



Executive Cabinet

Agenda and Reports
for consideration on

**Thursday, 18th February
2010**

in the Council Chamber, Town Hall, Chorley

At 5.00 pm



www.chorley.gov.uk

PROCEDURE FOR PUBLIC QUESTIONS/SPEAKING AT EXECUTIVE CABINET MEETINGS

- Questions should be submitted to the Democratic Services Section by midday, two working days prior to each Executive Cabinet meeting to allow time to prepare appropriate responses and investigate the issue if necessary.
- A maximum period of 3 minutes will be allowed for a question from a member of the public on an item on the agenda. A maximum period of 30 minutes to be allocated for public questions if necessary at each meeting.
- The question to be answered by the Executive Member with responsibility for the service area or whoever is most appropriate.
- On receiving a reply the member of the public will be allowed to ask one supplementary question.
- Members of the public will be able to stay for the rest of the meeting should they so wish but will not be able to speak on any other agenda item upon using their allocated 3 minutes.

PROCEDURE FOR 'CALL-IN' OF EXECUTIVE DECISIONS

- Each of the executive decisions taken at the Executive Cabinet meeting are subject to the adopted 'call-in' procedure within 10 working days of the Executive Cabinet meeting at which the decision is made, unless the decision has been implemented as a matter of urgency.
- Guidance on the 'call-in' procedure can be accessed through the following internet link:
<http://www.chorley.gov.uk/index.aspx?articleid=1426>
- If you require clarification of the 'call-in' procedure or further information, please contact either:
Tony Uren (Tel: 01257 515122; E-Mail: tony.uren@chorley.gov.uk) or
Carol Russell (Tel: 01257 515196, E-Mail: carol.russell@chorley.gov.uk)
in the Democratic Services Section.

9 February 2010

Dear Councillor

EXECUTIVE CABINET - THURSDAY, 18TH FEBRUARY 2010

You are invited to attend a meeting of the Executive Cabinet to be held in the Council Chamber, Town Hall, Chorley on Thursday, 18th February 2010 at 5.00 pm.

AGENDA

1. **Apologies for absence**

2. **Declarations of Any Interests**

Members are reminded of their responsibility to declare any personal interest in respect of matters contained in this agenda. If the interest arises **only** as result of your membership of another public body or one to which you have been appointed by the Council then you only need to declare it if you intend to speak.

If the personal interest is a prejudicial 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.

3. **Minutes of last meeting (Pages 1 - 4)**

To confirm as a correct record the minutes of the meeting of the Executive Cabinet held on 7 January 2010 (Minutes enclosed).

4. **Public Questions**

Members of the public who have requested the opportunity to ask a question(s) on an item(s) on the agenda will be asked to put their question(s) to the respective Executive Member(s). Each member of the public will be allowed to ask one supplementary question within his/her allocated 3 minutes.

MATTERS REFERRED BY THE OVERVIEW AND SCRUTINY COMMITTEE (INTRODUCED BY THE CHAIR OF THE OVERVIEW AND SCRUTINY COMMITTEE, COUNCILLOR DENNIS EDGERLEY)

5. **Overview and Scrutiny Inquiry - Highways issues (Pages 5 - 14)**

To receive and consider the enclosed final report and recommendations of the Overview and Scrutiny Task Group inquiry into Highway issues.

ITEM OF EXECUTIVE LEADER (INTRODUCED BY COUNCILLOR PETER GOLDSWORTHY)

6. **Review of Council Meetings Calendar for 2010/11 (Pages 15 - 18)**

To consider the enclosed report of the Chief Executive.

ITEMS OF EXECUTIVE MEMBER FOR POLICY AND PERFORMANCE (INTRODUCED BY COUNCILLOR GREG MORGAN)

7. **Chorley Council Performance Monitoring Report - Third Quarter of 2009/10 (Pages 19 - 36)**

To receive and consider the enclosed report of the Director of Partnerships, Planning and Policy.

8. **Chorley Partnership - Performance Monitoring Report for Third Quarter of 2009/10 (Pages 37 - 44)**

To receive and consider the enclosed report of the Director of Partnerships, Planning and Policy.

ITEM OF EXECUTIVE MEMBER (NEIGHBOURHOODS) (INTRODUCED BY COUNCILLOR ERIC BELL)

9. **Gypsy Roma Travellers - Illegal Encampment Procedure (Pages 45 - 56)**

To consider the enclosed report of the Director of People and Places on a joint Crime and Disorder Reduction Partnership approach to dealing with illegal encampments.

ITEMS OF EXECUTIVE MEMBER (BUSINESS) (INTRODUCED COUNCILLOR PETER MALPAS)

10. **Process for approving the Central Lancashire Local Development Framework Core Strategy (Pages 57 - 60)**

To receive and consider the enclosed report of the Director of Partnerships, Planning and Policy.

11. **Update on transfer of Home Improvement Agency (Pages 61 - 66)**

To consider the report of the Director of Partnerships, Planning and Policy (enclosed).

12. **Lancashire Review of Home Improvement Agencies (Pages 67 - 70)**

To consider the enclosed report of the Director of Partnerships, Planning and Policy.

13. **Sub-Regional Allocations Policy and Choice-based Lettings Procedure (Pages 71 - 124)**

To consider the enclosed report of Director of Partnerships, Planning and Policy (enclosed).

ITEM OF EXECUTIVE MEMBER (BUSINESS) AND EXECUTIVE MEMBER (RESOURCES) (INTRODUCED BY COUNCILLOR PETER MALPAS AND COUNCILLOR KEVIN JOYCE)

14. **Proposed Housing Capital Programme for 2010/11 and allocation of Repossession Grants (Pages 125 - 146)**

To receive and consider the enclosed report of the Director of Partnerships, Planning and

Policy.

ITEMS OF EXECUTIVE MEMBER (RESOURCES) (INTRODUCED BY COUNCILLOR KEVIN JOYCE)

15. **Revenue Budget Monitoring, 2009/10 - Third Quarter of 2009/10** (Pages 147 - 154)

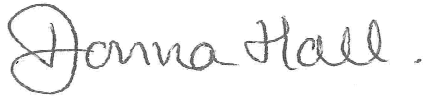
To consider the enclosed report of the Director of Transformation.

16. **2010/11 Budget Principles** (Pages 155 - 160)

To consider the enclosed report of the Director of Transformation.

17. **Any other item(s) that the Chair decides is/are urgent**

Yours sincerely



Donna Hall
Chief Executive

Tony Uren
Democratic and Member Services Officer
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Distribution

1. Agenda and reports to all Members of the Executive Cabinet, Lead Members and Directors Team for attendance.

This information can be made available to you in larger print or on audio tape, or translated into your own language. Please telephone 01257 515118 to access this service.

આ માહિતીનો અનુવાદ આપની પોતાની ભાષામાં કરી શકાય છે. આ સેવા સરળતાથી મેળવવા માટે કૃપા કરી, આ નંબર પર ફોન કરો: 01257 515822

ان معلومات کا ترجمہ آپ کی اپنی زبان میں بھی کیا جاسکتا ہے۔ یہ خدمت استعمال کرنے کیلئے براہ مہربانی اس نمبر پر ٹیلیفون

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Executive Cabinet

Minutes of meeting held on Thursday, 7 January 2010

Present: Councillor Peter Goldsworthy (Executive Leader in the Chair) and Councillors Eric Bell, Kevin Joyce, Peter Malpas, Greg Morgan and John Walker.

Also in attendance:

Lead Members: Councillors Harold Heaton (Lead Member (Development Control)) and Keith Iddon (Lead Member (Licensing)).

Other Members: Councillors Terry Brown, Dennis Edgerley, Anthony Gee and Ralph Snape.

10.EC.124 APOLOGIES FOR ABSENCE

Apologies for absence were submitted on behalf of the Deputy Leader of the Council (Councillor Pat Case) and Councillors Henry Caunce, Laura Lennox, Adrian Lowe and Marion Lowe.

10.EC.125 DECLARATIONS OF ANY INTERESTS

There were no declarations of interest by any of the Executive Cabinet Members in any of the meeting's agenda items.

10.EC.126 MINUTES OF LAST MEETING

The minutes of the last meeting of the Executive Cabinet held on 3 December 2009 were confirmed as a correct record for signature by the Executive Leader.

10.EC.127 PUBLIC QUESTIONS

The Executive Leader reported that there had been no requests from any member of the public to speak on any of the meeting's agenda items.

10.EC.128 EXECUTIVE AND ELECTORAL ARRANGEMENTS

The Executive Cabinet considered a report of the Executive Cabinet on the implications of the Local Government and Public Involvement in Health Act 2007 which required the Council to consult the public prior to the amendment of its executive arrangements. The Act also provided an opportunity for the Council to amend its electoral arrangements.

The Council was statutorily required to alter its executive arrangements and adopt either an elected mayor and cabinet or a new style of "strong" leader and cabinet executive. While the Council was required to determine its new executive arrangements by 31 December 2010, as the decision was likely to impact on Councillors standing for election in May 2010, it was accepted that the Council's decision would need to be made as early as practicable. The consultation exercise was likely to entail the publication of a consultation document on the Council's website and an approach to the citizens' panel.

The report suggested that the Council be recommended to agree that no steps be taken to alter the Council's current electoral arrangements, in view of the unlikelihood of the necessary two thirds Council majority supporting the option of all out elections once every four years being achieved. However, the Executive Cabinet accepted the suggestion of a Councillor that, for reasons of consistency and accountability, the

Council's public consultation exercise should also seek feedback on the available options for future electoral arrangements.

Decision made:

That the Council be recommended to instruct the Chief Executive to commence the required public consultation exercise on the available options to revise both the current executive and electoral arrangements, with a view to a feedback report being presented to the Special Meeting of the Council on 2 March 2010.

Reason for decision:

It is a legal requirement for the Council to consult the public in advance of any alteration to its executive arrangements.

The extension of the consultation to include options for future electoral arrangements will ensure a consistent approach to the exercise.

Alternative option(s) considered and rejected:

Immediate determination of the Council's future electoral arrangements.

10.EC.129 GREEN TRAVEL PLAN

The Corporate Director (Business) presented a report seeking endorsement of the Green Travel Plan which sought to promote and improve travel sustainability amongst Council employees.

The Plan aimed to address the over-dependency on cars by encouraging the exploration of all possible alternatives to single occupancy car use through, for example, car sharing, home working and use of alternative modes of transport (bicycle, public transport, walking, etc), whenever practicable.

The Green Travel Plan incorporated an action plan for the delivery of changes to staffs' travel patterns, together with a comprehensive list of targets to be achieved over the plan period. The successful implementation of the Plan was expected to reduce business travel mileage, travel costs for both staff and the Council and a reduction in the Authority's CO₂ emissions.

Decisions made:

- 1. That the objectives and actions contained within the Green Travel Plan, as now presented, be endorsed for application by the Council's staff.**
- 2. That further consideration of the proposal to extend and apply the provisions of the Plan to Council Members in future years be given at a later date.**

Reason for decisions:

It is important that the objectives and actions contained within the Green Travel Plan help to achieve Corporate Strategy targets. The objectives aim to reduce the environmental impact of travel to work and business travel by offering alternatives to car travel by increasing awareness of, and promoting, sustainable transport options and improvements to current facilities. Increasing the use of sustainable transport options such as walking and cycling will help reduce the authority's CO₂ emissions, thereby meeting Corporate Strategy target 4.1.1.

Alternative option(s) considered and rejected:

None.

10.EC.130 MEMBERS' E-MAIL, INTERNET AND TELEPHONE ACCEPTABLE USAGE POLICY

The Executive Cabinet was recommended to approve for adoption a revised policy which set out and defined the general rules for Councillors' and Officers' acceptable use of the e-mail, internet and telephone facilities provided by the Council.

The current policy was now several years old and did not reflect recent changes in technology, legal requirements or best practice.

The policy proposed for Members' use primarily replicated the policy regulating staffs' usage of ICT and telephony systems. While breaches of the policy by staff could result in disciplinary action, breaches by Members could result in Code of Conduct issues being considered by the Standards Committee.

A few Members questioned the validity of Clause 4.3 of the policy which prohibited the use of the Council's e-mail address by Members and Officers using public websites for non-business purposes (eg on-line shopping). In response, the Executive Member (Resources) and the Chief Executive reminded the meeting that the principal purpose of the ICT equipment was to improve the efficiency and effectiveness of the delivery of the Council's business and that transactions with public websites could result in the Council's network being inundated with unnecessary e-mails. The Executive Cabinet did, however, appreciate the concerns of Members who had disposed of personally owned computer equipment and agreed to the specific issue being debated by the Member Support Working Group.

Decision made:

That the revised policy for Councillors' and Council Officers' acceptable use of e-mail, internet and telephone facilities, as now presented, be accepted in principle, but that, following consideration of the proposed policy by the respective political groups, the Member Support Working Group be requested to address the implications of Clause 4.3 prohibiting the use of the Council e-mail address when using public websites for non-business purposes (eg on-line shopping), particularly in relation to Members who have dispensed with their personal computer equipment, and make any recommendation as to how the issue might be practically resolved.

Reason for decision:

The Council's policy for Members' and Officers' acceptable use of the Council's IT and telephony systems no longer reflects changes in technology, legal requirements and best practice. The reference to the Member Support Working Group will allow the Group to debate the implications of Clause 4.3 of the policy and determine whether any consequent revision will be justified.

Alternative option(s) considered and rejected:

The adoption of the acceptable usage policy in whole at this stage.

10.EC.131 CAPITAL PROGRAMME, 2009/10 TO 2011/12 - MONITORING REPORT

The Executive Cabinet considered a report of the Assistant Chief Executive (Business Transformation) on proposals to revise the Council's Capital Programme for 2009/10 to 2011/12.

While the decision on the Council's application for the capitalisation of redundancy payments and pension strain costs arising from the restructuring of Directorates in 2009 was not yet known, the report recommended the estimated costs of the recent senior management and Corporate Services restructures to be also capitalised, taking the total of the capitalised restructuring costs to £1,150,000.

Rephrasing of certain capital schemes to 2010/11 would offset part of the net increase in expenditure and other additions to the programme were expected to be financed through external resources.

The borrowing requirement to fund the 2009/10 programme had increased by £550,280, principally as a consequence of the capitalised restructuring costs. The cost of the increased borrowing, as well as the revenue savings in the region of £600,000 anticipated from the restructures, would be taken into account in the draft revenue estimates for 2010/11 onwards.

The proposed virements, rephrasing of expenditure and projected savings within the Capital Programme were shown in an appendix to the report.

Decision made:

That the Council be recommended:

- 1. to approve the revised Capital Programme for 2009/10, as shown in Appendix 1 to the submitted report;**
- 2. to note the amendments to the provisional Capital Programme for 2010/11, as shown in Appendix 1 to the submitted report;**
- 3. to note the inclusion of the additional restructuring costs in the December 2009 applications for Directions to capitalise redundancy and pension strain costs in 2009/10;**
- 4. to request budget holders to continue to review their uncommitted 2009/10 budgets in order to identify any further expenditure that can be rephased to a later financial year in order to reduce the borrowing requirement in 2009/10 and the revenue costs in 2010/11.**

Reason for decisions:

The 2009/10 Capital Programme has been updated to add, rephrase and vire budgets and to reflect the estimated availability of capital resources.

The provisional Capital Programmes for 2010/11 and 2011/12 have been updated to take account of the rephrasing of expenditure and the resources estimated to be available.

Alternative option(s) considered and rejected:

The redundancy and pension strain costs arising from the recent restructures, if not capitalised, would need to be charged to the revenue budget for 2009/10.

Executive Leader

Highways

Overview and Scrutiny Task and Finish Group



1. EXECUTIVE SUMMARY

Background

In March 2009 the Overview and Scrutiny Committee undertook a “review of the year event”, part of which was suggestions for topics to scrutinise the following municipal year. The topic of Highways was selected as one of the top two issues and the Task and Finish Group was set up in June 2009.

The desired outcomes of the inquiry were to improve the delivery of the highways service delivered by Lancashire County Council and Chorley Council for the residents of Chorley. This could be achieved through delivering the service more efficiently and the enhancement of communication and performance monitoring between Lancashire County Council, Chorley Council, Lancashire Locals and utility companies.

The basis of the relationship between Chorley Council and Lancashire County Council is set out in the Streetscene Services Agreement. This may shortly be superseded by a Public Realm Agreement.

There was a lot to consider within a short space of time and there was overlap between this inquiry and the ongoing Town Centre inquiry.

Objectives

- | | |
|-------------------------------|-------------------------|
| 1. Provision of information | 2. Communication cycles |
| 3. Consulting and influencing | 4. Anomalies |

Group Membership

Councillor Michael Devaney (Chair)	Councillor Alan Cullens (Vice-Chair)
Councillor Ken Ball	Councillor Nora Ball
Councillor Doreen Dickinson	Councillor Roy Lees
Councillor Adrian Lowe	Councillor Marion Lowe
Councillor June Molyneaux	

Officer Support

Martin Walls (Head of Streetscene Services)
Ruth Rimmington (Democratic and Member Services Officer)

Meetings

The meeting papers of the Group can be found on the Council’s website:
www.chorley.gov.uk/scrutiny

Contribution of Evidence

The Group would like to thank all those who have provided evidence and contributed to the Inquiry.

Recommendations	Financial Implications
<u>Objective 1: Provision of information</u>	
<u>Lancashire County Council:</u>	
1. To set in place a formal information sharing system between Councillors and officers on a strategic level, for example, changes to gritting routes and policy changes, utilising email and other communication tools.	Officer time.
2. To use “intheknow” to notify Members of practical information, such as, roadworks, highways and neighbourhoods information.	Officer time.
3. To identify and introduce meaningful performance indicators to enable both County and District officers and Members to scrutinise the performance of the Streetscene Services Agreement. This is subject to the development of the Public Realm Strategy that could supersede the Streetscene Services Agreement.	Officer time.
4. To present an update report to the relevant County Council Overview and Scrutiny Committee every six months on the inquiry recommendations to ensure robust performance monitoring.	Officer time.
5. That key information relating to inspections frequencies, highway intervention levels and key performance indicators are extracted from the Highway Maintenance Plan and provided in a simpler format to Members and Key Officers.	Officer time.
<u>Chorley:</u>	
6. To make available to Members current street cleaning schedules and the maintenance schedule for the car parks.	Officer time.
7. To utilise intheknow to cascade highways and Neighbourhoods information to Members.	Officer time.
<u>Objective 2: Communication cycles</u>	
<u>Lancashire County Council:</u>	
8. To provide a separate reporting mechanism for officers and Councillors rather than the current single telephone number.	To be confirmed.
9. To communicate with the public more, for example, by improving information on the Lancashire County Council website with the detail of the highways maintenance plan.	Officer time.
10. To reduce avoidable contact with the contact centre (NI14) by keeping customers updated, with text messaging, email alerts or use of postcards for “work in progress” or “work completed”.	To be confirmed.
11. To implement an information sticker to be used on grit bins, street lights and generally which displays contact telephone numbers and location information to enable easier fault reporting.	To be confirmed.
<u>United Utilities</u>	
12. To reduce avoidable contact (NI14) by keeping customers updated, with text messaging, email alerts or use of postcards for “work in progress” or “work completed”.	To be confirmed.



Recommendations	Financial Implications
<u>Objective 3: Consulting and influencing</u>	
<u>Lancashire County Council:</u>	
13. To introduce meetings between the county (Environment) and district (Neighbourhoods) portfolio holders at appropriate times, perhaps April and October, and to report back relevant information to Members via intheknow.	Officer time.
14. To introduce regular meetings between Lancashire County Council (Environment Directorate) and Chorley Council (People and Places Directorate) officers.	Officer time.
15. To streamline existing meeting arrangements (including co-ordination meetings with utility companies and highways schemes) to make them more effective and ensure the correct people are in attendance and the information from meetings is cascaded down.	Officer time.
16. Officers to enter into negotiations with respect to Chorley delivering some enforcement functions, such as advertising boards, highway encroachment and overhanging vegetation.	To be confirmed.
<u>Chorley Council</u>	
17. To include performance monitoring information on enforcement activities on the quarterly report presented to Overview and Scrutiny Committee and forwarded to LCC as the Highway Authority.	Officer time.
18. To enter into negotiations with Lancashire County Council to provide certain enforcement services such as advertising boards, highway encroachment and overhanging vegetation and seek a level of devolved budget to support this function.	To be confirmed.
19. To further develop Chorley's Pavement Café Policy to ensure it is fit for purpose and serves the needs of the traders and other town centre users and has an element of clear regulation built into to prevent abuse.	Officer time.
<u>Objective 4: Anomalies</u>	
<u>Lancashire County Council:</u>	
20. To enter into an agreement whereby the County has responsibility for maintaining roads and pavements and Chorley Council has responsibility for grass verges, weed control, tree and shrub maintenance, leaf sweeping and enforcing overhanging vegetation.	To be confirmed.
21. The Lancashire County Council call out officer to notify, by the most appropriate means, Members and the Head of Streetscene Services when gritting wagons are dispatched.	Officer time.
22. To formalise arrangements and resources to enable Chorley Council to deliver gritting services in an agreed town centre area on behalf of Lancashire County Council.	To be confirmed.
23. To investigate and resolve the anomaly of gully cleaning just one side of the road rather than both sides.	Officer time.
<u>Chorley:</u>	
24. To enter into an agreement whereby the County has responsibility for maintaining roads and pavements and Chorley Council has responsibility for grass verges, weed control, tree and shrub maintenance, leaf sweeping and enforcing overhanging vegetation.	Within existing budgetary provision.
25. The Head of Streetscene Services to set in motion the gritting of Chorley car parks on receipt of the above notification.	Officer time.
26. To formalise arrangements and resources to enable Chorley Council to deliver gritting services in an agreed town centre area on behalf of Lancashire County Council.	To be confirmed.

2. METHOD OF INVESTIGATION

Evidence

The Group received and considered several reports and documents, these included:

1. Streetscene Services agreement.
2. Lancashire County Council and Chorley Council current responsibilities.
3. The remit of the Lancashire Local Chorley Committee.
4. Extract showing an overview of the work of the Environment Directorate from Lancashire County Council Sustainable Development Overview and Scrutiny Committee - 15 July 2009.
5. Customer Contact information from Lancashire County Council and Chorley Council.
6. Highways maintenance plan.
7. Public Realm Integration Project report considered by the Lancashire County Council Executive Cabinet on 8 October 2009.

During the course of the inquiry the Group considered highways scrutiny inquiries undertaken by other Lancashire Authorities.

1. Highways trees and verges undertaken by Lancashire County Council.
2. Making inroads: the way ahead - a scrutiny review into the condition of roads & pavements undertaken by South Ribble Borough Council.
3. Scrutiny review of value for money of the residual highways agreement with Lancashire County Council undertaken by Pendle Borough Council.
4. The issues that have arisen following the termination of the Lancashire Highways Partnership undertaken by Hyndburn Borough Council.
5. Highways undertaken by Rossendale Borough Council.

Witnesses

Jo Turton (Executive Director for the Environment, Lancashire County Council).

Rick Hayton (Traffic and Safety Network Manager, Lancashire County Council).

Sarah Palmer (District Partnership Officer, Lancashire County Council).

Councillor Eric Bell (Executive Member (Neighbourhoods), Chorley Council).

Ishbel Murray (Corporate Director (Neighbourhoods), Chorley Council).

3. FINDINGS AND RECOMMENDATIONS

Objective 1: Provision of information

Members discussed the need for improved communication between Chorley and Lancashire County Council. On a practical level this included the notification of roadworks in the area and officer contacts and on a strategic level the highways maintenance plan, gritting routes and grit bins. A review had been undertaken of grit bins in Chorley to ensure they were in the ideal locations and were used. A key issue was when highway defects were noted the criterion for repair etc and the expected timelines for repair.

When considering the Streetscene Service Agreement the lack of performance indicators in respect of most of the functions made an assessment of performance difficult. In addition, the current split where Lancashire County Council and Chorley Council both attend to verges. These thoughts were echoed by an inquiry undertaken by Pendle Council. These points were discussed with Jo Turton.

The quality and timescales of Lancashire County Council in commenting on planning applications was raised as an issue. The Corporate Director (Business) has reviewed this with the Executive Director for the Environment at Lancashire County Council and a revised code has been introduced. Pendle Council expressed similar concerns.

Recommendations:

Lancashire County Council:

1. To set in place a formal information sharing system between Councillors and officers on a strategic level, for example, changes to gritting routes and policy changes, utilising email and other communication tools.
2. To use "intheknow" to notify Members of practical information, such as, roadworks, highways and neighbourhoods information.
3. To identify and introduce meaningful performance indicators to enable both County and District officers and Members to scrutinise the performance of the Streetscene Services Agreement. This is subject to the development of the Public Realm Strategy that could supersede the Streetscene Services Agreement.
4. To present an update report to the relevant County Council Overview and Scrutiny Committee every six months on the inquiry recommendations to ensure robust performance monitoring.
5. That key information relating to inspections frequencies, highway intervention levels and key performance indicators are extracted from the Highway Maintenance Plan and provided in a simpler format to Members and Key Officers.

Chorley:

6. To make available to Members current street cleaning schedules and the maintenance schedule for the car parks.
7. To utilise intheknow to cascade highways and Neighbourhoods information to Members.

Objective 2: Communication cycles

Members agreed that the perception and communication to the public is a key issue for consideration. South Ribble Council shared this view.

All Councillors and members of the public should be encouraged to use the Lancashire County Council contact centre to register highways faults to enable central collation of information and monitoring of performance.

When considering customer enquiries in July 2009 highways repeat calls are the second highest with the highest being flooding on the highways. Street lighting and potholes followed although it was noted that during the winter months 'gritting' joins the top ten. Year to date the most enquires Lancashire County Council have received were regarding 'street lighting'.

Members identified several issues with the current reporting arrangements in discussion with Jo Turton. There is no escalation available to Members or officers through the Lancashire County Council call centre. No feedback arrangements are offered routinely – this leaves the customer with no notification when the job has been completed or if the defect is not serious enough to warrant a repair. This results in avoidable contact and frustration as the customer has to call the contact centre for a progress report.

This is a particular problem where there is a street light problem. The key issue is that a standard repair may only take 72 hours, however when the (DNO) United Utilities are involved it may take considerably longer. South Ribble also highlighted this in their review, as there is no feedback loop to explain the delay that has a negative impact on reputation

Members had used the online fault reporting facility and found this fit for purpose.

Recommendations:Lancashire County Council:

8. To provide a separate reporting mechanism for officers and Councillors rather than the current single telephone number.
9. To communicate with the public more, for example, by improving information on the Lancashire County Council website with the detail of the highways maintenance plan.
10. To reduce avoidable contact with the contact centre (NI14) by keeping customers updated, with text messaging, email alerts or use of postcards for “work in progress” or “work completed”.
11. To implement an information sticker to be used on grit bins, street lights and generally which displays contact telephone numbers and location information to enable easier fault reporting.

United Utilities

12. To reduce avoidable contact (NI14) by keeping customers updated, with text messaging, email alerts or use of postcards for “work in progress” or “work completed”.

Objective 3: Consulting and influencing

The introduction of quarterly meetings between the county and district portfolio holders and also between Lancashire County Council and Chorley Council officers will enhance two-tier working. This could include planned maintenance, emergency works and consultation on decisions about highways trees. This current arrangement exists in terms of the New Roads and Street Works Act consultation meetings so there is a model that could be used to cover other areas.

This issue of information being cascaded with Police, in particular between meetings was considered, between PACT, road safety and other meetings. There was liaison with the Police, with regular road safety liaison meetings, although feedback could be improved. A further discussion would be needed on how PACT and Lancashire Locals could work together, for example, a regular bulletin could be produced.

Members would like a formal consultation mechanism with Borough Council Ward Members as well as County Councillors on proposed schemes to be undertaken and feedback on completion. Rossendale supported this proposal.

A major source of complaints to Members has been vegetation that encroaches onto footpaths, street lights and signage and advertising boards on pavements. It was felt that a more robust approach was required to enforcement. In particular, health and safety issues arising from vegetation that encroaches onto footpaths, street lights and signage and advertising boards on pavements. This could be incorporated into the duties of Neighbourhood Officers, enabling them to provide a wrap around service to the residents of Chorley. The group felt strongly that discussions take place to ensure that enforcement is consistent, positive and effective. Currently, the responsibility for some enforcement matters rests with Lancashire County Council. It would be better served if this was delivered by Chorley officers.

Of major concern is the issue of market stalls and pavement cafés encroaching. As this is currently a District function there is no reason for this and a more robust approach needs to be taken.

Discussions were undertaken as to whether Chorley Council should or could undertake minor repairs on roads and pavements and it was agreed this would not be appropriate at this time.

Recommendations:Lancashire County Council:

13. To introduce meetings between the county (Environment) and district (Neighbourhoods) portfolio holders at appropriate times, perhaps April and October, and to report back relevant information to Members via intheknow.
14. To introduce regular meetings between Lancashire County Council (Environment Directorate) and Chorley Council (People and Places Directorate) officers.
15. To streamline existing meeting arrangements (including co-ordination meetings with utility companies and highways schemes) to make them more effective and ensure the correct people are in attendance and the information from meetings is cascaded down.
16. Officers to enter into negotiations with Lancashire County Council with respect to Chorley delivering some enforcement functions, such as advertising boards, highway encroachment and overhanging vegetation.

Chorley Council

17. To include performance monitoring information on enforcement activities on the quarterly report presented to Overview and Scrutiny Committee and forwarded to LCC as the Highway Authority.
18. To enter into negotiations with Lancashire County Council to provide certain enforcement services such as advertising boards, highway encroachment and overhanging vegetation and seek a level of devolved budget to support this function.
19. To further develop Chorley's Pavement Café Policy to ensure it is fit for purpose and serves the needs of the traders and other town centre users and has an element of clear regulation built into to prevent abuse.

Objective 4: Anomalies

Currently Lancashire County Council, Districts and Parish Councils cut grass in certain areas. Many districts, including Pendle Council and South Ribble Council, believe that urban grass cutting standards should be set locally. In fact, a pilot project between Lancashire County Council and South Ribble Council is underway to enhance public service delivery of streetscene related functions. This involves the County having responsibility for maintaining roads and pavements and the District Council having responsibility for the grass cutting.

Chorley would like to undertake a similar pilot. This would ensure that tasks be carried out in a logical order, for example, litter picking before grass cutting.

Gritting

The Priority Road Network of 2350 km (34% of the Lancashire total highway network) is treated from 11 depots using 48 front line gritters with over 150 trained drivers & 40 supervisors spreading, on average, 18,000 tonnes of salt per season. During the inclement weather experience over Christmas 2009 Lancashire County Council were spending £100,000 a day to run the winter maintenance programme. *

Other anomalies do need to be considered by Lancashire County Council, for example, gully cleaning both sides of the same road rather than just one.

Recommendations:Lancashire County Council:

20. To enter into an agreement whereby the County has responsibility for maintaining roads and pavements and Chorley Council has responsibility for grass verges, weed control, tree and shrub maintenance, leaf sweeping and enforcing overhanging vegetation.
21. The Lancashire County Council call out officer to notify, by the most appropriate means, Members and the Head of Streetscene Services when gritting wagons are dispatched.
22. To formalise arrangements and resources to enable Chorley Council to deliver gritting services in an agreed town centre area on behalf of Lancashire County Council. *
23. To investigate and resolve the anomaly of gully cleaning just one side of the road rather than both sides.

Chorley:

24. To enter into an agreement whereby the County has responsibility for maintaining roads and pavements and Chorley Council has responsibility for grass verges, weed control, tree and shrub maintenance, leaf sweeping and enforcing overhanging vegetation.
25. The Head of Streetscene Services to set in motion the gritting of Chorley car parks on receipt of the above notification.
26. To formalise arrangements and resources to enable Chorley Council to deliver gritting services in an agreed town centre area on behalf of Lancashire County Council. *

* The points in italic text have been added following a meeting with the Chair and officers and are subject to agreement by the other members of the task and finish group.

Chorley Council



2008-2009
*Transforming Services:
Citizen Engagement
and Empowerment*



2009-2010
Cohesive and resilient communities



2009-2010
Better outcomes for people and places

Report of	Meeting	Date
Director of Transformation (Introduced by the Executive Leader)	Executive Cabinet	18 February 2010

REVIEW OF COUNCIL MEETINGS CALENDAR 2010/2011

PURPOSE OF REPORT

1. The Value for Money Review of Corporate Services raised a number of areas for further investigation, including recommending that a review be undertaken of the Council's meetings calendar with a view to conducting the Council's business through fewer meetings, enabling the deletion of one of the four posts of Democratic and Members Services Officer

RECOMMENDATION(S)

That the following changes in scheduled meetings be agreed:

2. Executive Cabinet, Informal Cabinet and Overview and Scrutiny Committee each reduce from 10 meetings a year down to 8.
3. Council meetings reduce from 7 meetings a year to 6 with the January meeting being removed from the calendar.
4. Member Support Working Group reduce from 5 meetings a year to 4.
5. That support for the Rivington and Brinscall Advisory Group be reviewed with Lancashire County Council.
6. That the number of scrutiny reviews be managed within the resources of the team.
7. The Policy team rather than Democratic Services team, support both the Chorley Partnership Board and Chorley Partnership Executive.
8. The Policy team rather than the Democratic Services team support any Task Groups established by the Equality Forum.
9. The Planning team rather than Democratic Services team support the Local Development Framework Working Group, but Democratic Services continue to support the Joint Central Lancashire LDF (on a rotational basis) as at present.
10. In recognition of the importance of the neighbourhood working agenda to Councillors, Democratic Services support one Neighbourhood Tour and one Neighbourhood Area Action Planning meeting per Neighbourhood Area per year – dates to be set in advance and included in the meetings timetable.

REASONS FOR RECOMMENDATION(S)

(If the recommendations are accepted)

11. These recommendations, along with other more minor changes in working practice, will allow a sufficient reduction in the workload of the team to allow the deletion of one post of Democratic and Member Services Officer.

ALTERNATIVE OPTIONS CONSIDERED AND REJECTED

12. There remains an option to retain a similar calendar of meetings with no fundamental changes but this would not allow the reduction in staffing and therefore costs in the Democratic Services team.

CORPORATE PRIORITIES

13. This report relates to the following Strategic Objectives:

Put Chorley at the heart of regional economic development in the Central Lancashire sub-region		Develop local solutions to climate change.	
Improving equality of opportunity and life chances		Develop the Character and feel of Chorley as a good place to live	
Involving people in their communities		Ensure Chorley Borough Council is a performing organization	/

BACKGROUND

14. On 3 December 2009, Executive Cabinet agreed a report on the outcome of Corporate Services VFM Reviews including a review of Democratic Services.

Democratic Services scored 14.5 overall from the elements of rationale (3/4), efficiency (3/4), economy (3/4), effectiveness (2.5/4) and impact (3/4). The report indicated that there was approximately 30% more meetings taking place in Chorley than in other similar authorities and recommended that a review be undertaken looking at:

- The number of meetings overall
- The frequency and time of meetings; and
- The need for Democratic Services to support all meetings

REVIEW OF MEETINGS

15. In 2008 a review of meetings was undertaken which resulted in a number of changes including the restructuring of Overview and Scrutiny and changes to the Licensing meetings structure. The team also took on the Member Development role from HR; introduced intheknow; absorbed new Standards requirements. There was also a change in the staffing of the team with the four staff supporting meetings being brought onto the same grade.

16. In reviewing the current meetings structure there is a need to ensure continued good governance of decision making and that the Council’s business is transacted as quickly and efficiently as possible. However there is some scope for change and the list below considers each element of the meetings calendar with recommendations and the rationale for those suggested changes. This includes formalising arrangements around Neighbourhood Area Working.

Meeting	Current	Proposed	Rationale and recommendations
---------	---------	----------	-------------------------------

	number of meetings 2009/10	number of meetings in 2010/11	
Council	7 (3 special, 4 ordinary)	6 (3 special, 3 ordinary)	If meetings are evenly spaced and special meetings consider other Council business, the January meeting could be removed
Executive Cabinet	10	8	By reducing meetings down to approximately every 6 weeks, there is scope for fewer meetings of the Executive Cabinet. The business could be accommodated in fewer meetings - as long as they are timed to allow key decisions to be made at the right time.
Informal Cabinet	10	8	
Overview & Scrutiny Committee	10	8	
Scrutiny Task Groups/ Reviews	3 to 4 task groups, total of 24 meetings a year	To be managed within the resources available	It is suggested that the number of scrutiny reviews not be specified, but managed within the resources available, bearing in mind the additional crime and disorder scrutiny to be undertaken.
Development Control Committee	12	12	No change is suggested
Licensing & Public Protection Committee	4	4	There were a number of changes to licensing last year – all of which worked well – no further change is suggested.
Licensing Sub Committees	12 scheduled but are arranged/ cancelled as required	12 scheduled but are arranged/ cancelled as required	The number of Sub Committee meetings is dictated by licensing applications/reviews.
Audit Committee	4	4	No change suggested
Standards Committee	4	4	No change suggested
Standards Sub Committees	12 approx – meet as and when required	As and when required	The number of Sub Committee meetings is dictated by cases being considered.
Member Learning Sessions	8	8	No change suggested
LDF Working Group	7	7	It is suggested that the Working Group continue but that the Planning team supporting the Group.
Central Lancs LDF Joint Advisory Committee	5	5 – Chorley supports 1 in 3 meetings	No change
Equality Forum	4	4	No change
Equality Forum Task Groups	Approx 2 per year, total of 6 to 8 meetings		It is suggested that the Policy team support any Task Group set up by the Equality Forum
Borough Parish Liaison	3	3	No change
Parish Clerks Meeting	3	3	No change

Members Support Working Group	5	4	Suggest reduce to quarterly meetings
Chorley Partnership Board	4	4	No change to meetings frequency but suggest the Policy team support rather than Democratic Services
Chorley Partnership Executive	6	6	
Safer Chorley & South Ribble Partnership	4	4	No change
Rivington & Brinscall Advisory Committee	4	To be reviewed	Suggest that support for this be reviewed and be subject to discussions with LCC who manage the overarching West Pennine Moors body. Most of the business of the meeting is United Utilities or LCC with very little officer input from Chorley Council.
Neighbourh'd Working Action Plan Meetings/ Tours	No formalised meetings but ward walks; action plan meetings; n/hood bus tours etc with partners have been organised by Democratic Services	7 x N/hood Action Plan Meetings in Jan/Feb 7 x N/hood Tours in Sept/Oct with partners	Providing Members in each of the Neighbourhood Areas with one meeting and one tour a year would retain the formal involvement of Members in Neighbourhood Working. It is suggested that these dates to be scheduled in the meetings calendar.

Members views on the suggestions are invited. As soon as a way forward is agreed a calendar of meetings for 2010/2011 will be circulated.

IMPLICATIONS OF REPORT

17. This report has implications in the following areas and the relevant Directors' comments are included:

Finance		Customer Services	
Human Resources		Equality and Diversity	
Legal	/	No significant implications in this area	

**GARY HALL
DIRECTOR OF TRANSFORMATION**

Report Author	Ext	Date	Doc ID
Carol Russell	5196	1 February 2009	

Report of	Meeting	Date
Director Partnerships, Planning and Policy (Introduced by the Executive Member for Policy and Performance)	Executive Cabinet	18 th February 2010

3RD QUARTER PERFORMANCE REPORT 2009/10

PURPOSE OF REPORT

1. This monitoring report sets out performance against the Corporate Strategy and the Council's National Indicators for the third quarter of 2009/10, 1st October – 31st December 2009.

RECOMMENDATION(S)

2. That the report be noted

EXECUTIVE SUMMARY OF REPORT

3. This report sets out performance against the Corporate Strategy and the Council's National Indicators for the third quarter of 2009/10, 1st October – 31st December 2009. Performance is assessed based on the delivery of Key Projects in the Corporate Strategy and the performance against National Indicators for which the Council is responsible.
4. Following the annual refresh of the Corporate Strategy at Policy Council on November 3rd 2009 and subsequent adoption in December 2009, this report will be the first time the new programme of key projects have been reported against.
5. The Corporate Strategy 2009/10 identifies 33 Key Projects. The overall performance of the key projects is excellent with 33 (100%) rated 'Green' and progressing ahead of or according to plan by the end of December 2009.
6. None of the key projects in the new Corporate Strategy have been completed, while thirty three projects are rated as 'Green' meaning that they are on track. No projects are rated 'Amber', which is an early warning that there may be a problem. There are also no projects that are rated 'Red', which indicates more serious problems such as falling behind schedule or exceeding budget.
7. At the end of the 3rd quarter, 15 national indicators can be reported. All of these indicators have targets set and have been reported previously. Of the 15 the majority (11) have matched or exceeded target and 4 have missed target by 5% or more.
8. Action plans have been included for those indicators where performance is lower than anticipated. It is not possible to compare Chorley's performance against other authorities, as comparative data has not yet been published. Comparative performance will be covered in a future report when the information becomes available.

REASONS FOR RECOMMENDATION(S)

(If the recommendations are accepted)

9. To facilitate the ongoing analysis and management of the Council’s performance

ALTERNATIVE OPTIONS CONSIDERED AND REJECTED

10. None

CORPORATE PRIORITIES

11. This report relates to the following Strategic Objectives:

Strengthen Chorley’s economic position in the Central Lancashire Sub Region	✓	Improve environmental sustainability and combat climate change	✓
Improving equality of opportunity and life chances	✓	Develop the Character and feel of Chorley as a good place to live	✓
Supporting people to get involved in improving their communities	✓	Ensure Chorley Council is a consistently top performing organization	✓

BACKGROUND

12. The Corporate Strategy is the key strategic document for the authority and is focused on delivering the Council’s six strategic objectives that underpin the priorities of: prosperity, people, place and performance. The Corporate Strategy mirrors, and outlines the Council’s contribution to, the Sustainable Community Strategy, delivery of which is taken forward by the Chorley Partnership.
13. The Corporate Strategy 2009/10 identifies a programme of 33 key projects, which contribute to the achievement of our objectives. These key projects are delivered using the Council’s corporate project management toolkit, which has been used successfully to improve performance for other key areas of work, such as the Capital Programme. The Strategy also contains a series of key measures to monitor the success in delivering improved outcomes for residents.
14. National Indicators (NIs) are indicators collected in accordance with definitions issued by the Department for Communities and Local Government.
15. Quarterly Business Plan Monitoring Statements have also been produced by directorates separately, and will be sent to the Overview and Scrutiny Committee. Quarterly Business Plan Monitoring Statements outline the performance of Key Directorate Performance Indicators and the key messages emerging from Directorates in the third quarter of 2009/10.

REPORT OVERVIEW

16. The report provides information covering the following areas:
 - The Council’s progress in delivering the 33 Key Projects identified in the Corporate Strategy 2009/10
 - The Council’s progress in achieving against targets that can be measured on a quarterly basis.

- Action Plans which outline reasons for lower than expected performance, and the action to be taken to improve performance in the next quarter are included for those indicators which have missed targets by 5% or more.

KEY PROJECT PERFORMANCE OVERVIEW

17. This section looks at the performance of the Key Projects to the end of the third quarter of 2009/10.
18. In order to manage our key projects lead officers have been asked to complete a high-level project plan, a business case, project initiation documentation and quarterly highlight reports.
19. The highlight reports provide a brief update on the work carried out during the last quarter (1st October to 31st December 2009), what achievements are expected in the next quarter, any current risks and issues affecting the project and an overall rating of either ‘Green’, ‘Amber’ or ‘Red’.
20. If the project is not going as planned, then an exception report is produced instead. This is similar to the action plans used for performance indicators that are below target. They provide a brief analysis of the problem(s), and options for bringing the project back on track.
21. The table below shows that the overall performance of the key projects is excellent. 100% (33 out of 33 projects) are rated ‘Green’ and progressing ahead of, or on schedule.

	No Projects	%
Completed projects	0	0%
Projects rated as ‘Green’	33	100%
Projects rated as ‘Amber’	0	0%
Projects rated as ‘Red’	0	0%

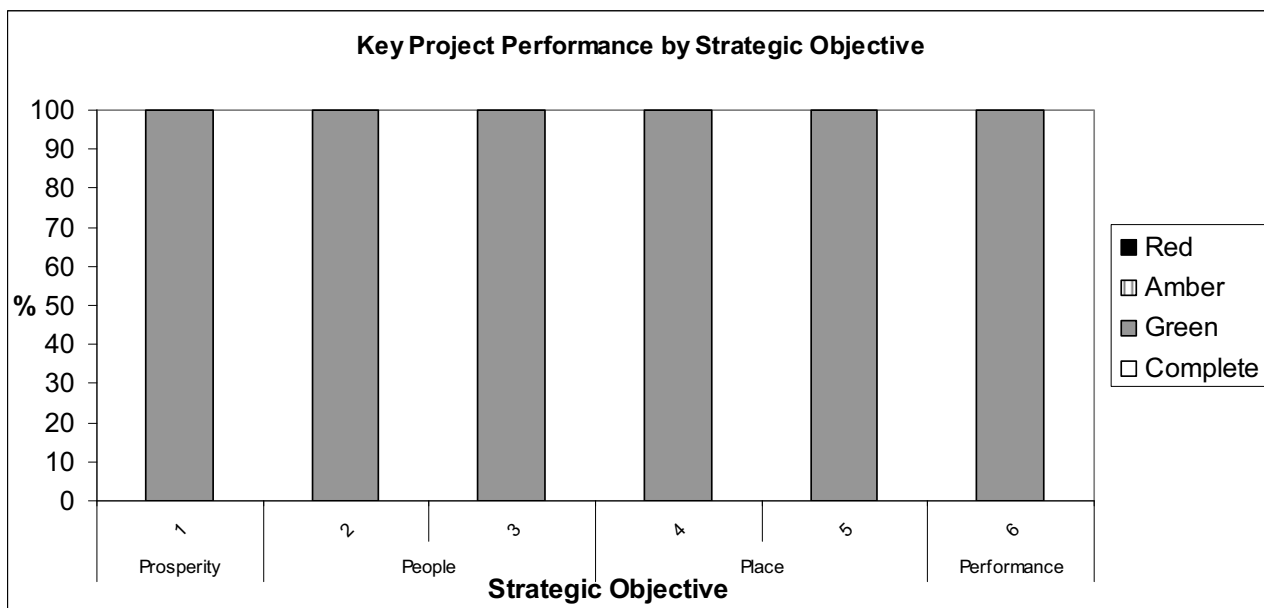
Table 1 - Summary of key project performance for the 3rd Qtr (Oct – Dec 09)

22. The table below demonstrates the performance of the established projects that have carried over from the 2008/9 Corporate Strategy.

	QTR 2 09/10	QTR 3 09/10	Variance
Projects rated as ‘Green’	71% (5 projects)	100% (7 projects)	+29%
Projects rated as ‘Amber’	29% (2 projects)	0% (0 projects)	- 29%
Projects rated as ‘Red’	0% (0 projects)	0% (0 projects)	-

Table 2 – Performance of existing projects (7) carried forward from 2nd Quarter 2009/10

23. The table above shows a marked improvement in performance in comparison with the second quarter for those projects that have carried over from the 2008/9 Corporate Strategy. 100% of projects are now rated ‘Green’ compared to 71% in the previous quarter. There has also been a 29% reduction in the number of projects rated ‘Amber’.



Priority	Strategic Objective	Complete	Green	Amber	Red
Prosperity	1	0	6	0	0
People	2	0	6	0	0
	3	0	4	0	0
Place	4	0	5	0	0
	5	0	7	0	0
Performance	6	0	5	0	0

COMPLETED KEY PROJECTS

24. The table below shows the key outcomes from the projects that have completed in the third quarter of 2009/10, 1st October – 31st December 2009. These are projects that have not been carried over into the new Corporate Strategy.

Key Project	Key Outcomes
Develop and deliver an action plan to support businesses through the economic downturn	<p>The action plan to support businesses through the economic downturn has achieved the following outcomes:</p> <ul style="list-style-type: none"> • In partnership with local businesses, Chorley Council provided the Future Jobs Fund with 22 new vacancies for young people • Partnership working with Business Link to provide additional support to Chorley businesses • Negotiations with NWDA over the deliver of the new business start up contract • Enterprise Facilitator is now operating across Chorley • Connect to Work scheme • Redundancy task force set up in conjunction with other partners
Develop a green travel plan for staff	<p>The Green Travel Plan has achieved the following outcomes:</p> <ul style="list-style-type: none"> • An assessment of the location and facilities at Chorley Council sites including any barriers to sustainable travel • A review of current Chorley Council policies that may positively or negatively affect the promotion of various travel choices • A travel survey to identify current trends in the way that staff travel to work • The identification of initiatives that could be promoted in light of the

	<p>findings from the travel survey and engagement that has taken place with staff</p> <ul style="list-style-type: none"> • Objectives for the green travel plan in light of the findings from the travel survey • The settings of actions and targets to ensure the success of the project
<p>Deliver an invest to save programme for the Council's use of energy</p>	<p>The project has delivered a series of energy efficiency measures throughout the Council's buildings. These include:</p> <p>Town Hall - Installation of water saving devices in toilet cisterns, installation of self closing taps, insulate loft space over Lancastrian, communications and Exchequer, installation of thermostatic radiator valves, replace central heating pump with energy saving pump, adjust the weather compensating controls to 19oC, installation of PIR movement detectors to control lights to 29 areas, provide photocell control to external lights, and provide photocell control to clock face lights</p> <p>Union Street - Installation of water saving devices in toilet cisterns, installation of self closing taps, replace the heating optimizer controls, replace central heating pumps with energy saving pumps (4No), replace existing room thermostats with anti tamper ones, installation of PIR movement detectors to control lights to 14 areas, installation of PIR movement detectors to main stairwell lighting, and installation of external lighting to the rear of the building, controlled by time clock and photocell.</p> <p>Bengal Street - Installation of PIR movement detectors to control lights to 10 areas, a period of education and promotion on energy saving has been conducted.</p> <p>All Seasons Leisure Centre – Sensor control of squash courts lights will save £421 per year and cut CO2 by nearly 1.8 tonnes. Lights in the practice hall, main hall and pool will be replaced with more energy efficient ones. This will save £2745 per year and reduce CO2 by 9 tonnes. Insulation of plant room pool circulating pipes will save £3241 per year plus reduce CO2 by nearly 26 tonnes. The Combined Heat and Power system will be installed by the end of February 2010. This will save £27,000 per year and cut CO2 by 88 tonnes. Installation of pool covers will save £13681 per year in costs and there will be a 162 tonnes reduction in CO2.</p> <p>Brinscall Leisure Centre – Insulation of plant room pool circulating pipes will save £3720 per year plus 29.6 tonnes of CO2.</p> <p>Clayton Green Leisure Centre – Conversion of lights to more efficient ones will save £2440 per year and reduce CO2 by 8 tonnes.</p> <p>Coppull Leisure Centre – Replacement of lights with more efficient ones will save £2938 and reduce CO2 by 9.6 tonnes.</p>
<p>Develop and embed a new staff competency framework</p>	<p>The project has delivered a new framework of behaviors and attributes that are aligned with the Council's core values. The framework has been adopted by the Council and has been embedded throughout all the key HR processes.</p>
<p>Deliver the Ruralty Awareness Project</p>	<p>The rural profiles that have been produced under this key project will provide robust information to Officer, Members and partner organisations which will help to shape service delivery to our seven rural wards in the borough. It will enable the Council and its partners to target resources and service delivery where they will have the greatest impact and ensure that</p>

	<p>the needs of rural communities are understood by the Council and its partners. These profiles will also act as evidence to support funding bids for these areas and provide a link to where the council can work with Parish councils to ensure that money is spent appropriately.</p>
<p>Involve young people in their communities and deliver Children's Trust priorities for Year 1</p>	<p>Chorley Local Children's Trust has made good progress in its first full year of operation. The Trust has good representation from the statutory duty to cooperate partners and has included representation from schools (secondary, primary and special), parents, VCF sector and children's centres. Other partners attend the Trust as and when items required.</p> <p>The Trust has undertaken two consultation events to ensure the priorities in the Children and Young People's Plan for Lancashire and the Trust and LSP's local priorities are relevant to local children and young people. Work is underway to enhance the engagement and involvement of children and young people in the work of the Trust, including those who are hardest to reach using traditional methods.</p> <p>The Trust has commissioned a series of projects that will reduce health inequalities and increase opportunities for children and young people to be active in their leisure time. Examples of such commissioning include, the Girls Aloud project that has contributed to a significant reduction in teenage conceptions in the borough. It also commissioned local providers to deliver more Friday and Saturday positive activities for children and young people; something that was request by young people as part of the consultation mentioned earlier.</p> <p>Research into the VCF sectors involvement in delivering the Every Child Matters outcomes was also commissioned and planning is underway to address the issues that emerged. The Trust has also refreshed its priorities, as well as the existing priorities of enhancing involvement/engagement, reducing teenage conceptions and more things to do/places to go the Trust will also focus on early interventions and reducing the number of young people who are NEET.</p>
<p>Continue to improve the green corridor of Chorley</p>	<p>The Astley Park element of the project has now been successfully completed. This was marked by the Chorley Smile Picnic in the park, which showcased the improvements that have been made. The café, function rooms and exhibition gallery are all fully functional and well used. Also, the walled garden has been the venue for a number of successful outdoor events. The Pets Corner and Play Area are also now open and being used. The final task is to complete the signage in the park.</p> <p>The Duxbury element of the project continues to make good progress. The new club house has been completed and has been well received by customers. Plans are currently been finalized for the beginners course. This element of the project has been rescheduled to take into account the programme of drainage works on the course and to minimize disruption to golfers.</p> <p>The Common Bank element of the project is now in its final phase that will see the transformation of Council owned land into an attractive recreational facility. The work at Big Wood South and Copperworks Wood has now been completed. Outcomes thus far include land remediation works, public access enhancement and ecological improvements. The Big Wood North element of the project is still to be completed. It is fully funded; but we are currently waiting for the money to be released in the form of a Section 106 agreement from the Gillibrand development.</p>

KEY PROJECTS IDENTIFIED AS 'GREEN'

25. A 'green' rating indicates that project performance is as planned or ahead of schedule with progress on target and costs within or under budget. Those projects that are yet to start are also classed as green as they are on course to start and finish by their target dates. The following projects are rated green: **those marked in bold are continuing projects from the previous Corporate Strategy**

1	Secure the development of the Pall Mall triangle and Market Street
2	Develop a proposal for improvements to the Flat Iron
3	Produce a marketing package for the town centre, markets and Chorley as a whole
4	Develop a succession strategy for major inward investment and identify niche markets for the strategic regional site
5	Produce site allocations Development Plan Document
6	Refresh the Economic Regeneration Strategy and Town Centre Action Plan
7	Evaluate the Families First project and establish intervention arrangements for vulnerable families
8	Increase weekend diversionary provision for children and young people
9	Improve co-ordination of work with children and young people
10	Evaluate the free swimming scheme and agree a way forward
11	Implement Year 2 of the 50+ Active Generation Project
12	Deliver Chorley's key actions for Year One of the Health Inequalities Strategy
13	Develop and deliver agreed community governance options for Chorley
14	Develop a Community Engagement Strategy
15	Develop and deliver an action plan to increase volunteering
16	Work with local residents to transfer community facilities into community management
17	Deliver Food Waste recycling
18	Install Combined Heat and Power System at All Seasons Leisure Centre
19	Carry out energy audit of all remaining Council buildings
20	Establish a community growing scheme
21	Ensure development of Group One woodland management plan
22	Deliver key projects from neighbourhood action plans
23	Implement revised street cleaning schedules following recommendations from O&S enquiry
24	Establish a choice based lettings scheme
25	Complete review of Home Improvement Agency
26	Deliver the Chorley housing refurbishment scheme
27	Pilot and review the Chorley/SRBC CDRP merger
28	Complete parks, open spaces and play review and complete improvement plan
29	Refresh Chorley's Sustainable Community Strategy
30	Complete Year 3 of the VFM Programme

31	Refresh the Council's Marketing and Communications Strategy
32	Develop a staff engagement strategy
33	Complete I&DeA Peer Review of LSP

PERFORMANCE OVERVIEW: NATIONAL INDICATOR SET

26. It is not yet possible to undertake the full analysis on performance that was previously undertaken in the quarterly performance report during the Best Value regime, as information on performance at a national level is not yet available to enable this. This includes analysis of quartile positioning. As it becomes possible to make these comparisons, information and analysis will be included in future performance reports.

PERFORMANCE AGAINST TARGET

27. The performance of the national indicators that can be reported at the end of the second quarter is shown in the table in Appendix 1.
28. This is a smaller subset of the total number of NIs for which the Council is responsible, as it is not possible to collect and report against the full suite of NIs at this point. All the indicators for which the Council is responsible that can be reported on at this point in time have been reported. However for several indicators the Council is reliant on third parties such as DEFRA to provide information. Performance on these indicators will be reported when this data is available. In addition, a report is made on a quarterly basis to report on the progress made against a wider set of indicators for which the LSP is responsible.
29. The majority of the indicators are performing at, or above, target. At the end of the 3rd quarter, of the 15 indicators reported, 11 have matched or exceeded target and 4 have missed target by 5% or more.
30. The 4 indicators that have missed target by 5% or more have had action plans prepared. These can be found at paragraph 40. The indicators below target are:
- NI 181 (Time taken to process Housing Benefit/Council Tax Benefit new claims and change events)
 - NI 195a (Improved street and environmental cleanliness: levels of litter)
 - NI 195b (Improved street and environmental cleanliness: levels of detritus)
 - NI 195c (Improved street and environmental cleanliness: levels of graffiti)

TREND ANALYSIS

Trend compared to the last quarter:

31. Analysis has been undertaken to compare the performance of indicators in this quarter to when they were reported in the previous quarter.
32. When compared against the previous quarter, 8 indicators out of 15 have shown an improvement or consistent performance and achieved target at the end of the quarter.
33. When compared against the previous quarter, 4 indicators out of 15 have deteriorated in performance and missed target by 5% or more.
- NI 181 (Time taken to process Housing Benefit/Council Tax Benefit new claims and change events)
 - NI 195a (Improved street and environmental cleanliness: levels of litter)

- NI 195b (Improved street and environmental cleanliness: levels of detritus)
- NI 195c (Improved street and environmental cleanliness: levels of graffiti)

34. 2 indicators have deteriorated in performance but have still hit target.

- NI 157a (Processing of planning applications as measured against targets for 'major' application types)
- NI 157c (Processing of planning applications as measured against targets for 'other' application types)

Trend compared to Quarter 3 last year:

35. Analysis has been undertaken where possible to compare the performance of indicators in this quarter to when they were reported at this point last year. It is possible to make this comparison for 11 indicators.
36. When compared to quarter three 2008/9, 10 indicators out of 11 have shown an improvement or consistent performance and hit target.
37. One indicator has improved in performance; but just missed target
- NI 181 (Time taken to process Housing Benefit/Council tax benefit new claims and change events)

DELIVERING ACTION PLANS

38. In the second quarter performance report, two indicators were below target triggering the production of action plans. These were NI 181 (Time taken to process Housing Benefit/Council Tax Benefit new claims and change events) and NI 195b (Improved street and environmental cleanliness: levels of detritus). Both of these indicators are still below target, therefore updated action plans have been produced to outline the further actions that will be taken to improve performance.
39. Although performance overall is a picture of continued strong performance, there remains a need to understand and carefully manage performance where it is not meeting our expectations. In the third quarter of reporting the National Indicator Set for 2009/10, four action plans have been triggered.
40. The following indicators have actions plans as they have fallen below the targets set for 2009/10:
- NI 181 (Time taken to process Housing Benefit/Council Tax Benefit new claims and change events)
 - NI 195a (Improved street and environmental cleanliness: levels of litter)
 - NI 195b (Improved street and environmental cleanliness: levels of detritus)
 - NI 195a (Improved street and environmental cleanliness: levels of graffiti)

ACTION PLANS: INDICATORS BELOW TARGET

Indicator Number	NI 181
Indicator Short Name	Time taken to process Housing Benefit/Council Tax Benefit new claims and change events

Quarter Three	
Performance	Target
11.37 days	10 days

Please explain the reasons why progress has not reached expectations

Increased caseload: Caseloads have increased as a direct result of the recession. More people out of work results in more customers claiming Housing and Council Tax Benefit for help towards paying their rent and Council Tax. Our caseloads have risen by 8.5% from 7,621 in April 09 to 8,272 in December 09 and this number continues to rise.

Christmas closedown: Every day counts from the date that we receive an application for Housing and Council Tax Benefit. Post received during the Christmas break is treated as if it was received on the last day that we were open (Christmas Eve). The clock for the purposes of counting the days that we take to process claims, (which is the Right Time indicator) starts on the day that we first receive the claim. Any delays in us dealing with work has a detrimental effect on performance against this indicator.

Annual Benefit uprating: Annual uprating is reassessing all existing customer's entitlement to Housing and Council Tax Benefit at the start of the new financial year in line with all the new social security benefit rates and housing benefit rates. It is also a time when all the elderly customers who receive Pension Credit have changes in their income that have to be reflected in the Housing and Council Tax Benefit calculation. This means that each claim needs to be adjusted ready for the start of the new financial year. It dramatically increases the volumes of work that pass through our department during the November/December period (when the DWP notifies us of the new figures). This increased volume of work being processed affects our performance stats.

Please detail corrective action to be undertaken

Q 4 is generally a better quarter and we hope to pull the figure back to nearer the target.

Although we have extra work to do during this period planning for year end, these high volumes of changes that need to be processed at year end (rent increases etc) are all done quickly because they are simple changes and this improves performance because it results in large volumes of changes processed in 1 day. This improves the NI181 for the whole year because the indicator is an average of all days to process for the year.

We have received DWP funding this year to help cope with the increased volumes of claims. We have used this money to take on 2 extra members of staff on 12 month fixed contracts to help with the increased workloads. The assessment staff have also

volunteered to work overtime at particularly busy periods to keep the backlogs down and maintain performance. In addition to this we monitor workloads and change priorities as required daily and are constantly looking for ways to improve performance. These actions have culminated in an improvement over the same quarter last year (12.33 days down to 11.37 days).

Indicator Number	NI 195a
Indicator Short Name	Improved street and environmental cleanliness: levels of litter

3 rd Quarter Cumulative Performance	Annual Performance Targets	
	Chorley LAA Target	Lancs LAA Target
7%	4.6%	10%

Please explain the reasons why progress has not reached expectations

Cumulative performance at the end of quarter 3 is above our end of year target. Performance is based on an average score of the inspections completed. The end of year target is challenging, however, we envisage that the gap between third quarter performance and the end of year target will reduce in the final quarter.

Performance with this indicator is seasonal, for example, autumn leaf fall can have a significant impact.

Analysis of the worst scoring areas has revealed that a significant proportion that are areas that Chorley Council has no maintenance responsibility or requirements to clean. For example, unadopted roads, non Council recreation/open spaces and industrial areas. This is picked up in the corrective action section.

During this period we were reviewing our continuity arrangements within the service and undertook a period of training of additional staff to operate the sweepers, which would have affected the cyclical rounds whilst staff were being trained.

During the summer there was a drive to review the cleaning rounds to provide more information to residents about when they can expect a sweeper in their area. This was started in the Autumn and did lead to some minor disruption to the rounds whilst the new routes were agreed

Please detail corrective action to be undertaken

As mentioned earlier a contributory factor to the underperformance in areas outside Chorley Council’s maintenance responsibilities. Our ability to influence others is an important element of this indicator. We will engage more with landowners to make them aware of how the areas for which they are responsible has a negative impact on the appearance of the Borough. We intend to do this by engaging landowners via the Neighbourhood Teams and seeking the support of the Local Strategic Partnership (LSP) and its partners.

The Head of Streetscene Services has met with each operational team to discuss ways

in which performance will be improved. This includes the playing deploying resources to increase cleaning frequencies in target areas and expanding the litter picking in the outer areas.

Performance against this indicator should improve as the recommendations of the Overview and Scrutiny enquiry are taken forward and developed further. Revised Street Cleaning schedules will be implemented as a key project in 2010-11 Corporate Strategy.

Inspectors have been instructed to report any sites which do not meet the target standard immediately so that the Head of Streetscene Services and Neighbourhood Quality Co-ordinator can take appropriate remedial action. By doing this it will make the operational staff more aware of expected standards which will result in improvements in out-turn over the following period.

Also, the training that has been undertaken in quarter 3 will make the service more resilient to unexpected events, which will improve performance in the long term. The review of the cleaning rounds will improve the way in which the rounds are undertaken and provide more information to residents.

Indicator Number	NI 195b
Indicator Short Name	Improved street and environmental cleanliness: levels of detritus

3rd Quarter Cumulative Performance	Annual Performance Targets	
	Chorley LAA Target	Lancs LAA Target
11%	4.7%	18%

Please explain the reasons why progress has not reached expectations

Cumulative performance at the end of quarter 3 is above our end of year target. Performance is based on an average score of the inspections completed. The end of year target is challenging, however, we envisage that the gap between third quarter performance and the end of year target will reduce in the final quarter.

10% of our worst scoring roads are unadopted and as such Chorley Council has no maintenance responsibility or requirement to clean in these streets. The guidance states that un-maintained roads remain in the survey data.

During this period we were reviewing our continuity arrangements within the service and undertook a period of training of additional staff to operate the sweepers, which would have affected the cyclical rounds whilst staff were being trained.

During the summer there was a drive to review the cleaning rounds to provide more information to residents about when they can expect a sweeper in their area. This was started in the Autumn and did lead to some minor disruption to the rounds whilst the new routes were analysed.

We have seen an increase in detritus, in this tranche on Industrial and Warehousing land use areas. This is picked up in the corrective action

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Please detail corrective action to be undertaken

As mentioned earlier, a contributory factor to the underperformance is the number of the areas surveyed in this tranche are outside Chorley's scope in terms of maintenance. Our ability to influence others is an important element of this indicator. We will engage more with landowners to make them aware of how the areas for which they are responsible has a negative impact on the appearance of the Borough. We will target industrial and warehousing land as part of this work. We intend to do this by engaging landowners via the Neighbourhood Teams and the Local Strategic Partnership (LSP) and its partners.

The Head of Streetscene Services has met with each operational team to discuss ways in which performance could be improved. As part of this we are increasing cleaning frequencies in more high profile areas and are expanding the litter picking into the outer areas.

Performance against this indicator should improve as the recommendations of the Overview and Scrutiny enquiry are taken forward and developed further. Revised Street Cleaning schedules will be implemented as a key project in 2010-11 Corporate Strategy.

Inspectors have been instructed to report any sites which do not meet the target standard immediately so that the Head of Streetscene Services and Neighbourhood Quality Co-ordinator can take appropriate remedial action. By doing this it will make the operational staff more aware of expected standards which will result in improvements in out-turn over the following period.

Also, the training that has been undertaken in quarter 3 will make the service more resilient to unexpected events, which will improve performance in the long term. The review of the cleaning rounds should improve the way in which the rounds are undertaken and provide more information to residents.

Indicator Number	NI 195c
Indicator Short Name	Improved street and environmental cleanliness: levels of graffiti

3rd Quarter Cumulative Performance	Annual Performance – to 31/03/2010	
	Chorley LAA Target	Lancs LAA Target
2.5%	1%	4%

Please explain the reasons why progress has not reached expectations

Cumulative performance at the end of quarter 3 is above our end of year target. Performance is based on an average score of the inspections completed. The end of year target is challenging, however, we envisage that the gap between third quarter performance and the end of year target will reduce in the final quarter.

- The areas where the scores are most significantly below standard are mainly recreations areas and also some of the industrial areas.
 - Not all of these are within the control of the local authority, many being private, the responsibility of local housing associations and parish councils.
 - Some of the play areas are yet to be formally adopted and therefore may have been assessed either inadvertently or are within the scope of the inspection, but not within the control of Chorley Council.
- There is also the impact of an increased scoring stringency, introduced for this year.

Please detail corrective action to be undertaken

- The Streetscene Service Manager has met with the Neighbourhood Quality Co-ordinator in preparation for the next inspection tranche to ensure areas of concern are raised in a timely manner.
- Inspectors have been instructed to report any sites which do not meet the target standard immediately so that the Streetscene Service Manager and Neighbourhood Quality Co-ordinator can take the appropriate remedial action.
- The pictures taken at the time of inspection, used for auditing purposes are also to be provided as soon as the inspection is complete so that the responsible officer can evaluate the scoring or to pursue enforcement action where graffiti is in areas of private ownership and seek to engage with responsible stakeholders on a more proactive basis.
- The Streetscene Officer responsible for the Council’s recreation and play areas has been provided with a graffiti removal kit for small issues, but has been reminded of the need to report larger or more difficult to remove defacements as a matter of urgency so that the graffiti contractor can deal with these.

Where graffiti is reported to the council for removal the response periods are consistently within target with, 94.8% of graffiti removed within 28 working days and 84% of all offensive graffiti removed within 2 working days.

CONCLUSION

41. The performance in this first quarter report shows that the Council continues to perform well. The progress made in delivering key projects is excellent and the performance against indicator targets demonstrates that we continue to deliver against our priorities.
42. The action plans and other steps to be taken where performance is lower than anticipated should help to drive improvement in performance indicators and project delivery.

IMPLICATIONS OF REPORT

This report has implications in the following areas and the relevant Corporate Directors’ comments are included:

Finance		Customer Services	
Human Resources		Equality and Diversity	
Legal		No significant implications in this area	X

LESLEY-ANN FENTON
 DIRECTOR OF PARTNERSHIPS, PLANNING AND POLICY

There are no background papers to this report.

Report Author	Ext	Date	Doc ID
Adele Reynolds	5325	27 th January 2010	Third Quarter Performance Report 2009 10

Appendix 1: National Indicator Set Performance

Performance Against Target



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Performance is better than the target set for 2009/10



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Performance is within the 5% tolerance set for this indicator.



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Performance is worse than the 5% tolerance.

The performance symbols denote end of quarter performance against the target

Code	Indicator Title	Target	Outturn Quarter 3	Performance against target
NI 16(LAA)	Serious Acquisitive Crime	5.9625 per 1000 population	5.2767 per 1000 population	★
NI 20 (LAA)	Assault with Injury Crime Rate	4.3650 per 1000 population	4.0076 per 1000 population	★
NI 156 (LAA)	Number of households in temporary accommodation	13	8	★
NI 157a	Processing of planning applications as measured against targets for 'major' application types	81%	82.35%	★
NI 157b	Processing of planning applications as measured against targets for 'minor' application types	82.5%	83.1%	★
NI 157c	Processing of planning applications as measured against targets for 'other' application types	92%	93.69%	★
NI 180	Changes in Housing Benefit/Council Tax Benefit entitlements within the year	6750	8602	★
NI 181	Time taken to process Housing Benefit/Council Tax Benefit new claims and change events ¹	10 days	11.37 days	▲

¹ NI 180 and NI 181 are taken directly from the Council's system by the Department for Work and Pensions. Therefore, the outturn at year end may not exactly match this reported outturn, although it should give a good indication.

NI 182	Satisfaction of businesses with Local Authority regulation services	90%	91.9%	★
NI 184	Food establishments in the area, which are broadly compliant with food hygiene law	95%	95.5%	★
NI 192 (LAA)	Household waste recycled and composted ²	49%	51.41%	★
NI 195a (LAA)	Improved street and environmental cleanliness: levels of litter	4.6%	7% ³	▲
NI 195b (LAA)	Improved street and environmental cleanliness: levels of detritus	4.7%	11% ⁴	▲
NI 195c (LAA)	Improved street and environmental cleanliness: levels of graffiti	1%	2.5% ⁵	▲
NI 195d (LAA)	Improved street and environmental cleanliness: levels of fly posting	1%	1%	★

² The waste figures are up to date in the current position at the end of September. Information for Quarter 3 will be received at the end of March 2010 and the outturn will change as more information is received.

³ Figure reported as a cumulative performance up to the end of Quarter 3

⁴ Figure reported as a cumulative performance up to the end of Quarter 3

⁵ Figure reported as a cumulative performance up to the end of Quarter 3

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Report of	Meeting	Date
Director of Partnerships, Planning and Policy (Introduced by the Executive Member for Policy & Performance)	Executive Cabinet	18 th February 2010

CHORLEY PARTNERSHIP 3ND QUARTER 2009/10 PERFORMANCE REPORT

PURPOSE OF REPORT

1. To update Members on the performance of the Chorley Partnership over the last quarter, covering the period from October to December 2009.

RECOMMENDATION(S)

2. Members are asked to note the content of this report.

EXECUTIVE SUMMARY OF REPORT

3. The report highlights the Chorley Partnership's performance in delivering the objectives of the LAA and Sustainable Community Strategy over the third quarter of 2009/10. In summary:
 - Crime is down, on average, by 0.8% on this time last year, and there has been an overall decrease in violent crime of 7.5% compared to this time last year. However, there has been an increase in acquisitive crime, in particular burglary dwellings and vehicle crime.
 - Numbers of primary fires in Chorley are below target.
 - The number of households in Chorley living in temporary accommodation has fallen to just 8. This shows a major reduction over the last year and we have performed exceptionally well hitting and exceeding our target of 13.
 - Street cleanliness (such as litter, detritus and graffiti) is below target in this quarter. This is due in part to the seasonal variation in terms of the numbers of leaves that fell in the last quarter, and actions are in place to improve this performance including a revised street cleaning schedule.
 - Unemployment has fallen from 3.1% at the end of the 2nd Quarter to 2.9% at the end of the 3rd Quarter. This means there are 148 fewer people claiming benefits than at the end of the 2nd quarter. Also new business start-ups are over-achieving targets due to the redundancy support package we have put in place including targeted support for new and young businesses.
 - All of the Chorley Partnership's projects for 2009/10 are now underway and are on track for this quarter.

CORPORATE PRIORITIES

4. This report relates to the following Strategic Objectives:

Put Chorley at the heart of regional economic development in the Central Lancashire sub-region	X	Develop local solutions to climate change.	X
Improving equality of opportunity and life chances	X	Develop the Character and feel of Chorley as a good place to live	X
Involving people in their communities	X	Ensure Chorley Borough Council is a performing organization	X

5. PERFORMANCE INDICATORS**All Crime**

Crime overall is down by 0.8% compared to the same period of last year. This is broken down into the following categories:

Category	Q3 2008/9	Q3 2009/10	% Change	YTD 08/09	YTD 09/10	YTD % Change
All Crime	1517	1382	-8.9%	4727	4690	-0.8%
Serious Acquisitive Crime (NI16)	151	195	+29.1%	555	593	+6.8%
Burglary Dwelling	43	75	+74.4%	141	188	+33.3%
Vehicle Crime	103	116	+12.6%	394	390	-1.0%
Robbery	5	4	-20.0%	20	15	-25.0%
All Violent Crime	377	280	-25.7%	1154	1068	-7.5%
Serious Violent Crime	17	13	-23.5%	54	55	+1.9%
Assault with Less Serious Injury (NI20)	175	126	-28.0%	513	447	-12.9%
Criminal Damage (inc arson)	364	290	-20.3%	1112	1048	-5.8%

- All crime has decreased, by 8.9% compared to this period last year, and by 0.8% compared to the year-end figures to date from last year. However, there has been an increase in Serious Acquisitive Crime, which is up by 6.8% on this time last year. The main reason for some of the individual categories of crime showing increases is that crime in Chorley has been at an all time low, following the 26% reduction between 2005 and 2008. Therefore, as we have few crimes, small increases in numbers can lead to large percentage changes. Both the figures for burglary dwelling and vehicle crime are up compared to these record low levels of last year, though noticeable reductions have been made and sustained over the long term. Overall, Chorley CDRP remains one of the top performing areas when compared to their iQuanta Most Similar Group and the LAA target to reduce Serious Acquisitive Crime (NI16) by 1% by March 2011 will be easily achieved.

LAA Quarterly Indicators

Indicator Code	Indicator Description	Target Quarter 3	Outturn Quarter 3	Performance against Target
NI 49	Number of primary fires	120.22 per 100000 population cumulative	110.6870 per 100000 population	★
NI 156	Number of households in temporary accommodation	13	8	★
NI 192	Household waste recycled and composted ¹	49%	51.41%	★
NI 195a	Improved street and environmental cleanliness: levels of litter	4.6%	7% ²	▲
NI 195b	Improved street and environmental cleanliness: levels of detritus	4.7%	11% ³	▲
NI 195c	Improved street and environmental cleanliness: levels of graffiti	1%	2.5% ⁴	▲
NI 195d	Improved street and environmental cleanliness: levels of fly posting	1%	1%	★

* Indicators NI195a, b, c have missed their target by 5% or more, and therefore have action plans. These are provided for information within the 3rd Quarter Performance Report 09/10 (paragraph 40) which is another item on this agenda.

Other Sustainable Community Strategy Indicators

Indicator Code	Indicator Description	Cumulative Target Quarter 3	Outturn Quarter 3	Performance against Target
CS 1.1.1	Number of new businesses established	39	50	★
SCS 1.1	Number of jobs created/preserved	225	21	▲
SCS 1.3	M ² of business floor space created/improved	41876	632	▲

¹ The waste figures are up to date in the current position in the end of September. Information for Quarter 3 will be received at the end of March 2010 and the outturn will change as more information is received.

² Figure reported as a cumulative performance up the end of Quarter 3

³ Figure reported as a cumulative performance up to the end of Quarter 3

⁴ Figure reported as a cumulative performance up to the end of Quarter 3

Unemployment Indicators

The unemployment benefit claimant count has fallen from 3.1% at the end of the 2nd Quarter to 2.9% at the end of the 3rd Quarter.

Indicator	July 09	Aug 09	Sep 09	Oct 09	Nov 09	Dec 09
Claimant Count - Chorley	3.1% (2023 claimants)	3.2% (2065 claimants)	3.1% (2048 claimants)	3% (1966 claimants)	2.9% (1924 claimants)	2.9% (1900 claimants)
Claimant Count – Lancashire	3.5%	3.6%	3.4%	3.4%	3.3%	3.3%
Claimant Count – UK	4.1%	4.1%	4.1%	4.2%	4.2%	4.2%

6. THE CHORLEY PARTNERSHIP’S PROJECTS FOR 2009/10

Manage Your Money Better	
What is it?	Supporting people through the recession with joined-up support form VCF sector agencies
Lead Partner	Citizens Advice Bureau
RAG Status G	The Project Manager has been in post since 1 October 2009. Initial meetings have been completed with several partner groups (e.g. Homestart, Help Direct, community groups and parent/school groups) and positive responses have been received with partners keen to engage with the project. In addition, promotional material has been produced and taster training has commenced to volunteer and frontline worker groups.

Messages	
What is it?	Diversinary arts education programme working with young people at risk from alcohol abuse
Lead Partner	The Arts Partnership
RAG Status G	<p>The first phase of the project, ‘Messages’, worked with 11 young people between the ages of 16 and 19 (all classed as NEET) who have all been affected by alcohol either directly or indirectly, is complete.</p> <p>The second project ‘Bus Station mural’ is under way and the first stage has been completed. This is working with young people classed as under achievers and unlikely to gain qualifications, and this work will be accredited to Silver Level. The young people have settled into the role and are taking more ownership. The partners, Bus Interchange, are happy with the progress and the framework will begin to go up early next year.</p>

Chorley Lifestyle Centre	
What is it?	To enable the Lifestyle Centre in Gillibrand Street, Chorley, to be refurbished, a new kitchen installed and an enhanced range of social inclusion activities to be provided.
Lead Partner	Age Concern Lancashire
RAG Status A	<p>The project plan was behind schedule due to the delay of the kitchen and office refurbishment, however, many of the key milestones have been achieved and progression is expected quickly in quarter four. Achievements include;</p> <ul style="list-style-type: none"> • The kitchen and office refurbishment has now been completed. • The Activities Co-ordinator commenced employment on 26/10/09. • The Catering Assistant employed by the Brothers of Charity has commenced employment • The centre was closed for the duration of the refurbishment. The centre reopened on 8/12/09. Activities included the Tuesday café and Thursday drop in. A Christmas luncheon club was arranged for the 11/12/09 and well attended. Also a Christmas Meal outing took place in December. • Activities are being planned commencing in January 2010. The Activities Co-ordinator has held discussions with Lancashire College regarding courses available. • A number of new volunteers have been recruited and been given their 1-1 induction
Explanation for Status	The project plan was behind schedule due to the delay of the kitchen and office refurbishment. This has delayed the re-opening of the centre, activities commencing and an increase in membership.
Actions to be taken	<p>The centre reopened on 8/12/09, and the project plan is in place and being implemented. Some of the tasks remain behind schedule, but we envisage progression quickly in the New Year now that the centre has reopened.</p> <p>Actions for the next quarter are;</p> <ul style="list-style-type: none"> • Increased publicity and marketing • Increase in membership and activities at the centre. • Commencement of meals available at lunch time on Mondays, Wednesdays and Thursday. • Questionnaire to be distributed amongst members regarding activities. • Help Direct service to be developed. • List of trips and outings to be formalised. • Re-launch of the centre to be planned • To actively recruit volunteers for the centre.

Street Pastors	
What is it?	Working with the police, to reduce alcohol related anti social behaviour and to ensure vulnerable people under the influence of alcohol get home safely
Lead Partner	Chorley Street Pastors
RAG Status G	<p>This project is on track, and Street Pastors have been patrolling the streets since October. This work includes;</p> <ul style="list-style-type: none"> • The Street Pastors visit areas where groups of youths are congregating including Coppull, Gill brand Rec and the Town Centre, following briefings from the Police. • The street pastors have been well received by the youths who have interacted well and enjoyed being listened to. Also, in the town centre they are working with the pubs and the landlords. <p>The police have also noted fewer incidents since the street pastors have been in operation, and the process is evolving based on experience, for example, the street pastors now go out at an earlier time to try to speak to the youths before they start drinking, both for safety reasons and to try and discourage heavy drinking where possible.</p>

Firebreak	
What is it?	An early intervention scheme working with young people to raise self-esteem and to raise aspirations and educational attainment
Lead Partner	Lancashire Fire And Rescue
RAG Status G	<p>The project is on track and the Firebreak course begins on 13th January 2010. 13 Young people (9 of which are from Chorley) have been chosen to attend the twelve day course. All training facilities and facilitators have been secured. Lunchtime speakers have been arranged, and talks include the consequences of fire setting, alcohol, smoking, road safety and some of the activities young people can engage in, in the Chorley area. Whilst the course is ongoing, preparations will be made for the passing out parade to be held at the end of the course.</p>

Warming Homes, Cooling Climate Change	
What is it?	Working with a 'cluster' of households that are currently high emitters of CO2 due to a reliance of inefficient energy sources, to improve energy consumption and to apply for external funding to install a community-based renewable energy technology for the benefits of local residents.
Lead Partner	Groundwork
RAG Status G	<p>This project is on track, and nearing completion. Key achievements are;</p> <ul style="list-style-type: none"> • All home energy audits have been completed as specified [17]. • In-home verbal advice has been given to each participating householders as specified. • All follow-up energy advisory reports have been issued to participating householders as specified. • An elementary renewable energy survey has been completed as specified. • Additional external potential funding sources [2] have been identified and applied for. • Two community workshops have been held in the village hall. • The project was also presented to Parish Council at an evening meeting.

Targeted delivery for teenage pregnancy	
What is it?	To continue the work of the teenage pregnancy action plan for Chorley.
Lead Partner	NHS Central Lancashire
RAG Status A	<p>This project has two parts - Level 2 Sexual Health Services, and Working with Parents and Carers. There have been some delays in the Level 2 part of the project; however, work is on track to deliver the interventions as proposed.</p> <p>Level 2 Sexual Health Developments – The service to be commenced in Q4 will be sustained through 2010/11. This will be achieved through the redirection of other partnership funds available to NHS Central Lancashire. Work is underway, therefore, to commence sexual health service in non-clinical setting and the development of marketing materials for this is underway.</p> <p>Work with Parents / Carers - The offer was made across the Chorley locality to train people on the Speakeasy model with no uptake and hence no spend has been incurred. Following this response, work has been undertaken to assess the suitability and viability of implementing a Speakeasy model. Libraries in 'target' wards (Central Chorley, Coppull & Adlington) received copies in November '09 of the good practice children's reading book 'Let's talk about sex and relationships' together with Parentlineplus posters, leaflets and associated marketing materials.</p>
Explanation for Status	<p>The Level 2 Sexual Health Services part of the project has given the project a 'amber' status and reasons for this are; It has taken longer than anticipated to identify a nurse to take Level 2 developments forward (reflecting the capability required to deliver this service in terms of clinical skill and experience of working with young people). There have also been concerns about the appropriateness of commencing a service that is only funded on a short term basis (to end March 2010). Work has been progressed to assess options for sustaining the service. A solution has been found which is an extremely positive development and means that the service to be commenced in Q4 will be sustained through 10/11. This will be achieved through the redirection of other partnership funds available to NHS Central Lancashire. Developments will also be integrated with sexual health service modernisation currently ongoing and anticipated to be live in autumn 2010. Regardless of these issues, work has been progressed through the existing service provider (NHS Central Lancashire Provider Services). A lack of response to the scoping of sites in Chorley (an exercise to see if services which currently offer a level 1 service in the Chorley area and have the possible potential to offer a level 2 service, would like to be involved) has been disappointing and has equated to further delays. The project has been and continues to be reworked around the issues encountered and is on track to deliver the interventions as detailed in the application.</p>
Actions to be taken	A nurse has now been identified. Detailed costings for this have been worked up and a meeting is due to take place w/c 25/01/10 to agree a start date for a service that can be advertised and accessible to young people living in the Chorley area. The launch of this will be one quarter behind the original anticipated schedule. Additional marketing and communications activity (funded by an alternative route) has been planned which will include activity within Chorley (Feb 10) and will be used as a further opportunity to promote the new service.

HomeStart Family Support groups	
What is it?	The project consists of two strands of family support including a home visiting family support service and family support groups. Homestart provide support to families in need around parenting and other family support. This project will help Homestart recruit and train additional volunteers to support more families in Chorley.
Lead Partner	HomeStart
RAG Status G	This project is on track and currently has 68 volunteers across the two Boroughs. Key achievements in the Chorley area are; <ul style="list-style-type: none"> • Two weekly Family Groups- currently supporting 40 families • Ongoing home visiting – currently 25 families supported • Two extra training sessions run for volunteers on Money Management and Play and Early Learning. • One event held in partnership with Help Direct during National Parents Week. • One event held for families during the Family Learning Festival.

The H Factor health event	
What is it?	Following on from last year’s successful event, we will be holding another free health checks event to encourage people to get early screening for common illnesses.
Lead Partner	Chorley & South Ribble CVS
RAG Status G	This project is on track and preparations are underway for the event. The date has been set as Saturday 6 th March, and will be held at Chorley Town Hall.

IMPLICATIONS OF REPORT

7. This report has implications in the following areas and the relevant Corporate Directors’ comments are included:

Finance		Customer Services	
Human Resources		Equality and Diversity	
Legal		No significant implications in this area	X

LESLEY-ANN FENTON
 DIRECTOR - PARTNERSHIPS, PLANNING AND POLICY
 There are no background papers to this report.

Report Author	Ext	Date	Doc ID
Sarah James	5348	26th January 2010	Third Quarter Chorley Partnership Performance Report 2009 10

Report of	Meeting	Date
Director of People and Places. Introduced by the Executive Member for Neighbourhoods	Executive Cabinet	18 February 2010

GYPSY ROMA TRAVELLERS (GRT) – COUNCIL APPROACH

PURPOSE OF REPORT

1. The purpose of this report is to inform Members of a multi agency response procedure to the Councils approach to Gypsy Roma Traveller (GRT) encampments.

RECOMMENDATION(S)

2. That the Council adopt the procedure for dealing with illegal encampments which has been developed by a task team of the merged Crime and Disorder Reduction Partnership (CDRP).

EXECUTIVE SUMMARY OF REPORT

3. The current operational methodology for dealing with illegal encampments is ad hoc and the merged CDRP has developed a procedure to ensure that encampments are dealt with in a consistent and fair manner which addresses GRT needs as well as ensuring the settled communities fears and needs are addressed.
4. The multi agency assessment will ensure that the illegal encampment are made aware of the legal status of the encampment at a very early stage as well as establish any urgent welfare needs for the encampment.
5. A key part of the revised approach is early contact with appropriate Members and communication with the surrounding settled community to keep them informed of developments as the process for removing the encampment progresses.

REASONS FOR RECOMMENDATION(S)

(If the recommendations are accepted)

6. To ensure that dealing with illegal GRT encampments is undertaken in a fair, systematic and consistent way and that the settled community is kept informed of developments.

ALTERNATIVE OPTIONS CONSIDERED AND REJECTED

7. Retain the existing ad hoc system for dealing with encampments.

CORPORATE PRIORITIES

8. This report relates to the following Strategic Objectives:

Put Chorley at the heart of regional economic development in the Central Lancashire sub-region		Develop local solutions to climate change.	
Improving equality of opportunity and life chances		Develop the Character and feel of Chorley as a good place to live	
Involving people in their communities	√	Ensure Chorley Borough Council is a performing organization	√

BACKGROUND

9. The proposed procedure is in the form of a flow diagram and is attached as Appendix A.
10. As part of the procedure an assessment of any encampment will be made jointly by the Council, Police, Fire and Rescue Service and Lancashire County Council. A draft assessment form is attached as Appendix B.
11. A code of conduct for illegal encampments has been drafted and is attached at Appendix C. This indicates clearly the illegal nature of the encampment but provides information on the expected behaviours and practices within the encampment whilst it occupies the land illegally.
12. These documents have been drawn up by a multi disciplinary task group including officers from both Chorley and South Ribble Councils, Lancashire County Council , Police and Fire Services.
13. In undertaking this work the task group reached the following broad conclusions:
 - Once aware of an unlawful encampment an immediate site meeting should be held between the Police, relevant local authorities and if on private land, the landowner where known, to include an initial assessment of the situation, including risks.
 - A ‘Case Conference’ involving relevant agencies should be held within one working day of every trespass to recommend the most appropriate option, including whether to ask the Police to use urgent powers to move travellers on or whether to tolerate the trespass temporarily until an eviction order is obtained.
 - Early involvement of Ward Members and the Councils Communication Team.
 - Where it is decided to temporarily tolerate the trespass, a Code of Conduct should be issued to travellers outlining the behaviours expected and the sanctions for not following the Code. This should include an option for the travellers to hire skips/latrines.
 - Council Officers to be contactable and able to respond appropriately outside of normal office hours.
 - Improved liaison with and assistance for local residents/businesses, including issuing of information leaflets etc. These are currently being drafted.
 - Documented procedures and guidance are produced to help ensure consistency of approach between and within the agencies involved.
 - A multi-agency training/awareness workshop is held and will include Members.

- The procedures and code of conduct are published under the name of the Safer Chorley and South Ribble Partnership.
- Maximum publicity is given to the new approach

IMPLICATIONS OF REPORT

14. This report has implications in the following areas and the relevant Directors' comments are included:

Finance	√	Customer Services	
Human Resources		Equality and Diversity	
Legal	√	No significant implications in this area	

COMMENTS OF THE DIRECTOR OF TRANSFORMATION

15. There will be some minor additional costs associated with the provision of welfare and skip facilities on site. Given the scale and frequency of the events any such costs will be contained within current budgets.

COMMENTS OF THE HEAD OF GOVERNANCE

16. The report does not introduce new powers, and as such there are no legal issues. However, as it sets out a new procedure for approaching these matters an equality impact assessment should be considered.

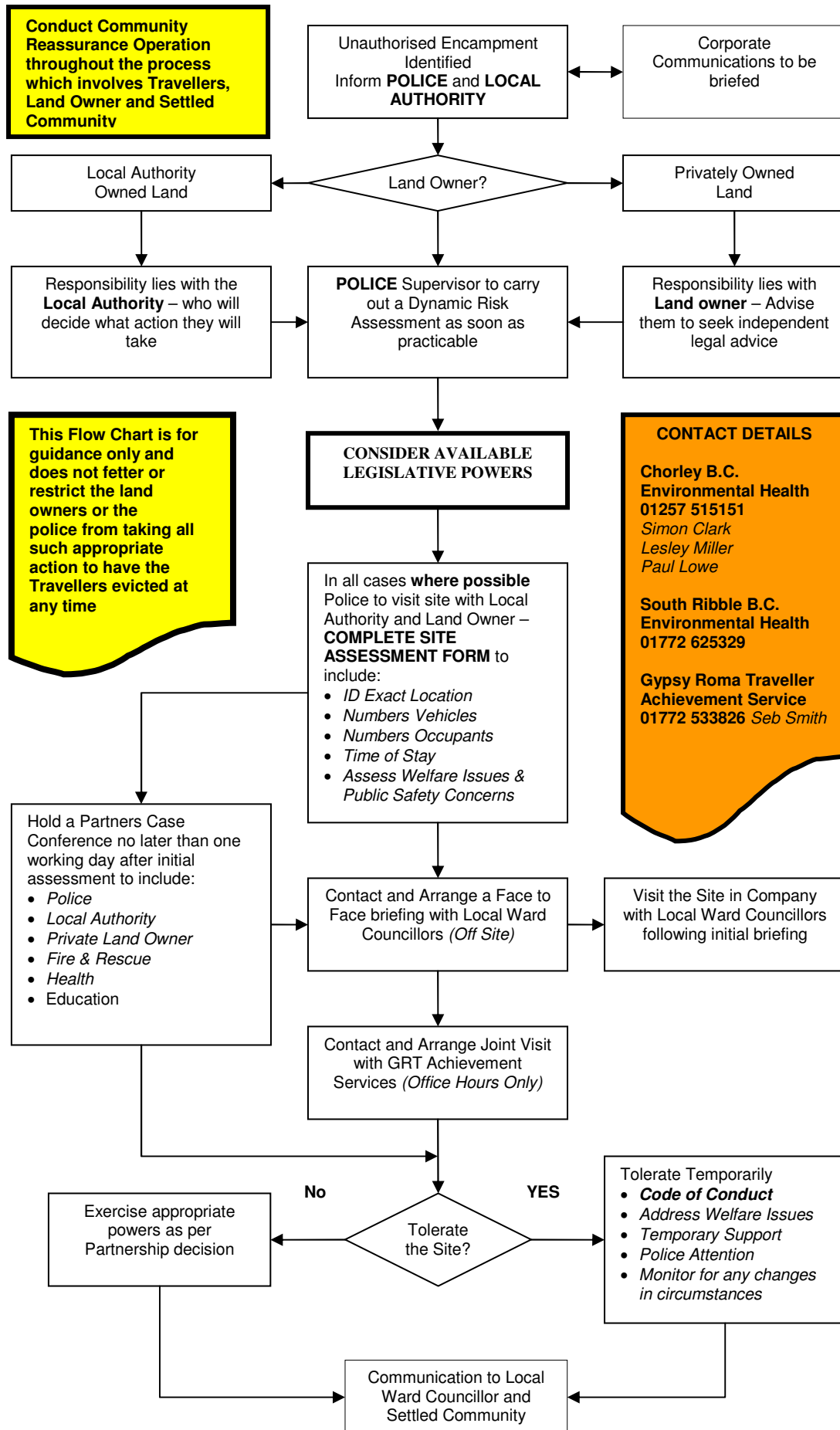
JAMIE CARSON
 DIRECTOR PEOPLE AND PLACES

There are no background papers to this report.

Report Author	Ext	Date	Doc ID
Simon Clark	5732	25 January 2010	GRT

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PLEASE NOTE THAT IN THE MAJORITY OF CASES THE LEAD AGENCY WILL BE THE LOCAL AUTHORITY UNLESS LCC OWNED



Conduct Community Reassurance Operation throughout the process which involves Travellers, Land Owner and Settled Community

Local Authority Owned Land

Responsibility lies with the **Local Authority** – who will decide what action they will take

Unauthorised Encampment Identified
Inform **POLICE** and **LOCAL AUTHORITY**

Corporate Communications to be briefed

Land Owner?

Privately Owned Land

POLICE Supervisor to carry out a Dynamic Risk Assessment as soon as practicable

Responsibility lies with **Land owner** – Advise them to seek independent legal advice

This Flow Chart is for guidance only and does not fetter or restrict the land owners or the police from taking all such appropriate action to have the Travellers evicted at any time

CONSIDER AVAILABLE LEGISLATIVE POWERS

CONTACT DETAILS

Chorley B.C. Environmental Health
 01257 515151
 Simon Clark
 Lesley Miller
 Paul Lowe

South Ribble B.C. Environmental Health
 01772 625329

Gypsy Roma Traveller Achievement Service
 01772 533826 Seb Smith

In all cases **where possible** Police to visit site with Local Authority and Land Owner – **COMPLETE SITE ASSESSMENT FORM** to include:
 • ID Exact Location
 • Numbers Vehicles
 • Numbers Occupants
 • Time of Stay
 • Assess Welfare Issues & Public Safety Concerns

Hold a Partners Case Conference no later than one working day after initial assessment to include:
 • Police
 • Local Authority
 • Private Land Owner
 • Fire & Rescue
 • Health
 • Education

Contact and Arrange a Face to Face briefing with Local Ward Councillors (Off Site)

Visit the Site in Company with Local Ward Councillors following initial briefing

Contact and Arrange Joint Visit with GRT Achievement Services (Office Hours Only)

Exercise appropriate powers as per Partnership decision

Tolerate the Site?

Tolerate Temporarily
 • **Code of Conduct**
 • Address Welfare Issues
 • Temporary Support
 • Police Attention
 • Monitor for any changes in circumstances

Communication to Local Ward Councillor and Settled Community

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Gypsy and Traveller Site Assessment

Site Assessment Form

Location of site:			
Assessment Officer:			
Land owners details:		Contact number:	
Key Contact from site:		Log Number:	
Agencies present:		Date:	
Intended length of stay?			

Site Description:	
Number of adults and children	
Names and date of birth	
Numbers of vehicles present	

	Yes	No	Details
Any damage present i.e. Point of access?			
Do the families have any Health and Welfare needs i.e. access to education, maternity services and vaccinations? (If yes please fully detail and fax to Gypsy Roma Traveller Achievement Service on 01772 532737)			

Appendix B

	Yes	No	
Is there any litter and waste present as a result of the encampment? (Please detail)			
Are there any animals on site and what condition are they in?			
Has there been any impact on the local community? (Please detail and use additional paper if necessary)			
Has there been any impact on the Land owner? (Please detail and use additional sheets if necessary)			
Is the location suitable for habitation i.e. are there any health and safety, fire safety risks, road obstruction or environmental such as a rising river?			
What is the attitude of those present and are they willing to abide by the code of conduct?			

Appendix B

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Is there is a need to evict from the site now?:
POWERS – s:61,62 CJPOA 1994 Yes / No
s:77,78 CJPOA 1994 Yes / No
s: 105 H'ways Act Yes / No
(If yes please provide comprehensive evidence including reasons and use additional sheets if necessary)

OTHER OBSERVATIONS:

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APPENDIX C This Code of Conduct is for guidance only and does not create impliedly or expressly any rights for you to stay on the land. The information contained in the Code should not be relied upon as a substitute for legal advice. You occupy the land as a trespasser without licence or consent and the owner reserves the right to take all such appropriate action to have you evicted at any time.

Code of conduct for unauthorised encampments

To make sure both local people and the Travelling Communities can live together in a peaceful way we expect you to follow this Code of Conduct while you are in the area. We expect you to treat the land you have occupied with respect, and that you respect the rights and freedoms of other people who also wish to use the area.

We expect the following basic standards of behaviour, which are the same as those we expect of other local people:

- If the encampment does not cause any disruption to the local area, then we will try hard to make sure that you are left in peace whilst legal proceedings are progressing, however:
 - Public areas such as school playing fields, public parks and other areas regularly used by local residents are not good places for Traveller camps, since they stop local people being able to use them. If you camp in public places such as these, then we will take steps to have you removed.
 - If the encampment causes a problem for local businesses or residents, for example by blocking their entrances, or stopping vehicles getting in or out, this stops businesses being able to work, and people from being able to go about their lives. If your site gets in the way of residents or businesses going about their daily lives we will take steps to have you removed.
 - Please be particularly careful about where you put your caravans; blocking footpaths or pavements stops people from getting past, and upsets local residents. If you are blocking pavements or footpaths then we will take steps to have you removed.
- If the encampment has caused no damage to an area, then we will try hard to make sure you are left in peace whilst legal proceedings are progressing, however, if you have caused damage, for example by breaking locks or digging up barriers to get access to a site, or by causing damage to buildings or property on a site, then we will take steps to have you removed.
- While you are in the area, we will make every effort to make sure that you are offered the opportunity to hire a skip for domestic waste and portable toilets at your expense to make sure the site is kept tidy and clean. Local agencies will be available to discuss the disposal of commercial waste, for example hardcore, soil or UPVC, and will take appropriate action if they have evidence of fly-tipping or unlicensed transporting of commercial waste. We

APPENDIX C This Code of Conduct is for guidance only and does not create impliedly or expressly any rights for you to stay on the land. The information contained in the Code should not be relied upon as a substitute for legal advice. You occupy the land as a trespasser without Licence or consent and the owner reserves the right to take all such appropriate action to have you evicted at any time.

therefore expect you to keep the site clean and tidy. If you do not use the skips and toilets, and cause a mess on the site, then we will take steps to have you removed.

- While you are in the area, we will work hard to make sure that you are not the victims of crime or racial, verbal or physical abuse, and will investigate anything which you make us aware of. We will not assume that you have committed any crimes; however, if we have evidence that you are intimidating or abusing local people, or have committed criminal offences in the area, then we will have to arrest any suspects and take steps to have you removed.
- We understand that while you are in the area you need electricity, however interfering with live electrical cables is very dangerous for you and other people in the area, and if we have evidence that you have tried to interfere with electricity supplies then we will take steps to have you removed.
- We understand that you need to use generators for electricity, but since generators make a lot of noise which stops people sleeping at night, we ask that you turn them off between 11 o'clock at night and 7 in the morning so local people can sleep. We also ask that between 11 at night and 7 in the morning you keep noise, particularly loud music and voices to a minimum.
- Everybody has a right to keep animals, and we respect your right to keep dogs, horses and other animals which are healthy, happy and safely secured. However, if your animals are causing a nuisance in the area, for example if they are loose and intimidate people, attack people in the area, are used for illegal activities such as hare coursing/dog fighting or are not properly looked after, then we will consider removing them from you, and we will take steps to have you removed.
- While you are in the area, we will make sure that the educational needs of your children and young people are met. However, we expect you to make sure that children, particularly of primary school age attend school, and that you work positively with teachers and representatives of the education authority who are trying to meet the educational needs of your young people.

Please remember that if damage is caused to land or property which you are camped on, or the landowner has to pay to remove rubbish, waste or any other mess after you have left, then steps will be taken to recover costs from persons who are or have been present on the site.

Report of	Meeting	Date
Director of Partnerships, Planning and Policy (Introduced by the Executive Member for Business)	Executive Cabinet	18 th February 2010

CENTRAL LANCASHIRE LDF CORE STRATEGY – MEMBER ENGAGEMENT AND APPROVAL

PURPOSE OF REPORT

1. To outline the approach and timetable for engaging Members in the approval of the Central Lancashire LDF Core Strategy.

RECOMMENDATION(S)

2. To agree the approach and timetable set out in paragraph 10.

REASONS FOR RECOMMENDATION(S)

(If the recommendations are accepted)

3. To ensure Members are engaged in the development of the Core Strategy whilst ensuring that the LDF timetable and Project Plan remains on track.

ALTERNATIVE OPTIONS CONSIDERED AND REJECTED

4. None.

CORPORATE PRIORITIES

5. This report relates to the following Strategic Objectives:

Put Chorley at the heart of regional economic development in the Central Lancashire sub-region	√	Develop local solutions to climate change	√
Improving equality of opportunity and life chances		Develop the Character and feel of Chorley as a good place to live	√
Involving people in their communities	√	Ensure Chorley Borough Council is a performing organisation	

BACKGROUND

6. As part of the LDF process, we are now at the stage where a publication version of the Central Lancashire Preferred Core Strategy will shortly need to be approved by the three Central Lancashire Councils; Chorley, Preston and South Ribble.
7. The Preferred Core Strategy builds upon the previous Issue and Options stages of the project which was shared extensively with Members, stakeholders and the public during 2007 and 2008.
8. The Core Strategy sets out the long term vision, policies, objectives and strategies for Central Lancashire. It details how the area will grow, how services will be provided and how the environment and character of the area will be enhanced and protected.
9. During the past few years in order to ensure Member input into the LDF and the associated strategies and documents there has been in place a Chorley Local Development Framework Working Group and an LDF Joint Advisory Committee including Member representatives from all three Local Authorities.

NEXT STEPS

10. In order to produce a Publication version of the Core Strategy in line with the Project Plan the timetable and approach to ensuring Member engagement is outlined below:
 - The draft Core Strategy will be available during week commencing 15th February 2010.
 - A special Chorley LDF Working Group to consider key areas (prior to special JAC Meeting – see below) will take place on Tuesday 23rd February 2010 5.30 – 6.30 pm
 - A special informal JAC Meeting open to all LDF Members will take place on Thursday 25th February 2010, 5.00 pm onwards at the Town Hall, Chorley.
 - A scheduled Chorley LDF Working Group to discuss a revised draft Core Strategy will take place on Thursday 11th March 2010 at 5.30 pm.
 - A scheduled JAC meeting will take place at 5.30 pm on 18th March 2010 to consider revised draft Core Strategy.
 - The final Core Strategy for joint (Chorley, Preston and South Ribble) Executive Cabinet Approval will take place at 5.00 pm on 31st March 2010 at South Ribble Civic Offices.
 - The revised Preferred Core Strategy will be submitted for approval to the full Council meeting on 13 April 2010.

LOOKING AHEAD

11. The Publication Version of the Core Strategy will be aligned with a Site Allocations Document identifying both broad locations and specific sites for development. It is intended to produce an Issues and Options paper for the Site. Allocations document in September 2010 following extensive Member engagement.

IMPLICATIONS OF REPORT

12. This report has implications in the following areas and the relevant Directors' comments are included:

Finance		Customer Services	
Human Resources		Equality and Diversity	
Legal		No significant implications in this area	√

LESLEY-ANN FENTON

DIRECTOR OF PARTNERSHIPS, PLANNING & POLICY

There are no background papers to this report.

Report Author	Ext	Date	Doc ID
Lesley-Ann Fenton	5323	08.02.2010	

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Report of	Meeting	Date
Director Partnerships, Planning & Policy, Lesley-ann Fenton (Introduced by the Executive Member (Business))	Executive Cabinet	18 th February 2010

TRANSFER BACK OF CHORLEY HOME IMPROVEMENT AGENCY

PURPOSE OF REPORT

1. To update members on the progress of the transfer of the Home Improvement Agency back to the Council, approved on 3/12/09.

RECOMMENDATION(S)

2. To note the contents of the report .

REASONS FOR RECOMMENDATION(S)

(If the recommendations are accepted)

3. To keep Members updated on the progress of the transfer.

ALTERNATIVE OPTIONS CONSIDERED AND REJECTED

4. None.

CORPORATE PRIORITIES

5. This report relates to the following Strategic Objectives:

Put Chorley at the heart of regional economic development in the Central Lancashire sub-region		Develop local solutions to climate change.	✓
Improving equality of opportunity and life chances	✓	Develop the Character and feel of Chorley as a good place to live	✓
Involving people in their communities		Ensure Chorley Borough Council is a performing organization	✓

BACKGROUND

HOME IMPROVEMENT AGENCY

6. Approval was obtained from Executive Cabinet in November 2009 to instigate proceedings to establish an in-house Home Improvement Agency offering Disabled Facility Grants, Home Repair Assistance and Energy Efficiency grants/ advice. It was agreed that a follow up report will be provided, detailing the staffing structure required to operate the service from April 2010.

5. Since the date of the decision, a project team has been set up to oversee the transfer and ensure that measures are put in place to prepare the Council for the transfer on 1st April 2010. This includes looking at the procedures and systems used, including the ICT, procurement of (local) contractors and dealing with TUPE matters.
6. Liaison meetings have taken place with Anchor and they have confirmed that one member of staff, a Home Improvement Caseworker, will be subject to TUPE and will transfer to the Council. This is in addition to the two Technical Officers who have been seconded to Anchor and will simply come back to the Council. The structure of the Housing Service following this transfer is attached in appendix one.
7. In order to prepare staff for the transfer and ensure smooth running of procedures, staff will spending a session mapping the processes for the grants and agreeing a clear procedure.
8. A legal document is to be agreed between the Council and Anchor which will include all the information which is to be exchanged between the two parties, at transfer and also will detail how cases where works are not yet complete, will be handled and by whom. This will ensure that service provided to customers is not disrupted and that a smooth transition can take place. Agreement will also be reached with regards to a consistent message to be provided to customers, both existing and new, who contact Anchor and are redirected to the Council.
9. In order to make full use of existing resources and enable the Council to promote the services of its in house service, the Customer Contact centre will be engaged in providing the frontline service and training will be provided to enable staff to answer general queries regarding grants and energy efficiency.
10. It is not envisaged that this transfer will result in any additional revenue costs to the Council. In 08/09 it cost the council £43,014 for Anchor to provide this service and by transferring the service back, these costs will be saved from the overall grant and therefore, increase the amount of grant we have available to help vulnerable people.

IMPLICATIONS OF REPORT

11. This report has implications in the following areas and the relevant Corporate Directors' comments are included:

Finance		Customer Services	
Human Resources	√	Equality and Diversity	
Legal	√	No significant implications in this area	

COMMENTS OF THE HEAD OF HUMAN RESOURCES AND OPERATIONAL DEVELOPMENT

12. The proposed transfer of the Home Improvement Agency from Anchor to Chorley Council would potentially involve the transfer of employee(s) currently employed by Anchor who are wholly or mainly engaged on the provision of Disabled Facilities Grants and Decent Homes Assistance. Any transfer would be carried out in accordance with the TUPE Regulations 2006. Furthermore, the two Officers currently seconded to Anchor would return to the employment of Chorley Council..

COMMENTS OF THE HEAD OF GOVERNANCE

13. The transfer of the service will ensure that the legal obligations in relation to Home Improvement Repair and Disabled Facilities Grants continue to be met. The legal implications of the transfer inhouse are being addressed as the matter progresses.

COMMENTS OF DIRECTOR OF TRANSFORMATION

14. The return to Chorley Council of the Home Improvement Agency service will have impact

on current budgets, as essentially the costs will be covered within the budget already contributing to the service. I would hope, however, in the longer term that efficiencies can be made from this service through redesigning the processes involved and better procurement.

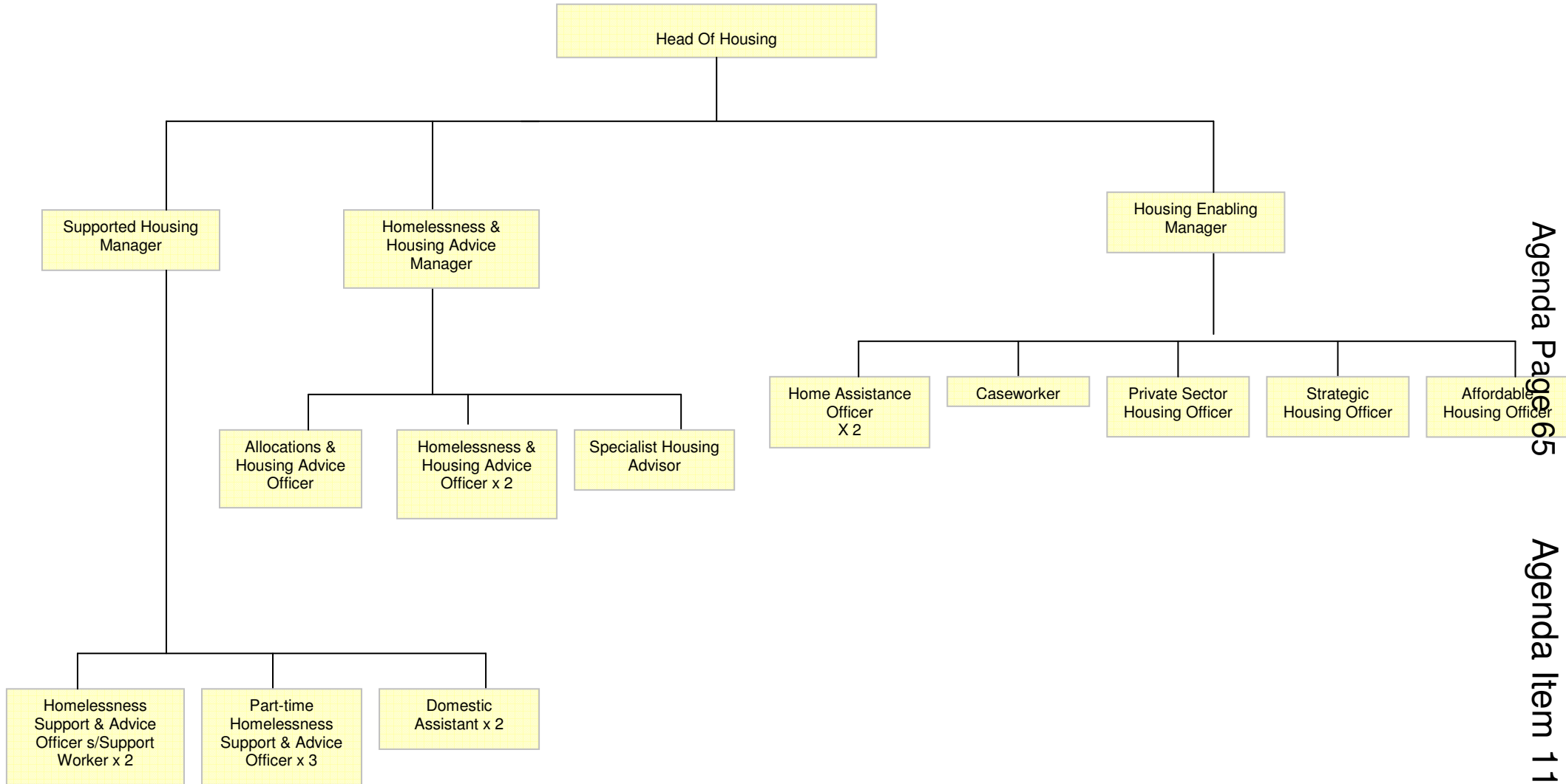
LESLEY-ANN FENTON
 Director, Partnerships, Planning & Policy.

There are no background papers to this report.

Report Author	Ext	Date	Doc ID
Zoë Whiteside	5711		

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Proposed structure following HIA transfer



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Report of	Meeting	Date
Director Partnerships, Planning & Policy, Lesley-ann Fenton (Introduced by the Executive Member (Business))	Executive Cabinet	18 th February 2010

REPORT OF LANCASHIRE REVIEW OF HOME IMPROVEMENT AGENCIES

PURPOSE OF REPORT

1. To advise members of the review of Home Improvement Agencies in Lancashire

RECOMMENDATION(S)

2. To approve the proposed responses to the recommendations made in the review for Chorley Council and these be returned to the consultants & LCC.

REASONS FOR RECOMMENDATION(S)

(If the recommendations are accepted)

2. To ensure Chorley Council has provided a full and considered response to the review & that we have influenced any decisions made by LCC and other partners which affect our services.

ALTERNATIVE OPTIONS CONSIDERED AND REJECTED

3. None.

BACKGROUND

4. In 2009, an external consultant, the Housing Quality Network Consultancy was commissioned by LCC to undertake a review of the provision of Home Improvement Services (HIAs) across Lancashire. The Supporting People Commissioning Body provide funding to various HIAs and these contracts are due to end in 2010 and 2011. In order to advise future commissioning decisions and to lend weight to attracting funding from other partners, a review was commissioned.
5. The purpose of the review was to enable commissioners to work together to develop longer term approaches to commissioning and funding of HIA services across Lancashire. The key recommendations are that the number of HIA services in the county should be reduced and a new approach to funding agencies based on needs should be adopted.

REVIEW RECOMMENDATIONS

6. The report makes a number of recommendations and these include the following:
 - Consolidation of the number of services
 - A new approach to funding
 - A phased approach to implementation

- All services to be accredited
- Clear criteria for access to HIA services
- Councils should ask HIAs to provide DFG services and should provide additional funding for this.
- LCC Social Care should commission all minor aids and adaptations services within HIAs countywide
- Commissioners should actively manage contracts
- Access to services should be monitored
- PCTs should consider how they can contribute to funding services which prevent accidents and ill health
- HIAs should promote services more pro-actively and respond to customer demand

7. The report advises that they have undertaken the review in the context of accessibility to services, delivering services to those needing long term care, increasing choice and, ensuring services meet those in greatest need. The report includes a proposed needs model using data such as age of population, levels of disability, tenure and stock condition. It predicted that based on delivery in 08/09, there was an unmet need of 4,859 jobs in Chorley & South Ribble.

8. As part of the review, existing provision was scrutinised and assessed for value for money and performance. Further, it looked at how much HIAs should cost in each district and concluded that resources should not be distributed equally to all districts, as some areas have higher needs than others. Anchor Home Improvement Agency was not deemed to have achieved good value for money.

9. Customers, carers and stakeholders were consulted as part of the review and the report states that general themes in the feedback given included the following:

- Customers and service users expect services to be provided in all districts
- There is a need for services to support people who can afford to pay but who are vulnerable and would otherwise not have repairs done
- There is potential to increase take-up considerably if services are better promoted
- There is a need for better integration of services for disabled people

KEY QUESTIONS FOR STAKEHOLDERS INCLUDING DISTRICT COUNCILS.

10. The report produced by HQN is now being consulted across all Districts as key commissioners and stakeholders and there are five questions which are being asked. The proposed responses for Chorley Council are in bold text.

11. Question one: Do you agree that the number of HIAs in Lancashire should be reduced?

Chorley recognises that there are benefits to joint commissioning of HIA services, in terms of efficiencies and economies of scale. However, local provision can provide value for money and more local added value. Therefore, in order for Chorley to explore this approach, benefits including value for money and added value for the customer would need to be evidenced.

12. If so, will three HIAs based on PCT localities work?

Possibly, although local service provision may become diluted, particularly if there is only a single base for the HIA.

13. Question two: Funding should be allocated on the basis of need.

If your agency is a funding partner, will it be adopting the funding formula proposed in paper four?

N/A

If you are a provider, what challenge will the funding formula pose?

Currently it is not possible to set the budget for 2011/12 given the lack of clarity regarding capital grant.

14. Question Three: Do you support the idea of a phased approach to implementation, delaying implementation until April 2012?

Yes as budgets are not yet set and given the recent changes at Chorley Council, given we have taken the decision to bring the service back in house, this may prove very successful and we would want to monitor and review the impact of this.

15. If you are a provider, will you be able to continue until April 2012 on proposed funding or would you prefer recommissioning for April 2011?

From 1st April 2010, Chorley Council will be a provider and on the premise that Supporting People grant is transferred to Chorley Council from this date, the Council would prefer recommissioning to take place in 2012

17. What factors do you think should affect the pace of change?

The impact of the move to area based grant, the implementation of the single capital pot methodology (RHP) and publication of the Lancashire North West Needs Model findings.

18. Do you agree that localities should be able to choose whether or not to adopt the recommended (most efficient) option in their area?

Yes definitely & these decisions must be informed by the respective Executive Cabinets.

19. For recommendations 3-10, we are interested to hear your views and receive comments

The report recommends that Councils should consider contracting out DFGs to HIAs. This is a statutory function of the Council and contracting out does not always achieve value for money, and can reduce the level of grant available.

Chorley agrees that LCC should commission small aids and adaptations from HIAs.

Chorley agrees that contracts should be managed & supports the development of a common outcome framework.

Access should be fully monitored; including the outcomes from customers who are not able to access grant. PCTs must look at what resources they can contribute to an area of service which brings them cost savings.

Chorley supports the promotion of HIA services.

20. Do you have any other comments on the future of HIAs in Lancashire?

HIAs deliver significant outcomes to vulnerable people and in particular, contribute to the elimination of risks to older people and young people with disabilities. For this reason, other agencies, including the PCTs and Social Care must be fully engaged and contribute resources to these.

20. The outcome of the consultation with all Councils and stakeholders is to be collated by the consultants and tabled for discussion at the Supporting People Commissioning Body.

CORPORATE PRIORITIES

21. This report relates to the following Strategic Objectives:

Put Chorley at the heart of regional economic development in the Central Lancashire sub-region		Develop local solutions to climate change.	✓
Improving equality of opportunity and life chances	✓	Develop the Character and feel of Chorley as a good place to live	✓
Involving people in their communities	✓	Ensure Chorley Borough Council is a performing organization	✓

22. This report has implications in the following areas and the relevant Corporate Directors' comments are included:

Finance		Customer Services	
Human Resources		Equality and Diversity	
Legal		No significant implications in this area	✓

LESLEY-ANN FENTON
 Director of Partnerships, Planning & Policy.

There are no background papers to this report.

Report Author	Ext	Date	Doc ID
Zoë Whiteside	5711		

Report of	Meeting	Date
Director Partnerships, Planning & Policy, Lesley-ann Fenton (Introduced by the Executive Member (Business))	Executive Cabinet	18 th February 2010

SUB REGIONAL ALLOCATIONS POLICY AND CHOICE BASED LETTING PROCEDURE (SELECTMOVE)

PURPOSE OF REPORT

1. To present the Sub Regional Allocations Policy and Sub Regional Choice Based Lettings (CBL) procedure.

RECOMMENDATION(S)

2. That Sub-Regional Allocations Policy and Choice Based letting procedure (Select Move) be adopted as Chorley Council allocations Scheme and procedure subject to consultation.

REASONS FOR RECOMMENDATION(S)

(If the recommendations are accepted)

3. Introducing a Sub Regional Choice Based Lettings Scheme would provide greater choice and access to housing.
4. Communities and Local Government's five year housing plan, *Sustainable Communities: Homes for All*, sets out the Government's plans for taking forward its Choice Based Lettings policy, there is a target by 2010 for all Local Authorities and Housing Associations to be operating a CBL scheme
5. Adopting a CBL scheme would ensure a simple, transparent process for households applying for housing while giving them a more active role in choosing where they live.
6. It would simplify the application process for households when applying for housing, enabling them to make one application for all partners.

ALTERNATIVE OPTIONS CONSIDERED AND REJECTED

7. **Option 1 – Do nothing.** This would result in the Council continuing with its current housing allocations policy and housing register. Whilst, in the short term, there is no legal requirement to change these arrangements, the Council would fail to meet the Government target if it did not implement some form of CBL scheme this year. Local households would be deprived of expressing choice in where they live. There is potential that wider Sub Regional relationships could be damaged if the Council decided to opt out of the scheme and partnership.

8. **Option 2 – Developing a localised CBL scheme.** This would have the advantages of local control and policy development, and would still meet the Governments basic CBL target. However, a localised scheme would contradict Government guidance, restrict mobility for households and would be significantly more expensive to implement due to lost economies of scale. There is potential that wider relationships could be damaged if the Council decided to opt out of a Sub-Regional CBL Partnership.

The determination of the Government’s grant for CBL was issued towards costs incurred by entering into a Sub-Regional CBL, therefore, this could be at risk.

CORPORATE PRIORITIES

- 9 This report relates to the following Strategic Objectives:

Put Chorley at the heart of regional economic development in the Central Lancashire sub-region		Develop local solutions to climate change.	
Improving equality of opportunity and life chances	✓	Develop the Character and feel of Chorley as a good place to live	✓
Involving people in their communities	✓	Ensure Chorley Borough Council is a performing organization	

BACKGROUND

- 10 CBL was first introduced by the Government in the 2002 Housing Act and is outlined in the former officer of the Deputy Prime Minister five-year plan, Sustainable Communities: Homes for All. A CBL scheme allows people to apply for social housing vacancies, which are advertised through various mediums, rather than waiting for an organisation to identify their need and preference through the waiting list.
11. The Governments policy objectives is for the CBL schemes to develop on a regional or sub-regional basis, involving partnerships of local authorities, RSLs and, where possible, private sector landlords in order to achieve the greatest choice and flexibility in meeting housing need.

Advantages of larger cross-authority schemes are as follows:

the provision of a larger pool of available housing, giving people more choice and helping ease localised problems of high demand.

breaking down artificial boundaries and recognising existing housing and labour markets addressing wordlessness and offering greater mobility

reducing complexities and costs associated with RSLs being involved in a number of different schemes; and

partners are able to share the costs associated in developing CBL schemes

- 12 Preston Council, South Ribble and RSL partners launched their sub regional scheme in July 2007 which has been successfully operating since. The partnership introduced a common housing register and allocations policy, it enables partners to make best use of their housing stock and widened the scope for lettings and transfers across local authority boundaries while reducing the need for households to apply to each individual organisation.

13. The Council has been working with South Ribble and Preston Council and Local Registered landlords (RSLs) in developing an allocations policy that will be applied across all three council areas. Chorley's current allocations policy informed the final draft of the Sub-Regional SelectMove policy, all partners have agreed a 5 band allocations policy. Chorley is successfully assessing applicants against the 5 band scheme, therefore, transition to the Selectmove policy can take place efficiently.
14. Following assessment, eligible applicants will be put into five priority bands for housing, based on their circumstances. The bands will be as follows:
 - a. **A band:** This band is for applicants who are in urgent need and given additional preference. This category would include, for example, applicants with a serious medical condition, households who are defined as statutorily overcrowded in the Housing Act 2004, households in unsanitary accommodation or 16 and 17 year old care leavers who are threatened with homelessness.
 - b. **B band:** This band is for applicants who are high need and are given reasonable preference. It would include, for example, homeless households who are owed the full homeless duty, or applicants living in unsatisfactory housing that lack basic facilities.
 - c. **C band:** This band is for applicants who have recognisable need and are given reasonable preference. This would include, non-priority homeless applicants or applicants aged over 60 who are seeking sheltered accommodation.
 - d. **D band:** This band is for applicants who are assessed as owed reasonable preference, but who have reduced preference under the policy due to rent arrears, behaviour, no local connections, savings, equity or earnings, or where two offers have been refused. This band also includes those who are not in any of the reasonable preference groups, however they meet a recognised 'community' criteria as specified within the policy. This will include applicants who can demonstrate having a good tenancy history and/or positive contribution to the local community including volunteering or membership to a local community group.
 - e. **E band:** This band is for applicants with no recognisable housing need. This is for all other applicants who do not qualify for the other bands, but would like to move to alternative accommodation.

The Select Move banding currently matches Chorley's allocations policy approved by Executive Cabinet in October 2009.

15. Within the Sub Regionally policy, quotas have been proposed for each band, setting out percentages of properties per reasonable preference group. This enables all applicants to have access to available housing, reducing lengthy waiting times. The Council will work closely with RSLs to inform and monitor adequate proportioning to continue to address households in housing need.

Band A 40%

Band B 30%

Band C 15%

Band D 10%

Band E 5%

The Council will be reviewing this proportion every 12 months.

16. The finalised Allocations Policy is included as Appendix 1 of this report

Lettings Criteria

17. Applicants who join the Select Move Scheme will be placed in one of five bands to reflect their housing need.
- Vacant properties that become available under the Choice Based Lettings Scheme will be advertised weekly via a number of methods eg: web based kiosks and partner receptions etc. A lettings cycle will start on midnight Friday and will end at 12am the following Wednesday. No expressions of interest will be allowed on the Thursday or Friday at the end of a lettings cycle. Lettings cycles may be changed to reflect public holidays.
 - Applicants can only express an interest (bid) in homes advertised which they are eligible for. For instance, they must meet the property criteria (i.e. any age restrictions, local letting policy).
 - There will be no restriction on the number of expressions of interest (bids) for properties.
 - Once the deadline of the advertising cycle is reached, a shortlist of the applicants who have expressed an interest is provided by the IT system Abritas.
 - For each property the Abritas software will run a unique list of applicants, the applicant who is deemed suitable and who has been waiting the longest period of time in this band will receive a formal offer.
 - Applicant refusing suitable properties may lose their additional priority for housing and placed in a lower band.

Migration

18. It is not envisaged there will be a great percentage of migration between boundaries, Preston and South Ribble have indicated that migration experienced has been very low and below 10%. To manage cross boundary movement Chorley have made it a condition of joining the scheme that a cap of 10% on migration be set down to safe guard local people and Chorley's limited social housing stock.

Chorley will also be using local lettings policies in specific areas, estates and newly developed affordable units that are created through the affordable housing delivery, in the interest of balanced and sustainable communities, working in partnership with the RSLs.

Cross Tenure

19. Chorley Council shares Selectmove aspiration to include Low Cost Home Ownership options within the scheme. The Council currently manages its own Low Cost Home Ownership scheme. These properties are made available to applicants who can demonstrate that they are in need for affordable housing. Also, It is the intention to offer good quality private sector rented accommodation through the CBL scheme working together with housing management and the implementation of a robust accreditation scheme.

Consultation

20. Subject to Cabinets approval Chorley will be consulting with partners and stakeholders i.e. Social services, Probation, Temporary Accommodation providers etc, It is recommend that the final policy is approved by the Executive Member. We do not anticipate any objections to the scheme although in the event of any serious objection by partners or stakeholders we will report these concerns back to Cabinet.

Risk

21. The Council would be at risk of reducing ratings within future inspection programmes and the Comprehensive Area Assessment if it fails to implement policies to promote the Governments choice agenda in housing.

IMPLICATIONS OF REPORT

22. This report has implications in the following areas and the relevant Corporate Directors' comments are included:

Finance		Customer Services	
Human Resources		Equality and Diversity	
Legal	√	No significant implications in this area	

COMMENTS OF THE HEAD OF GOVERNANCE

23. The proposal meets the Council's obligations.

LESLEY-ANN FENTON
 Director, Partnerships, Planning & Policy.

There are no background papers to this report.

Report Author	Ext	Date	Doc ID
Fiona Daniels	5706		

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Appendix 1



**Sub Regional Choice Based
Lettings**

Allocations Policy

**Preston, South Ribble and
Chorley Councils and Partner
Registered Social Landlords**

December 2009

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Note: Throughout this document we refer to All Local Authority (LA), Registered Social Landlord's (RSL), Large Scale Voluntary Transfer (LSVT), Private Rented Sector (PRS) and other participating organisations as Partner Organisations (Partners). People seeking access to social housing for rent or low cost home ownership options are referred to as "customers"

This allocation policy represents the Allocations Policy of the following Local Authorities:

Preston
Chorley
South Ribble

The following partners have also committed to adopting this scheme as their policy for allocating 100 % of their properties within the agreed sub region:

Registered Social Landlords
Community Gateway Association
New Progress Housing Association
Manchester and District Housing Association
Adactus Housing Association
Chorley Community Housing
Accent Foundation
Contour Housing

Each of these organisations is a partner organisation of Select Move, hereafter referred to as the Partner.

Any RSL with stock in a Local Authority area who are not part of this scheme will be subject to local nomination agreements. Any applicants will be assessed in accordance of this policy.

1.0 Policy Statement

The aim of the Allocations Policy is to ensure that homes are allocated to eligible people in a fair, consistent and accountable way according to their housing needs and choices and having regard to the communities in which the homes are located.

The partners are committed to equality of opportunity and anti-discriminatory practice in service provision and seek to promote social inclusion. Applicants who are seeking, accessing or applying will not be discriminated against on the grounds of race, colour, ethnic or national origin, disability, religion, age, gender, sexual orientation, marital or employment status.

Partners will ensure that everyone has an equal opportunity to seek, access or apply to the service and is responsive to any special needs of applicants.

1.1 Policy Aims

The overall aim of the policy is to offer applicants real housing choice, while continuing to give reasonable preference for re-housing to those in the most urgent housing need.

The Policy's key objectives are to:

- Foster partnership working with other registered social landlords (RSL), local authorities and other agencies and voluntary organisations working in the sub region.
- Change the lettings culture from gate keeping to applicant choice and empowerment
- Create and stimulate new markets and interest in rented housing in the sub region to tackle problems of empty and unpopular stock as well as sustaining demand for popular areas
- Increase housing opportunities for people in the sub region
- Ensure that the partners fulfil nominations agreements with local authorities.
- Ensure that support is provided for vulnerable people with special needs and that extension of choice to these applicants promotes wider social inclusion.
- Ensure that those in the greatest housing need are prioritised e.g. applicants whose living conditions are unsanitary, overcrowded or in unsatisfactory housing conditions.
- Meet the Tenant Services Authority and other statutory obligations including Good Practice Note 8.
- Develop and support sustainable communities that contribute to sustainable regeneration.
- Increase customer satisfaction through a one stop approach
- Ensure applicants are treated fairly and sensitively
- Support and contribute towards local authorities strategic objectives
- Comply with the Commission for Race Equality Code of Practice on race equality in housing by ensuring that ethnic minority applicants are re-housed in proportion to their representation among applicants taking into account different preferences and needs.
- Balance housing needs against applicants aspirations
- To work towards the development of a common disabled adaptations register and allocation process

2.0 Monitoring and Reviewing the Scheme

Select Move CBL scheme Steering Group comprises of representatives from the Partners and will meet no less than 6 times a year to monitor the operation of the Sub-Regional CBL Policy by regularly reviewing the Policy to ensure that it meets its stated objectives and complies with legislative changes.

Rigorous and robust monitoring of the Select Move CBL Policy is essential to ensure that, in practice, the Select Move CBL scheme:

- Meets the stated aims and objectives
- Demonstrates trends that are legally compliant relating to the preference given to applicants, i.e. ensuring that applicants with one or more reasonable preference qualification are awarded the priority the law entitles them to.
- Adheres to Equality and Diversity standards
- Complies with allocation and related legislation

2.1 Administration of the Scheme

Select Move Choice Based Lettings (CBL) scheme through its Partners will administer the waiting list for properties in the form of the Common Housing Register (referred to as the CHR). This is a single register for both new applicants who want to move into a property and existing tenants seeking to transfer.

The CHR is divided into 5 Bands according to housing need, with the Band A awarded the highest priority and Band E the lowest. Applicants are prioritised within the bands according to their individual needs, circumstances and waiting time. (See section 6.0).

Select Move CBL scheme follows the Code of Guidance published in August 2008 by the Communities and Local Government (CLG).

3.0 Choice Based Lettings (CBL)

In order to promote choice to applicants, Partners will advertise available properties using a variety of methods. People wishing to be considered for a particular property express their interest by placing a 'bid' often called an 'expression of interest'. Expressions of interest will be prioritised by a transparent system that uses five Priority Bands to reflect need, and an 'effective date' that usually reflects the time spent in a particular band, to differentiate between households with the same level of need. At the end of each advertising cycle there will be a 'Unique Queue' for each property and unless there are valid reasons not to, an offer of a tenancy will be made to the applicant who has made a bid and is at the top of this queue. Additional information on how the Select Move Scheme will operate is detailed later within this Policy.

It is the purpose of Select Move's CBL Scheme Policy that wherever possible, applicants requiring social housing should be able to choose the properties they wish to be considered for from those that will be advertised. However, there may be some circumstances that mean it will be necessary to make a 'direct offer' of a property to a particular household, without that property having been advertised. Such circumstances may include offers made to discharge a Council's statutory duties. (See section 20).

3.1 Moving Across Local Authority Boundaries

The partnership is committed to promoting applicants choice and enabling those who need to move to other Local Authority Boundaries the ability to do so. The Partnership also wants to build strong local communities and ensure that local people stay in their community. For this reason, within each Local Authority Area, there will be a proportion of homes, which are only available to local residents, and these will be clearly identifiable when advertised.

Partners may, in the interests of promoting balanced and sustainable communities, develop local lettings policies for specific areas, estates or blocks. Local lettings policies may include, for example, age restrictions, a desire to encourage more employed tenants to live in a certain area and to promote key workers living locally. The decision to implement a local lettings policy will have to be approved by the individual's partner's board/ committee. Any decision to implement a local lettings policy will always take into account the implications for equal opportunities and the need to ensure that the Council's nominations meet the allocation needs of those owed a reasonable preference.

3.2 Local Authority nominations

The scheme applies to partners and all those properties to which any of the Councils have rights of nomination (whether by way of a legally enforceable arrangement or not) of the tenant. Properties to which the Local Authority has rights of nomination of the tenant include properties owned by the participating RSL listed at page 3. The participants are obliged to advertise vacant properties in accordance with this policy.

An applicant can apply to any of the participating housing organisations involved. Where the organisation is not an LA, it will assess the applicant on behalf of the local authority; they do not need to apply directly.

The LA's also hold nomination rights with RSL who do not participate in this scheme. Select Move applicants may be nominated for available properties to non partner RSL's. Applicants eligible for a property will be deemed ranked for nomination by priority band and within bands in date order for qualifying for that band.

This Allocations policy supersedes previous nominations agreements for RSL's within the partnership.

3.3 CONSULTATION

Any significant changes to this policy will need to be approved by the relevant committee or portfolio holder for each participating local authority. The relevant decision-making bodies of RSL's, namely the Board, will also need to consider and endorse any changes that the partners agree to make to the policy. Any significant changes will also be subject to consultation with relevant statutory and voluntary sector organisations and tenant representatives.

The Select Move scheme is subject to a Sub Regional partnership agreement, which ensures that the scheme is kept up to date and meets regional and national best practice guidelines. The Select Move Scheme will be managed by a Steering Group made up of the appropriate senior managers from all the Partners'. The group will meet at least quarterly to ensure continuous dialogue between partners and:

- Compliance with CLG guidance, legislation and any new case law
- Compliance with and reports to TSA requirements
- Publication of indicators and statistics relating to allocations and completed lettings
- Publication of reports monitoring equality and diversity of service delivery
- Compliance with any promises and commitments made locally
- Quality assurance of the scheme
- Commissioning of periodic audits of the scheme
- Compliance with statute
- Agree future funding for the scheme

4.0 How to Apply

Applicants can only be placed on the Common Housing Register with Select Move CBL Scheme by completing the Select Move Housing Application Form. These forms can be obtained by telephone request on 0800 655 6785. Forms can also be downloaded or applicants can apply online from our website at **www.selectmove.co.uk**

Applicants will be able to register an interest in a home by several methods:

- Automated Telephone Service (24 hours)
- Website (Selectmove.co.uk)
- Email to any partner organisation through the Select Move website
- In person at any partner office
- Automated Text by mobile phone (24 hours)
- Kiosk (14 across Preston)
- Digital TV (24 hours)
- Partner contact centres
- Agency / Advocate

All printed information is available on request in Braille, Large Text, Audio and translations can also be arranged on request. Additional support is available for those who need special help and to vulnerable people through:

- The availability of interpreters/Language line, including British Sign Language and a loop system is available at all applicant contact Points
- Translation of documents
- Face to face office interviews to offer housing advice and/or help and support with completing forms
- Home visiting service for people who are unable to come into our offices

- Auto Bidding

People requiring such assistance should contact 0800 655 6785.

How the Scheme will operate

Applicants who join the CHR are placed in one of five bands to reflect their housing need.

- Vacant properties that become available under the Choice Based Lettings Scheme will be advertised weekly. A lettings cycle will start on midnight Friday and will end at 12am the following Wednesday. No expressions of interest will be allowed on the Thursday or Friday at the end of a lettings cycle. Lettings cycles may be changed to reflect public holidays.
- Applicants can only express an interest in homes advertised which they are eligible for. For instance, they must meet the property criteria (i.e. any age restrictions.).
- There will be no restriction on the number of expressions of interest.
- Once the deadline of the advertising cycle is reached, a shortlist of the applicants who have expressed an interest is provided by the IT system Abritas.
- The CBL Policy is then used to determine who is prioritised for housing from the shortlist.
- The selected applicant will receive a formal offer of the property.
- Following acceptance of the offer, the tenancy will commence when the property has reached the Partners letting standard.
- Reasonable Preference qualification is awarded the priority the law entitles them to.
- Adverts will adhere to the scheme's Policy on Equality and Diversity standards
- A property that has been advertised once and has failed to attract a suitable applicant will be designated as "Open Market Property". An open market property will be offered to the first applicant to express an interest who meets the minimum eligibility requirements for the vacancy.
- Senior management of the Partners may on occasions authorise relaxation of certain criteria attached to a property and/or applicant to enable an "Open Market Property" to be let.
- Feedback on lettings will be made as soon as the property has been let and displayed on the website and the subsequent Newsletter.
- Feedback will include information about the priority and effective date of the selected applicant, but not any personal information relating to them.

Management Discretion

There will be certain circumstances when vacant properties will not be advertised in the normal way, herewith referred to as management lets. The following are situations where the Partners may need to use vacant properties for specific management purposes and the qualifying person will normally receive one reasonable offer of accommodation:

- People having to move from areas affected by major repairs or demolition
- Emergency Plan Re-housing (for example accommodation which may be required following fire, flood or other major incident)
- Witness Protection Scheme
- Other very exceptional housing management or social need reasons i.e. Domestic Violence Cases

4.1 Getting Registered

The Application form will require applicants to provide information that will enable a Partners' staff to determine eligibility and assess priority for re-housing. Applicants will also be asked whether or not they are interested in other options such as Shared Ownership or Private Rented Housing.

Applicants will be expected to sign a declaration to:

- Confirm that the information given is correct and that the applicant will notify Select Move CBL Scheme of any changes in circumstances. This may change their priority, need and their banding.
- Confirm that applicants will allow Select Move CBL Scheme Partners staff to make enquiries into their circumstances for verification purposes.
- Give consent to provide information to another Partners who is also actively participating in the scheme.

The registration process also involves verification checks. Checking if the applicant is Eligible via:

- Assessing if the household is in housing need and subsequently awarding one of the priority bands.
- Sending out a request for references, which must be a current or most recent landlord, if the applicant lives in social rented accommodation. NB. If a customer has not had a previous social landlord, references will not be required.
- Requesting information about current or former tenant arrears and history of payment.
- Requesting information about any current or previous anti social/criminal activity.
- Transfer applicants will be expected to have a clear rent account and their home and garden must be in satisfactory condition at the point of offer. In cases of vulnerability or domestic violence each partner organisation may vary this requirement.

Applicants will be unable to express an interest until these checks have been carried out and the applicant has been deemed suitable.

4.2 Eligibility

Those who may apply for registration on the scheme are:

- A tenant of a Partner Organisation
- Anyone aged 16 or over* unless:
 - They are 'Persons from Abroad' who the Secretary of State for Communities & Local Government has deemed ineligible for an allocation of housing accommodation.
 - They, or a member of their household, have been proven guilty of serious unacceptable behaviour and they are not considered by the Select Move CBL Scheme to be suitable tenants.

*NB. 16 & 17 yr olds can apply to go on the register, but will not be made an offer of a tenancy without evidence of an appropriate support package being in place.

Applicant checks will be carried out at the time of application on all members of the household applying to be re-housed. These checks will be made to confirm:

- Identity e.g. passport, Identity Card (issued to certain Foreign Nationals), photo-driving licence, birth certificate or written confirmation from a professional person or support agency
- Social housing landlord references (where the applicant has previously held a social rented tenancy)
- Police checks where applicants have indicated an "unspent" conviction or a partner has reason to believe that information has been withheld on the application form.
- Applicants have a responsibility to inform a partner of any change in circumstances which may affect their eligibility.

Part 6 of the Housing Act 1996 as amended by Homelessness Act 2002 (Section 160A (7)) allows the local authority to treat a person as ineligible where:

"The applicant, or any member of his household, has been guilty of unacceptable behaviour serious enough to make him/her unsuitable to be a tenant"
"And at the time of the application, the customer is still unsuitable to be a tenant because of that behaviour"

Unacceptable behaviour is defined as that which, if the applicant was a secure tenant, would entitle any Landlord to a possession order under the grounds for possession in the Housing Act 1995, Schedule 2 Part 1, other than Ground 8. This covers the behaviour of both the applicant and his or her household. Applicants refused inclusion on the register because of their behaviour will be notified of that decision in writing and the grounds for it and have the right to request a review.

Unacceptable behaviour includes, but is not restricted to:

- Harassment
- Violence
- Drug Dealing
- Eviction for anti-social behaviour or subject to an ASBO or ASBI
- Domestic violence
- Using the property for illegal or immoral purposes
- Non-payment of rent

Each application to the CHR will be considered individually and in deciding whether a applicant is ineligible, we can only consider behaviour that would have entitled us to seek a Possession Order had the customer been a secure tenant at that time. In addition, the behaviour must have been serious enough that the outright order for Possession would have been gained.

N.B. It does not matter whether or not the applicant was in fact a secure tenant or not. This is a notional test.

Select Move CBL Scheme Partners' must also consider whether at the time of the application the applicant is still unsuitable to be a tenant, because of that behaviour.

Failure to disclose an 'unspent' conviction can lead to an application being suspended or a tenancy being terminated should the information subsequently come to light.

The decision that a applicant is ineligible will be made by the Partners' where the application was originally submitted.

Select Move CBL Scheme Partners will write, giving reasons to applicants deemed ineligible to join the Register. Customers who are considered to be ineligible due to unacceptable behaviour have the right to request a review of that decision. (Section 7.0 – Requesting a Review).

Providing these checks are satisfactory the applicant will then be accepted on to the scheme.

At the offer stage a further check will be carried out to check for any change in circumstances plus additional Police Check to ensure no further relevant convictions or anti-social behaviour needs to be taken into account since registration on the scheme.

Applicants who do not comply with the Eligibility Criteria at **Appendix C** will not be registered onto the scheme until they have addressed satisfactorily the reasons for reduced or no preference.

4.3 Confirmation of Application

When an application to join the Select Move scheme has been accepted, applicants will receive written confirmation and be notified of:

- Their unique registration number
- Their current priority band status
- The date application on the scheme commenced (or the date the priority status was awarded)

If a applicant feels that any details are incorrect, they should contact a Select Move CBL Scheme Partner. If a customer feels that they have been placed in the wrong band, they will be given the opportunity to ask for a review of the priority awarded with the registering partner.

4.4 Joint applications

A applicant may include anyone on their application form who may reasonably be expected to live with them. Where more than one eligible applicant wishes to have a shared application they will be joint applicants.

4.5 Closing an application

An application will be closed from the housing register in the following circumstances:

- At the applicants' request.
- If the applicant becomes ineligible for housing.
- When the applicant has been housed through the scheme.
- When a tenant of social housing completes a mutual exchange.
- Where an applicant does not maintain their application through the re-registration process, or where they move and do not provide a contact address.
- If the applicant fails to respond to a request for further information within 28 days.
- If the applicant fails to respond to an offer of accommodation within the period stated on the offer letter the offer will be made to the next household on the list.

Should an applicant whose application has been cancelled wish to re-join the housing register they will receive a new effective date according to the Select Move CBL Policy. However, if an applicant contacts the Partner within 3 months of the closing of their application, the application can be reinstated without the loss of their waiting time.

4.6 Vulnerable Applicants

Each Partner is committed to equality of access to the Sub regional CBL Scheme, customers with special needs or who are vulnerable will be provided with appropriate assistance to ensure that they:

- a) Understand how the choice based lettings scheme works
- b) Have information on vacancies that are available in any lettings cycle

- c) Can express an interest in any vacancy advertised
- d) Understand the feedback on completed lettings cycles
- e) Understand the priority banding system
- f) Know how to obtain advice and assistance
- g) Understand the appeal process and can access such a process
- h) Understand the offer process and their responsibilities as a future Tenant

4.7 Serious Offenders

It is sometimes necessary to provide housing, which will minimise the risk to the community and where supervision of the individual can be maintained. This may also apply to individuals currently living in the community who are considered to pose a risk to themselves and/or others, although they have not been convicted of an offence.

Partners will work with the Police and Probation Services to assess and manage risk and apply special arrangements where cases are referred through the Multi-Agency Public Protection Panel (MAPPA) or the Probation Protocol. Officers will attend case conferences with the Police, Adult Social care and Health professionals. A planned and managed relocation pathway including a full discussion of a range of housing options which are most appropriate to the applicant's circumstances and supervision needs will be carried out and may result in restrictions being placed on the choice of property or area that is open to an applicant. Where this is the case, the applicant will be advised of the restrictions, but will whenever possible be given the opportunity to exercise some choice.

4.8 False or Withheld Information

Under Section 171 of the Housing Act 1996, it is a criminal offence for applicants knowingly to give false information or to withhold information relevant to their application. An offence may be committed if an applicant knowingly gives false information or knowingly withholds information which has reasonably been requested on the housing registration form, in response to correspondence at the renewal of the application, or relating to any other review of the application. An offence is also committed if the applicant allows a third party to provide false information on his or her behalf, or at his or her instigation. In these circumstances action may be taken with regard to the tenancy awarded and or their application.

4.9 Change of Circumstances

Applicants are required to notify a Partner in writing of any change in their circumstances, for example:

- A change of address for themselves or any other person on their application
- Any additions to the family or any other person they would wish to join the application (N.B. it is for the Partner to decide whether they will allow a person(s) to join the application.)
- Any member of the family or any other person on the application who has left the accommodation
- Any other change of circumstances which may affect eligibility or banding.

4.10 Review of Applications

Each application on the Housing Register will be reviewed at least annually, on the anniversary of its entry on the register. Should an applicant initially fail to reply to their annual review, their application will be closed. If good reason can be shown why they failed to respond to the review the application may be reinstated within 3 months.

If the applicant fails to respond to an offer of accommodation within the period stated on the offer letter the offer will be made to the next household on the list and the renewal process will be initiated.

5.0 Owner Occupiers

Applicant's financial circumstances will be taken into account in assessing the priority they may receive through this Allocations Policy even if they qualify for consideration under one or more reasonable preference categories. Where an applicant is considered to be in a position to provide their own accommodation, they may be offered the opportunity of an alternative housing solution when advised on housing options. Owner-occupiers who are adequately housed or with the resources to secure accommodation locally, would normally not attract any priority under the Select Move Scheme. This would also apply to applicants with financial resources sufficient to secure and maintain alternative accommodation. Each case will be assessed on its individual circumstances.

5.1 Local Lettings Policies

Partners may draw up "Local Lettings Policies" where either local tenants, or partners in the scheme, recommend a policy that would benefit the local community.

The aims of Local Lettings Policies would be to address imbalances in the community. Local Lettings Policies will be subject to a review at least every 12 months, or as and when changes in the community necessitate such a review. Local Lettings Policies will be formally publicised to ensure fair access to all applicants. Local Lettings policies will take into account the agreed quota's of the Local Authority.

5.2 Deliberately Worsening Circumstances

If a Partner is satisfied that an applicant has deliberately worsened their circumstances to gain extra priority on the Register, they will be assessed based on the circumstances before their situation changed.

Examples of this are:

- An applicant moving from available accommodation that was suitable or more suitable for them than the accommodation they have moved into, and which it was reasonable for them to have continued to occupy
- Homeowners who have transferred their property to another family member within the last five years from the date of application

- Applicants who have dispersed or deprived themselves of assets which could have reasonably been used to secure housing within the last five years from the date of application
- Applicants who have moved family members or others into a property unsuitable for their needs, when suitable accommodation was being occupied by them elsewhere resulting in overcrowding

6.0 Calculating which Band

6.1 Band A

<p>A: Urgent Need Band</p> <p>Medical/Welfare Grounds RP D</p> <p>GLOBAL</p>	<ul style="list-style-type: none"> • An immediate life threatening or progressive condition which is seriously affected by the current housing and where re-housing would solve or alleviate that medical condition or make it significantly easier to manage. • A member of the household seeking accommodation cannot be discharged from hospital or rehabilitation accommodation until suitable housing is provided and: <ul style="list-style-type: none"> • The household had settled accommodation in a Partners’ area prior to hospital admission. • A member of the household is elderly, disabled or has a progressive illness and is likely to require admission to hospital or residential/nursing care in the immediate future and re-housing would enable that person to remain living at home. • The household seeking accommodation has welfare needs so severe that the protection of vulnerable adults or children is only possible if the household were to move to a new home and where the present circumstances could deteriorate to such an extent as to place household members at risk, or in need of residential care unless re-housing is offered. • Applicants’ who need to move to a particular locality where failure to meet that need would cause hardship to themselves or to others.
<p>Care Leavers</p> <p>RP D</p> <p>GLOBAL</p>	<p>Care leavers who are threatened with homelessness and who will continue to be supported by their local Leaving Care Team assessed through the agreed protocol.</p> <ul style="list-style-type: none"> • Applicants are awarded this category in accordance with protocols between the Council’s Housing and County Council Children Services Department. Applicants must

	<p>be a former relevant child as defined by the Children Leaving Care Act 2002. They must have vulnerability and urgent housing need that is best met by the provision of long term settled housing</p>
<p>Release Adapted properties (RP-E) GLOBAL</p>	<ul style="list-style-type: none"> • Where a Partner tenant does not require a specially adapted property for disabled use, and there is demand for its use.
<p>Exceptional need to move, determined by partners with agreed procedures (RP-D)</p> <p>Domestic Violence/MARAC, Racial, Homophobic or Transgender Harassment, witness or child protection, management transfers</p> <p>RP E</p> <p>GLOBAL</p>	<ul style="list-style-type: none"> • Agreed in exceptional circumstances due to significant problems associated with the tenants’ occupation of a dwelling in the social or private rented sector and there is high risk to the tenant or their family’s safety if they remain in the dwelling/areas. For social housing tenants transfers will be to properties of the same size and type where required, but locations or areas are likely to change. A list of cases that could qualify is detailed in the policy. • Emergency need to move due to exceptional circumstances where there is high risk to the tenant or family’s safety if they remain in the dwelling/area. Urgent management transfer cases accepted by a participating landlord or waiting list cases accepted by a participating Local Authority.
<p>Statutory overcrowded (RP-C) GLOBAL</p>	<ul style="list-style-type: none"> • Those that are statutory overcrowded as defined by the Housing Act 2004
<p>Private Sector properties unsanitary or unfit. (RP-C)</p> <p>GLOBAL</p>	<ul style="list-style-type: none"> • A private sector property either owned or rented where a statutory notice has been issued by the environmental health department that an unfit property is to be demolished under the Housing Act 2004 • They are a private sector tenant and the Council’s Public Health Team has decided that the property poses a category 1 hazard under the Health and Safety Fitness Rating and the Council are satisfied that the problem cannot be resolved by the landlord within 6 months and as a result continuing to occupy the accommodation will pose a risk to the applicants health. This includes a property that has severe damp, major structural defects including subsidence, flooding, collapse of roof, or have living conditions which are a statutory nuisance, and there is no prospect of the problems being remedied within a 6 month time period
<p>Supported Accommodation (RP-E)</p> <p>GLOBAL</p>	<ul style="list-style-type: none"> • Applicants’ leaving supported accommodation and have been assessed by the support provider as ready for independent living by the approved route in each local authority and the resulting vacancy can be used by someone else who needs the support.

6.2 Band B

<p>Band B:</p>	
<p>Homeless Households owed a full homeless duty under section 193(2) or 195(2) RP B LOCAL</p>	<p>Statutory Homeless Cases accepted by Local Authorities within the Scheme</p>
<p>Under Occupying RP E GLOBAL</p>	<p>Tenants of the partner Housing Associations under occupying family accommodation by two or more bedrooms in comparison with the Bedroom Standard and moving will free up accommodation required. Or Tenants of a partner organisation seeking a move to non family housing that will free up a house to enable use by a family.</p>
<p>Over Crowded by the bedroom standard for overcrowding RP C (Refer to 5.3, if accepted) GLOBAL</p>	<p>Applicants who need to move due to severe over crowding – short by 2 or more bedrooms.</p>
<p>Applicants living in unsatisfactory Housing that lack basic facilities RP C GLOBAL</p>	<p>Applicants without access to any of the following:</p> <ol style="list-style-type: none"> 1. Bath or Shower 2. A toilet 3. Cooking facilities 4. Running hot water supplies 5. Electric/gas needed for essential activities <p>Subject to verification by the Local Authority.</p>
<p>Medical Mobility Cases / Medical grounds RP D GLOBAL</p>	<ul style="list-style-type: none"> • Applicants who have an urgent need to move on medical grounds because their current home is having a severe adverse effect on the health of a member of the household but who do not qualify for Band A urgent medical priority. • The household includes a person who needs to access medical assistance on a regular basis and cannot do so, or it is unreasonable to expect them to do so, from the area in which they currently live. • The household includes a person who provides essential care to someone in another part of the region and they cannot deliver that care effectively from their current location • The applicant is elderly or disabled and needs to move

	<p>to a specific area to receive essential care or support from a close relative who lives there. Supporting evidence must be provided.</p> <ul style="list-style-type: none"> The household includes a child or young person with a disability or learning difficulty, who needs to access specialist education or training facilities and cannot do so from their present home. Supporting evidence must be provided.
<p>Homeless Prevention option being chosen (RP-A)</p> <p>LOCAL</p> <p>Priority will be awarded by LA after a 3 month period.</p>	<p>An applicant has children or is pregnant, or is a single person who would likely to be found to be in priority need and the Council consider they will be physically homeless within 28 days and they accept a prevention option from the Council's Housing Options Team.</p>

6.3 Band C

<p>Band C</p> <p>Applicants who are entitled to reasonable preference as being non-priority homeless, intentionally homeless or homeless within the meaning of part 7.</p> <p>RP A - LOCAL</p>	<p>Applicants who are entitled to reasonable preference as being non priority homeless, intentionally homeless or homeless within part 7 of the Act. This will be assessed by the Local Authority.</p>
<p>Applicants living in Housing with children that lacks level access</p> <p>RP C</p> <p>GLOBAL</p>	<p>Applicants without ground level access or upper floor accommodation with children under the age of 10.</p>
<p>Homeless Prevention option being chosen</p> <p>LOCAL</p> <p>Priority will be awarded for a 3 month period.</p>	<p>An applicant has children or is pregnant, or is a single person who would likely to be found to be in priority need and the Council consider they will be physically homeless within 28 days and they accept a prevention option from the Council's Housing Options Team.</p>

6.3 Band D

Band D	
Applicants not assessed as being owed reasonable preference but who meet the partnership positive community criteria	<ul style="list-style-type: none"> • Those employed or undertaking training within the borough to which they are applying • Transfer applicants of partner organisations with a positive tenancy history • Applicants that can demonstrate a contribution to the local community such as voluntary work. This could be specific to the area where the work takes place or could be tenants on an estate with positive work on that estate • Applicants with a family connection to the specific area required due to caring or specific support purposes • Applicants who are key workers
GLOBAL	

6.5 Band E

E Band	
No priority Need	<ul style="list-style-type: none"> • Applicants that do not qualify for additional preference but would like to move to alternative accommodation. • Applicants who will be awarded the reasonable preference that their needs warrant once they have complied with the criteria for the removal of reduced preference.
GLOBAL	
Priority Status Reduced	

* Please note that applicants who have been awarded the priority, because they need to move to a particular area or property type will only be valid for bids made on suitable properties.

6.6 Effective Date

On submitting an application an "Effective Date" will be awarded starting from the date the applicant is accepted onto the Housing Register. The effective date will determine an applicants 'Position' within a band and on the CHR, this will have an impact on the applicants waiting time for an offer of a new home. Applicants will have an Effective Date from the date the priority band was awarded.

However, applicants given priority because they are 'moving on' from supported housing will have an effective date of the date they moved into that supported housing scheme. The accommodation provider must supply this.

6.7 Moving up a band

If a applicant moves up a band, then their Effective Date will be the date they enter the higher band, not the original effective date as this would give them unfair advantage over an existing applicant who is already in that higher band.

6.8 Moving down a band

If the applicant moves down to the lowest band the original effective date will apply. E.g. original date the application was accepted onto the CHR. If the applicant moves down to any other band, the partners will take into consideration effective dates awarded for other reasons such as medical need.

7.0 Requesting a review

Under the terms of this Policy, an applicant has the right to request a review of their application if they are not satisfied.

In order to request a review, the applicant, or an advocate, are advised to contact the Select Move Partner dealing with their application, within 28 days of the date beginning with the day on which he/she is notified of any decision giving the reason why the decision is wrong and the review will be based on that submission. The Local Authority will deal with any decisions about homelessness duty or housing options.

Applicants are advised to put any request for a review in writing but can do so in person or by telephone making it clear they wish to request a review. Should they require any assistance in doing so they are advised to speak to Select Move CBL Scheme or contact their nearest advice agency. The applicant will also be given the opportunity to submit any further information that they may want the reviewing officer to consider.

The review will be carried out by an appropriate Manager within the Partner organisation dealing with the applicant, in accordance with their internal review procedure. The review will exclude any staff that may have had any influence or involvement in the original decision.

The review is a reconsideration of the case and is not limited to the conduct of the original decision. The review decision will be made on the relevant information available at the time of the review. In addition to any information provided by the applicant, the Partner may ask for further information if this is needed to make a decision. The merits of each case will be considered on an individual basis.

Select Move CBL Scheme Partners' aim to complete all reviews within 28 days of all information being received by the reviewing officer unless a longer period has been agreed with the applicant.

The applicant will be informed of the outcome in writing. If the original decision is upheld, the applicant will be fully informed of the reasons for this decision. Each Partner will make the

applicant aware of any internal complaints process that is available should the applicant still be unhappy about the review decision. The review would normally be conducted as the initial stage of the partner organisations complaint process where the matter is not resolved at the review level.

7.1 Complaints

The complaint will be dealt with by the Partner dealing with the applicant. Details of all complaints will be made available to the Select Move Steering Group to ensure consistency of decisions. This will happen at the final stage of the complaints and review process.

However, if the applicant is not satisfied with the way the complaint has been dealt with they can contact The Local Government Ombudsman or the Housing Ombudsman Service. (See appendix A)

7.2 Re-Assessment of Priority

Each applicant's preference band maybe be reviewed and altered to reflect any change in circumstances. All applications will be subject to regular reviews to ensure that bids/expressions of interest are being made for suitable properties.

If statutory homeless applicants have not obtained accommodation using the priority status within 10 weeks, the review will take place to decide whether to extend the period. If not, priority status will be retained and waiting time will continue to accrue, but the Homelessness & Advice Team will make bids on behalf of the applicant for any suitable properties available. The applicant will be notified of any successful bid and, subject to rights of review under Part 7 of the Housing Act 1996, this will constitute an offer of housing as a discharge of the Council's homelessness duty. Should the applicant be rejected by the RSL under their own allocations' criteria, they will remain eligible for a further offer. If a suitable offer is refused, the homelessness duty will be discharged and the applicant will cease to have priority status and placed in the appropriate band according to their circumstances.

It is the applicants' responsibility to notify us of any changes to their circumstances which may affect their housing needs priority.

8.0 Quota System

Partner organisations will allocate properties to each band by the following percentages;

Band A – All properties first preference

Band B 40% of remaining stock

Band C 35%

Band D 20%

Band E 5%

This will allow for those cases in urgent need to be rehoused as quickly as possible, however, it is anticipated that the numbers here will be minimal and allow for allocations on the percentages as detailed above on the remaining stock which reflect the urgencies of housing

need. Partners will take into account the area and type of property to give access to all applicants irrespective of their banding. Within in each band the applicant with the longest waiting time that meets the criteria set in the advert will be allocated the property.

All previous nominations agreements/rights will be accommodated within this policy.

Quotas will be revised in agreement with Local Authority’s based on area, demand and need.

9.0 Advertising Guidance:

In certain circumstances properties will be advertised with the following in mind:

- To make best use of the available housing stock
- To ensure community sustainability
- To ensure that supported housing schemes include a balance of needs
- To help the local authority to fulfil its responsibilities to people in need

Examples

- Size and composition of household that is eligible to bid (See Table 1- below)
- Minimum age for some flats and bungalows
- Preference given to applicants with a mobility difficulty who need ground floor accommodation
- Preference given to a applicant who needs any adaptations installed in the property – e.g. Level Access Shower
- Whether or not some pets may be kept in the property
- Section 106 restrictions e.g. only to be let to applicants currently living in the local authority area.
- Sheltered need identified

9.1 Table 1 – Property / Need

Size of Accommodation	<p>Single people/Couples One bedroom accommodation will be allocated unless one of the following circumstances apply:</p> <ul style="list-style-type: none"> • The need for an additional room for a carer is evidenced • The applicant cares for children who live with them for part of the week (a consistent need for at least one half of each week) Evidenced by Court Order e.g. staying and access arrangements or parental responsibility agreement. • The applicant has evidenced proof of pregnancy (e.g. MatB1) • The applicant or household is currently living in a property with more than 1 bedroom and has been displaced by clearance initiatives. In these cases, entitlement would be for a 2 bedroom home.
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Families

Size of accommodation required:

- One room each for applicants over the age of 18 (a couple will be allocated one room).
- One bedroom for children of the same sex (maximum of two per room)
- One bedroom for children of different sex up to the age of 10 years old (maximum of two per room.)

In cases of large households minimum bedroom requirement may be waived in agreement with the household.

Estates/properties which are designated low demand can be under occupied by one bedroom or more in order to facilitate a Positive letting.

Adapted Properties

Properties that have been adapted for someone with a disability may be offered directly to applicants known to require the adaptations concerned. The property will be offered, to the applicant identified as most suitable for the property. This may not be the person with the highest priority and oldest Effective date.

Sheltered Accommodation

Sheltered Accommodation will normally only be allocated to applicants who are aged 60 or over. However in some case e.g. in areas of low demand, such properties may be advertised and let to people below the age of 60 in order to facilitate a Positive letting of the property. Priority will be given to applicants requiring a move within a sheltered scheme due to infirmity. All applicants will need to be assessed for the suitability for each partners sheltered schemes.

9.2 Homeless Applicants

This section applies to applicants who are considered to be homeless under Part 7 of the 1996 Housing Act. Under the legislation set out in the Housing Act 1996, as amended by the Homelessness Act 2002, Local Authorities have a legal duty to make enquiries into an applicant's eligibility and whether any duties are owed under the Act to secure accommodation for applicants who are homeless or at risk of becoming homeless.

Local Housing Authorities will assess cases and provide housing options to attempt to resolve or prevent homelessness. If a homeless application is necessary, enquiries will determine what housing duty is owed.

10.0 One Offer Policy – Statutory Homeless Applicants

The Select Move CBL Scheme will always aim to meet applicants' housing aspirations in terms of property type and location. At the same time however, choices must be balanced against homeless people's urgent need to move and the high priority awarded in recognition of this, as well as the pressures caused by demand on the local housing stock. Some areas and types of home are in extremely high demand and waiting times can be lengthy. Therefore, it may not always be possible to re-house people according to their preferred options.

In order to reduce waiting times and to facilitate choice, Statutorily Homeless people will retain their homelessness priority until they receive one suitable offer of accommodation.

Homeless applicants have the right to request a review within the terms of the Housing Act 1996 (Part V11) as amended by the homelessness Act 2002 and appeal against any decision regarding their status or suitability of accommodations offered. The relevant Local Authority will make decisions relating to suitability in accordance with the legislation

If a homeless applicant refuses a suitable offer, the Local Authority has no further legal duty to re-house them. They would lose their reasonable preference band and be re-assessed and placed in a lower Band according to their needs. They will still however, be able to make bids and receive offers in the same way as all other applicants on the housing register.

10.1 Proxy Bidding

We acknowledge that there will be a number of vulnerable individuals and groups who may be in need of a proxy to make bids on their behalf. Suitable arrangements will be in place to allow for this with agreement reached with the applicant as to who can make bids on their behalf.

11.0 Positive Lettings

It is the intention of Partners that the majority of properties becoming available in Preston, South Ribble and Chorley may be advertised and let via the Select Move CBL Scheme. There are however situations when a direct letting of a property will be made.

- Circumstances where there would be a risk to the applicant by being required to take part in the bidding process.
- Properties that have been fitted with 'level 3 Sanctuary' target hardening measures
- Homes that have been significantly adapted for a disabled person.
- New build wheelchair accessible homes
- Homes that are suitable for adaptation for an identified applicant with a disability and it hasn't been possible to identify an existing suitably adapted property
- Lettings made in partnership with other statutory or voluntary sector agencies to meet specific needs
- Extra Care/Very Sheltered Housing
- Succession of tenancy, mutual exchanges and transfers of interest made under a court order
- Family intervention tenancy schemes.
- Emergency Decants
- Management Transfers
- Furnished Tenancies

12.0 Making Offers

In most cases the applicant who made an eligible bid and is at the top of the list for a property at the close of bidding will be made an offer of that property. Offers of accommodation will be made via the telephone where possible in order to speed up the process of re-letting empty homes. Applicants will be given a maximum of 48 hours in which to view and decide if they

wish to accept the offer and sign for the tenancy when the property is ready to let. If the property is not ready to let the Partner may agree to a longer timescale.

12.1 Circumstances That Will Result in No Offer Being Made

There are however circumstances that may result in an offer not being made. These are:

- Since joining the scheme an applicant has become ineligible or is ineligible at the time of offer or sign up
- On verification of the applicants' details, the priority band was found to have been incorrectly awarded or they are no longer entitled for reasonable preference
- The applicants' circumstances have changed since the priority band was awarded and the applicant is no longer entitled to the same level of priority
- The applicants circumstances does not meet the local lettings Policy
- The applicant does not satisfy the advertised lettings criteria for the property
- The applicant has been assessed as needing support to sustain a tenancy and such support is not in place, has been declined or cannot be arranged before the proposed tenancy commencement date
- The applicant could not be contacted by the landlord of the property
- The applicant has failed to maintain an agreed repayment plan
- The applicant has failed to carry out necessary repairs to their home for which they are liable

When an applicant has accepted an offer of a property, their application will be cancelled and it will be necessary to re-apply, should they wish to move again in the future.

12.2 Numbers of Offers and Restrictions

In most cases applicants will be able to refuse an offer of a tenancy without affecting their priority band status. However, the following circumstances may result in their priority band being reviewed:

Awarded Band B Priority Because Of Homelessness

Applicants awarded Band B priority because of homelessness will lose this priority status if they refuse an offer of suitable accommodation, whether made within the Select Move CBL Scheme or directly by a landlord. (See section on One Offer Policy) This includes offers of tenancies resulting from bids placed by a member of the Housing Options Team. (See also section on Suitability of Offers)

Awarded Band A Priority Because They Are a 16/17 Year Old Care Leaver

Applicants Awarded Band A priority because they are a 16/17 year old Care Leaver will lose their priority status if they refuse an offer of accommodation for which the individual, or their proxy, has bid and which is considered by Select Move CBL Scheme, following discussion with the Leaving Care Team, to be appropriate for the young person concerned.

Awarded Band A Priority on Medical/Welfare Grounds

Applicants awarded Band A priority on medical/welfare grounds will lose their priority status if they refuse an offer of accommodation for which they or their proxy has bid and which is considered by Select Move Scheme to meet their needs. A property will be usually considered to be a reasonable offer for this purpose if:

- It is of sufficient size to accommodate the applicants household
- The physical access to the property and the internal layout and facilities are appropriate
- The property was accurately described in the property advert

12.3 Cancellation due to No Contact or Repeat Refusals

If a applicant does not reply to an offer within 48 hours the offer is deemed to be withdrawn and a further attempt will be made to contact them within 10 working days to ask if they want to remain on the CHR. If there is still no response, the applicant will be removed from the waiting list.

Where an applicant has refused two reasonable offers within the past 12 months the application **may** be closed and the applicant will be required to re-register, thus losing their time on the waiting list.

This is in place to prevent offers being made for properties they do not want and to keep the register up to date. By reducing wasted offers, waiting times will also be reduced for those people who do still need and want a home.

Where there are reasonable reasons for non-contact from an applicant or repeat refusal, or where there may be new information, a applicant can request to be reinstated on the Housing Register. Upon reinstatement to the register their original banding and effective date will be assessed.

Requests to be reinstated on the Housing Register must be made within 3 months of removal.

12.4 Care

A carer is someone who, with or without payment, provides help and support to a partner, relative, friend or neighbour, who could not manage without their help. This could be due to age, physical or mental illness, addiction or disability. In all cases the carer must have been identified by the applicant as the person as who is primarily responsible for providing them with care and needing to live with them or near them.

Under some circumstances it may be appropriate to consider cases when the carer is not in receipt of Carer's Allowance. Under these circumstances it will still be necessary for the applicant to demonstrate that the person looked after is in receipt of one of the following benefits:

- Disability Living Allowance – paid at either the middle or higher rate for personal care

- Attendance Allowance
- Constant Attendance Allowance
- Disablement benefit

12.5 Sheltered Housing

Applicants for sheltered housing must normally be aged 60 or over or have a need for sheltered accommodation due to vulnerability or disability. It is a condition of all tenancies in sheltered housing schemes that tenants agree to take the Support Service. Separate charges are made for these services on top of the rent.

12.6 Tenant Management Organisation (TMO)

The allocation of housing accommodation by the TMO must be in accordance with Select Move CBL Scheme Policy under Part 6 of the Housing Act 1996.

TMO will agree to operate the Allocations Service in line with this Policy. Should the TMO at any time decide to alter this or introduce a Local Lettings Policy then agreement to do so must first be obtained from Select Move CBL Scheme Steering Group. Any scheme proposed must be mutually agreed.

Under these arrangements, the TMO should ensure that, overall, additional and reasonable preference is given to applicants in the categories listed and that the TMO has arrangements in place to monitor the allocation procedures and that these have been agreed with Select Move CBL Scheme Partners' Manager.

12.7 Equality & Diversity

The aim of this policy is to ensure that the benefits of the Select Move choice based lettings system are accessible to all applicants. We aim to empower people to make their own choices and decisions and provide support to enable people to do so.

Through this policy and associated procedures we aim to give clear guidance to staff about ensuring and maintaining equal access to the choice based lettings scheme from many diverse groups in the community and that Select Move partner organisations values all customers regardless of their race gender or sexual orientation, and will endeavour to assist those vulnerable households who require assistance because of a disability or health issue.

Appendix A**Local Government Ombudsman**

The Local Government Ombudsman can be contacted at:

Local Government Ombudsman
10th Floor
Millbank Tower
Millbank
London, SW1P 4QP
Tel: 020 7217 4620
Email: www.lgo.org.uk

If an applicant wishes to make a complaint against a scheme landlord (Housing Association or Local Authority) they should contact:

The Housing Ombudsman Service
81 Aldwych
London, WC2B 4HN
Tel: 020 7421 3800
Email: www.ihos.org.uk

Appendix B

Ineligibility Criteria

1.0 Introduction

- 1.1** The lettings policy aims to achieve fair, open and non-discriminatory allocations. We also recognise that in order to build balanced and sustainable communities regard must be taken of the issues that may exist in particular communities and the ability of future tenants to conduct their tenancy in a satisfactory manner.
- 1.2** The Housing Corporation Regulatory Code states that 'applicants are excluded from consideration for housing only when their unacceptable behaviour is serious enough to make them unsuitable to be a tenant and only in circumstances that are not lawfully discriminating'.
- 1.3** The ineligibility Criteria will be used to reduce the risk of letting properties to people who pose a significant risk or threat to the stability of their new community or to a partner organisation.
- 1.4** The policy will enable us to be clear about those applicants that we would deem as being ineligible for an offer of accommodation from a partner organisation and therefore receives reduced preference. In cases where the behaviour has not been serious enough to treat the applicant as ineligible reduced preference will apply and the applicant will be placed in Band E. It will be the applicant's responsibility to show that his/ her circumstances or behaviour have changed. Examples of the type of behaviour that could cause an application to receive reduced preference due to the behaviour of the applicant or a member of the applicant household can be found at Appenedix C.
- 1.5** In cases of serious unacceptable behaviour some applicants will have no preference until that behaviour is addressed. This will be assessed on an individual basis.

2.0 Principles

- 2.1** This policy will apply to all applicants for housing regardless of the source of their application or type of tenancy that they will be granted.
- 2.2** It also applies to anyone who is included on the application form.

3.0 Statutory and Legislative Framework

- Housing Act 1996 as amended by the Homelessness Act 2002
- Housing Corporation Regulatory circular 07/04

4.0 Responsibilities and purpose of the ineligibility criteria

- 4.1** To send out a clear message that all tenants are expected to conduct their tenancy in a way that does not cause nuisance or offence to their neighbours.
- 4.2** To reduce the incidents of anti-social behaviour and to achieve balanced and sustainable communities.
- 4.3** To ensure applicants understand their responsibilities to pay rent and service charges where they are due.
- 4.4** To achieve consistency of approach across all our stock and with other Registered Social landlords' in the areas in which we work.
- 4.5** To give individuals the opportunity to modify their behaviour.
- 4.6** To ensure that vulnerable applicants' cases are considered individually to ensure that their past behaviour does not put them at a disadvantage.
- 4.7** We will consider the level of unreasonable behaviour, its relevance and whether it would be grounds for seeking a possession order, or instigating other forms of legal action, had that person been a tenant of a partner of the sub regional scheme at the time.
- 4.8** All cases will be assessed individually and any extenuating circumstances will be taken into account when a decision is made. *E.g.:* Family Intervention Tenancies (FITS). In certain circumstances, a person may be allowed onto the housing register and be made active if they agree to a FITS and suitable support is provided.
- 4.9** All applicants given reduced preference or no preference on the CHR will be informed of the decision and given details of actions they need to take to be included in the future.

Appendix C – Unacceptable Behaviour

Unacceptable behaviour is defined as that which, if the applicant was a secure tenant, would entitle any Landlord to a possession order under the grounds for possession in the Housing Act 1995, Schedule 2 Part 1, other than Ground 8. This covers the behaviour of both the applicant and his or her household. Applicants refused inclusion on the register because of their behaviour will be notified of that decision in writing and the grounds for it and have the right to request a review.

Each application to the CHR will be considered individually and in deciding whether a applicant is ineligible, we can only consider behaviour that would have entitled us to seek a Possession Order had the customer been a secure tenant at that time. In addition, the behaviour must have been serious enough that the outright order for Possession would have been gained. **Please see section 4.2**

Anti- Social Behaviour

Applicants or anyone who will be living with them who have had action taken against them for anti-social behaviour or have a history of anti-social behaviour any time during the two years prior to their application. There must be reasonable evidence of the anti-social behaviour.

The term 'action' involves any legal proceedings in relation to anti-social behaviour.

The term 'history' will be applied to any on-going anti-social behaviour for which there is reasonable evidence.

Racial Harassment

Applicants who have had action taken against them or a history of any racially motivated offence, during the previous two years.

The term 'history' will be applied to any on-going racially motivated offence, for which there is reasonable evidence.

Homophobic Harassment

Applicants who have had action taken against them, for any offence, where it was motivated by homophobia.

The term 'history' will be applied to any on-going homophobia for which there is reasonable evidence.

Criminal

The individual whom is applying for accommodation, convicted of a 'serious offence' that has not been spent, and may pose a threat/risk to any partner to the scheme, the tenants of any partner to the scheme or the community in general. Examples include:

- Public Order offences, nuisance and vandalism.
- Dealing with controlled drugs.
- Burglary, robbery, theft.
- Domestic violence
- Violence.
- Schedule 1 offence(s). The MAPPA process should be instigated before these applicants are offered accommodation.
- Offences aggravated by racial or homophobic motivation.

Rent Arrears

Applicants who have a current or former rent debt with either their current or previous public sector landlords.

N.B. Cases where applicants have been subject to domestic violence, racial harassment or some other forms of harassment will be considered on a case by case basis.

Applicants with arrears will be allocated a reduced preference until:

- the applicant has made, and maintained, an arrangement to repay the debt(s) for a period of three months for debts of £1,000 and under or six months for debts over £1,001
- the applicant has reduced the total debt by 50%

At the time of applicants being successful for an offer the officer will check that agreed repayment plans have been adhered to. Applicants who have failed to keep to the agreed repayment plan will be skipped on the shortlist and not made the offer of accommodation.

Officers have the authority to consider the circumstances surrounding individual cases.

Abandonment

Applicants who have left the tenancy of a social landlord without providing advance notice of their intention to vacate and consequently have a debt(s) with a former landlord(s).

N.B. This may not apply to those applicants who have fled from domestic violence, racial harassment or some other forms of harassment.

The applicant will be allocated a reduced preference until any outstanding debt to the appropriate landlord(s) has been repaid in full or the applicant has made and maintained an arrangement to resolve the debt(s) for a period of 3 months for debts of £1,000 or under and 6 months for debts over £1,001 or reduced the total debt(s) by 50%.

Officers have authority to consider the circumstances of individual cases.

Misrepresentation

Applicants who have knowingly or recklessly misrepresented their circumstances to obtain the tenancy of a social landlord.

Depending on the circumstances applicants will be allocated no or reduced preference.

Appendix D**Approved Supported Housing Schemes**

- Belgrave Court
- Haddon Lodge
- The Mill
- The Charnocks (teen parents)
- Supported lodgings
- South Ribble Women's Refuge
- Preston's Women Refuge
- Foundations /INN2
- Millbank Court

Appendix E

Reasonable Preference Categories

In assessing need reasonable preference will be given to those applicants who fall into one or more of the following categories (In line with the Homelessness Act 2002)

Category	Reasonable Preference Category	Band Awarded
Homeless people owed a full duty under part V11 of the Housing act 1996	B	B
Homeless Individuals (not owed a duty under the above act)	A	C
Applicants occupying unsanitary or overcrowded housing or otherwise living in unsatisfactory housing conditions	C	A , B or C depending on the severity as detailed below
Applicants who need to move on medical or welfare grounds or grounds of disability	D	A or B depending on the severity as detailed below
Those who need to move to a particular locality in the district where failure to meet that need would cause hardship to themselves or others	E	A or B as detailed below

Additional Preference

Under section 167(2) of the Housing Act 1996 additional preference may be given to applicants in urgent housing need owed a reasonable preference. Reasonable preference will be given to applicants who demonstrate an urgent housing need , the criteria for when additional preference will be awarded is fully detailed in the relevant sections below

Following the House of Lords Newham v Ahmed allocation schemes are no longer required to apply cumulative preference and applicants will be prioritized on the basis of waiting time within the bands

Reasonable preference category A – People who are homeless (within the meaning of part 7 of the Act)

This group comprises all households who are homeless under the definition of homelessness contained in sections 175 -177 of the Housing Act 1996 Part 7 whether or not they were assessed as a result of a formal homelessness application. It does not include those cases that have made a formal homeless application which has determined that they are owed a full homelessness duty under section 193 or 195 of the Housing Act 1996.

This definition includes a person who does not have accommodation which is legally and physically available to him or her, or has accommodation that is not reasonable for him or her to continue to occupy. Under this provision there is no requirement that an applicant should be in 'priority need' for accommodation, or that they have made a statutory homelessness application to the local authority under Part 7 of the Housing Act 1996. Where the Council has assessed that the applicant is homeless under this definition they will be awarded the Band C priority.

Applicants may qualify under reasonable preference (A) if they are:

- Rough Sleepers
- Those who have no accommodation at all where they can live in along with other family members who normally live with them, or family members that the Council decides might reasonably be expected to live with them.
- Those who have accommodation but where in the Council's opinion it wouldn't be reasonable for them to continue to occupy it
- Those that have accommodation but they cannot secure access to it, or, in the case of a moveable structure, like a caravan, there is no lawful place they can lawfully live in it
- Those who have made a homelessness application and have been determined by the Council to be homeless but not in priority need, or found to be intentionally homeless but are no longer owed the limited temporary accommodation duty (normally 28 days) following a decision of intentional homelessness

N.B. The Council will award Additional Preference for members of this group where:

- An applicant is likely to be found to be in priority need if they became homeless and wished to pursue a homeless application
- And the Council consider they will be physically homeless within 28 days
- And they accept a prevention option from the Council's Housing options Team which will mean their homelessness is prevented for a minimum of 3 months

These households will be awarded band C for up to 3 months with Band B being awarded by the Local Authority after the 3 months with an effective date from the date they entered the higher band

Important Note: Where a statutory homelessness application has been made and the applicant has been found to be owed a full homelessness duty as they have been found to be in priority need i.e. unintentionally homeless, they will be awarded reasonable preference category (B) below

Reasonable preference category (B) - Homelessness households who are owed a duty by any housing authority under section 190(2), 193(2) or 195(2) of the 1996 Housing Act.

Applicants will receive Band B to reflect their reasonable preference if they are homeless, in priority need and owed any duty under sections 193(2), 195(2) or 190(2) of the Housing Act 1996 as amended.

People who would fall into reasonable preference (**B**) are:

- A person who is in priority need and unintentionally threatened with homelessness and the Council has accepted that it owes an applicant a full duty under section 195(2) as being threatened with homelessness in the next 28 days.
- A person who has been accepted as being owed the full homeless duty under section 193(2) i.e. those who are deemed homeless, in priority need and unintentionally homeless.
- A person who is owed a section 190(2) duty that have been assessed as being in priority need but are intentionally homeless and have been provided with accommodation for a period of time to enable them to secure their own accommodation. N.B. Priority under reasonable preference group B for the intentionally homeless is only awarded for the period of time the duty is owed. This is normally 28 days following the decision that the person is intentionally homeless but the exact time will be determined by the Council on an individual case basis. For this short period of time intentionally homeless applicants will be given reduced Band C in recognition of the deliberate act or omission that led to that decision. After 28 days they will remain in Band C, having been awarded reasonable preference group A, which includes those households who are intentionally homeless but no longer owed an intentionally homeless accommodation duty.

Reasonable preference category (C) - People occupying unsanitary or overcrowded housing or otherwise living in unsatisfactory housing conditions. All applicants that are determined as being owed reasonable preference under this group will be granted Band A or Band B status depending on the severity of their housing need.

Reasonable preference will be awarded plus an award of additional preference resulting in Band A status for:

A private sector property either owned or rented where a statutory notice has been issued by the environmental health department that an unfit property is to be demolished under the Housing Act 2004; They are a private sector tenant and the Council's Public

Health Team has decided that the property poses a category 1 hazard under the Health and safety fitness rating and the Council are satisfied that the problem cannot be resolved by the landlord within 6 months and as a result continuing to occupy the accommodation will pose a risk to the applicant's health. For those living in a property that is a category 1 hazard and as a result uninhabitable due to, for example, severe damp, major structural defects including subsidence, flooding, collapse of roof, or have living conditions which are a statutory nuisance, and there is no prospect of the problems being remedied within a 6 month time period. In exceptional cases, where the problem can be rectified within 6 months but the impact on the applicant of remaining would be considerable, a senior officer will decide if reasonable preference will be granted. Those that are Statutory overcrowded as strictly defined by the Housing Act 2004.

Note: The assessment of all cases under the above criteria will be carried out by the Council's Housing Options Team taking advice from the Public Health Department of the Council (or any other council if the property is outside of the participating Council's areas)

Note: Those who are statutory overcrowded as defined by the Housing Act 2004 will not meet these criteria if this is as a result of an applicant voluntarily agreeing to house additional member of their extended family or friends.

Note: Those overcrowded by two bedrooms or more under the bedroom standard but are not statutory overcrowded will be granted reasonable preference but not granted additional preference and will be placed into Band B

For those applicants where their housing conditions or level of overcrowding mean that it is not reasonable for them to continue to occupy their overcrowded accommodation and as a result they are owed a Statutory homeless duty under section 193(2) of the Housing Act 1996, will result in an award of reasonable preference for the statutory homeless duty under reasonable preference group B rather than under his group C.

An applicant will also be awarded Band B status if they lack access to any of the following. Shared access in Housing in Multiple Occupancy counts as access and would not lead to any award: Band B will be awarded for those applicants who lack access to:

1. A bath or shower
2. A toilet
3. Cooking facilities
4. Running hot water supplies
5. Electric/gas needed for essential activities

Applicants who have children under the age of 10 or are pregnant and live in accommodation that has no ground level access or is an upper floor property will be awarded Band C.

Reasonable preference category (D) - Medical, disability and welfare. All applicants assessed as owed reasonable preference for medical, disability or welfare grounds will be granted Band A or B priority depending on the severity of the impact of their housing on their condition. All other applicants will be granted Band E as detailed below.

This reasonable preference category includes any applicant for accommodation whose health, disability or welfare, or that of a member of their household, is significantly impaired by remaining in their current accommodation and there is as a result a need to move.

Medical Grounds or Grounds of Disability: Reasonable preference is awarded by the partners following an assessment of an applicant's need to move due to medical or disability needs. An assessment may be made by an officer of the Partner Organisation handling the application Team and will be informed, but not determined solely, by set criteria for routine medical conditions, or for more serious cases following a recommendation from the Community Occupational Therapy Team, or from a qualified Medical Advisor or consultancy commissioned by the Partners.

An applicant's circumstances will normally be referred for a medical assessment if an applicant has indicated that there is a medical or disability problem that is made substantially worse by their current housing. Otherwise their circumstances will be assessed by **an appropriate Senior Officer** who will consider standard criteria in making any assessment. Priority will be given depending on how unsuitable the current accommodation is in relation to their medical, welfare or disability needs.

The assessment is not of the applicant's health but how their accommodation affects their health or welfare. Only in exceptional cases will the detrimental effect on health or welfare be caused by the location of the accommodation itself rather than the physical condition or nature of the accommodation occupied. Such exceptional cases will be considered by a senior officer of the Partners handling the application.

An applicant that has an urgent need to move for medical reasons or due to their medical problems or disability will be awarded reasonable preference and additional preference and placed in the Band A.

The following are examples of cases that would qualify for Band A status under one of the statutory reasonable preference categories. I.e. medical, welfare or disability needs.

- Where an applicant's condition is expected to be terminal within a period of twelve months and re housing is required to provide a basis for the provision of suitable care.
- A member of the household seeking accommodation cannot be discharged from hospital or rehabilitation accommodation until suitable housing is provided and the household had settled accommodation in the participating Council's area prior to hospital admission
- The condition is life threatening and the applicant's existing accommodation is a major contributory factor

- The applicant's health is so severely affected by the accommodation that it is likely to become life threatening
- A member of the household is elderly, disabled or has a progressive illness and is likely to require admission to hospital or residential/nursing care in the immediate future and re- housing would enable that person to remain living at home.
- People who are completely housebound because of the type of accommodation they live in.

Where an applicant's housing is unsuitable for severe medical reasons or due to their disability, but who are not housebound or whose life is not at risk due to their current housing, but whose housing conditions directly contribute to causing serious ill-health. If this is the case they will be awarded reasonable preference and placed into Amber Band B. Registered social Landlord partners being informed by set criteria, and may or may not need to be referred to a medical advisor or Occupational Therapy Team depending upon the circumstances

The following are examples of cases that would qualify for Band B status under one of the statutory reasonable preference categories. I.e. medical, welfare or disability needs:-

- The applicant is unable to mobilize adequately in their accommodation and requires re housing into accommodation suitable for their use.
- The applicant's accommodation is directly contributing to the deterioration of the applicant's health such as severe chest condition requiring intermittent hospitalisation as a result of chronic dampness in the accommodation.
- Where overcrowding in the property leaves the applicant at risk of infection, for example, where an applicant is undergoing chemotherapy or suffering from advanced AIDS.
- Children with severe conditions such as autism, or cerebral palsy where their long term needs cannot be met without settled accommodation.
- A member of the household seeking accommodation is disabled and re-housing will enable that person to overcome physical barriers created by current accommodation e.g. steps and stairs.
- A person with a severe disability requiring substantial adaptations to a property which is not provided for in their current accommodation
- A person with a terminal illness or long term debilitating condition whose current accommodation is not having a significant impact on their condition but where their quality of life would be significantly improved by moving to alternative settled accommodation which may or may not be closer to support.

Welfare Issues

Those applicants that qualify for reasonable preference on welfare grounds will be those urgent cases that require care and support needs or have other social needs that do not require medical care or support. There are three groups that will be awarded reasonable preference for welfare needs. These are listed and detailed below.

Those leaving care or who are ready to move on from specific supported housing schemes that need a stable base from which to build a secure life.

The Council wants to ensure that care leavers and other vulnerable people with support needs are helped to access secure and suitable long term housing. It is important that they are only nominated to move on accommodation therefore until they are assessed as ready to move on their application will be registered but deferred. The Council will not therefore allocate reasonable preference under this category until the person has been assessed as being ready to move on. The following cases in supported accommodation or care will qualify for Reasonable preference and additional preference under this category and placed in Band A when they have been assessed as being ready to move on:

A person who has been awarded a move on priority having been assessed as ready to move on to long term settled housing. There are two categories of cases:

Move on Supported Housing Projects

Applicants will be awarded this category for certain listed projects in accordance with protocols agreed between the Council and the voluntary sector body. Not all applicants who occupy named supported housing projects will qualify for reasonable preference. They must have vulnerability and urgent housing need that is best met by the provision of long term settled housing. All other cases will not be owed reasonable preference under this category and will be expected to be assisted by the project with support from the Housing options service to move on to private rented sector accommodation. The criteria for an award of reasonable preference will be:

- An applicant is ready to move to independent settled housing
- The applicant is in need of long term rather than short term ongoing tenancy support
- That support package has been assessed and is in place
- An applicant's vulnerability is such that accommodation in the private rented sector would through its short term have a detrimental effect on their vulnerability

Move on from Care

Applicants are awarded this category in accordance with protocols between The Local Authorities and the County Council's Children Services Department. Applicants must be a former "Relevant Child" as defined by the Children Leaving Care Act 2002. As with the need to move on from supported accommodation not all care leavers will qualify for reasonable preference. They must have vulnerability and urgent housing need that is best met by the provision of long term settled housing. All other cases will not be owed reasonable preference under this category and will be expected to be assisted by the Children's Services with support from the Housing options service to move on to private rented sector accommodation. The criteria for an award of reasonable preference will be:

- A care leaver is ready to move to independent settled housing and is genuinely prepared for a move to independent living

- They possess the life skills to manage a tenancy including managing a rent account.
- The care leaver is in need of either a long term or medium term tenancy support
- That support package has been assessed and is in place
- Their needs are such that accommodation in the private rented sector would through its short term nature have a detrimental effect on their transition to independent living

Those applicants who need to move on welfare grounds due to infirmity caused by old age. These cases will have their welfare need recognised and reasonable preference awarded. An assessment of an applicant's need to move due to infirmity caused by old age will be made by the **Partner Organisations appropriate senior Officer taking into account information provided by one or more of the following:-**

Applicant's GP or consultant

Social Services

Occupational Therapist

Age Concern or any other voluntary sector organisation representing the applicant/Partner Organisation medical advise

Any other relevant agency

Priority award as a result of Exceptional Circumstances With the exception of elderly infirm applicants and those leaving care or who are ready to move on from specific supported housing schemes that need a stable base from which to build a secure life the award of reasonable preference Priority on welfare grounds will be made by the relevant partner organisation or Council.

Reasonable preference category (E) – People who need to move to a particular locality within the Partnerships districts, where failure to meet that need would cause hardship to themselves or to others. Details of when Reasonable Preference will be granted for this group and what Band are given below.

This category applies to those who need to move to a particular area within the partnership, where failure to meet that need would cause hardship to themselves or others. The Government's Code of Guidance suggests that people may fall into this category if they need to move in order to give or receive care, to be able to access specialist medical treatment, or to take up particular education, employment, or training opportunities in a particular locality. In addition the need to move should be sufficiently great that hardship would be caused if they did not move effecting health or leading directly to an inability to take up employment or training opportunities. it will be only be in limited circumstances that an award of reasonable preference will be made. Reasonable preference priority would not normally be awarded to applicants who claim that they require ongoing support from relatives or friends, unless there is severe mental health, medical or welfare issues relating to this person or a member of this person's household and exceptional reasons why this support cannot be made available through a

reliance on public transport or the applicant's own transport. Such cases will be submitted to the **partner organisations senior officers**

- a) Need to move on hardship grounds – domestic abuse, extreme violence or extreme harassment. (to be awarded Band A)

People who have satisfied the Council that they are fleeing severe harassment or violence from inside or outside of the home but they have not been accepted as being owed a statutory homelessness duty as a result of that violence or harassment.

N.B: A statutory homeless duty applies if the applicant applies as homeless and a full duty is accepted. Those cases that do not apply as homeless and wish to remain with relatives or friends can be awarded reasonable preference under this group without going through the homelessness route.

- b) Hardship will be awarded to tenants of a Housing Association in the Local Authority area who occupy a specially adapted property and where the move will free up the property. **Band A because RP plus additional preference will be awarded)**
- c) Or tenants of a Housing Association in the Council's Districts who occupy a 3, 4 or 5 bedrooms or larger property than needed by 2 bedrooms or more and where the move will free up this accommodation for a severely overcrowded household. (**Band B)**
- d) Or Tenants of a partner organisation seeking a move to non family housing that will free up a house to enable use by a family (**Band B)**

Appendix F:

Legal Requirements

The 1996 Housing Act (as amended) by the 2002 Homelessness Act requires local authorities to make all allocations and nominations in accordance with a published Allocation Scheme. The law covers all nominations made by Local Authorities by which a person becomes an assured or an assured short-hold tenant of housing accommodation held by a Registered Social Landlord, commonly known as Housing Associations. A summary of the Allocation Scheme must be made available free of charge to any person who asks for a copy. This document is the full version of the scheme and a summary of the scheme is available through the websites of all partners or by contacting any of the partners offices

The Housing Act 1996, as amended by the Homelessness Act 2002, requires local authorities to give "reasonable preference" in their allocations policies to people with high levels of assessed housing need. This includes homeless people, those who need to move on welfare or medical grounds, people living in unsatisfactory housing and those who would face hardship unless they moved to a particular locality within the local authority's area.

This policy complies with the requirements of the Act, and takes into account the Code of Guidance on the Allocation of Accommodation issued in 2002. It also takes into account the statutory Code of Guidance on the Allocation of Accommodation: under Choice Based Letting Schemes issued by the Communities and Local Government Department in August 2008 and the draft CLG statutory guidance document on social housing allocations "Fair and Flexible". The scheme has also been amended to fully take into account the implications for local authorities of the House of Lords decision in the London Borough of Newham V Ahmed, which sets out how Councils should balance choice and meeting housing need.

The Scheme is based on:

- The recognition of reasonable preference categories which are set by law i.e. those applicants who must be given reasonable preference meaning a 'head start' under the Council's Allocation Scheme.
- The principle that social housing properties should be let on the basis of an applicant's housing needs.

Reasonable preference for housing must be given to those groups set out in the 1996 Housing Act, amended by the 2002 Homelessness Act listed below. A full description of each of these categories and how they are applied is given at paragraphs appendix E of this Policy. The statutory reasonable preference categories cover:

- All categories of homeless people (whether or not the applicant is owed a statutory homeless duty and regardless of whether such cases have any local connection with the partner Local Authorities);
- People occupying unsanitary, overcrowded or otherwise unsatisfactory housing;
- People who need to move on medical or welfare grounds (including grounds relating to a disability);
- People who need to move to a particular locality within the district to avoid hardship to themselves or others.

In addition the partnership will grant additional priority to reflect the needs of those applicants owed reasonable preference that the Partnership believes have urgent housing needs.

It is important to note that even if an applicant is assessed as being included in one of the statutory reasonable preference categories listed above; they may still be awarded a reduced preference to others in that category as a result of their circumstances or actions. A full list of examples of such cases is given at Appendix C. Reduced or no priority will be awarded where:

- There are current or former rent arrears owed to a social or private sector landlord, and the Council is not satisfied by the actions being taken by the applicant to resolve the arrears;
- Cases of current or former unacceptable, or anti social, behaviour and the council is not satisfied this behaviour has been fully addressed
- Applicants with access to a certain level of financial resources
- Applicants without a local connection with the Council

Appendix G:**Schedule 1- Allocations**

Part 1 of Schedule 1 of the Housing Act 1996 restricts payments and benefits which RSL can give to

- Board members;
- Employees – that is people employed on a contract and receiving wages or a salary, but in some cases people working on a freelance basis may also be classified as employees;
- People who have been board members or employees during the previous 12 months;
- A close relative of a board member or employee –

'close' is not defined in the Act

The Tenant Services Authority considers that someone's husband, wife, partner, parents, grandparents, children, grandchildren, brothers, sisters would be included, and that similar relations by marriage would also count as 'close'.

The granting of a tenancy is a benefit and, therefore, before any of the above can be accepted on to the scheme or offered a tenancy, each Partner's procedure in relation to Schedule 1 must be followed.

Local Authorities must ensure that all applicants are treated fairly therefore any applications for housing from the following applicants must be disclosed on the application form:

- Members of the Council or their immediate families
- Employees, or their immediate families of any of the participating Councils or Partner Housing Associations or any other Housing Associations operating in the partnership area

These applications will be assessed in the normal way but registration, eligibility, the assessment of housing need and any offer of accommodation will require special approval by a senior manager of the Council.

Appendix H:**Data Protection**

The Select Move CBL Scheme and its Partners will make every effort to keep information provided by applicants safe and confidential. They will comply with Policies on Data Protection. The Data Protection Act 1996 gives applicants the right to request a copy of their records held on the SRCBL System. Applicants wishing to see and receive a copy of their records should make a written request to the Partners responsible for registering their application.

All information received relating to an applicant's housing application will be treated as confidential. The Data Protection Act 1998 prevents the disclosure of information about you to any other person without your consent and prevents disclosure to you without their consent, information disclosed by other people.

Information sharing without consent

Information may be shared about the individual and their history irrespective of whether their consent has been obtained in exceptional circumstances, which will include:-

- in accordance with the provisions of the Crime and Disorder Act 1998 (section 115)
- For the purposes of the prevention or detection of crime and fraud
- Where there is a serious threat to the applicant or a third party including staff or contractors
- Where information is relevant to the management or support duties of the proposed landlord or support organisation to ensure the health and safety of the applicant, a member of his or her household, or a member of staff

For further information, please refer to separate data protection agreement signed by the partnership.

Report of	Meeting	Date
Director Partnerships, Planning & Policy (Introduced by the Executive Member (Business) and Executive Member (Resources))	Executive Cabinet	18 th February 2010

REPORT OF HOUSING CAPITAL BUDGET FOR 2010/11 & ALLOCATION OF REPOSSESSION GRANTS.

PURPOSE OF REPORT

1. To advise members of the various grant funding received in 09/10 and initiatives it is to be allocated to.
2. To advise members of the proposed cut in housing capital grant for 2010/11 and the proposed capital programme for 2010/11.

RECOMMENDATION(S)

3. To approve the allocation of the grant resources to the various initiatives.
4. To approve the introduction of the Chorley version of the CLG standard Repossession Policy.
5. To approve the draft housing capital programme, subject to the allocation of capital grant being confirmed as correct.

REASONS FOR RECOMMENDATION(S)

(If the recommendations are accepted)

6. That the grant is intended to be used to prevent homelessness due to repossessions, either through provision of education material and marketing
7. That the Council can be clear with customers regarding its priorities for housing and can shape the policies and procedures of the newly established in house HIA.

ALTERNATIVE OPTIONS CONSIDERED AND REJECTED

8. *That the funding is not used for repossession measures*
9. *That the capital programme is not set until the findings of the private sector stock condition survey are published.*

REPOSSESSION GRANTS FUNDING

10. In 2009/10 the Government announced a commitment to prevention of repossessions and a series of measures aimed to stop people losing their home. Whilst the impact of the credit crunch and repossessions were slowed due to the mortgage providers having to take steps to help people, these agreements are now expiring and the CLG are fearing a wave of repossessions in 2011.
11. Chorley Council therefore received three grants aimed to deliver services targeted to those most affected by the credit crunch and risk of repossession.

12. These grants include £38,000 Preventing Repossessions fund, which has guidance attached and is primarily to be used for grants and or loans to help those at risk of repossession
13. A further £30,000 was awarded to Chorley, to lead on a sub regional project aimed at assisting Housing Services to develop a response to the recession. This money is to be shared between Chorley, Preston, South Ribble and West Lancs. Chorley was selected following its performance in tackling homelessness and reducing the use of temporary accommodation.
14. In January 2010, £20,000 was received towards the costs of providing a court desk service, which is now delivered by the Specialist Housing Advisor, Sacha Girling.
15. All of these grants in 2009/10 are non recurrent, which means the CLG strongly advise that they are recycled where possible and that marketing/ provision of advice are central to educating people as to where and what help is available to help them avoid repossession.
16. The CLG will be requesting outcomes from the Council as to how the grants have been used and the positive outcomes.
17. The main principles for which, these grants will be used are as follows:
 - Comprehensive training programme for housing staff across Central Lancs. (Paid for from the shared pot) to include provision of mortgage advice and dealing with repossessions.
 - Printing of publicity material and posters to provide advice on how to access help and advice and promoting the Councils' housing advice service. These are to be circulated in all public buildings and other targeted areas, eg Magistrates Court.
 - Additional funding for the Rental Bond Scheme, which has been very successful, and therefore we want to increase the number of binds we can issue. This service has helped 23 families to access private rented accommodation and who may not have otherwise been able to access housing, due to their vulnerability.
 - Establishment of a Repossession Pot to provide grants and/or loans for those at risk of repossession and who meet certain criteria.
 - Funding towards the revenue cost of implementing choice based lettings.
18. With respect to the Repossession Pot, a standard policy has been devised by CLG and this has been tailored for Chorley and is attached.

Housing Capital Grant

19. Each year the Council sets its priorities for its housing capital programme. This includes affordable housing, disabled facilities grant, home repair assistance and energy efficiency measures. These are funded by a combination of Disabled Facilities grant, regional housing pot and section 106 (affordable housing) monies.
20. In 2009/10 the Council received a good allocation of regional housing pot, specifically £1.2 Million. However, during the course of the year, the northwest regional bodies along with the Lancashire Strategic Housing Partnership have been reviewing the methodology used to divide the regional amount of grant between all the councils.
21. A new proposed methodology has been approved and, subject to final ministerial sign off, it will mean that for 2010/11, Chorley Council will receive only £ 397,000 (excluding Disabled Facility Grant monies). This allocation is based on a complex mix of the new methodology and a level of protection and represents a 68% cut. The figure for 2011/12 is not yet available; however, it is envisaged that it will decrease further.
22. Chorley Council, along with some other district councils who were significantly disadvantaged by the new methodology, made representations regarding these cuts to both the Regional Leaders board and ministers.
23. Therefore in light of this, the Council is proposing to target its capital resources more strategically, and has produced a new Private Sector Housing Assistance Policy (currently out for consultation), which has tightened the eligibility criteria on its grants, in order to ensure those customers in greatest need, are helped.
24. The proposed priorities and respective budget allocations (subject to the approval of regional housing capital funding) are as follows:

Programmes	Allocated budget	Source of finance
Affordable Housing New Development Projects	£721,710	Regional Housing Pot (carried forward from 2009/10)
Disabled Facilities Grants	£450,000	Regional Housing Pot and CLG disabled facilities grants
Home Repair Grants/Direct Homes Assistance	£72,000	Regional Housing Pot
Energy Grants	£50,000	Regional Housing Pot
Handyperson Scheme	£22,000	Regional Housing Pot
Landlord Accreditation	£5,000	Regional Housing Pot
Total	£1,320,710	

25. These priorities & allocation of funding represent the best use of these resources, with affordable housing being the highest strategic priority for housing, followed by the provision of disabled facilities grants (DFGs). Demand for DFG has increased significantly over recent years given more people are electing to remain in their own home rather than move into specialist/supported accommodation. This is particularly true of older people. Demand for DFGs is set to increase further as population projections indicate that by 2015 19% of the Chorley population will be over 65 and by 2020 20% will be over 65.
26. Affordable Housing is a key priority of the Council, with access to social rented accommodation a big issue given the small size of stock and the levels of need. The Council has already delivered 39 units of affordable housing to date, the majority of which have been in partnership with Adactus (CCH) and with HCA grant. The Councils Strategic Housing team has been key to the delivery of these units and has worked closely with partners to ensure the programme has remained on track.
27. In 2009/10 the Council invested in a new project, 'purchase & repair scheme' with Adactus (CCH) in order to delivery more housing for social rent, whilst at the same time bringing empty homes back into use. Early indications are that it is expected that some homes may be delivered in this year as part of this project. If this project is successful, a further programme may be developed in 2010/11 and it may be promoted as an example of best practice.
28. Some provision has been made for offering grants for energy efficiency measures and repair assistance; however these will be available to those in most need and means tested. There are national programmes for energy efficiency grants and discounts available to the wider population and these will also be promoted. Following a challenge to EEGA's current pricing policy, we are confident we will get a better deal from this organisation in the future.
29. Landlord accreditation schemes can bring real benefits in encouraging landlords to provide good quality accommodation and services in return for the market advantage which being accredited confers. This small allocation will be used as part of the scheme once developed in 2010/2011 to provide incentives for landlords to join, and can include provision of items such as fire safety equipment, smoke alarms or window locks etc.

CORPORATE PRIORITIES

30. This report relates to the following Strategic Objectives:

Put Chorley at the heart of regional economic development in the Central Lancashire sub-region		Develop local solutions to climate change.	✓
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Improving equality of opportunity and life chances	✓	Develop the Character and feel of Chorley as a good place to live	✓
Involving people in their communities		Ensure Chorley Borough Council is a performing organization	✓

31. This report has implications in the following areas and the relevant Corporate Directors' comments are included:

Finance	✓	Customer Services	
Human Resources		Equality and Diversity	
Legal		No significant implications in this area	

COMMENTS OF THE DIRECTOR OF TRANSFORMATION

30. The report sets out the proposed allocation of all available funds allocated for Housing schemes. They represent the totality of cash available for housing purposes as all the Section 106 funds for housing have now been allocated and/or spent.

LESLEY-ANN FENTON
 Director, Partnerships, Planning & Policy.

There are no background papers to this report.

Report Author	Ext	Date	Doc ID
Zoë Whiteside	5711		



**Chorley Repossession &
Eviction Prevention Fund**

Chorley Borough Council



Chorley Borough Council Repossessions Prevention Fund
Loans to Prevent Repossessions & Evictions

The Repossessions Prevention Fund was created by government in the 2009 Budget. The aim of this fund is to enable Local Authorities to extend small loans to families at risk of homelessness through repossession or eviction. Chorley Borough Councils share of this national fund was £38,000.

The Council has previously provided funding through the Homelessness Grant to operate a Homelessness Prevention Fund. Criterion and procedure for the use of the Homeless Prevention Fund should be seen as **separate** to the procedure for administering the Repossessions Prevention Fund.

The Homelessness Repossessions Prevention Fund will be used to provide loans or grants of between £1,000 and £3,000 and up to a maximum of £5,000 per household. The primary aim will be preventing repossessions or evictions where households are struggling to pay their mortgage or rent due to the current climate and through no fault of their own.

This guidance sets out the eligibility criteria and procedure for administering the Homelessness Repossessions Prevention Fund.

Nature of Payments from the Fund

In the guidance accompanying the Repossessions Prevention Fund the CLG refer to using the money to provide loans where possible because this will allow for money to be recycled to help other households in the Local Authority area in the future. The guidance does however go on to state that “final decisions on efficient and equitable deployment of this additional funding rest with Local Authorities and should be based on individual local need and circumstances”.

The Council recognises the advantages of using loans rather than grants but at the same time noted concerns about the administrative costs of collecting relatively small amounts of money from people already in difficult financial circumstances, therefore Chorley Council would aim to make payments on a loan basis but would have the freedom to make grant payments where the likelihood or cost of achieving repayment was disproportionate.

In light of this recommendation each household making an application to the fund will be assessed according to the circumstances of their individual case and a recommendation will be made by the prevention officer to the Homelessness and Housing Advice Manager who will make a final decision on the nature of the payment to be made (i.e. whether it will be on a loan or grant basis).

Criteria for use of the Fund

Based on the CLG Guidance and local discussion the Repossessions Prevention Fund should only be administered to those households who meet the following criteria:

- Households who genuinely cannot pay their rent or mortgage (and not those who choose not to). For example assistance could be provided to a tenant who had accumulated rent arrears as a result of loss of earnings or reduced hours and who has no history of high arrears. Supporting information would be required as evidence that households were experiencing genuine difficulties in paying their rent or mortgage payments (this could include payslips, proof of benefit, confirmation from employers, rent account information, bank statements etc)
- A payment should only be made to those households who are willing to act on money and debt advice from either the Specialist Housing Advisor or the Councils CAB in order to resolve the problems that have led to their financial difficulties
- A payment should only be made in circumstances where households can demonstrate (with the aid of money advice) that their rent or mortgage repayments will be affordable following the receipt of a payment from the fund – i.e. that their situation will be sustainable in the longer term
- Payments are not intended to completely clear arrears but to recover the situation where all other options have failed
- Where possible payments should be made based on the fact that all parties are prepared to compromise on the debt in order to avoid repossession or eviction. For example a loan could be provided to clear a proportion of rent arrears, however the loan might only be agreed by the Council if a social or private sector landlord is prepared to write down or write off the remaining arrears owed.
- A payment should not be made where there is another way to resolve the problem. For example where arrears can be cleared by backdating a Housing Benefit Claim.
- In cases of Housing Associations, tenants with arrears should pursue other options considered by landlords through their existing rent recovery process before a payment is made through the Repossessions Prevention Fund.
- Where a payment is agreed households should be asked to agree that a payment is made directly to a creditor on their behalf. No cash payments will be made.
- Only one payment can be made per household
- The maximum payment permitted through the fund is £5,000

Prevention Options that may be considered

The primary objective of the Repossessions Prevention Fund is to prevent homelessness arising from repossessions and evictions across all tenures. The fund should be used as a tool for working with the lender or landlord in order to remove the risk of repossession or eviction by making a payment which they are prepared to accept in return for compromising the overall debt owed by the household.

Situations in which this may apply include:

- To support possible mortgage rescue applications - small payments to, when necessary, 'top up' lender write down on Mortgage Rescue cases where the household is in negative equity (where their mortgage and secured loans are greater than the value of their home). In these cases the emphasis is on the lender to write down any negative equity. Lenders will be willing to do this on a flexible case by case basis and can do so in a number of ways:
 - by writing down the loan(s); or
 - by allowing any debt to remain as an unsecured debt which would be treated as a normal loan; or
 - by allowing the debt to remain and charge the customer a nominal charge (e.g. £5 or £10 a month).

In those cases where lenders are unwilling to take any of these measures, or their write down is insufficient to keep the household in the scheme then a small payment from the fund could be issued to 'top up' and rescue the households
- To reduce mortgage arrears in cases where the level of arrears are too high for lenders to apply forbearance measures - This would normally require action from a lender to write down the level of debt. The principle would be that these loans are not made unless the homeowner had acted on money advice and is able to meet any existing or newly negotiated monthly payments (i.e. the situation is affordable for the household in the longer term).
- To reduce, or part settle, second charge actions where that charge had been taken out against the property for security - This would normally require action from a second charge lender to write down or write off the level of debt. The principle would be that payments from the fund are not made unless the homeowner has acted on money advice and is able to meet any existing or newly negotiated monthly payments (i.e. the situation is affordable for the household in the longer term).
- To reduce the level of debt for tenants in the private rented or social sectors who are in rent arrears – This would only apply in cases where rent arrears had been caused by income shocks as a result of loss of earnings, or reduced hours, and where there was no previous history of significant rent arrears. In these instances, the household may be unaware of entitlement to housing benefit support and back payment of a legitimate claim may not be possible (where applicants are entitled to back pay this option should be explored in the first instance and instead of any payment being made from the repossessions prevention fund).

- To prevent eviction for a household which is due to be imminently evicted or repossessed - A loan or guarantee up to a capped level payable to the lender or landlord could be made in order for the household to be given a 'last chance' by their landlord or lender. The tenant / owner would need to agree to keep to a repayment schedule and be able to meet any existing or newly negotiated monthly payments (i.e. the situation is affordable for the household in the longer term).
- To assist householders threatened with imminent repossession to remain in their homes - A payment from the fund could be made and paid in instalments to the lender on behalf of the household. Eligible applicants could receive an interest free loan of up to £5,000, secured against the property. At the end of the interest free period, the loan is repayable, and if not repaid in full, interest is chargeable.
- Making a joint agreement with a lender, landlord and household to resolve arrears - For example, a third of the arrears could be paid by off through a hardship payment, a third through a payment from the Fund, and a third written off by the landlord or lender.
- 'Last chance' or emergency payment to lenders, social landlords or private sector landlords to enable further intervention that may prevent eviction –
An emergency payment can be made at the point where a possession order is about to be enforced but where it is possible to hold the position to allow further intervention from debt and money advice where it has been assessed that there is a good prospect of resolving the overall problem. A short term guarantee could be made to cover rental or mortgage payments from that date whilst targeted intervention is taken to resolve the problem.

This list is not exhaustive. The fund should be used in any cases where prevention officers feel that they could negotiate with the landlord or lender to keep the household in their current home and prevent repossession or eviction. Each case will be considered on its own merits and a final decision will be made by the Housing Advice and Homelessness Manager.

Procedure for Accessing the Fund

- I. The household is referred from a partner organisation or self refers and highlights problems paying their rent or mortgage. They are asked to attend a housing options interview where a prevention officer will interview them, assess their circumstances and discuss the options available to them.
- II. As part of the options interview the prevention officer should establish whether the household could afford to stay in the existing property in the long term if the rent / mortgage arrears were reduced or repayment plans were agreed. Evidence should be requested to support any applications to the Repossessions Prevention Fund. This should include:
 - Written confirmation of the arrears that are owed
 - Proof of earnings (and proof to demonstrate any temporary income shocks) – wage slips, bank statements, benefit details, correspondence from employer etc
 - Financial statement detailing all income and out-goings (including details of all outstanding debt and repayment agreements)

- III. The household should be referred to money advice (either the Specialist Housing Officer or the local CAB) for further advice and support on managing their debts and budgeting, to draw up a financial statement (where they do not already have one) and to look at affordability of mortgage / rent payments in the longer term. The prevention officer should maintain close contact with the designated money advice officer throughout the application process in order to share information and agree on the final recommendation.
- IV. The prevention officer should contact the landlord or lender to confirm the level of arrears, the circumstances reported by the applicant and to establish whether they would be willing to negotiate with Chorley Borough Council to prevent eviction or repossession.
- V. Where the landlord / lender is willing to negotiate the full range of options should be discussed with both them and the applicant. When an option is agreed by all parties the prevention officer should obtain written confirmation from the landlord/lender setting out the level of arrears owed by the household and the fact that they are willing to freeze all action and pursue the chosen option.
- VI. This information should also be summarised for the applicant to sign and authorise. At the same time applicants should be asked to confirm that they are happy to continue to work with money advice in order to resolve the problem that has led to the accumulation of arrears / financial difficulties and they should also be asked to confirm that the payment can be made directly to their lender or landlord.
- VII. Based on discussion with and evidence received from the lender / landlord and the applicant and bearing in mind feedback received from money advice regarding the applicant's ability to repay a loan the prevention officer will assess whether the payment should be provided as a grant or a loan.
- VIII. The prevention officer in partnership with money advice should continue to monitor the level of arrears during the application process in order to make sure that the arrears do not continue to grow.
- IX. The prevention officer should provide a brief written report of the background circumstances and details of the discussions with the applicant and lender / landlord, which has, lead them to make a recommendation for payment under the fund. As part of this report the officer should set out the reasons they believe that the applicant will be able to meet payments and maintain their existing accommodation once the one-off payment has been made.
- X. The report should also make a recommendation as to whether the payment should be a one-off grant payment or a loan and the amount that would be required. The prevention officer should explain their recommendation with reference to the details of the case and any relevant supporting evidence.
- XI. The report, along with a copy of the housing options interview form and all relevant supporting information should be passed to the Homelessness and Housing Manager with a formal request for the agreed amount.

- XII. The Homelessness and Housing Advice Manager will assess the application and make a decision. If a negative decision is made recommendations will be made on alternative housing options and further options and prevention work will need to be carried out with the household.
- XIII. Once the funding is approved a letter should be sent to both the landlord / lender and the applicant. The letter should confirm the amount that has been paid, the agreement that has been reached and any arrangements for further payments. Where the payment was made as a loan to the applicant their letter should include details of the repayment schedule and any other relevant information.
- XIV. The prevention officer should continue to monitor the application until payment has been made to the lender / landlord. They should also check that the applicant / household has taken up the support offered through money advice and is receiving on-going support to ensure that they do not get into a similar situation again. All stages of the process (including any conversations with the applicant, lender or landlord) should be recorded on the case file and on the Homeless database (Peter Lally).
- XV. Where a loan payment has been agreed Chorley Borough Council will make arrangements to collect regular payments from the applicant by creating a sundry debtor account. In the event of non-payment of the loan the debt will be chased through 2 reminder letters before being referred back to the homelessness prevention team to follow up. If the household is unwilling to engage and regular payments are still not being made after this point a recommendation will be made to the Head of Finance that the debt be written off.

Monitoring & Evaluation

Information on the use of the Repossessions Prevention Fund will be reported to the CLG as part of the mortgage rescue monitoring returns on a monthly basis.

Procedure for Accessing the Repossessions Prevention Fund (RPF)**1. General Principles**

- 1.1 A request for assistance from the Repossession Prevention Fund in all cases. All payments must be approved by the Homelessness and Housing Advice Manager. Where they are not available, or for payments over £1000, approval must be sought from the Director of Partnerships, Planning & Policy.
- 1.2 A detailed financial statement must be completed by either the CAB or the Specialist Housing Advisor in ALL cases. Based on the information in the financial statement the money adviser should make a recommendation as to whether a grant or a loan should be provided. This assessment should be based on whether or not the client can afford to make regular repayments.
- 1.3 The client must engage with money and debt advice services in order to be eligible for a payment from the RPF.
- 1.4 Where a loan is provided a credit agreement to repay the loan is to be completed and signed by applicant.
- 1.5 Copies of all paperwork must be held on the applicant's individual file.
- 1.6 Copies of the following must be given to applicant:
 - Completed request for assistance from the RPF form
 - Financial statement and debt management plan
 - Where a loan has been provided the applicant should receive a copy of the credit agreement
- 1.7 Where loans are provide the repayment period will be dependent on the total amount and its purpose as well as on the client's individual circumstances.
- 1.8 The repayment period and schedule of payments must be agreed before any loan is made.
- 1.9 All payments (grants or loans) should be made directly to creditors (with agreement from the applicant). No cash payments will be made.

2. Role of the Specialist Housing Advisor

- 2.1 At the initial enquiry stage and during the housing options interview consideration must be given as to whether the applicants needs can be met through the Fund.

The Specialist Housing Advisor must: -

- Determine if the applicant is homeless or threatened with homelessness.
- Determine if the applicant is in Priority Need
- Complete RPF application form.
- Consider whether use of the fund can be made in maintaining the applicants existing accommodation;
- Verify all information provided by the applicant;
- Establish whether use of the Fund is appropriate or whether there is another way to resolve the problem;
- Establish whether use of the fund is the most suitable option for the applicant or whether another prevention initiative would better suit their needs;
- Where applicants are tenants appropriate obtain a written undertaking from the landlord that the applicant can remain for 6 months;
- Refer applicants to money advice to obtain a financial statement and liaise with the money advisor regarding whether the payment should be made as a grant or a loan.

2.2 The application must then be discussed with the Homelessness and Housing Advice Manager. Where approved, the application form must be signed by the Homelessness and Housing Advice Manager or the Director of Partnership, Planning & Policy in their absence.

2.3 **Payment Approved**

The Specialist Housing Advisor will: -

- a. Inform the applicant and any other parties involved, i.e. landlords.
- b. Complete 2 x loan agreement form. An original is to be given to the applicant, the other is to be passed to the Homelessness Prevention Officer, and a photocopy placed on the applicants file.
- c. Arrange for payment to be made.
- d. Raise a sundry debtor invoice.
- e. Monitor repayments.
- f. Where the household doesn't engage with repayments, the Homelessness and Housing Advice Manager will make a recommendation that the debt be written off.

2.4 Payment not approved

The Specialist Housing Advisor will: -

- a. Advise the applicant and other interested parties of the decision and the reasons for it in writing. Copies of all correspondence to be passed to the Homelessness Prevention Officer with a copy retained on the applicants file.
- b. Pass the original Request for Assistance form to the Homelessness and Housing Manager and place a copy on the applicants file.

2.5 Monitoring

The Specialist Housing Advisor will: -

- a. Monitor progress of the applicant's housing situation on a quarterly basis and will re-establish contact where informed by the finance team that they have missed loan repayments. Any further information or action will be noted on the applicants file and a written report provided.
- b. Where the applicant has failed to make agreed repayments and the Specialist Housing Advisor is unable to work with them to provide further advice and support a recommendation will be made to finance for the debt to be written off and a written report will be added to the applicants file and passed to the Homeless Prevention Team leader to be placed in the central log.

The Specialist Housing Advisor will: -

- a. Liaise with the finance team to monitor repayment schedules of individuals to ensure that the agreement is being maintained.
- b. Liaise with the finance team regarding default of payments and record any action taken on the applicant's monitoring sheet.
- c. Liaise with the Specialist Housing Advisor on progress of individual cases regarding their housing situation.
- d. Provide quarterly progress reports to the Housing Aid and Homelessness Manager or as requested on the overall budget and operation of the scheme.

The Housing Advice and Homelessness Manager will: -

- a. Carry out the duties of the Specialist Housing Advisor when they are not available or on leave.
- b. Carry out quarterly file checks in order to ensure that the procedure is being followed correctly. The file checks will be carried out for

10% of the cases where an application has been made to the RPF during the quarter.

REQUEST FOR ASSISTANCE FROM THE REPOSSESSIONS PREVENTION FUND

FOR COMPLETION BY SPECIALIST HOUSING ADVISOR:

Applicants Name _____

Address _____

Date of Birth _____ Case / Ref Number _____

Family Details _____

Case Officer _____

Is applicant Homeless or threatened with homelessness? Yes/No

If yes please give brief details including date will be homeless

Is applicant in priority Need? Yes/No If yes give reason

If payment through the repossessions prevention fund is not approved, will the applicant need TA? Yes/No

Rent Arrears/Mortgage Arrears Cases only

Name and Address of landlord/lender

Has a written undertaking been received from the landlord or lender that the client will not be evicted from the property, or that they can return and remain for 6 months.

Yes No (Please attach a copy)

If No, please give details

Background information

Gender - please tick ✓ one box only

Male

Female

Age - please tick ✓ one box only

16-24

25-34

35-44

45-54

55-59

60-64

65-74

75+

Do you consider yourself to have a disability? – please tick ✓ one box only

Yes

No

Ethnic group? Please choose ONE section from A to E and then tick the appropriate boxes.

<p>Section A <input type="checkbox"/> White</p>	<p><input type="checkbox"/> British <input type="checkbox"/> Irish</p>	<p><input type="checkbox"/> Other White _____ (Please provide details)</p>
<p>Section B <input type="checkbox"/> Mixed</p>	<p><input type="checkbox"/> White and Black Caribbean <input type="checkbox"/> White/Asian</p>	<p>White/Black African Other mixed _____ (Please provide details)</p>
<p>Section C <input type="checkbox"/> Asian or Asian British</p>	<p><input type="checkbox"/> Indian <input type="checkbox"/> Bangladeshi</p>	<p><input type="checkbox"/> Pakistani <input type="checkbox"/> Other Asian _____ (Please provide details)</p>
<p>Section D <input type="checkbox"/> Black or Black British</p>	<p><input type="checkbox"/> Caribbean <input type="checkbox"/> African</p>	<p><input type="checkbox"/> Other black _____ (Please provide details)</p>
<p>Section E <input type="checkbox"/> Chinese or Other</p>	<p><input type="checkbox"/> Chinese <input type="checkbox"/> Traveller or Gypsy</p>	<p><input type="checkbox"/> Other _____ (Please provide details)</p>

LOAN AGREEMENT

This Loan Agreement is made the day of 2009

Between

Chorley Borough Council, Civic Offices, Union Street, Chorley PR7 1AL

AND

OF

("the borrower")

IT IS AGREED as follows:

1. DEFINITIONS

In this agreement the following are the key financial information, and shall have the following meanings:

“**Term of agreement**” – x months

“**Amount of loan**”

“**Instalments**” - £each, payable on the day of each consecutive month, commencing on theday of.....

2. THE COUNCIL’S DUTIES

- 2.1 The ALMO agrees to advance £..... to the Borrower, payable within 14 days of this agreement being entered into.

3. THE BORROWER’S DUTIES

- 3.1 The Borrower agrees to repay the amount of the loan by the instalments by their due dates. Prompt payment is essential. Payment must be made either directly to Chorley Council’s bank account (.....) or by cash at Chorley Council’s offices. Payment must have been received by the due date.

4. BREACH OF THE AGREEMENT

- 4.1 If the borrower fails to pay any instalment by its due date the Council may require the borrower to pay interest at the interest rate stated in the key financial information. The interest due will be on the over-due instalment from its due date until its receipt by the Council after as well as before any judgment.
- 4.2 If the Borrower fails to pay any instalment within 14 days of its due date the Council may end this agreement and require the Borrower to immediately pay the outstanding balance under the agreement. In the

event of further non payment the Council will follow its debtor procedure and seek to provide any further support to the borrower around money / debt advice.

TERMINATION

- 5 The borrower may end this agreement at any time by giving written notice of termination. The Borrower must then pay the outstanding balance under this agreement (which the Council will notify the Borrower of).

LAW AND JURISDICTION

- 6. This agreement shall be governed by English Law and the parties agree to the exclusive jurisdiction of the English Courts in all matters.

DATA SHARING AND ANTI FRAUD

- 7. Chorley Council is under a duty to protect the public funds it administers, and to this end may use the information you have provided on this form and the request for assistance form for the prevention and detection of fraud. It may also share this information with other bodies responsible for auditing or administering funds for these purposes.

AGREED BY THE PARTIES

For and on behalf of the COUNCIL

The Borrower

Signed

Signed

Print name

Print name

Date

Date

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Report of	Meeting	Date
Director of Transformation (Introduced by the Executive Member for Resources)	Executive Cabinet	18 February 2010

REVENUE BUDGET MONITORING 2009/10 REPORT 3 (END OF DECEMBER 2009)

PURPOSE OF REPORT

1. This paper sets out the current financial position of the Council as compared against the budgets and efficiency savings targets it set itself for 2009/10 for the General Fund as measured at the end of the 3rd quarter 2009/10.

RECOMMENDATIONS

2. Executive Cabinet are asked to note the contents of the report.
3. That non-committed revenue expenditure budgets are identified and savings taken where possible to reduce the impact on the use of general balances in 2009/10.

EXECUTIVE SUMMARY OF REPORT

4. The Council expected to make overall target savings of £410,000 in 2009/10 which equates to £307,500 for the first three quarters. I am pleased to report that excellent progress has been made in this area with the full target savings of £410,000 already achieved. Should further vacancies occur over the final quarter, any additional savings will contribute to reducing further the impact on general balances to be used in 2009/10.
5. The projected outturn shows a forecast underspend of around £169,000 against the budget. Although this is a very positive position at this stage of the year, non-employee related expenditure will continue to have to be carefully controlled over the final months in order to offset the lower than anticipated income levels forecast for 2009/10.
6. There are a number of areas that will be monitored closely over the final quarter, the main ones being:
 - Major income streams, in particular car parking fees and building control fees.
 - Concessionary travel and benefit costs
7. As the 2009/10 budget used working balances to mitigate the costs of the Concessionary Travel scheme costs and the impact of the economic downturn, it is recommended that non-committed budgets are identified to ensure savings are taken wherever possible to reduce this impact.
8. The level of working balances is set to increase significantly as a result of various factors which are outlined in the report.



REASONS FOR RECOMMENDATIONS

(If the recommendations are accepted)

- 8. To ensure the Council's budgetary targets are achieved.

ALTERNATIVE OPTIONS CONSIDERED AND REJECTED

- 9. None.

CORPORATE PRIORITIES

- 10. This report relates to the following Strategic Objectives:

Put Chorley at the heart of regional economic development in the Central Lancashire sub region.		Develop local solutions to climate change.	
Improving equality of opportunity and life chances.		Develop the character and feel of Chorley as a good place to live.	
Involving people in their communities.		Ensure Chorley is a performing organisation.	✓

Ensuring cash targets are met maintains the Council's financial standing.

BACKGROUND

- 11. The Council's budget for 2009/10 included real cash savings targets of £350,000 from the management of the establishment and a further £60,000 of savings to come from efficiency and procurement related activities.
- 12. The 2009/10 budget was influenced by two significant factors, the impact of the economic downturn and the increase in Concessionary Travel costs. In setting the budget for 2009/10 it was agreed that general balances would be used as a short term measure, pending the grant distribution review and lobbying by to get the distribution mechanism changed. It was estimated that a sum of around £273,000 would be needed from balances to fund the impact of the economic downturn and around £234,000 to finance the additional Concessionary Travel costs.
- 13. The budget also included challenging targets for the Council's main income streams despite adjustments being made to the 2009/10 budgets to reflect the downturn in the economy.

CURRENT FORECAST POSITION

- 14. Appendix 1 shows the summary forecast position for the Council based upon actual spending in the first nine months of the financial year, adjusted for future spending based upon assumptions regarding vacancies and service delivery. No individual service directorate figures are attached. These are available for inspection in the Members Room. Please note that for continuity and ease of analysis the figures are presented using the Councils previous directorate structure. This will change to the new three directorate structure for the 2010/11 financial year.
- 15. In my quarter 2 report (end of September), I advised on the projected outturn for 2009/10, which outlined a forecast deficit of £42,000 based on monitoring information at the end of

September. I advised that no action was required as I anticipated the cash spending target set in the budget would be achieved by the end of the financial year. The forecast has now been updated to include income and expenditure to the end of December and the revised outturn position is detailed in Appendix 1. The forecast shows a change from the position reported in September with a forecast underspend of around £169,000 against the budget.

The significant movements since my last report are shown in the table below. Further details are contained in the service unit analysis available in the members' room:

Table 1 – Significant Variations from the last monitoring report

	£'000
Expenditure	
Award of costs – Planning Applications	(18)
Core Funding	(15)
Asset Maintenance/Repairs	46
Income	
Planning Application Fees	(63)
Housing & Planning Delivery Grant	(53)
Car Parking Fees income	23
Cemetery Income	30
Net Financing Transactions	(137)
Other minor forecasts	(24)
Net Movement	(211)

16. In addition to the variances outlined above, significant savings have been generated over the last quarter as a result of directorate restructures and other vacant posts. This has resulted in contributions towards the Corporate Savings target in the sum of £168,000 in the quarter enabling the full target for the year to be met by the end of the third quarter.

The main savings achieved are analysed by directorate as £90,000 from Business Directorate, £30,000 from People Directorate, £22,000 from The Chief Executives Office, and £26,000 from other directorates.

17. Clearly the most significant change is the position regarding Net Financing Transactions. The 'Net Financing Transactions' budget consists of the provision to repay borrowing, plus interest payable on external borrowing, less interest receivable on cash balances invested. Over recent months the Council's cash flow position has remained positive and as a result has reduced the Council's need to borrow cash. The conclusion of the final accounts audit of the accounting treatment on repayment of borrowing for the new recycling containers has also meant that the provision for borrowing can be reduced in 2009/10. This together with additional interest receivable in the year has generated a significant saving to the Council of around £137,000 for the current year.
18. The other significant change outlined in the table above is the additional income generated from Planning Application Fees. This year has seen a significant increase in fee income

over and able the budgeted amounts despite the difficulties in the current economic climate. The current forecast estimates that income for the year will be around £600,000 compared to the budget of £401,000. The impact has been lessened and offset by an equally significant reduction in building control fees.

It is not possible to say if that these levels will be maintained over the longer term?

19. Another major change to report is the additional Housing and Planning Delivery Grant available for revenue purposes in the current year. The 2009/10 budget was set on the understanding that use of the grant received from the Department for Communities & Local Government would be split between revenue and capital. This was in line with the allocation for 2008/09 which was awarded on the basis that 67.5% would be used for revenue purposes and 32.5% for capital.

The DCLG have recently confirmed however that there is no capital element for the grant allocation for 2009/10 which means the full grant of £154,969 can be used to finance revenue activity, resulting in an additional £52,969 revenue income in the current year. As there was no planned or committed capital scheme funded by PDG, the increase will be taken to revenue.

20. One area that has been highlighted in previous monitoring reports is the shortfall in Car Parking fee income. Income levels have continued to remain below the levels anticipated in the budget over the third quarter and as a result the forecast deficit has increased by £23,000. The budget for 2009/10 was set at £858,000. The latest forecast for actual fee income received is £750,000 a shortfall of £108,000.

There are several possible causes for the downturn in revenue this year. This could be as a result of customer resistance to pricing, the increased take up in the Concessionary Travel scheme or just down to the current economic climate. Whatever the cause, it is likely that income levels will remain under pressure for some time.

21. Another of the Council's income streams that is currently forecasting a shortfall against budget is Cemetery income from interment and grant of right of burial fees. Income levels are significantly down on last year and the current forecast for 2009/10 is for a deficit of around £30,000. This position is currently under review to establish what the impact is likely to be for future budget years.

22. One issue that was highlighted in the September monitoring report was the potential award of costs in respect of a Planning Application appeal from Wainhomes regarding a site at 605 Preston Road. The likely cost of the appeal and legal costs was estimated to be around £18,000 but I am pleased to report that the appeal has subsequently been withdrawn and these costs will no longer be incurred.

23. One area closely being monitored at present is the cost of asset maintenance and repairs. There are various forecast for work done in areas such as road repairs at Duxbury Jubilee Park, work done at Astley Park Coach House, replacing heaters at Chisnall Hall Playing Fields and installing a new water pump at the Town Hall. There is also the potential cost of installation of extra security measures at the Council's Admin buildings which could total as much as £30k for improved external and internal security and as a result of these and other works completed in the year the forecast is for an overspend of around £46,000 in total.

24. The greatest potential impact on the Council's year-end position is likely to come from Concessionary Travel. As indicated in my last monitoring report, bus operators have yet to agree the new reimbursement rates for 2009/10. The bus operators had offered a flat rate of 61% with the Lancashire Leaders Group rejecting this offer and making a final counter offer of 59.5%. The bus operators have yet to give their response to that offer. However a meeting with the operators has been scheduled for 11 February and the

operators have indicated that they wish to agree an arrangement for both 2009-10 and 2010/11.

The outturn cost of the 2009/10 scheme will be determined by the eventual reimbursement rate and additional cost rates, agreed by negotiation with operators or by the DfT appeal process, together with any changes in levels of usage and fare changes.

Provisional usage data and cost information has now been received for the period April to December 2009. Based on the operators offer rate of 61% and a seasonally adjusted usage basis, initial indications are that the forecast outturn costs for 2009/10 will be around £1,268,000 which equates to around £70,000 below budget. As these figures are only indicative at this stage and are subject to various influencing factors, the predicted underspend has been excluded from the overall forecast outturn for the Council at this stage. The recent cold spell is also likely to have impacted on demand and this should help to reduce costs further and ease the impact on the use of general balances.

25. One other issue that Members should be aware of is the Council has made claim against HM Revenue & Customs for the reclaim of VAT paid in earlier years. This item was highlighted in my report on the year end accounts for 2008/09 to the Audit Committee. HMRC has received a significant number of backdated overpaid VAT and has already repaid £1.5bn with £4.8bn set aside for repayments. The claims relate to a decision by the HMRC in 1997 to only refund overpayments of VAT backdated for up to three years, where previously this had been six years. This was challenged and the three-year cap was thrown out following a legal battle that went to European judges and the House of Lords.

In making the claim the Council has worked with Price Waterhouse Coopers on a no win no fee basis.

The following table gives current details of the claim:

	Comment	Disputed £'000	Council's Recovery £'000
Culture	Agreed and paid	0	21
Sports Coaching	Unresolved issues	72	
Leisure	Largely agreed but not yet paid	100	524
Total		172	545

The culture claim has been agreed and paid. The coaching claim is disputed and unresolved. The Leisure claim has been largely agreed, but no payment will be made until resolution of the total leisure claim.

The claim figures shown further include simple interest. Compound interest has been claimed and could increase the claims by up to £240k, but no account has been taken off this potential sum the Council may receive.

WORKING BALANCES

26. Set out below for Members information is a summary of the working balances position, made up of balances in hand and forecast changes.

	£'000
General Fund Balance outlined in Appendix 1	1,262
VAT Recovery	545
Parkwise Account 2008/09	59
Icelandic investment impairment	(310)
Forecast General Fund Balance	1,556

In my report to the Executive Cabinet of 13 August I highlighted the ongoing discussions with Lancashire County Council regarding the use and application of marginal off-street parking income on the Parkwise account. It is the Council's view that the recording of this income has not been treated correctly in the account and the amount owing to the Council if the correction in treatment is backdated for previous years could be as much as £330,000 in total. The total due to the Council for 2008/09 has now been agreed in the sum of £58,623.

One other issue that will impact on balances is the result of the application to capitalise the Icelandic investment impairment. As the application has been unsuccessful the impact on balances is estimated to be around £310,000. early indications are that the majority of applications for capitalisation have been required as the key criteria was that extreme financial hardship must be demonstrated as a result of not being able to capitalise the impairment.

IMPLICATIONS OF REPORT

27. This report has implications in the following areas and the relevant Directors' comments are included:

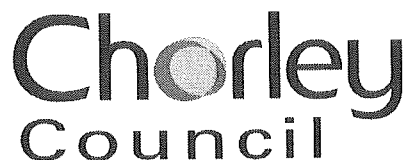
Finance	✓	Customer Services	
Human Resources		Equality and Diversity	
Legal		No significant implications in this area	

28. The financial implications are detailed in the body of the report.

GARY HALL
DIRECTOR OF TRANSFORMATION

There are no background papers to this report.

Report Author	Ext	Date	Doc ID
Gary Hall	5480	27/01/10	



Report of	Meeting	Date
Director of Transformation (Introduced by the Executive Member of Resources)	Executive Cabinet	18 February 2010

2010/11 BUDGET PRINCIPLES

PURPOSE OF REPORT

1. To advise members of the current forecast position for 2010/11 based upon the latest available information.
2. To advise members of the aspirations of the Executive Cabinet in relation to the 2010/11 budget.

RECOMMENDATION(S)

3. That the information and budget principles be approved for consultation/discussion.

EXECUTIVE SUMMARY OF REPORT

4. This report summarises the progress being made towards presenting the Executives proposal for the 2010/11 budget following the confirmation on 28 January 2010 of the final funding figures from government. The analysis shows that after accounting for volume changes eg changes in expenditure and income not associated with policy changes, the Council would have required further saving of £747k to balance the budget in 2010/11. Decision made by the Executive during this year has resulted in that savings target being achieved. Consequently the forecasts are that for the 2010/11 budget is balanced. The budget framework to be adopted by the Executive in constructing its budget and which is currently being finalised will be built on the following principles:

- Containing Council Tax increases
- Protecting businesses from the ongoing impact of the recession
- Continuing to provide value for money
- Protecting front line services
- Preparing for the future and the uncertainty over public finances

REASONS FOR RECOMMENDATION(S)

(If the recommendations are accepted)

5. To update members of the current budgetary forecast position in 2010/11 in advance of the budget setting Council meeting to be held on 2 March 2010.

ALTERNATIVE OPTIONS CONSIDERED AND REJECTED

6. Not applicable.

CORPORATE PRIORITIES

7. This report relates to the following Strategic Objectives:

Put Chorley at the heart of regional economic development in the Central Lancashire sub-region		Develop local solutions to climate change.	
Improving equality of opportunity and life chances		Develop the Character and feel of Chorley as a good place to live	
Involving people in their communities		Ensure Chorley Borough Council is a performing organization	✓

BACKGROUND

8. In previous years the current Executive Cabinet have been able to present their proposed budget prior to the budget setting meeting at Council. However the ability to do this for 2010/11 has been restricted due to the uncertainty regarding the funding of the concessionary travel scheme. The consultation for a revised distribution mechanism for the funding concluded at the end of December 2009. Confirmation of the sums to be received by Chorley Council was received at the end of January 2010. As the sums involved are significant it has not been possible for the Executive to consider and present its options in the normal way.
9. Given that certainty has now been removed the budget package will be available for debate at the future Council meeting on 2 March 2010.
10. However, the Executive are still keen to seek views on their overall approach to the next year budget and has been consulting on the Budget Principles to be adopted through local press. The Overview and Scrutiny Committee to be held on 15 February 2010 has had the opportunity to discuss and comment on the following principles. A further public consultation is also taking place on those principles.

Budget Principles

11. Set out below are the key principles which the Executive will seek to adopt in constructing it's budget for 2009/10.

Council Tax

12. The Executive have as an overriding principle of each of it's budgets over the last three years aimed to contain Council Tax increases. In 2006 Council Tax was frozen, and the average increase over the financial year 2007/08 to 2009/10 has been 1.4%.
13. **For 2010/11 the Executive will be looking to continue this approach and keep any Council Tax increase as low as possible.**

Protecting Business in Chorley

14. Again over subsequent budgets the Executive have aimed to protect business in Chorley by where ever possible restricting increase in car parking charges and market rents, despite this source of funding being a key increase stream for the Council. **For 2010/11 the Executive will again aim to protect wherever possible local businesses.**

Providing Better Value Services

15. The Executive approach has traditionally, been to provide value for money to the tax payer of Chorley. The efficiencies and savings made historically and the recent use of resources and organisational assessment score provide some evidence that has been achieved successfully.
16. **Over the coming financial planning period 2010/11-2012/13 this approach will be continued.**

Protecting Frontline Services

17. The Executive is clear on this point that savings and efficiencies should wherever possible come from managerial and administrative costs, rather than frontline service.
18. **The approach for 2010/11 will be no different, and the series of restructuring undertaken recently continues this approach.**

Maintaining Frontline Services

19. As the overarching budget approach has been to reduce managerial and administration costs, by design the budget for 2010/11 will look to maintain spending in key priority areas which will mean:
 - Helping to continue to fund the provision of 22 PCSO's in the borough.
 - Continuing to provide free swimming and the Get Up and Go activity programme.
 - Investing in partnership working to help reduce teenage pregnancy, alcohol harm and to encourage active lifestyle.
 - Working to help reduce unemployment in the area.
 - Investing in solutions to reduce the Council's carbon footprint.
 - Improving the Town Centre.
 - Continuing to invest in and provide more affordable homes.
 - Providing street pastors and play rangers to help reduce anti-social behaviour.
 - Completing the building of the Buckshaw railway station.

Preparing for the Future

20. Post 2010/11 the state of the public finances and hence the support the Council will receive from Government is uncertain. Current forecasts indicate there may be cuts in government support rather than any increases? The scale of these reductions in grant is unclear, but could mean a cut of between 10-12% over the next spending period 2011/12 – 2012/13 which will make life very different for local authority budgets. In addition to this the Pension Fund triennial review will become effective from April 2011 and the effects of the recession will continue to impact on local authority budgets for some time.

- 21. The 2010/11 budget will therefore with this in mind look to prepare the Council for difficult financial time ahead.

Updated Budget Forecasts 2010/11

- 22. Set at in Appendix A is a summary of the budget forecasts for the next financial year 2010/11. Based upon a continuation budget with no further policy change, the key movements between the two financial years 2009/10 and 2010/11 is also shown.
- 23. The analysis shows that the Council's cash budget of £15.477m will be reduced to £15.040m for 2010/11 as a result of the savings achieved. This represents a reduction of 0.437 or a 2.8% year on year.

Budget Consultation

- 24. The Overview and Scrutiny Committee have had the opportunity to scrutinise this budget principles paper and their feedback will be reported verbally to this meeting. Consultation will take place with the business community through the Chamber of Trade through a online consultation with 300 members of the Citizens Panel.

IMPLICATIONS OF REPORT

- 25. This report has implications in the following areas and the relevant Corporate Directors' comments are included:

Finance	✓	Customer Services	
Human Resources		Equality and Diversity	
Legal		No significant implications in this area	

Financial implications are indicated in the body of the report.

GARY HALL
 ASSISTANT CHIEF EXECUTIVE (BUSINESS TRANSFORMATION AND IMPROVEMENT)

There are no background papers to this report.

Report Author	Ext	Date	Doc ID
Gary Hall	5480	3 February 2010	

Analysis of Budget Variations 2009/10 - 2010/11

	2009/10 £000	2010/11 £000
Cash Base Budget Requirement	14,817	15,016
Movements:		
Inflation	156	41
Pay	162	68
Pensions	163	125
Non-Pay	70	25
Contractual	24	(43)
Income	108	90
Increments		
Revenue Effects of the Capital Programme		
Volume - Income	70	(174)
Volume - Expenditure	112	(6)
Investment		
Rebasing of Base Budget	163	
Savings Achieved for 2009/10	(254)	
Savings Proposals	(748)	-
Directorate changes from Dec Draft	244	
Contingency:		
- Management of the Establishment	(70)	110
Directorate & Corporate Cash Budgets	15,016	15,252
Savings Achieved for 2010/11		
Corporate Services Restructure		(220)
Senior Management Restructure		(443)
Contracts		(74)
Other Savings		(10)
Directorate & Corporate Cash Budgets	15,016	14,505
Net Financing Transactions:		
- Net Interest/Premiums/Discounts	103	71
- MRP less Commutation Adjustment	358	464
Total Expenditure	15,477	15,040
Financed by:		
Council Tax - Borough	(6,305)	(6,320)
Parish Precepts	594	594
Council Tax Parishes	(594)	(594)
Aggregate External Finance	(8,358)	(8,487)
LAA Reward Grant	(150)	(150)
Area Based Grant	(23)	(29)
LABGI Grant	(150)	(75)
Collection Fund Surplus	16	20
Use of General Balances	(273)	-
Use of General Balances (Concessionary Travel)	(234)	
Total Financing	(15,477)	(15,040)
Net Expenditure	(0)	(0)
Analysis of Net Expenditure (Budget Gap)		
Net Expenditure in Year	(0)	(0)

Key Assumptions	2010/11 %/£
Pay Award	0.5%
Increase in Pension Contribution	1.0%
Increase in Grant Settlement	£129k
Increase in Council Tax	0%
Performance Reward Grant	£150k
Housing & Planning Delivery Grant	£102k

BUDGET UPDATE			
Variances from 2009/10 Budget	£'000	£'000	Comments
1) External Factors			
Concessionary Travel Grant/Pooling Adj.	(426)		Redistribution of grant agreed for 2010/11.
Increase in Government Settlement	(129)		Represents a 1.5% increase from 2009/10.
		(555)	
2) Savings Achieved			
Corporate Services Restructure	(220)		In line with report to Executive Cabinet 3/12/09.
Senior Management Restructure	(443)		In line with report to Executive Cabinet 12/11/09.
Energy saving on Indoor Leisure contract	(20)		Various energy saving measures, eg, insulation of the pool during non use hours.
Rephasing of ISP contract with LCC	(15)		Higher implementation costs resulted in lower ongoing revenue costs.
Other contract savings	(22)		Various minor savings achieved across directorates.
Corporate Policy Consultancy	(12)		Reduced budget provision required as work done internally.
BT ESP8 lines move to broadband	(5)		Continuation of the programme to replace expensive data connections
Pre-Application planning advice	(10)		Introduction of new charges as per report.
		(747)	
3) Volume Changes			
Employees			
Pay	(7)		Reduced pay award in 2009/10, and 0.5% provision for 2010/11.
Pensions	60		Increase in pension rate by 1% for 2010/11
Increments	90		
		143	
Other Expenditure			
Non Domestic Rates	31		Increase in rates resulting from revaluations, in particular car parks.
Markets Refuse Contract	16		Market Walk have increased the refuse collection cost
Local Development Framework	50		This is the additional contribution required to LDF reserve for 2010/11.
Liberata Contract	13		Inflationary increase on contract.
Duxbury Park Coach House Rent	12		
Lancashire Economic Partnership subscriptions	(14)		LEP annual subscriptions have reduced by £14k
External Audit (incl. Shared Services & IFRS)	13		Increased costs to cover Shared Services and IFRS issues.
Shared Assurance Services recharge	(12)		Reduction in recharge to SRBC in line with SRBC draft budget.
IT costs for Gov. Connect Security	12		New requirement for annual security testing to enable us to use Gov Direct
Fuel (Petrol/Diesel)	22		Budget now brought into line to reflect price increases over last two years.
		143	
Income			
Reduction in Parking Fees/Permits income	119		To bring in line with forecast income in 2009/10 as reported in budget monitoring.
Reduction in Planning/Building Control Fees income	43		Budget rebased in line with 2008/09 income volumes and 2009/10 forecast.
Saving from Shared Enforcement Officer not achieved	23		Proposed saving not achieved as shared service not yet implemented.
Saving from Shared Head of Revs & Bens not achieved	25		Proposed saving not achieved as shared service not yet implemented.
Income from Street Naming/Numbering not achieved	10		Slowdown in housing developments, budget phased to rise back over next 3 years.
Land Charges income (increase in fees)	(19)		Increase in fees in line with report to Cabinet.
Cotswold House Rents/Voids	(28)		Increased voids based on 2008/09 void rates
Cotswold House - Lifeskills Grant	(20)		Supporting People Grant to fund Life Skills coordinator post
Reduction in Recharges to Capital Schemes	50		Recharges adjusted to reflect Capital programme.
Shared Financial Services recharge	(17)		Inflationary increase in recharge to SRBC for 2010/11.
Buckshaw Waste Collection charges	(14)		Budget rebased in line with 2008/09 income and 2009/10 forecast.
Astley Park Catering	(12)		Contract with Southcott Catering Ltd allows for increased rent to year 5.
Housing & Planning Delivery Grant	(25)		Extra revenue income as no capital / revenue split based on 09/10 announcement.
Cemetery Income	15		Budget rebased in line with 2008/09 income and 2009/10 forecast.
Benefits Admin Subsidy Grant	19		Further 2.5% reduction in grant awarded by DWP for 2010/11.
		169	
Other Changes			
Net Financing	74		Increased cost of borrowing predominantly for recycling and reduction in investment interests
Housing & Council Tax Benefits	68		Based on predicted increase in volume and rent levels for 2010/11.
Reduction in use of LABGI grant	75		Reduced use of grant for 2010/11 as outlined in 2009/10 budget papers.
Increase in Council Tax Base	(19)		Represents 0.3% increase in Council Tax Base for 2010/11.
Reduction in Management of the Establishment savings target	50		Reduction based on reduced number of Senior Management posts.
Reduction in Procurement/Efficiency savings target	60		Significant savings achieved over recent years therefore unlikely to maintain.
Additional Area Based Grant	(6)		Additional grant awarded for 2010/11.
Use of General Balances 2009/10	273		No use of general balances for 2010/11
Use of General Balances (Concessionary Travel) 2009/10	234		No use of general balances for 2010/12
Deficit on Collection Fund	20		
Other minor variances	18		
		847	
Budget Gap 2010/11	0	0	