough is able to live in good quality, energy efficient and suitable homes both the Housing Strategy and the Prevention of Homelessness Strategy are being refreshed. The Housing Strategy provides guiding priorities and actions that will ensure the council is proactive in ensuring everyone in the borough is able to live in good quality, energy efficient and suitable homes, and the Homelessness Strategy sets out the approach to strengthen the council's determination to work closely with partners to address emerging issues. In quarter one, the first draft of the new strategies and action plans have been completed. These are now out for informal consultation and will be presented to Senior Management for approval in quarter two.
15. The project to deliver the Home Energy Support Scheme has continued in quarter one with a combination of referrals for a home visit received, those made through internal and external partners including Social Prescribing and Housing, as well as those residents who had previously accessed the Household Support Fund. Over the quarter, 1,474 residents whose homes are listed as poorly performing in terms of energy efficiency have been contacted and the scheme has supported 89 households. Referral pathways have been developed across the service, to include social prescribing, housing, Home Improvement Agency, Children and Family Wellbeing Service, family hubs, Chorley Families networks and Chorley Dementia Action Group meaning those residents who may benefit from a home energy visit can be identified and supported. In order to simplify the customer journey customer services have been provided with information about the programme to enable customers to easily access the scheme when contacting the council directly.

Performance of key projects



16. There are five projects included in the 2023 Corporate Strategy under this priority and at the end of quarter one, overall performance is good.
17. Three projects are rated as green, meaning they are progressing according to timescales and plan:
- Refresh the Prevention of Homelessness Strategy,
 - Deliver the Home Energy Support Scheme,
 - Refresh the Housing Strategy.

18. Two projects are rated as Amber.

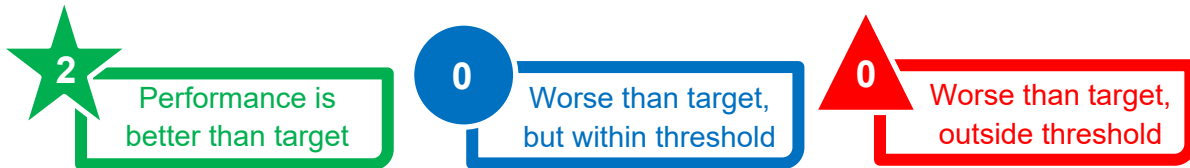
- Develop and deliver a plan to improve housing standards across the borough,
- Develop the Local Plan.

Project Title:		Project Status:
Develop and deliver a plan to improve housing standards across the borough		Amber
Explanation:	<p>During quarter one there has been a large amount of reactive housing enforcement work taking place which has resulted in the prohibition of several properties within the Chorley area. There has also been a large piece of work undertaken to ensure that the necessary policies and procedures are in place in order to continue to provide proactive enforcement. This has meant that although the data collection has continued as planned within quarter one it will not be completed until quarter two.</p> <p>In addition, in quarter one Chorley was awarded £11,000 to support data collection as a control group of the DLUHC Healthy Homes project to tackle damp and mould growth effectively in homes. This is a joint project with the Department for Work and Pensions (DWP) and Department of Health and Social Care (DHSC) to test different enforcement approaches to damp and mould. Over the next 6 months, a pilot of the initiative will be rolled out. The primary objectives are to boost the capability and capacity of enforcement teams and gather data on what works when it comes to enforcement of damp and mould hazards.</p>	
Action required:	<p>During quarter two work will continue to identify the properties in the borough in the private rented sector with an EPC (Energy Performance Certificate) rating of E or below. It is anticipated that this will be completed in quarter two and that the project will continue to be delivered to timescale.</p>	

Project Title:		Project Status:
Develop the Local Plan		Amber
Explanation:	<p>Significant progress has been made on developing the new Central Lancashire Local Plan with more than 80% of the policies being drafted. This project however has continued to be rated as Amber to highlight the potential delays to the schedule for the finalisation of site selection for housing and employment.</p> <p>The Strategic Flood Risk Assessments (SFRA) Level 1 have reported a much higher number of sites that require a Level 2 SFRA than anticipated. The number of assessments required, the cost implications and the timeframes are as yet unknown at this stage, however, is likely to have an impact on the budget provision.</p> <p>There is also the added risk of national policy changes from the new government.</p>	
Action required:	<p>The Central Lancashire Steering Group will continue to monitor and review the Local Development Scheme and programme, taking the necessary steps to maintain progress.</p>	

	The partnership are working in collaboration with Jacobs and key partners (Lead Local Flood Authority, United Utilities and Environment Agency) to finalise which sites require a level 2 assessment and the costs and timings of this work.
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Performance of corporate strategy measures



19. At the end of quarter one, two of the three corporate performance indicators under this priority are due to be reported.
20. Both indicators are performing on or better than target:
 - The number of long-term empty properties in the borough,
 - The percentage of households living in fuel poverty.



A green and sustainable borough

Our commitments:

- Work towards our commitment to be carbon neutral by 2030,
- Support waste reduction, reuse, and recycling,
- Work with partners to retain natural habitats and improve air quality,
- Promote sustainable transport and infrastructure.

Delivering our Commitments in Quarter One

21. The Rural Business Support and Grant Scheme project has completed in quarter one, following the approval of six successful applicants in quarter four to a total value of £398,800 in capital grant funding, all contracts were issued. The six rural businesses are now progressing with their approved projects which will assist them to develop new products and services or improve existing facilities to help them grow, create new jobs and support a vibrant rural economy, and will now be monitored to ensure they complete within the defined timeframe (by end of quarter four 2025).
22. The council is committed to promoting sustainable transport and infrastructure, and the project to deliver improvements to Chorley's bus shelter network has made excellent progress in quarter one. A total of 45 shelters across the borough have now been replaced with more inviting, accessible, and sustainable bus shelters, in addition four living roof shelters have been installed which will help to increase local biodiversity. The phased installation plan has also been adjusted to accommodate cantilever shelters which maintain sufficient pavement access with the installation of these due to start in quarter two.
23. In quarter one the project to increase the number of parks with a Green Flag status has progressed well, this scheme recognises and rewards well managed parks and green spaces across the United Kingdom and around the world. All work was completed to improve the cleanliness and general standard of both Carr Brook Linear Park and Tatton Recreation Park. The judging of these sites has taken place with confirmation of the results being communicated in quarter two, if successful this will mean that Chorley would have a total of eight green flag parks.
24. The council continues to deliver the Business Energy Support Scheme to boost businesses across the borough with ongoing promotion of the scheme taking place on social media, the Council website, newsletters and at events in order to generate interest. Enquiries have been forwarded onto to the Chamber of Commerce, who have been commissioned to provide the energy audits, with 24 businesses put forward in quarter one for a fully funded energy use audit.
25. The project to maintain and Improve Council Buildings has continued to make good progress in quarter one. The scope and costs for the works to the Town hall have been presented to Senior Management for approval. This includes surveys of the Town Hall to help identify the work that needs to be undertaken to the fabric of the building, as well as internal decoration. The longer-term plans for the leisure centres have also been approved, and these include a larger more flexible space for the All Seasons gym, new changing room areas and the introduction of a swimming pool walkway which will enable the number of swimming lessons on offer to increase.
26. In quarter one the project to develop and deliver a plan to improve Chorley Bus Station has made good progress. The internal and external decoration has all been completed to improve the aesthetic of the building, the toilet refurbishment has been completed and

all the seats and bins have been powder coated to create a thick, tough finish. These improvements will all help to provide a welcoming entrance point for visitors to the town centre. In quarter two, the specifications and tender exercise will conclude, and contracts will be awarded for the installation of the green wall, external cladding, digital screens and the tourism information point.

Performance of key projects



- 27. There are six projects included in the 2023 Corporate Strategy under this priority and at the end of quarter one, overall performance is excellent.
- 28. One project has been classified as completed, indicating that it has delivered the milestones planned for this year:
 - Deliver a Rural Business support and grant scheme.
- 29. Five projects are rated as green, meaning they are progressing according to timescales and plan:
 - Increase the Number of Parks with Green Flag Status,
 - Deliver the Business Energy Support Scheme to Boost Businesses across the Borough,
 - Maintain and improve council buildings,
 - Develop and deliver a plan to improve Chorley bus station.
 - Continue to deliver improvements to Chorley’s Bus Shelter Network.

Performance of corporate strategy measures



- 30. At the end of quarter one, two of the four corporate performance indicators under this priority are due to be reported.
- 31. One indicator is performing on or better than target or within the 5% threshold:
 - Number of bus shelters improved.
- 32. One indicator is performing below target and outside the 5% threshold.
 - Percentage of household waste sent for reuse, recycling or composting.

Indicator	Polarity	Target	Q4 2022/23	Q4 2023/24	Symbol	Trend
Percentage of household waste sent for reuse, recycling or composting	Bigger is Better	46.04%	46.0%	43.3% ¹	▲	Worse than Q4 2022/23

<p>Reason below target:</p>	<p>Data analysis shows lower than anticipated quarter three and quarter four performance. This has resulted in the year to date performance at quarter four being below target. In 2023/24 there has been a lower-than-expected tonnage of household recycling, and higher than expected tonnage of residual waste.</p> <ul style="list-style-type: none"> • Dry mixed recycling (plastics/cans/glass) tonnage is 600 tonnes lower than the 5-year annual average; and has fallen 200 tonnes compared with 2022/23. • Paper and card recycling tonnage is 300 tonnes lower than the 5-year annual average; and has fallen 80 tonnes compared with 2022/23. • Garden waste tonnage is 400 tonnes lower than the 5-year annual average; however, this has increased by 200 tonnes compared with 2022/23. • Residual (non-recyclable) waste tonnages for 2023/24 are 500 tonnes lower than the 5-year annual average, however, has increased by 480 tonnes compared with 2022/23. <p>The above variations in tonnages collected means the percentage recycled (dry recycling) is 2% lower than the 5-year annual average, and 3% lower than 2022/23. The percentage composted (garden waste) is equivalent to the 5-year annual average and has increased 0.7% compared to 2022/23.</p> <p>In 2022/23 there was considerably more back allocation of recycled tonnages, due to glass being extracted from the residual waste. For quarters three and four 2023/24 there was only 116 tonnes, compared with approx.1200 tonnes for quarter three and four 2022/23, this is being investigated further.</p>
<p>Action required:</p>	<p>Early indication shows that Chorley has the third highest annual recycling rate across Lancashire for 2023/24, with 9 of the 12 districts confirming their data with Defra, and of those nine, six districts also had a notable decrease in recycling.</p> <p>Our new Recycling and Waste Strategy has projects and actions designed to drive up recycling rates and reduce levels of residual waste, and food waste collections are to be introduced from April 2026 which should enable increases in waste recycled and a corresponding decrease in residual waste.</p> <p>It is anticipated that the next two quarters of 2024/25 data will likely include back allocation tonnages from the Mechanical Biological Treatment process, therefore it is likely that performance will see an improvement in quarter one and/or two.</p>
<p>Trend:</p>	<p>This indicator is performing worse than the 46.0% reported in Q4 2022/23.</p>

¹ This indicator is reported in arrears and reflects quarter four 2023/24 performance.

An enterprising economy with vibrant local centres in urban and rural areas



Our commitments:

- Support business growth and expansion across the borough,
- Work with partners to support skills, development, and innovation,
- Work with partners to promote the district as a visitor destination and attract investment in our local service centres,
- Promote the green economy.

Delivering our Commitments in Quarter One:

33. The project to develop a destination Management Plan for the borough has continued in quarter one, the commissioned agency who were appointed in quarter four have now completed the stakeholder engagement stage, this included meeting with local businesses, members of staff, and Councillors to get a view on what Chorley has to offer, and how to promote the district as a visitor destination and attract investment in our local service centres. This information and evidence gathered will be used to collate a draft Visitor Economy Strategy in the next quarter for approval by key stakeholders.
34. The Jobs and Skills programme to upskill residents across the borough, has progressed during the quarter with the final planning of the Chorley Employment Gateway Expo, which is due to take place in quarter two at Inspire Youth Zone. A total of 41 employers and organisations have signed up to showcase their job vacancies, training programmes, voluntary positions and support opportunities directly to residents of all ages. The employment and skills strategic framework is currently being developed and this will outline the support required by residents to access employment and skills training and how partners can work collaboratively to achieve this and is due for completion in quarter three. Consultation activities will take place with partners to gather feedback and ensure we are meeting the needs of residents.
35. The refresh of the Economic Development Strategy to promote growth across the borough has progressed this quarter with the analysis of the findings from the evidence base taking place which are being used to inform the review of the strategy and action plan. There have been some delays to this project due to a number of factors which has impacted on the completion date by four months (for further details please see the action plan below).

Performance of key projects



36. There are three projects included in the 2023 Corporate Strategy under this priority and at the end of quarter one, overall performance is good.

- 37. Two projects are rated as green, meaning they are progressing according to timescales and plan:
 - Develop a Destination Management Plan for the borough,
 - Deliver a Jobs and Skills programme to upskill residents across the borough,
- 38. One project is rated as amber:
 - Refresh of the Economic Development Strategy to promote growth across the borough.

Project Title:	Project Status:
Refresh of the Economic Development Strategy to promote growth across the borough	Amber
Explanation:	<p>This project is rated as Amber to highlight the delays that are beyond the original approved plan completion dates, whilst still remaining within the delivery year.</p> <p>There are several reasons for the delays including capacity, changing policy context (including the development of a Lancashire Economic Plan), and uncertainty around future national priorities and funding.</p>
Action required:	<p>These issues mean that there will be an impact to the completion date of the project by four months. The additional time will allow for the refresh of the action plan and strategy to align with national and regional policy changes/priorities, for Partnership structures to be implemented and for consultation to take place.</p> <p>The refresh of the Economic Development Strategy is expected to be presented to Executive Cabinet in January 2025.</p>

Performance of corporate strategy measures



- 39. At the end of quarter one, three of the four corporate performance indicators under this priority are due to be reported.
- 40. One indicator is performing on or better than target or within the 5% threshold:
 - Number of business engagements by the Council.
- 41. Two indicators are performing below target and outside the 5% threshold:
 - The number of projected jobs created through Chorley Council support or intervention,
 - The % of 16-17 year olds who are not in education, employment, or training (NEET)

Indicator	Polarity	Target	Q1 2023/24	Q1 2024/25	Symbol	Trend
The number of projected jobs created through Chorley Council support or intervention	Bigger is better	50	95	42	▲	Worse than Q1 2023/24
Reason below target:	<p>The information about the number of projected jobs is gathered from businesses in two ways, firstly through the grants process as a number of the grants require new jobs to be created to access the funding and the business has 2 years to create the jobs. Secondly, as part of the business support process, any businesses indicating growth are asked to project an estimated number of new jobs to be created. Unfortunately, this can only be done at a point in time and the number of projected jobs is an estimate which is subject to numerous factors such as profit, sales and increasing inflation and energy costs.</p> <p>There has been an increase in the number of business engagements on the same period last year due to an increased level of activity through UKSPF programmes e.g. events, startup programme. There is also an increased grant offer this year with a number of new grants being introduced through UKSPF. We have also widely promoted the grants to encourage uptake. The following grants are currently on offer:</p> <ul style="list-style-type: none"> • BIG (Business Investment Grant) • Choose Chorley • Shop front improvement • Retail and Hospitality • Energy Efficiency/Road to net zero • Start Up • Apprenticeship • Rural <p>Not all the grants however require jobs to be created as some are quite small amounts and others require match funding, which often means there are delays in progressing the grant applications as businesses secure their side of the funding.</p> <p>The main reason for the reduction in projected jobs is likely to be the economic slowdown that has occurred nationally in the last few months. Rising costs including wages due to an increase in the minimum wage/living wage, post Brexit problems with exports and a general lack of confidence in national politics have all contributed to businesses being more cautious and not investing in either improvements to premises or increased staffing levels.</p>					
Action required:	The projected jobs will be monitored over the next two quarters as the general election and new economic policies could potentially see an increase in confidence and growth in the wider economy.					
Trend:	This indicator is performing worse than the 95 reported in Q1 2023/24, but slightly better than the 40 reported in the previous year (Q1 2022/23). The increase in performance at Q1 2023/24 can be attributed to the inclusion on jobs created through Council developments including Strawberry Meadows and Tatton Garden. At the end of 2023/24 performance was 50% better than target.					

Indicator	Polarity	Target	Q1 2023/24	Q1 2024/25	Symbol	Trend
The percentage of 16-17 year olds who are not in education, employment, or training (NEET)	Smaller is better	3.0%	3.5%	3.8%	▲	Worse than Q1 2023/24
Reason below target:	<p>The number of 16 and 17 year olds who are not in education, employment or training (NEET) has been off target at 3.8%, which reflects that there are known 105 NEETs at the end of quarter one. This is an increase from the same time last year (3.5%) and is above Lancashire (3.5%). The NEETs' number have increased across most districts in Lancashire. Wards with the highest number of NEETs include Clayton East, Brindle and Houghton followed by Clayton West and Cuerden; and Coppull.</p> <p>The performance of the number of NEETs in quarter one is impacted by the end of the academic year and young people transitioning into the workforce or onto further education or training opportunities. Lancashire County Council continue to face challenges contacting NEET young people, with an increased number of "Unknown NEET" and 'Unavailable NEET' facing specific challenges preventing young people from actively seeking work or participating in educational opportunities. Contributing factors include illness, mental health or the need to support family.</p>					
Action required:	<p>Lancashire County Council (LCC) continue to work and engage with the 16 and 17 year olds who are NEET through the Youth Futures team with a focus of reducing the number of 'Not Known' and to develop a partnership approach to increase the number of young people accessing education, employment or training. The Council has also formed an 'Increasing Education, Employment and Training (EET)' working group with LCC Education Improvement Team and Inspire Youth Zone to identify and support NEET young people within the borough.</p> <p>The Council have been working with local partners to deliver a range of activities supporting young people, including:</p> <ul style="list-style-type: none"> • The commissioning of Inspire Youth Zone, utilising UKSPF funding to deliver a programme to target NEET young people, and young people who are at risk of becoming NEET as identified by the education settings. • Delivering a programme in partnership with UDevelop offering 1:1 mentorship for NEET young people with the aim of developing personal growth, resilience and motivation for future opportunities. • Delivering events to support young people around careers and aspirations this quarter, including career events at Albany Academy and Parklands High School. The events supported employability skills through engaging team activity, time management and problem solving. • The Council is also working with partners to deliver employability skills courses and ensure that young people have right skills to take advantage of available employment opportunities. 					
Trend:	This indicator is performing worse than the 3.5% reported in Q1 2023/24.					

Healthy, safe, and engaged communities



Our commitments:

- Support and encourage active lifestyles and health and wellbeing,
- Support development of leisure services and facilities meeting the needs of residents,
- Deliver events and places to go for everyone,
- Ensure all residents of all ages can access the services they need physically and digitally,
- Promote resilient, cohesive neighbourhoods by listening and responding,
- Work with partners to join up public services so that they make sense for everyone.

Delivering our Commitments in Quarter One

42. The launch of an enhanced Social Prescribing service focussed on supporting family and early years has progressed well in the first quarter, continuing to build referral pathways with partners and making important links with schools, as well as providing support to those families in supported housing. Referrals have been made to 50 external partners offering dedicated specialist help and 127 families signposted to further support opportunities to benefit their wellbeing. The services impact continues to grow, with 52 families receiving support in quarter one. An example case involved a customer struggling with daily activities, while caring for two young children and undergoing a separation. The Social Prescribing Service provided comprehensive support, including health coaching, referrals to family counselling, family sessions at Inspire Youth Zone, assisted bin collection, and a Cost of Living payment. As a result, the family is now thriving, the customer has secured full-time employment, lives independently with shared custody of the children, who are excelling in school.
43. The Cost of Living Action Plan has made good progress within quarter one, the Chorley Conversations consultation has been refreshed, which is the process of capturing qualitative feedback from residents about how they are coping with cost-of-living challenges and seeks to add context and case-studies to the quantitative data collected. Telephone conversations will take place when residents are contacted about their request for help via the Household Support Fund and Social Prescribing, and face-to-face conversations with residents will take place where there are community events (e.g. at Summer Play Day in August and at Warm Spaces over the winter). The information collated will then be analysed to help shape future service delivery including community group commissioning.
44. During the quarter, the Health and Wellbeing programme continued to support residents across the borough. Three 10-week adult healthy weight courses were successfully delivered, with a total of 49 residents participating. The Childhood Healthy Weight Programme also progressed within schools, with 14 schools identified for the 2024/25 delivery. Four school sessions were conducted in quarter one, resulting in increased parental engagement, which is crucial for sustaining changes beyond the programme. Additionally, Andy's Man Club, a men's suicide prevention charity, conducted presentations during the quarter, with more planned for quarter two. These presentations aim to end the stigma surrounding men's mental health and support men through conversation. They also provide council staff and councillors with valuable insights into the support available for themselves and others they may assist.

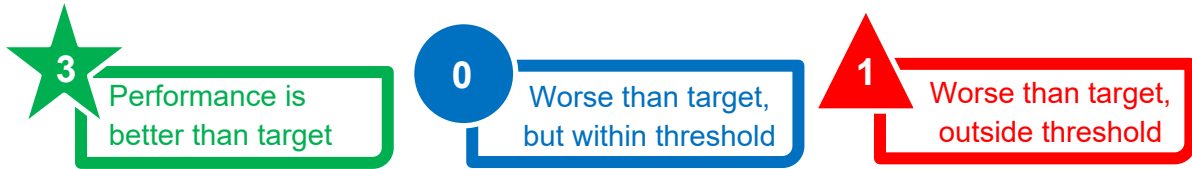
45. The delivery of a borough Anti-Social Behaviour action plan continued in quarter one with the grant scheme to reduce Anti-Social Behaviour, Crime and Disorder launched, this has been promoted through social media channels, and will look to provide solutions to businesses that have experienced anti-social behaviour or have been a victim to crime at their premises. Additionally, Police-led Operation-Centurion Patrols were conducted during peak times in hotspot areas across the borough. Intelligence was shared for coordinated action when necessary, offering reassurance and confidence to the public and residents that the Police and Council are actively addressing crime.
46. During the first quarter, progress has been made in developing the Transformation Programme, which will integrate with the Corporate Strategy, Business Planning and budget setting processes. This integration ensures that the various programmes and strategies complement each other and address the current needs of each council. The programme's monitoring will be part of the broader Fit for the Future initiative and will be overseen by a new Change and Delivery board. This board will identify and deliver budget savings, address gaps in skills, knowledge, and capabilities necessary for effective transformation, and provide opportunities for future growth. The draft terms of reference for the board have been developed, with the board set to be established at the start of quarter three to align with the finalisation of Corporate Strategy and Transformation Programme projects. Additionally, the project management framework and toolkit are being refreshed to ensure robust governance of all projects within the transformation programme, effective monitoring of risks and issues, monitoring progress and the realisation of benefits.

Performance of key projects



47. There are five key projects included in the 2023 Corporate Strategy under this priority and at the end of quarter one overall performance is excellent.
48. All five projects are rated as green, meaning they are progressing according to timescale and plan:
- Launch an enhanced social prescribing service focussed on supporting family and early years,
 - Deliver the Cost-of-Living action plan,
 - Deliver a Health and Wellbeing programme to support the needs of residents across the borough,
 - Delivery of a borough Anti-Social behaviour action plan
 - Refresh and deliver the transformation programme.

Performance of corporate strategy measures



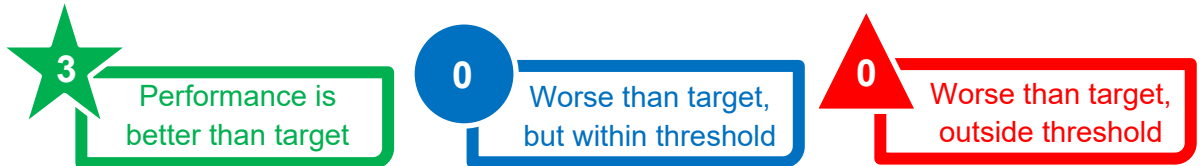
- 49. At the end of quarter one, five of the six corporate performance indicators under this priority are due to be reported.
- 50. One indicator is being baselined in 2024/25:
 - The average percentage reduction in GP appointments following support from the council.
- 51. Three indicators are performing on or above target or within the 5% threshold:
 - The number of visits to Council leisure centres,
 - Average improvement in wellbeing score following support from the council,
 - The percentage of service requests received online.
- 52. One indicator is performing below target and outside the 5% threshold, however in line with the Customer Access Charter, which was adopted in 2023/24, a new collection method is being used and therefore this indicator will be revised in 2025/26 to align with the Customer Access Charter:
 - The percentage of customers dissatisfied with the service they received from the council.

Indicator	Polarity	Target	Q1 2023/24	Q1 2024/25	Symbol	Trend
The percentage of customers dissatisfied with the service they received from the council	Smaller is better	17%	12.1%	23.73%	▲	Worse than Q1 2023/24
Reason below target:	<p>In previous years the data used to measure customer dissatisfaction was captured through a survey which was emailed to all customers who had interacted with the council online. The survey asked a single question ‘Taking everything into account how satisfied were you with the overall service you received from the Council in this instance?’</p> <p>From April 2024 the data source for measuring the level of customer satisfaction changed and the data is now collected through a telephone survey, which inbound callers to the contact centre can opt in to complete. Therefore this is only a snapshot of the customer experience when contacting customer services. The telephone survey also contains 4 questions, with the rate of overall customer satisfaction calculated from responses to these questions:</p> <ol style="list-style-type: none"> 1. Did you manage to do everything you needed to do when you contacted us today? 2. How satisfied were you with your overall experience when you contacted us today? 3. How easy was it to complete what you wanted to do today? 4. How do you rate the service provided by the advisor you spoke to today? <p>In quarter one 2024/25 there were 1003 responses received with a total of 238 negative responses, this represents a much larger response rate than the same time last year (132 responses with 16 negative responses).</p>					

	When the Customer Access Charter was adopted the 2024/25 target for customer satisfaction was set at 70%. For the period April to June 2024 performance is within tolerance, with 69.2% of customers being satisfied with the service they received from the Council.
Action required:	An additional question has been added to the survey to gain consent to contact customers for their feedback if they opt in to complete the survey. Therefore, when a customer has expressed dissatisfaction, they will be contacted by the Customer Services team to try to put things right and to use this feedback to continue to develop and improve our services. In addition, as the opt in survey is currently only available to customers calling the contact centre, once the new online forms go live later this year there will also be the opportunity to expand the survey to capture feedback from these customers as well.
Trend:	This indicator is performing worse than the 12.1% reported in Q1 2023/24

Performance of National and Regional Comparators

53. In addition to delivery indicators under each of the key priorities, the Council also measures outcomes compared to national and regional performance indicators within the Corporate Strategy.

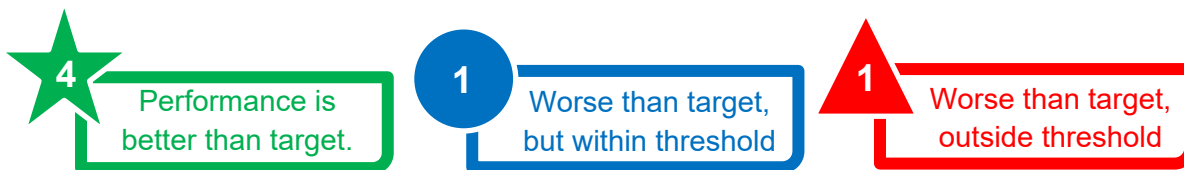


54. At the end of quarter one, three of the five corporate performance indicators under this category are due to be reported, and full outturn information is available at Appendix A.

55. All three indicators are performing on or above target or within the 5% threshold:
- The number of claimants as a proportion of the resident population of the area aged 16-64,
 - Town Centre vacancy rate,
 - Overall employment rate.

Performance of Key Service Measures

56. There are some important indicators that are not included within the Corporate Strategy but are measured locally as indicators of service performance.



57. At the end of quarter one, all six key service measures are due to be reported. The full outturn information for this is available at Appendix B.

58. Five indicators are performing on or above target or within the 5% threshold:
- Percentage of minor planning applications decided within 8 weeks or agreed time extension,
 - Percentage of major planning applications decided within 13 (16 for EIA) weeks or agreed time extension,
 - Percentage of Council Tax collected,
 - Percentage of Business Rates (NNDR) collected,
 - Contact Centre inbound calls answered within wait time of less than 5 minutes.

59. One indicator is performing below target and outside the 5% threshold.
- Average working days per employee (FTE) per year lost through sickness absence.

Indicator	Polarity	Target	Q1 2023/24	Q1 2024/25	Symbol	Trend
Average working days per employee (FTE) per year lost through sickness absence	Smaller is Better	1.96 days	1.96 days	2.22 days	▲	Worse than Q1 2023/24
Reason below target:	<p>In quarter one the average working days per employee was 2.22 days (target 1.96 days), with short-term sickness at 0.91 days (target 0.28 days) and long-term sickness at 1.31 days (target 1.69 days).</p> <p>Sickness cases both short and long term have been managed effectively and in line with policy. During this period as has been the case in 2023/24 there has been a noticeable increase in cough cold/covid and stomach bugs which are not dissimilar to other organisations throughout the country. The most common cause of short-term absence reported in the UK in 2023 was minor illnesses, with COVID as a leading reason along with cough, colds etc.</p> <p>During quarter one some people have been testing negative for COVID within the Council but having the same symptoms as someone who has tested positive, while others have chosen not to test. Long term sickness cases has largely related to physical issues requiring medical intervention.</p>					
Action required:	<p>Robust action plans and early interventions are in place, alongside training for managers covering best practice in managing attendance. The Council employs its Improving Attendance Policy, implementing formal attendance processes when necessary and offering support measures such as counselling and occupational health referrals to assist employees. Analysis of sickness has also been shared with Heads of Services in order to highlight any trends and/or cause for concern.</p>					

Trend:	This indicator is performing worse than the 1.96 days reported in Q1 2023/24. At Q1 2023/24 in Lancashire, short-term sickness absence was 0.8 days and long-term sickness was 2 days per FTE.
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Climate change and air quality

60. The work noted in this report impacts on the following areas of climate change and sustainability targets of the Council’s Green Agenda: net carbon zero by 2030, reducing waste production, limiting non sustainable forms of transport, working with sustainable and green accredited companies, limiting, or improving air quality, limiting water waste, and flooding risks, improving green areas and biodiversity.

Equality and diversity

61. An Impact Assessment (IA) was completed in October 2023, which was considered as part of the approval process for the Corporate Strategy 2023. Impact Assessments have also been individually conducted for each corporate project as part of the planning and documentation process. This has ensured that the impact on equality, our communities, and the environment has been fully considered and addressed.

Risk

62. Each corporate project has a risk register established on the GRACE risk management system to ensure the effective identification, monitoring, and mitigation of risks to the Corporate Strategy and its delivery. These will inform the wider risk assessment for the Corporate Strategy on an ongoing basis.

Comments of the Statutory Finance Officer

63. There are no direct financial implications of this report. The financial impact of performance upon budgets is reflected within quarterly financial reporting.

Comments of the Monitoring Officer

64. The report is for noting only. There are no direct legal implications as a result of this report.

Background documents

65. The following documents are background items to this report:

- [Corporate Strategy 2023](#)
- [Corporate Strategy 2023 cover report](#)

Appendices

66. The following appendices are included with the report.

- Appendix A – Performance of Corporate Strategy key measures,
- Appendix B – Performance of key service delivery measures,

Report Author:	Email:	Telephone:	Date:
Louise Wingfield (Policy and Performance Advisor)	louise.wingfield@chorley.gov.uk	01257 515151	23/08/24

Appendix A: Performance of Corporate Strategy key measures



Performance is better than target



Worse than target but within threshold



Worse than target, outside threshold

Indicator Name	Polarity	Target	Previous Reported Period	Quarter 1 2024/25		Trend (compared to same period last year Q1 2023/24)	
Housing where residents can live well							
Number of long-term empty properties in the borough	Smaller is better	150	128 (Q4 2023/24)	132	★	Worse than Q1 2023/24	129
Percentage of households living in fuel poverty	Smaller is Better	National Average 14.1%	11.1% (Q1 2023/24)	11.1%	★	Same as Q1 2023/24	11.1%
No. of affordable homes delivered	Bigger is Better	75	117 (Q4 2023/24)	To be reported Q2 2024/25		-	-
A green and sustainable borough							
Number of bus shelters improved	Bigger is better	32	15 (Q4 2023/24)	45	★	Reported from Q3 2023/24	-
Number of Trees Planted	Bigger is better	23,000	151,780 (Q4 2023/24)	To be reported Q4 2024/25		-	-
Number of improvements to parks, open spaces and playing pitches linked to strategy delivery	Bigger is better	6	12 (Q4 2023/24)	To be reported Q4 2024/25		-	-
% of household waste sent for reuse, recycling, or composting (Q3 data)	Bigger is better	46.04%	45% (Q3 2023/24)	43.3% ¹	▲	Worse than Q4 2022/23	46.0%
An enterprising economy with vibrant local centres in urban and rural areas							
Number of projected jobs created through Chorley Council support or intervention	Bigger is better	50	301 (Q4 2023/24)	42	▲	Worse than Q1 2023/24	95
The % of 16-17 year olds who are not in education, employment, or training (NEET)	Smaller is better	3.0%	3.6% (Q4 2023/24)	3.8%	▲	Worse than Q1 2023/24	3.5%
Number of Business Engagements by the Council	Bigger is better	225	1123 (Q4 2023/24)	291	★	Better than Q1 2023/24	235
Growth in the business rate base	Bigger is better	0.5%	14.81% (Q4 2023/24)	To be reported Q4 2024/25		-	-

¹ This indicator is reported in arrears and reflects quarter four 2023/24 performance. Its previous performance relates to quarter three 2023/24.

Indicator Name	Polarity	Target	Previous Reported Period	Quarter 1 2024/25		Trend (compared to same period last year Q1 2023/24)	
Healthy, safe, and engaged communities							
The number of visits to Council's leisure centres	Bigger is better	85,000	344,125 (Q4 2023/24)	95,209	★	Better than Q1 2023/24	89,854
Average improvement in wellbeing score following support from the council	Bigger is Better	70%	73% (Q4 2023/24)	76%	★	Better than Q1 2023/24	73%
Average % reduction in GP appointments following support from the council	Bigger is Better	Baseline	Not available	38%	-	NEW for 2024/25	-
% of service requests received online	Bigger is better	50%	53.84% (Q4 2023/24)	60.30%	★	Worse than Q1 2023/24	61.02%
% of customers dissatisfied with the service they have received from the council	Smaller is better	17%	17.84% (Q4 2023/24)	23.73%	▲	Worse than Q1 2023/24	12.10%
% increase in visitor numbers to Chorley	Bigger is better	2%	31.5% (Q3 2023/24)	To be reported Q3 2024/25		-	-

National and Regional Comparators							
Overall employment rate	Bigger is Better	73.2% (Regional Average)	68.8% (Q4 2023/24)	78.2%	★	Better than Q1 2023/24	67.5%
The number of claimants as a proportion of resident population of the area aged 16-64	Smaller is Better	4.40% (Regional Average)	2.6% (Q4 2023/24)	2.6%	★	Worse than Q1 2023/24	2.4%
Town Centre Vacancy Rate	Smaller is better	11.25% ²	7.69% (Q4 2023/24)	8.55%	★	Better than Q1 2023/24	10.2%
Median Workplace Earnings better than the North West Average	Bigger is better	Regional Average	£615.70 (Q4 2023/24)	To be reported Q4 2024/25		-	-
Earnings by place of residence (better than the North West average)	Bigger is better	Regional Average	£668.50 (Q4 2022/23)	To be reported Q4 2024/25		-	-

² This indicator tracks against the national average which was previously provided on a quarterly basis from an external source, the report is no longer available therefore this means that we will no longer be able to compare ourselves to the national rate as set out in the 2023/24 Corporate Strategy. The target of 11.25% is an average of the most recent national rate data over the last twelve months.

Appendix B: Performance of key service delivery measures

★ Performance is better than target
 ● Worse than target but within threshold
 ▲ Worse than target, outside threshold

Indicator Name	Polarity	Target	Comparison (previous quarter)	Quarter 1 2024/25		Trend (compared to same period last year Q1 2023/24)	
				Value	Performance	Trend	Value
% MINOR planning applications decided within 8 weeks or agreed time extension	Bigger is Better	85%	99.0% (Q4 2023/24)	99.0%	★	Better than Q1 2023/24	98.0%
% MAJOR planning applications decided within 13 (16 for EIA) weeks or agreed time extension	Bigger is Better	80%	88% (Q4 2023/24)	100%	★	Same as Q1 2023/24	100%
Average working days per employee (FTE) per year lost through sickness absence	Smaller is Better	1.96 days	8.05 days (Q4 2023/24)	2.22 days	▲	Worse than Q1 2023/24	1.96 days
Percentage of Council Tax collected	Bigger is Better	28.09% ¹	96.91% (Q4 2023/24)	27.68%	●	Worse than Q1 2023/24	28.09%
Percentage of Business Rates (NNDR) collected	Bigger is Better	25.68% ¹	97.0% (Q4 2023/24)	29.84%	★	Better than Q1 2023/24	25.68%
Contact Centre inbound calls answered within wait time of <5 minutes	Bigger is Better	55%	82.49% (Q4 2023/24)	62.80%	★	Worse than Q1 2023/24	76.49%

¹The annual council tax/ business rates charge is payable by residents/ ratepayers in 10 or 12 monthly instalments. The targets for this indicator are therefore incremental and change every quarter. The quarterly targets are based on actual performance for the same period in the previous financial year.

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Report of	Meeting	Date
Director (Customer and Digital) (Introduced by Executive Member (Customer, Streetscene and Environment))	Executive Cabinet	Thursday, 10 October 2024

Policy for managing unreasonable customer behaviour

Is this report confidential?	No
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Is this decision key?	No
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Purpose of the Report

1. To gain approval to adopt a formal policy for managing unreasonable customer behaviour

Recommendations to Executive Cabinet

2. Members are recommended to approve the adoption of a formal policy for managing unreasonable customer behaviour.
3. Members are asked to note the implementation of a Managed Customer Contact Register to alert staff to problematic individuals and properties.

Reasons for recommendations

4. The policy for managing unreasonable customer contact will set out a clear process on how unreasonable behaviour will be managed. This will safeguard that council employees have a safe working environment, and the time spent with our customers is fair and balanced.

Other options considered and rejected

5. To not adopt a formal policy for managing unreasonable customer behaviour. This option was rejected because to maintain a safe working environment for council employees we should set out clearly to everyone who accesses our services what we consider to be unreasonable and the steps we may take to deal with such behaviour.

Corporate priorities

6. The report relates to the following corporate priorities:

Housing where residents can live well	A green and sustainable borough
An enterprising economy with vibrant local centres in urban and rural areas	Healthy, safe and engaged communities

Background to the report

7. We are committed to providing the highest level of service and strive to continue to develop and improve our services. We encourage feedback and comments to help us to improve our services, but we must avoid contact that is not of value to our customers or the council.
8. In a minority of cases our customers pursue their requests or complaints in a way that is unreasonable. They may behave unacceptably or be unreasonably persistent in their contacts and submissions of information.
9. This can impede investigating a request or complaint and have significant impact on our resources.
10. Following a small number of incidents it has been identified that Chorley do not have an active formalised procedure to manage contact arrangements for vexatious customers.
11. Recent examples of unreasonable behaviour by different customers include:
 - a. Destroying a telephone by repeatedly smashing the handset on the reception desk
 - b. On multiple occasions phoning up to 7 times in 1 day in a verbally aggressive or abusive manner with no value or purpose
 - c. Harassing and intimidating employees outside of working hours by approaching them in the town centre and following them to their car
12. By adopting a formal policy, we will set out a clear process on how unreasonable behaviour will be managed. This will ensure a safe working environment for council employees and that the time we spend with our other customers is open, fair, and proportionate. A copy of the proposed policy is shown at Appendix A.
13. We have a zero-tolerance of violence or serious threats against our staff and this type of behaviour should always be reported to the Police.
14. The proposed policy is relevant to all our customers, both internal and external, and will be applied by all council employees and Members.
15. A customers' access to statutory services or information provided by the council will not be affected by the implementation of this policy.
16. When applying the policy, we will consider the Equalities Act 2010 and recognise an individual's requirements.
17. Where there is evidence of mental health problems, substance misuse, learning disabilities or other additional needs we will work with relevant agencies about potential support and appropriate pathways to support the customer.
18. Any managed contact arrangements we implement will acknowledge and be appropriate to the customer's circumstances.

19. This new policy will operate alongside the Customer Access Charter and Feedback Policy, which set out our approach to customer services, what our customers can expect from us and how we respond to customer comments, compliments and complaints.
20. The new Managed Customer Contact Register will be a central point of reference to alert staff about individuals or properties where the risk of unreasonable behaviour is known so this can be managed.
21. An internal operational guide will define internal processes and responsibilities within the policy and register. Standard letter templates will also ensure consistency across all services.

Definitions of unreasonable behaviour

22. The Local Government and Social Care Ombudsman's definitions of unreasonable or and unreasonably persistent behaviour will be applied in the policy.
23. Unreasonable customer contact includes behaviours or language whether face-to-face, by telephone, on social media or written contact that may cause our employees to feel intimidated, threatened or abused.
24. Some examples of unreasonable customer contact are:
 - a. threats
 - b. verbal abuse
 - c. offensive language, including comments viewed to be hurtful, derogatory, or obscene
 - d. derogatory remarks
 - e. rudeness
 - f. making provocative statements
 - g. raising unsupported allegations
 - h. shouting
25. Unreasonably persistent customer contact is considered as contact that:
 - a. does not have any serious value or purpose
 - b. is designed to cause disruption or annoyance
 - c. has the effect of harassing the council or its officers
 - d. can be categorised as obsessive or vexatious
 - e. fails to accept the council's position
26. Behaviours considered unreasonable include, but are not limited to:
 - a. sending high volumes of letters, emails and or phone calls
 - b. demanding responses within unreasonable timescales
 - c. insisting on speaking with specific members of staff
 - d. adopting a scatter-gun approach by contacting many members of staff
 - e. continually contacting us when we are in the process of looking at a matter
 - f. making many complaints about different issues or continually adding issues to the same complaint
27. The types of unreasonable contact outlined above are examples and not exhaustive lists.

Managed Customer Contact Register

28. A corporate register of customer managed contact arrangements at Stage 1 and Stage 2, which can be assessed by all staff, is under development.
29. The Head of Audit & Risk will be the Information Asset Owner for the register, with the appropriate Head of Service responsible for recording and managing individual cases of unreasonable customer behaviour which is impacting their service.
30. The Managed Customer Contact Register will include:
 - a. the name and contact details of the customer
 - b. details of the managed contact arrangements
 - c. when the managed contact arrangements commenced and the provisional end date
 - d. when the customer was advised of the decision to manage their contact
 - e. the review date and the outcome
 - f. the name and job title of the reviewing officer
31. In cases where a property is identified as a place where unreasonable behaviour is known, and the occupant's details are unknown, the property details should be included on the register along with the issues identified.
32. A risk assessment should be completed before any council employee attends a property which is on the register. Staff will be reminded to routinely check the register.

Proposals to manage unreasonable behaviour**Stage 1 warning & monitoring period**

33. If a customer demonstrates unreasonable behaviour they will be asked to change their contact with the council, with reasonable levels of expectation set out on each side. The options, we may consider at this stage, include:
 - a. Requesting the customer enters into an agreement about their future contact
 - b. Placing time limits on contacts
 - c. Restricting all or the number of telephone calls that will be accepted
 - d. Limiting the customer to one type of contact (telephone, letter, or email)
 - e. Refusing to acknowledge or respond to any repeated complaints on closed cases
 - f. Requiring the customer to communicate only through a single point of contact (SPOC)
34. This list is not exhaustive, and other measures appropriate to the circumstances may also be included.
35. The Head of Service or Director of the service affected by the unreasonable contact will inform the customer in writing and evidence the impact of their behaviour on service delivery.
36. It should also be explained why the customer's contact is unreasonable, the managed or restricted contact arrangements that are in place and the monitoring period for these arrangements.
37. The minimum monitoring period is 6 months, but this may be extended.

Stage 2 implementing managed contact arrangements

38. Stage 2 managed contact arrangements can be implemented with immediate effect, and or without issuing a Stage 1 warning.
39. Unreasonable contact may be escalated to this stage if the customer is persistent or abusive, for example, if they are repeatedly telephoning, shouting, or swearing at council employees.
40. The Head of Service or Director of the service affected by the unreasonable contact is required to propose additional managed or restricted contact arrangements and justify the reasons for placing the customer under stage 2 of the policy.
41. The proposals will be considered by the Director of Governance for a final decision which will be recorded on the corporate Managed Customer Contact Register.
42. The options we may consider at this stage include:
 - a. Diverting the customer's emails to a single point of contact (SPOC)
 - b. Terminating all telephone calls from the customer to the council, after requesting they email the SPOC with their enquiry.
 - c. Requiring any contacts to take place face-to-face in the presence of a third party
 - d. Restricting any face-to-face contacts to designated council premises
 - e. Asking the customer to contact us through an advocate
 - f. Instigating formal legal action such as issuing a Community Protection Warning
43. This list is not exhaustive, and we may include other measures appropriate to the circumstances.

Right of appeal

44. There is no right of appeal to the council at either Stage 1 or Stage 2 of the policy. The managed contact arrangements will be reviewed after the monitoring period expires and the customer will be informed of the outcome in writing.
45. If the customer disagrees with the implementation of managed contact arrangements, they may escalate their complaint to the Local Government and Social Care Ombudsman.

Climate change and air quality

46. The work noted in this report has an overall negative/positive impact on the Councils Carbon emissions and the wider Climate Emergency and sustainability targets of the Council.

Equality and diversity

47. An Impact Assessment been completed to consider any positive or negative impacts this new policy may have for our residents. (Appendix B).

Risk

48. If managing unreasonable behaviour is mishandled this could lead to legal challenges or damage the council’s reputation. The policy sets out a clear process how the council will manage unreasonable customer. This alongside staff training and internal operational guidance on the policy will mitigate this risk.

Comments of the Statutory Finance Officer

49. There are no direct financial implications of this report.

Comments of the Monitoring Officer

50. The adoption of a policy provides clear approach to what is classed as unreasonable behaviour and how it will be managed and escalated. This provides clarity for staff and the public and enables transparent decision making and fair treatment.

Background documents

There are no background papers to this report

Appendices

Appendix A Draft policy for managing unreasonable customer behaviour

Appendix B Equality Impact Assessment

Report Author:	Email:	Telephone:	Date:
Alison Wilding (Head of Customer Services)	alison.wilding@chorley.gov.uk	01257 515151	9 August 2024

This decision will come into force and may be implemented five working days after its publication date, subject to being called in in accordance with the Council’s Constitution.

Policy for managing unreasonable customer behaviour

September 2024

Version 1.0

Introduction:

We are committed to providing the highest level of service possible and strive to continue to develop and improve services, so they are customer focused, accessible, and meet the needs of all our customers.

You can help us to deliver an excellent customer service by treating our employees fairly and with honesty and respect so we can ensure you get the services that you need.

Feedback is important for continuing to improve and develop our services and ensuring we are responsive to customer needs and concerns. We encourage feedback and comments to help us to improve our services, but we will avoid contact that is not of value to you or the council.

In a minority of cases our customers pursue their requests or complaints in a way that is unreasonable. They may behave unacceptably or be unreasonably persistent in their contacts and submission of information. This can impede investigating a request or complaint and can have significant impact on our resources.

By adopting this formal policy, we have set out a clear process on how unreasonable customer behaviour will be managed so the time we spend with our customers is open, fair, and proportionate.

Under this policy we will manage customer behaviour that is aggressive, abusive, or unreasonably persistent, and has significant resource issues for the council.

Before implementing any managed contact arrangements, we will consider the Equalities Act 2020 and recognise an individual's requirements. Where there is evidence of mental health problems, substance misuse, learning disabilities or other additional needs we will work with relevant agencies about potential support and appropriate pathways for the customer.

This policy is relevant to all our customers, both internal and external, and will be applied by all council employees and Members.

All council employees will receive training on the requirements of this policy alongside the Customer Access Charter and Feedback Policy, which set out our approach to customer services, what our customers can expect from us and how we respond to customer comments, compliments and complaints.

From time-to-time we will review this policy and update it if the law or guidance on managing customer contact changes.

This Policy:

- Recognises some customers may have reasons to feel aggrieved, upset, or distressed but it is not acceptable when anger becomes aggression directed towards our staff.
- Defines what unreasonable customer contact means to the council. This may include one or two isolated incidents or unreasonably persistent behaviour, which is usually a build-up of incidents or behaviour over a longer period.
- Identifies and manages situations where customer behaviour may be considered unreasonable.
- Provides a clear process to manage unreasonable customer contact.
- Helps council employees understand our approach and the processes they should follow to manage unreasonable customer contact.
- Safeguards that council employees have a safe working environment and are not exposed to unreasonable customer contact.
- Does not replace any statutory guidance that may be in place for a service.

Definitions and examples of unreasonable customer contact:

We have adopted the Local Government and Social Care Ombudsman's definitions of unreasonable complainant behaviour and unreasonably persistent complainants, even though this policy is not limited to customers making complaints and may also be applied to anyone displaying unreasonable contact.

We consider unreasonable customer contact to include behaviours or language whether face-to-face, by telephone, on social media or written contact that may cause our employees to feel intimidated, threatened or abused. Some examples of unreasonable customer contact are:

- threats
- verbal abuse
- offensive language, including comments viewed to be hurtful, derogatory, or obscene
- derogatory remarks
- rudeness
- making provocative statements
- raising unsupported allegations
- shouting

We consider unreasonably persistent customer contact as contact that:

- does not have any serious value or purpose
- is designed to cause disruption or annoyance
- has the effect of harassing the council or its officers
- can be categorised as obsessive or vexatious
- fails to accept the council's position

The behaviours considered unreasonable include, but are not limited to:

- sending high volumes of letters, emails and or phone calls
- demanding responses within unreasonable timescales
- insisting on speaking with specific members of staff
- adopting a scatter-gun approach by contacting many members of staff
- continually contacting us when we are in the process of looking at a matter
- making many complaints about different issues or continually adding issues to the same complaint

The types of unreasonable contact outlined above are examples and not an exhaustive list.

Raising legitimate requests or criticisms of a council action or if a complaint is not progressing within agreed timescales will not lead to a customer being identified as displaying unreasonable contact. Similarly, if a customer is unhappy with the outcome of a complaint and seeks to challenge it once, or more than once, will not automatically identify them as vexatious or unreasonably persistent.

How this Policy will be applied:

A customer's access to statutory services or information provided by the council will not be affected by the implementation of the policy to manage unreasonable customer behaviour. Access to our services or raising new complaints will still be possible, but how this is done may be managed or restricted. In these cases, the customer will be informed in writing how to request services.

If a customer continues to demonstrate unreasonable contact, the appropriate Head of Service or Director will write to inform them that their contact will be managed or restricted with immediate effect.

This policy follows a two-stage process. However, if a customer's contact is extreme, we may move straight to Stage 2.

The decision to manage contact is only taken in exceptional circumstances and after we have considered possible adjustments to our services to help the customer change their behaviour.

In all cases we will explain to the customer in writing why we believe their behaviour is unreasonable, the action we are taking, and the duration of this action.

Approval for managed contact arrangements at Stage 1 will be taken by the appropriate Head of Service or Director and Stage 2 approval will be taken by the Director of Governance. Any managed or restricted contact arrangements will be appropriate, proportionate, and subject to regular review.

Managed Customer Contact Register:

A register of managed contact arrangements will be saved centrally to be updated by the relevant Head of Service with the details of the case and any action taken. The register will include:

- the name and contact details of the customer
- details of the managed contact arrangements
- when the managed contact arrangements commenced and provisional end date
- when the customer was advised of the decision to manage their contact
- the review date and the outcome
- the name and job title of the reviewing officer

In cases where a property is identified as a place where unreasonable behaviour is likely, and the occupant's details are not known the property details should be included on the register of managed contact arrangements. A risk assessment should be completed before any council employee attends a property which is on the register.

The Head of Audit & Risk is the Information Asset Owner for the register, with the appropriate Head of Service responsible for recording and managing individual cases.

Stage 1

Warning & Monitoring Period:

At Stage 1 we will write to the customer about their unreasonable contact.

The appropriate Head of Service or Director will inform the customer in writing and evidence the impact of their unreasonable contact on service delivery. This will also set out why the customer's contact is unreasonable, the managed or restricted contact arrangements that are in place and the monitoring period for these arrangements.

The minimum monitoring period is 6 months, but we reserve the right to extend this.

The customer will be asked to change their contact with the council, with reasonable levels of expectation set out on each side. If possible, the customer will be informed of our final position on the issues they are raising.

The options we may consider at this stage include:

- Requesting the customer enters into an agreement about their future contact

- Placing time limits on contacts
- Restricting all or the number of telephone calls that will be accepted
- Limiting the customer to one type of contact (telephone, letter, or email)
- Refusing to acknowledge or respond to any repeated complaints on closed cases
- Requiring the customer to communicate only through a single point of contact (SPOC)

This list is not exhaustive, and we may include other measures appropriate to the circumstances.

Stage 2

Implementing managed contact arrangements:

We reserve the right to implement managed contact at Stage 2 with immediate effect, and or without issuing a Stage 1 warning.

Unreasonable contact may be escalated to this stage if the customer is persistent or abusive, for example, if they are repeatedly telephoning, shouting, or swearing at council employees.

The Head of Service or Director of the service affected by the unreasonable contact is required to propose additional managed or restricted contact arrangements and justify the reasons for placing the customer under Stage 2 of this policy. The proposals will be considered by the Director of Governance for a final decision which will be recorded on the Managed Customer Contact Register.

The options we may consider at this stage include:

- Diverting the customer's emails to a single point of contact (SPOC)
- Terminating all telephone calls from the customer to the council, after requesting they email the SPOC with their enquiry.
- Requiring any contacts to take place face-to-face in the presence of a third party
- Restricting any face-to-face contacts to designated council premises
- Asking the customer to contact us through an advocate
- Instigating formal legal action such as issuing a Community Protection Warning

This list is not exhaustive, and we may include other measures appropriate to the circumstances.

In cases where behaviour is so extreme that it threatens the personal safety and welfare of our employees, we will report the matter to the Police and consider taking legal action. We have a zero-tolerance of violence and serious threats against our staff and this type of behaviour will always be reported to the Police.

Review:

A review of managed contact arrangements implemented at Stage 1 or Stage 2 will take place no later than every 6 months from the date of the decision to implement the arrangements.

The appropriate Head of Service or Director will inform the customer of the outcome in writing within 7 working days of the review decision.

The date of the review, details of the consideration made and the date when the restriction expires, or is to be extended to, will be recorded on the Managed Customer Contact Register by the appropriate Head of Service or Director.

Closed cases will be deleted from the Managed Customer Contact Register after 12 months if within that period there has been no further activity requiring consideration of the policy to manage unreasonable customer behaviour.

Right of appeal:

There is no right of appeal at either stage of this policy. The managed or restricted contact arrangements will be reviewed after the monitoring period expires and the customer will be informed of the outcome in writing.

The customer may wish to escalate their complaint with the Local Government and Social Care Ombudsman. Their contact details are:

The Local Government and Social Care Ombudsman
PO Box 4771
Coventry
CV4 0EH

Telephone: 0300 061 0614

Email: advice@lgo.org.uk

Website: www.lgo.org.uk

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Appendix A – Impact Assessment (IA)

Name of the project, policy, service, or strategy:	Policy for managing unreasonable customer behaviour		
Responsible officer:	Alison Wilding (Head of Customer Services)		
Service Lead:	Alison Wilding (Head of Customer Services)		
Date of assessment:	September 2024	Date of review:	

Introduction

Overview

What is an Impact Assessment?

The Impact Assessment is a tool to ensure that any policy, project, strategy, or service is assessed to consider any positive or negative impacts for all our residents with regards to equalities, health and sustainability. It is important that this is done in a timely manner and ideally it should precede the start of the project, policy or strategy concerned at Chorley Council or South Ribble Borough Council.

Who is the Impact Assessment for?

The responsibility of conducting the Impact Assessment is with the leading officer of the policy that is being assessed, with service leads responsible for the final sign off of the assessment. Once complete and signed off, the Impact Assessments are submitted to Performance and Partnerships, who are responsible for storing, monitoring, and ensuring the quality of the assessments. The assessment tool covers both Chorley and South Ribble Borough Council.

Why do we need to do Impact Assessments?

As Councils, we are committed as community leaders, service providers, and employers. Therefore, we will work to ensure that everybody is afforded equality of opportunity and good life chances. The Impact Assessment is a tool we use to ensure that we fulfil these commitments and thus meet our legal duties.

Instructions

Quick steps for completion

Follow the quick steps below when completing the Impact Assessment:

1. Sections: There are three sections to the Impact Assessment. These include:

- Equality impact: the impact on the nine equality strands, which include age, disability, sex, gender reassignment, race, religion, sexual orientation, pregnancy and maternity, and marriage and civil partnership. See the **Equality Framework**.
- Health and environmental impact: the impact on health and wellbeing as well as the environment.
- Reputational impact: the impact on the Councils' reputation and our ability to deliver our key priorities. Reference should be made to the Corporate Strategies.

2. Rating and evidence: Each section has a number of questions that should be given a rating and evidence given for why the rating has been selected. This allows us to quantify the impact. The rating key is outlined below:

Code	Description
P	Positive impact
N	Negative impact
NI	Neutral impact

3. Actions: Once a rating is given, actions should be identified to mitigate any negative impacts or maximise any positive impacts of the policy, project, or strategy that is being assessed.

4. Sign off: Once the assessment is completed, sign off is required by a Service Lead.

5. Submit: Once signed off, the Impact Assessment should be sent to the Performance and Partnerships Team, who will store the assessment securely and check for quality.

6. Follow up: Actions should be implemented and changes should be made to the policy, project, or strategy that has been assessed, with follow ups conducted annually to monitor progress.

Information and Support

Contact details

To submit your completed Impact Assessment or for guidance and support, please contact Performance and Partnerships at performance@chorley.gov.uk or performance@southribble.gov.uk

Equality Impact

Area for consideration	P	N	NI	Evidence	Further action required
What potential impact does this activity have upon:					
Those of different ages?			✓	No impact. The policy applies to all customers regardless of their age.	
Those with physical or mental disability?	✓			<p>The Equalities Act 2020 will be considered before the policy is applied.</p> <p>If there is evidence of physical or mental disability, we will work with relevant agencies about potential support and appropriate pathways for the customer.</p>	No further action required.
Those who have undergone or are undergoing gender reassignment?			✓	No impact. The policy applies to all customers regardless of their gender.	
Those who are pregnant or are parents?			✓	No impact. The policy applies to all customers regardless of if they are pregnant or parents.	
Those of different races?			✓	No impact. The policy applies to all customers regardless of their race. However, the policy will be published on our website where it can be translated into other formats and languages.	

Those of different religions or beliefs?			✓	No impact. The policy applies to all customers regardless of their religion or beliefs	
Those of different sexes?			✓	No impact. The policy applies to all customers regardless of their sex.	
Those of different sexual orientations?			✓	No impact. The policy applies to all customers regardless of their sexual orientation.	
Those who are married or in a civil partnership?			✓	No impact. The policy applies to all customers regardless of if they are married or in a civil partnership.	
Socio-economic equality or social cohesion?			✓	No impact. The policy applies to all customers regardless of their socio-economic equality or social cohesion.	

Health, Social and Environmental Impact

Area for consideration	P	N	NI	Evidence	Further action required
What potential impact does this activity have upon:					
Enabling residents to start well (pre-birth to 19)? <i>(Please consider childhood obesity, vulnerable families, and pregnancy care)</i>			✓	No impact.	
Enabling residents to live well (16 to 75 years)? <i>(Please consider mental and physical wellbeing, living environment, healthy lifestyles, and improving outcomes)</i>			✓	No impact.	
Enabling residents to age well (over 65 years)? <i>(Please consider social isolation, living independently, dementia, and supporting carers and families)</i>			✓	No impact.	
Natural environment? <i>(Please consider impact on habitation, ecosystems, and biodiversity)</i>			✓	No impact.	
Air quality and pollution? <i>(Please consider impact on climate change, waste generation, and health)</i>			✓	No impact.	
Natural resources? <i>(Please consider the use of materials and as well as transport methods and their sustainability)</i>			✓	No impact.	
Rurality? <i>(Please consider the impact of those who live in rural communities, their access to services/activities)</i>			✓	No impact.	

Strategic Impact

Area for consideration	P	N	NI	Evidence	Further action required
What potential impact does this activity make upon:					
The Councils' reputation? <i>(Please consider impact on trust, confidence, our role as community leaders, and providing value for money)</i>	✓			By setting out a clear process to manage unreasonable customer behaviour the policy should have a positive impact on the Councils' reputation.	No further action required.
Our ability to deliver the Corporate Strategy? <i>(Please refer to the Strategic Objectives)</i>	✓			Managing unreasonable customer behaviour will allow the time we spend with our customers to be fair and balanced. This supports the Corporate Strategy priority 'healthy, safe and engaged communities' by ensuring all residents of all ages can access the services they need, physically and digitally.	No further action required.

Impact Assessment Action Plan

If any further actions were identified through the Impact Assessment, then they should be listed in the table below:

Action	Start Date	End Date	Lead Officer

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

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