

EXECUTIVE CABINET

THURSDAY, 19TH JANUARY 2017, 6.00 PM
COUNCIL CHAMBER, TOWN HALL, CHORLEY

AGENDA

APOLOGIES FOR ABSENCE

1 **MINUTES OF MEETING THURSDAY, 8 DECEMBER 2016 OF EXECUTIVE CABINET**

(Pages 5 - 12)

To confirm the minutes of the Executive Cabinet meeting held on 8 December 2016 (enclosed)

2 **DECLARATIONS OF ANY INTERESTS**

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

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

3 **PUBLIC QUESTIONS**

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

4 **EXCLUSION OF THE PUBLIC AND PRESS**

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

By Virtue of Paragraph 1: Information relating to any individual.

Condition:

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

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

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

Condition:

Information is not exempt if it is required to be registered under-

The Companies Act 1985

The Friendly Societies Act 1974

The Friendly Societies Act 1992

The Industrial and Provident Societies Acts 1965 to 1978

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

The Charities Act 1993

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

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

Condition:

Part 3 of the Local Government Act 2000 in reaching any finding on a matter referred under the provisions of section 60(2) or (3), 64(2), 70(4) or (5) or 71(2) of that Act.

Condition:

Where a meeting of a standards committee, or a sub-committee of a standards committee, is convened to consider a matter referred under the provisions of section 60(2) or (3), 64(2), 70(4) or (5) or 71(2) of the Local Government Act 2000.

ITEM OF EXECUTIVE LEADER AND EXECUTIVE MEMBER (ECONOMIC DEVELOPMENT AND PARTNERSHIPS) (INTRODUCED BY COUNCILLOR ALISTAIR BRADLEY)

5 MARKET WALK EXTENSION - PRE CONSTRUCTION SERVICES AGREEMENT

(Pages 13 - 18)

Report of the Chief Executive (enclosed)

**ITEM OF EXECUTIVE MEMBER (CUSTOMER AND ADVICE SERVICES)
(INTRODUCED BY COUNCILLOR GRAHAM DUNN)**

- 6 **PROPOSED CHANGES TO THE WASTE COLLECTION SERVICE** (Pages 19 - 28)

Report of the Director of Customer and Digital (enclosed)

**ITEM OF DEPUTY EXECUTIVE LEADER AND EXECUTIVE MEMBER
(RESOURCES) (INTRODUCED BY COUNCILLOR PETER WILSON)**

- 7 **APPROVAL FOR THE CONTRACT AWARD PROCEDURE AND
EVALUATION CRITERIA FOR THE PROCUREMENT AND
DISTRIBUTION OF WASTE RECEPTACLES** (Pages 29 - 32)

Report of the Director of Customer and Digital (enclosed)

- 8 **APPROVAL FOR THE CONTRACT AWARD PROCEDURE AND
EVALUATION CRITERIA FOR TRADE WASTE COLLECTIONS
FROM COUNCIL BUILDINGS** (Pages 33 - 36)

Report of the Director of Customer and Digital (enclosed)

- 9 **COMMUNICATIONS AND EVENTS TEAM STAFFING REVIEW** (Pages 37 - 46)

Report of the Director of Policy and Governance (enclosed)

**ITEM OF EXECUTIVE MEMBER (COMMUNITY SERVICES) (INTRODUCED
BY COUNCILLOR BEV MURRAY)**

- 10 **REVIEW OF COMMISSIONING AND THE PROCESS FOR 2017/18** (Pages 47 - 50)

Report of Director of Policy and Governance (enclosed)

THE MEETING WILL BE RE-OPENED TO THE PUBLIC AT THIS POINT

**ITEM OF DEPUTY EXECUTIVE LEADER AND EXECUTIVE MEMBER
(RESOURCES) (INTRODUCED BY COUNCILLOR PETER WILSON)**

- 11 **COMMUNITY INFRASTRUCTURE GOVERNANCE ARRANGEMENTS
AND ALLOCATION OF FUNDING TO INFRASTRUCTURE** (Pages 51 - 66)

Report of the Director of Business Development and Growth (enclosed)

- 12 **DRAFT BUDGET AND SUMMARY POSITION OVER THE MEDIUM
TERM 2016/17**

Report of the Chief Finance Officer (enclosed)

**ITEM OF EXECUTIVE MEMBER (COMMUNITY SERVICES) (INTRODUCED
BY COUNCILLOR BEV MURRAY)**

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| 13 | PERMISSION TO CONSULT ON THE REVISED PRIVATE SECTOR HOUSING ASSISTANCE POLICY

Report of the Director of Early Intervention and Support (enclosed) | (Pages 67 - 96) |
|
ITEM OF EXECUTIVE MEMBER (PUBLIC PROTECTION) (INTRODUCED BY COUNCILLOR PAUL WALMSLEY) | | |
| 14 | DRAFT CENTRAL LANCASHIRE EMPLOYMENT SKILLS SUPPLEMENTARY PLANNING DOCUMENT (DECEMBER 2016)

Report of the Director of Business Growth and Development (enclosed) | (Pages 97 - 116) |
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ITEM OF EXECUTIVE MEMBER (STREETSCENE SERVICES) (INTRODUCED BY COUNCILLOR ADRIAN LOWE) | | |
| 15 | STREETSCENE STRATEGY 2017

Report of the Director of Customer and Digital (enclosed) | (Pages 117 - 134) |
| 16 | ANY URGENT BUSINESS PREVIOUSLY AGREED WITH THE CHAIR | |

GARY HALL
CHIEF EXECUTIVE

Electronic agendas sent to Members of the Executive Cabinet Councillor Alistair Bradley (Chair), Councillor Peter Wilson (Vice-Chair) and Councillors Beverley Murray, Paul Walmsley, Adrian Lowe and Graham Dunn.

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

To view the procedure for public questions/ speaking click here

<https://democracy.chorley.gov.uk/documents/s67429/Appendix%203%20Standing%20Orders%20Aug%2016.pdf> and scroll to page 48

To view the procedure for “call-in” of Executive Decisions click here

<https://democracy.chorley.gov.uk/ieListMeetings.aspx?CId=117&Year=0>

**MINUTES OF****EXECUTIVE CABINET****MEETING DATE****Thursday, 8 December 2016****MEMBERS PRESENT:**

Councillor Alistair Bradley (Chair), Councillor Peter Wilson (Vice-Chair) and Councillors Beverley Murray, Paul Walmsley, Adrian Lowe and Graham Dunn

MEMBER RESPONSIBLE:

Councillors Danny Gee, Kim Snape and Alistair Morwood

COUNCIL CHAMPIONS:

Councillors Gordon France, Margaret France, Margaret Lees and Marion Lowe

OFFICERS:

Gary Hall (Chief Executive), Jamie Carson (Director (Early Intervention and Support)), Chris Sinnott (Director (Policy and Governance)), Asim Khan (Director (Customer and Digital)), Chris Moister (Head of Legal, Democratic & HR Services) and Dianne Scambler (Democratic and Member Services Officer)

APOLOGIES:

None

OTHER MEMBERS:

Councillors Jane Fitzsimons, Tom Gray, Roy Lees, June Molyneaux, Richard Toon, Paul Leadbetter, Greg Morgan, Sheila Long and John Walker

16.EC.33 Minutes of meeting Thursday, 17 November 2016 of Executive Cabinet

Decision: The minutes of the Executive Cabinet meeting held on 17 November 2016 were confirmed as a correct record for signing by the Executive Leader.

16.EC.34 Declarations of Any Interests

There were no declarations of any interest.

16.EC.35 Public Questions

A number of questions were submitted on behalf of the Protect Chorley Hospital from Cuts and Privatisation against Item 3a on the agenda: NHS Sustainability and Transformation Plans.

A written response to each of the thirteen questions was provided by The Executive Leader and circulated at the meeting as follows:

It is important to note through the responses to all of the questions that Chorley Council does not have a formal role in the development or agreement of Sustainability and Transformation Plans, nor any of the plans that could be associated with them (such as commissioning strategies)

They are primarily NHS documents – requested from health economies from NHS England. The focus in the NH England planning guidance states that the NHS should take a system wide view of change (including local government). However, its focus is then on social care when it refers to working with local government. This means that attention is focussed on the county council, particularly through the health and wellbeing board, which is managed and led by the county council.

However, even with these caveats, Chorley Council has stated that it wants to protect the interests of its residents through any changes to public services. This means that we will and have lobbied other organisations where we think change is needed.

Also it should be noted that the responses to these questions are based on the agreed position of the entire Council, and not representative of any individual Councillor or Group. Some points raised have not been subject to decisions of the full Council and the attendant due process, and are proffered in a spirit of openness and transparency. Therefore some current Council answers and position may be subject to change by future due process.

1. When did you first become involved in the Commissioning, Sustainability, and Transformation plans?

Chorley Council's Chief Executive has acted as the representative of the Lancashire district councils in the development of the STP. As such, he was first involved in the STP process in January 2016. He has been involved as a representative of district councils, but without any decision making power, with a particular focus on the prevention work stream.

Councillors have not had any direct involvement in the sustainability and transformation plans, other than to be invited and attend engagement events for Our Health, Our Care in November 2016.

2. What Health and Social Care meetings are the Council involved in and could you please list the organisations, and how often they meet?

The Council is represented on the county council's health scrutiny committee in a non-voting capacity by Councillor Hasina Khan. She also took part in the recent review undertaken by the committee into the closure of the Emergency Department at Chorley Hospital. The membership of the Committee can be found on the county council's website:

<https://council.lancashire.gov.uk/mgCommitteeDetails.aspx?ID=182>

The Chief Executive chairs the health and wellbeing partnership for central Lancashire. This partnership meets on a quarterly basis. The organisations represented on the partnership are; Chorley Council, South Ribble Borough Council, Preston City Council, Ribble Valley Borough Council, Lancashire County Council Chorley and South Ribble and Greater Preston CCGs, Lancashire Care Foundation Trust and Lancashire Teaching Hospitals.

The Chief Executive of Chorley Council sits on the Lancashire Health and Wellbeing Board as a representative of Lancashire district council Chief executives. The membership of the board can be found on the county council's website:

<https://council.lancashire.gov.uk/mgCommitteeDetails.aspx?ID=825>

The Council Leader was appointed as the Council representative on the LTHTR Board of Governors in ay this year after we lobbied to have District Council representation across central Lancashire reinstated after it was removed a number of years ago.

3. Where can we find the minutes of these meetings?

The minutes of the county council's health scrutiny committee can be found on the county council website.

The minutes of the central Lancashire health and wellbeing partnership are not published, but we can make them available if you would like.

The minutes of the central Lancashire health and wellbeing board can be found on the county council's website.

The minutes of the Lancashire Teaching Hospitals council of governors are available here:
<http://www.lancsteachinghospitals.nhs.uk/council-of-governors-papers>

4. Who attends on behalf of the council and what is their remit?

The representation of the council is set out in the answer to the earlier question.

Where the Chief Executive represents other district council Chief executives, his remit is to provide representation for other district Chief Executives, and to provide them with updates on the work being undertaken. In this capacity, he is not representing Chorley Council as a single organisation.

5. Is your role to help develop publicly owned and democratically accountable and controlled Health and Social Care facilities?

As a district council, Chorley Council does not have any role in the control, commissioning or provision of health and social care facilities.

However, the council has been proactive in giving its views on health and social care facilities, most notably the closure of the Emergency Department at Chorley Hospital and the letting of the contract for the Urgent Care Centre.

In addition, the council continues to work towards wider public service reform, including seeking to work towards changed local government structures to make services more sustainable. In that decision, the council was clear that the reason for wanting change is to make public services sustainable, while retaining community identity and local accountability.

6. Does the Council have a plan or policy for the future of Health and Social Care?

No, although the council has set out its broad ambitions in its future governance models work and at its recent full council meeting.

7. Does the Council intend to be involved in co-commissioning?

Chorley Council doesn't have any role in commissioning. This lies with the county council.

8. Where is the money to invest in new facilities coming from?

The council is not involved in the provision of new facilities for health and social care.

9. Which cabinet member is responsible for overseeing and communicating with other Health and Social Care organisations and the public?

The Executive Leader has responsibility for Public Service Reform. The report to the Executive Cabinet tonight recommends that Councillor Hasina Khan will continue to take a role in representing the council with regard to health and wellbeing matters.

10. Do you intend to hold public meetings to inform the public of your policy, role and the changes that are proposed?

While the council is committed to engaging with the public, we have not got a role in the changes proposed within the STP. We will continue to make our buildings available to facilitate engagement events, and to support our residents in campaigns to protect their services.

11. Are your discussions part of the future devolved Governance of Local Government across Lancashire and south Cumbria?

Chorley Council is involved in the combined authority for Lancashire. This may involve a devolution proposal to government, but it is not yet at this stage. Any proposals will require the agreement of a meeting of full council.

12. Will these devolution plans be put before the public on whether they want devolution or not?

We would expect significant engagement of the public in respect of any devolution proposals before they were agreed.

13. At what point would you say you are unwilling to be involved in the STP's?

As a council, we are not currently involved in the STP process. We will continue to work to ensure plans achieve changes that need to happen, but this also means making public services better at meeting the needs of our residents and more democratically accountable to local areas.

A spokesperson for the Protect Chorley Hospital from Cuts and Privatisation who was present at the meeting spoke of their concerns of the STP process and provided a background of the main issues before the Cabinet debated the responses given.

16.EC.36 NHS Sustainability and Transformation Plans

The Executive Leader presented the report of the Director of Policy and Governance that provided an update on the recently published Sustainability and Transformation Plan (STP) for Lancashire and South Cumbria. It was this item that questions had been submitted against by a representative of the Protect Chorley Hospital from Cuts and Privatisation

The STP sets out the collective challenges facing health and social care across Lancashire and South Cumbria in the coming years. As previously reported to Council, the challenges are significant and relate to budgetary constraints against an increasing demand for services. The funding gap will reach £572 million by 2021 unless changes are made to the system.

The plan identifies the following key objectives that it aims to respond to:

- To set out a clear direction of travel for the unified health and care system in Lancashire and South Cumbria as the Five Year Forward View has across England.
- To achieve fundamental and measurable improvements in health outcomes.
- To reduce health inequalities across Lancashire and South Cumbria
- To achieve parity of esteem for mental health and physical health across Lancashire and South Cumbria.
- To ensure greater focus on ill-health prevention, early intervention and self-care where this improves outcomes.
- To ensure change is supported by a clear evidence base or an evaluation structure where evidence is not available
- To remove organisational or professional boundaries that get in the way of progress.
- To make maximum use of new technology when this will improve the quality of care provided.

The plan identifies a series of priority areas for 2016 to 2021 and much of the focus of the STP appears to have similar ambitions to the work that the Council undertook on future governance models, particularly around improving on prevention, early intervention and improving community resilience.

The local Our Health, Our Care programme will be the key vehicle for changes within the local health economy, and Councillors along with the Chief Executive have been invited and have attended engagement events that have provided updates on the programme. It is however

important to note that the Council has no role in approving the STP and that the plans are part of the NHS planning guidance.

The Council had recently reviewed and reiterated its position on public service reform and governance models at its Special Council meeting in November and is clear in its desire to maintain and protect public services and ensuring that they retain a local identity and improve democratic accountability. The Council through its Executive Leader and Public Services Reform Board would continue to press for public service reform that maintains and improves locally accountable public services.

Decision:

- 1. The contents of the report were noted.**
- 2. Approval that the Chair of Equalities and Well Being (in her role as Lead Member for Health and Wellbeing, Equality and Diversity) will provide updates to the Executive Cabinet and Council as the Sustainability and Transformation Plan develops further and the local Our Health, Our Care programme is published.**
- 3. Approval that the Executive Cabinet will continue to support local residents in their campaign to protect local health services.**

Reasons for Recommendation(s)

Development and changes in the local health economy affects Chorley's residents, and impact upon the Council's ambitions with regard to future governance models. It is therefore important that the Executive Cabinet receives updates on the STP.

Alternative options considered and rejected.

To not receive an update, would mean the Council not engaging in wider public service reform.

16.EC.37 Botany Bay Masterplan

The Executive Leader presented the report of the Chief Executive updating Members on the progress of the Council project to develop an Economic Masterplan for the Botany Bay Area.

The adopted Chorley Local Plan for 2012-2026 allocated the Botany Bay/Great Knowley Area as a sub-regional employment and mixed use site under policy EP2. Changes with that policy required the site to have a Masterplan, an acceptability of other forms of development to secure the delivery of the wider allocation including retail and housing. This was the second time that this area had been allocated in the Local Plan and if the site did not come forward in this plan period, it would have to be deallocated.

The project was listed as a corporate priority and has now been progressed with stakeholders. The report updated Members on the progress that had been made and presented a final draft for information. The Masterplan was policy and evidence led and reflected the aspirations of those Stakeholders that had signed up to a Memorandum of Understanding (MoU).

The Masterplan would be used to support any future planning application as evidence and would show how all the parcels of land within the allocation will contribute to the Local Plan. The costs of the Masterplan would be met from the site's various stakeholders and the carried forward investment budget. Any additional works regarding the improvements to the highway network would be met from the furthering key employment sites budget.

Members had concerns that current highways issues would increase if this site was developed and assurances were given that Highways England had already engaged with the Council to identify possible solutions to address these issues.

Officers were also asked to consider other issues that included the development of a Public Transport Plan to ease congestion and parking pressures, a park and ride facility, improvements to the Canal to provide a much improved leisure offer for the area and the undertaken of market testing should a retail development application be received as Members had concerns that any such development would affect the growth of the Town Centre.

Decision:

The report and draft illustrative Masterplan document at Appendix A was noted.

Reason(s) for recommendations:

Members cannot approve the proposed Masterplan as this will be a key consideration for any Planning Application and the Council should not do anything that may give the appearance of fettering any future decision.

Alternative options considered and rejected.

To take no action on progression of the Corporate Project.

16.EC.38 Elections and Electoral Registration Printing Procurement

The Executive Leader presented the report of the Chief Executive that sought approval of the proposed process for appointing a supplier for the printing of elections and electoral registration stationary. The report sought a departure for the Council's contract procedure rules by asking for permission to approach four suppliers directly.

A market testing exercise had been undertaken three years previously that had demonstrated best value and a waiver granted each subsequent year to reappoint the successful bidder

The quotes would be assessed in terms of both quality and cost for printing both elections and electoral registration printing and that the decision to award the contract would be taken by the Chief Executive in his role as Returning Officer.

Decision:

1. **The intention of the Elections and Electoral Registration Manager to seek a waiver from the Council's Contract Procedure Rules was noted.**
2. **Approval for a market testing exercise to be undertaken to enable the Council to demonstrate best value in retention to supply contracts for printing for elections and electoral registration.**
3. **Approval that the assessment of any quotations received for elections printing to be assessed on the basis of 70% quality and 30% cost.**
4. **Approval that the assessment of any quotations received for electoral registration printing be assessed on the basis of 60% quality and 40% cost.**
5. **Approval that the authority to award the contract be delegated to the Chief Executive in their role as Returning Officer.**

Reasons for recommendation(s)

It is necessary to undertake a market testing exercise to demonstrate best value. There are few experienced elections printers and so it is appropriate to approach them directly rather than do an open process.

Alternative options considered and rejected.

To continue with the current provider.

16.EC.39 Draft decision in response to proposal by BT to remove payphones

The Executive Member (Public Protection) presented the report of the Director of Customer and Digital that presented Members with the council's draft decision in response to the proposal by British Telecom (BT) to remove a number of public call boxes in the borough.

The Council had prepared the draft response to BT after a 90 day consultation period undertaken with the authority and local community and a response was given against each payphone as to whether to agree with its removal, object to the removal or whether the local community wished to adopt the box.

As part of the consultation process, BT is giving communities the opportunity to adopt a traditional red 'heritage' phone box and make them an asset that people will benefit from, such as a book store or a defibrillator station.

There are 30 payphones in the borough proposed for removal and a list of their location and usage over the past 12 months was appended to the report along with informed responses.

Decision:

1. **The report was noted.**
2. **Approval that the preparation and issuing of the Final Notification to BT and the Secretary of the State be delegated to the Director of Customer and Digital in consultation with the Executive Member with the portfolio for planning.**

Reasons for recommendation(s)

None

Alternative options considered and rejected

None

16.EC.40 Appointment of Consultants For Primrose Gardens and authorisation for the purchase of the St John ambulance building

The Executive Member (Customer and Advice Services) presented the report of the Chief Executive to provide an update on the commission of professional consultancy services for Primrose Gardens retirement living (extra care) scheme on Fleet Street and sought approval to award the contract to Pick Everard.

The report also confirmed the outcome of the negotiations regarding the sale of the St John Ambulance building to the Council as part of the land assembly for the development of Primrose Gardens Retirement living scheme.

Decision:

1. **Approval to award the contract for project management and quantity surveyor service for Primrose Gardens to Pick Everard under the Scape framework to a contract value of £144,000.**
2. **Approval of the acquisition of the St John Ambulance Hall with vacant possession for the capital sum of £188,500.**
3. **Authorisation be delegated to the Head of Legal, Democratic and Human Resources to prepare and execute the necessary legal documentation to complete the purchase of the St John ambulance Hall**
4. **Approval for the payment of £770 stamp duty plus the legal fees for St John on the condition that the sale is completed within eight weeks.**

Reasons for recommendation(s)

To enable the Primrose Gardens Project to continue and be delivered to timescales ensuring Eric Wright Construction deliver a high quality development with value engineering throughout the process to ensure costs are contained within budget.

Alternative options considered and rejected

None

16.EC.41 Exclusion of the Public and Press

Approval that the press and public be excluded for the following items of business on the grounds that they involve the likely disclose of exempt information as defined in Paragraph 3 of Part 1 of Schedule 12A to the Local Government act 1972.

16.EC.42 24-26 Gillibrand Street, Chorley

The Executive Member (Resources) presented the report of the Chief Executive that sought approval to the surrender of the existing lease of the above premises and the grant of a new 25 year lease to the Chorley Surgery Practice on terms provisionally agreed.

The surgery is now well established and has plans to improve the facility including the creation of a dispensing pharmacy within the property that will be open to patients and the general public.

Decision:

Recommendations approved.

Reasons for the recommendation(s)

The Council will secure occupation of the building until January 2042

Alternative options considered and rejected

The Council could continue with the existing lease; however the agreement does not offer the security of tenure required by the tenant to carry out alterations and investment in the property.

Chair

Date

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

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Report of	Meeting	Date
Director of Business Development and Growth (Introduced by the Executive Member (Resources))	Executive Cabinet	19 January 2017

GOVERNANCE ARRANGEMENTS FOR THE COMMUNITY INFRASTRUCTURE LEVY AND PROPOSALS FOR THE ALLOCATION OF RECEIPTS

PURPOSE OF REPORT

1. To provide an update on the governance and allocation of CIL infrastructure monies and seek approval for the proposals.

RECOMMENDATION(S)

2. To approve the methodology for assessing and allocating CIL Infrastructure receipts.
3. To approve the allocation £1,300,000 CIL capital infrastructure monies to the Chorley Town Centre enhancements /Flat Iron enhancements Market Walk project for spend in 2017/18.
4. To note the proposal for the governance of the 15% CIL receipts allocated to unparished areas of Chorley (Town Centre).
5. To note that a review of the CIL 123 List will be undertaken in early 2017 in order to remove obsolete projects and provide LCC with a full opportunity to propose new infrastructure projects, particularly education schemes for the allocation of CIL.

EXECUTIVE SUMMARY OF REPORT

6. The Community Infrastructure Levy (CIL) was introduced to simplify the process of calculating and collecting planning obligations and must be spent on infrastructure needed to support the development within the borough.
7. The Council adopted a CIL Charging Schedule in 2013. This required the application of CIL to new planning applications submitted following its adoption. It is a tariff based system based on square metre floor space. CIL is to be used to plug the gap on infrastructure projects which arise as a result of the scale of development required in the Council's Local Plan.
8. The infrastructure projects are included on the CIL Regulation 123 List which is required by the regulations and can only be amended following appropriate consultation. Only infrastructure projects on the list can be funded from the main CIL fund.
9. The CIL charging schedule rates applied to developments for CIL have been calculated by reference to this list and a broad test of viability across the Central Lancashire area. Any substantial changes to it will require the CIL charging schedule to be reviewed subject to an independent examination. There is a need to develop a framework as to how projects on the CIL 123 list will be assessed and how the CIL receipts will be allocated.

10. Given there is £1,549,338.68 of accumulated CIL receipts, it is appropriate to formalise a framework to decide how the money will be spent.

Confidential report Please bold as appropriate	Yes	No
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Key Decision? Please bold as appropriate	Yes	No
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Reason Please bold as appropriate	1, a change in service provision that impacts upon the service revenue budget by £100,000 or more	2, a contract worth £100,000 or more
	3, a new or unprogrammed capital scheme of £100,000 or more	4, Significant impact in environmental, social or physical terms in two or more wards

REASONS FOR RECOMMENDATION(S)

(If the recommendations are accepted)

11. To allocate the CIL Infrastructure fund in the way that it is intended and ensure the methodology of how it is allocation is transparent.

ALTERNATIVE OPTIONS CONSIDERED AND REJECTED

12. None

CORPORATE PRIORITIES

13. This report relates to the following Strategic Objectives:

Involving residents in improving their local area and equality of access for all	X	A strong local economy	
Clean, safe and healthy communities		An ambitious council that does more to meet the needs of residents and the local area	

BACKGROUND TO COMMUNITY INFRASTRUCTURE LEVY

14. The Community Infrastructure Levy was introduced in the Localism Act 2010. Its purpose was to provide some certainty to developers at an early stage what their likely contribution to local infrastructure costs would be upon development of certain sites. It also simplifies the planning process by reducing the need of for section 106 agreements, and importantly does not delay the commencement of development, unlike section 106 agreements.
15. The CIL is non-negotiable unlike section 106 agreements, and therefore enables more accurate forecasting of planning obligation income whilst also spreading the cost of infrastructure across all developments.

DEFINITION OF INFRASTRUCTURE

16. Infrastructure has to be physical items that are required for the operation of the area, and not simply contribute to its wellbeing. The legislation defines what is qualifying infrastructure as for the purposes of CIL as:

- “A charging authority must apply CIL to funding the provision, improvement, replacement, operation, or maintenance of infrastructure to support the development of its area” Regulation 59(1).
- The CIL Regulations define infrastructure as the meaning given in section 216(2) of the Planning Act 2008, as amended by Regulation 63. The list supplied by the Act includes, but is not exclusive to:
 - a. Roads and other transport facilities;
 - b. Flood defences
 - c. Schools and other educational facilities
 - d. Medical facilities
 - e. Sporting and recreational facilities and
 - f. Open spaces

THE CIL REGULATION 123 LIST

17. The CIL Regulation 123 list, also known as the infrastructure delivery schedule, itemises the essential strategic infrastructure necessary for the delivery of the core strategy.
18. The list includes the infrastructure the Council as a charging authority intends to part fund, or may part fund, through the use of CIL and is based upon the draft prepared when the charging schedule was submitted for examination by the Planning Inspectorate. The list was updated in April 2016 following consultation to remove items that had already been delivered by external partners and include additional schemes.
19. The Council’s infrastructure projects have been grouped into themes including Transport, Cycle Schemes, Health, Education and Public Realm/Green Infrastructure. The list also includes pan central Lancashire projects to be supported, which will serve the residents of Chorley, Bus Rapid Transport Routes for example.
20. Projects for education are included on the list as developer contributions are no longer sought from section 106 agreements and so require a partnership approach with the County Council. It is essential to ensure additional demand arising as a result of development growth is partially funded by CIL.
19. The CIL Regulation 123 list is available for inspection on the Council’s website.

REVIEW OF THE CIL REGULATION 123 LIST

20. The CIL Regulation 123 list is a living document and so requires updating periodically to ensure any new infrastructure is added, and that any projects which are no longer required or have been delivered are omitted.
21. Authorities may amend the regulation 123 list without revising their charging schedule, subject to appropriate consultation with statutory providers including expressions of interest and 4 weeks consultation. However, where a change to the regulation 123 list would have a very significant impact on the viability evidence that supported examination of the charging schedule, this should be made as part of a review of the charging schedule which will be subject to an independent examination.
22. A review of the CIL 123 list in addition to a full review of CIL is planned for 2017. A national panel has been tasked with undertaking a review of CIL and the recommendations of the panel are due to be reported to ministers shortly.
23. A review would enable partners, particularly LCC to propose new infrastructure projects for inclusion on the list, and potential allocation of CIL monies. This is important as LCC have suggested that there is a need for educational contributions to respond to the growing demand on school places in Chorley.

24. Clearly CIL infrastructure can be allocated for educational projects (for example school extensions) provided the projects are specified on the list and meet the criteria for allocation.

CIL CHARGING SCHEDULE

25. Chorley adopted a CIL charging schedule in September 2013. The CIL charge was calculated by reference funding deficit required to deliver the infrastructure contained on the regulation 123 list. The current charge for CIL on qualifying infrastructure is
- | | |
|-----------------------|----------|
| a. Dwelling Houses | £65 sq. |
| b. Convenience Retail | £160 sq. |
| c. Retail Warehouse | £40 sq.m |

However, these are subject to indexation, so currently the charges are circa £78, £193, and £48 respectively. The indexation fluctuates, so this can change on a weekly basis.

26. CIL is payable on commencement of development, and receipts are now starting to accrue.

ALLOCATING CIL EXPENDITURE

27. CIL receipts are split into 3 parts:

- a) administration expenses
- b) the neighbourhood portion
- c) CIL Infrastructure portion.

28. The CIL charging authority can charge up to 5% of CIL receipts for the administration of the CIL regime and the Council are using this in order to part finance the staffing costs for the Planning Obligations officers who run the scheme in addition to other planning obligations.

NEIGHBOURHOOD PORTION

29. The distribution of the neighbourhood portion of CIL is outlined in the Annual CIL Monitoring Report which is published on the Council website in December each year.
30. The CIL regulations require the CIL Charging Authority to pass 15% of CIL receipts collected within the neighbourhood area in which the development takes place, to the Local Council. The amount of the annual neighbourhood portion is capped at up to £100 per dwelling, plus indexation, within that neighbourhood area and therefore may be less than the 15%.
31. The Regulations are not as prescriptive on the spending of the Neighbourhood Portion and allow for it to be used for: The provision, improvement, replacement, operation or maintenance of infrastructure; or, anything else that is concerned with addressing the demands that development places on an area.
32. The neighbourhood portion should be paid to each respective Parish Council every 6 months by 28 October and the 28 April and these funds must be spent within 5 years.
33. Between 2014/15 and 2016/17 £288,070.20 has been paid to parished and non parished areas in neighbourhood CIL funding. Details of the Local Council CIL income and spend within each Parish are reported in the Local Council CIL financial report, which they must publish on their own website.

'CHORLEY PARISH' CIL INCOME

34. The regulations require that when an area where development occurs does not have a Parish/Civil/Town Council, and then the 15% share that would have been passed to those Civil Parishes is instead put into a separate pot to be used as though there is a Parish Council in place.
35. This is the case in Chorley, with Chorley North East, North West, South West, South East, and East, accumulating CIL receipts.
36. To date, Chorley Parish has in budget £60,034.16. This comprises of £3,381.73 collected from developments within Chorley North East, £1,217.14 collected from developments within Chorley East, and £55,435.29 collected from developments within Chorley South East.
37. The regulations prescribe how this money is spent, which is that it has the same parameters as the neighbourhood portion. The regulations do not, however, prescribe a specific process for agreeing which projects it should choose to fund, but it is prudent to ensure that there is clear and transparent consultation with neighbourhoods in deciding how it is spent.
38. Ward Councillors from within the unparished areas which forms 'Chorley Parish', where development has taken place and CIL monies have been collected, will propose how the money is best spent, working with officers and their local community. Spend of the cash will be monitored through the normal budget monitoring processes.

ALLOCATION OF INFRASTRUCTURE MONIES TO CIL 123 LIST PROJECTS

39. The main purpose of this report is to formalise and implement a system for allocating the main CIL monies to infrastructure projects which are on the CIL 123 list.
40. Provided the projects funded are on the CIL 123 list, it is at the charging authorities discretion as to which projects are allocated funding and how much.
41. It is important to recognise that CIL is not intended to fully fund infrastructure projects on the CIL 123 list, rather it is to be used a source of match funding to enable projects to come forward.

CIL INCOME

42. There is £1,549,338.68 of CIL infrastructure funding accumulated and currently available for allocation to projects.

METHODOLOGY FOR ASSESSING PROJECTS

43. The proposed methodology for the allocation of infrastructure funds is detailed in the document at appendix two.
44. The methodology sets out the steps which will be used to assess and rank the infrastructure schemes applying the key principles of
 - Strategic priority
 - Deliverability
 - % match funding secured
45. The methodology includes five clear steps which involve collecting the necessary information as to the status of each infrastructure scheme (because situations change and

some may be at different stages, some may no longer be a priority or have any match funding secured).

- 46. Appendix three is the information which was gathered from the relevant statutory authorities responsible for the projects on the CIL 123 list.
- 47. We wrote to the lead agencies for the strategic projects and from the data returned, we determined that only one project met the criteria.
- 48. Representations were received from Lancashire County Council regarding education contributions however no requests for funding of the projects on the CIL 123 list were requested. A request was made for a school extension at Brookwood Way however this project is not currently on the CIL 123 List and therefore cannot receive an allocation at present.
- 49. LCC also requested a contribution for funding towards the development of Central Lancashire Cycling Strategy, however, as this is for consultancy fees as opposed to actual infrastructure, it cannot be financed from CIL.
- 50. The one project which is 'oven-ready' and has secured match funding is Chorley Town Centre Enhancements. This is an infrastructure project which is on the CIL 123 List and has been developed by the council as part of a town centre masterplan process.
- 51. The project meets the criteria as set out in the policy for the Allocation of CIL Infrastructure as it is strategic, deliverable and has match funding.
- 52. It is recommended that this project is approved for a CIL allocation as detailed in the table below.

Infrastructure Project	Lead Authority	What the Project will deliver	Total Cost	Capital Secured	Start and End Dates	Recommended CIL allocation
Chorley Town Centre enhancements Flat Iron enhancements	CBC	Public realm improvements, footpaths, car parking and town centre accessibility.	£6,713,899	£5,487,286	Jan 2017- Jan 2019	£1,300,000
					Total Allocation of CIL	£1,300,000

- 53. There is £1,549,338.68 CIL infrastructure funding available and so it is recommended that the residual amount of £249,338.68 is rolled over to the next cycle of allocation.

IMPLICATIONS OF REPORT

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

Finance	X	Customer Services	
Human Resources		Equality and Diversity	
Legal	X	Integrated Impact Assessment required?	
No significant implications in this area		Policy and Communications	X

COMMENTS OF THE STATUTORY FINANCE OFFICER

55. The September 2016 report to Full Council identified potential financing sources for the public realm works relating to the extension of the Market Walk shopping centre. One of the potential sources identified was Community Infrastructure Levy funds. Subject to the approval of using £1.3m CIL funds, this will then be included in the financing of the Council's capital programme for 2017/18 onwards.
56. Use of CIL funds is not committed until the cash is received from the developers. In addition to the figures quoted in this report, invoices totalling £337k have been sent to developers, and therefore the balance available for funding of infrastructure projects would increase when the invoices have been paid.

COMMENTS OF THE MONITORING OFFICER

57. The expenditure of CIL receipts is defined by statute. A proportion (15% or 25% where there is a neighbourhood plan) should be spent within the neighbourhood of the receipt. The balance must be spent on infrastructure anywhere in the borough provided it is contained within the regulation 123 list. This report sets out proposals on how the council should allocate this spend. The methodology proposed is sound and transparent and will enable the council to best meet local priorities and support wider infrastructure projects.
58. The proposed allocation of CIL to town centre redevelopment works is an example of how the assessment methodology operates. This is a strategic objective, which is due to commence in the near future, funding has been secured for the additional costs and it is all supported by a project plan.

CHRIS SINNOTT
DIRECTOR OF POLICY & GOVERNANCE

There are no background papers to this report.

Report Author	Ext	Date	Doc ID
Zoe Whiteside	5771	10/01/2017	***

Appendix one: Chorley Council CIL 123 List

CHORLEY COUNCIL
COMMUNITY INFRASTRUCTURE LEVY
Regulation 123 List

Adopted September 2013

The Regulation 123 List was updated on 7 April 2016

Introduction

The purpose of the list is to demonstrate the broad range and type of infrastructure that it is likely the Council will seek to spend CIL funds upon. This is a 'living' document and will be the subject of on-going update and monitoring.

Regulation 123 List

The Community Infrastructure Regulations 2010 (as amended) restrict the use of planning obligations where there have been 5 or more obligations in respect of a specific infrastructure project or type of infrastructure entered into on or after 6 April 2010.

The Regulations (paragraph 123) provide for a charging authority to set out a list of projects or types of infrastructure that the levy is intended to fund, and this is referred to as the 'Regulation 123 List'.

The purpose of this Regulation 123 List is to ensure clarity on what CIL might be spent on and there is no duplication ('double dipping') between CIL and S106 agreements in funding the same infrastructure projects.

A CIL charging authority is expected to publish a list of infrastructure that it intends will benefit from CIL on its website. The Council can review this list at least once a year as part of its monitoring of CIL collection and expenditure.

The inclusion of a project or type of infrastructure in this list does not signify a commitment from the Council to fund either in whole or in part the listed project or type of infrastructure through CIL. Nor does the order of the table imply any order of preference or weighting of one project as opposed to another.

Background

The Regulation 123 List (adopted September 2013) was derived taking into account the background supporting documents that were prepared in association with the Central Lancashire Core Strategy (adopted July 2012), which sets out the infrastructure needed to deliver the development set out in the Core Strategy up to 2026 and the Lancashire County Council adopted LTP3 Strategy and Implementation Plan 2011-2021 which sets out the strategic objectives for transport and travel.

Infrastructure projects to be funded at least in part by the CIL

CHORLEY INFRASTRUCTURE DELIVERY SCHEDULE

PROJECT	TIMING	FUNDING DEFICIT £M
Transport		
New Coppull Railway Station	2014-2024	8
Mini interchange: Clayton Green Asda	2012-2015	0.2
Chorley Railway Station car parking –Friday Street (110 spaces)	2012-2015	0.8
Car park on Southport Road, Chorley (100 spaces to support Astley Park)	-	-
Cycle Schemes		
Clayton-le-Woods	2015-2020	0.2
Clayton Brook and Whittle-le-Woods to Chorley A6	2015-2020	0.5
Canal towpath, Botany to Blackburn	2015-2020	0.5
Chorley to Abbey Village –old railway	2015-2020	1
Cycle Schemes near Wheelton on the A676	2015-2020	0.125
Chorley North-East-Harpers Lane, Railway Rd-Park Rd	2015 -2020	0.3
Cycle Link, Croston to Ulnes Walton to Leyland	2015-2020	0.15
Euxton-Wigan Rd and School Lane	2015-2020	1.5
Buckshaw-Chancery Lane-Cuerden Valley Park-Southport Road	2015-2020	0.6
Chorley East –Eaves Lane, Lyons Lane, Yarrow Gate to Carr Lane/Myles Standish Way	2015-2020	0.25
Improvements to Cycle Links - Adlington	2015-2020	0.34
Chorley South to Coppull	2015-2020	0.4
Eccleston to Chorley via Back Lane	2015-2020	0.15
Health		
Local Community Health Hub, Friday Street, Chorley	-	-
Education		
Group 1 Site, 1 form entry primary school, Buckshaw Village	2016-2021	2.5
Adlington half form entry primary places	2016-2021	2
Clayton-le-Woods 1 form entry	2016-2021	3.5 – 5
Eccleston half form entry places	2016-2021	1.72
Green Infrastructure/public realm		
Chorley Town Centre enhancements	2012-2016	1
Flat Iron enhancements		0.30

PAN CENTRAL LANCASHIRE

PROJECT	TIMING	FUNDING DEFICIT £M
Transport		
Bus Rapid Transport Routes: Chorley to Preston B6258 Preston East – City Centre Preston - Lostock Hall – Leyland Cottam – Preston Cuerden – Preston via A6	2012-2018	
HOV/Bus Lanes on A582 corridor serving Park & Ride sites	2012-2018	55.2

Appendix two: Methodology for the Allocation of Infrastructure Funds

CHORLEY COUNCIL

COMMUNITY INFRASTRUCTURE LEVY

**Methodology for Allocation of Infrastructure
Funds**

Background

This document sets out how collected receipts for community infrastructure levy will be allocated to infrastructure projects on the published Community Infrastructure Levy Regulation 123 list. This process will generally be undertaken annually to fit in with the budget cycle however it could be more frequent depending on the levels of capital collected.

This process will only be used to allocate collected receipts. No decisions are to be made regarding invoiced but not collected CIL or forecasted income.

The Community Infrastructure Regulations 2010 (as amended) restrict the use of planning obligations where there have been 5 or more obligations in respect of a specific infrastructure project or type of infrastructure entered into on or after 6 April 2010.

The Regulations (paragraph 123) provide for a charging authority to set out a list of projects or types of infrastructure that the levy is intended to fund, and this is referred to as the 'Regulation 123 List'.

The purpose of the Regulation 123 List is to ensure clarity on what CIL might be spent on and there is no duplication ('double dipping') between CIL and S106 agreements in funding the same infrastructure projects.

A CIL charging authority is expected to publish a list of infrastructure that it intends will benefit from CIL on its website. The Council can review this list at least once a year as part of its monitoring of CIL collection and expenditure.

The inclusion of a project or type of infrastructure in this list does not signify a commitment from the Council to fund either in whole or in part the listed project or type of infrastructure through CIL. Nor does the order of the table imply any order of preference or weighting of one project as opposed to another.

The principles by which the council will allocate CIL receipts to infrastructure are

- Strategic priority
- Deliverability
- % match funding

This document sets out the methodology which will be used to collate essential data necessary to assess each scheme however the council reserves the right to exercise its discretion in making decisions whilst always acting reasonably.

Procedure

The regulations set out the methodology for how monies collected from the CIL are to be distributed as illustrated in the table below.

Purpose of Funding	% Allocated
Administration	5% of all receipts
Neighbourhood area portion	15% of CIL collected within that area capped at £100 per dwelling
*Neighbourhood area where there is a neighbourhood plan in place (25%)	25% of CIL collected within that area uncapped.

CIL Infrastructure	Remaining CIL receipts collected for the financial year.
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Step one Identifying Available CIL Monies for Infrastructure

A full breakdown of the CIL receipts collected for the previous financial year along with the distribution of those monies is published in the Annual CIL Monitoring report published each December.

This is the first step in carving up the CIL monies and establishing the total amount of CIL available to be allocated to the CIL 123 Infrastructure Projects,

Step Two: Assessing CIL 123 Infrastructure Projects

The projects specified on the CIL Regulation 123 List are strategic, long term schemes which can require significant lead in times in order to secure the necessary funding, resourcing and decision making processes are in place. Therefore at any one time, some of these projects will be more deliverable than others.

The second step in identifying which schemes are recommended for an allocation of CIL is a desktop gathering exercise.

The infrastructure projects are led by a range of statutory authorities and infrastructure providers and therefore this data collection form will be sent to the appropriate bodies for completion and return to Chorley Council.

Upon return of the data sheets for each project, the information will be collated and scored in accordance with the following criteria illustrated in the table below.

	Criteria	Pass/Fail	Desirable	Example Evidence Upon Request
1	Strategic Priority	✓		Referenced in a published corporate document or masterplan
2	Timeline for Delivery(start and end)	✓		Detailed project plan or timeline demonstrating project is feasible
3	Total Cost £	✓		High Level Budget
4	Match funding secured to date (£)	✓		Details of budget gap
5	Contribution from CIL sought (if known)£	✓		Details of the budget gap and confirmation no other capital source can be identified.
6	Included within the local plan		✓	Referenced published Chorley Local Plan

Any scheme not achieving a pass in any of the essential criteria will automatically fail to progress to stage 3 as these are considered not to be deliverable at this time. For as long as a scheme remains on the CIL 123 list, it will continually be assessed annually for an allocation of CIL.

If a project has been completed or is no longer being pursued and remains on the CIL 123 list, for the purpose of this exercise it will simply be omitted from the assessment and accounted for in the next review of the CIL 123 List.

If a project is not included within the local plan, officers will need to verify that the proposal is policy compliant and does not contravene either Chorley Council’s Local Plan or associated Central Lancashire Core Strategy and SPDs. Information may be followed up from the lead authority to demonstrate that the project is acceptable in planning terms.

Projects need to be identified to start within the following financial year to be considered. This start does not have to be an actual start on site but it must be clear in any evidence requested that there is a clear project plan which illustrates the need for preparatory work to commence. CIL monies cannot be used to pay for the design of infrastructure.

In the event that a formal decision of the start date is subject to confirmation of CIL funding, this is acceptable however payment of any CIL monies will only be made upon written confirmation of that start date with evidence of the formal approval within the organisation, statutory body etc.

Step Three: Ranking of Schemes According to Financial standing

Projects which have passed in all the essential criteria will then be assessed based on their financial standing and ranked according to *deliverability*. This ranking will be based on the amount of gap funding required, as a % of the total project cost required to enable the project to be delivered, starting with the smallest % first. For example,

Project A-total cost of £800,000
 Capital secured to date £700,000
 CIL contribution sought £100,000 (12.5%)

Project B-Total cost £5M
 Capital secured to date £1.25M
 CIL Contribution sought £3.75 (75%)

Project C- total cost £5M
 Capital secured to date £4.5M
 CIL contribution sought £500,000.(10%)

Project D –total cost £3M
 Capital secured to date £2.5M
 CIL contribution sought £2.5M (50%)

The Council will only allocate CIL where there is sufficient CIL available to provide 100% of the funding sought. The Council will not allocate a fraction of the CIL contribution sought as this may still mean that the scheme is not immediately deliverable. This will not negate the scheme from being reconsidered for CIL monies in future rounds. Project costs and finance information can be reviewed and updated at any time prior to the CIL allocation process.

The projects are ranked as illustrated in the table below.

Infrastructure Scheme	Funding Secured	Funding Required	Scheme Start if Capital Secured	CIL Contribution Recommended
Project C	£4.5M	£500,000	2017/18	£500,00
Project A	£700,00	£100,00	2017/18	£100,000
Project D	£2.5M	£2.5M	2017/18	NIL
Project B	£1.25M	£3.75M	2017/18	NIL

Step Four

The final step will consist of a series of recommendations to Executive Cabinet for approval which will include a summary of the projects and what they will deliver. This will be provided along with confirmation of the total CIL funding for infrastructure. It is not necessary for all the monies to be allocated in the cycle; some may simply roll over for allocation in the next round.

The information to be provided will include the following:

Infrastructure Project	Lead Authority	What the Project will deliver	Capital Secured	Start and complete Dates	Recommended CIL allocation
<i>Project C</i>	<i>CBC</i>	<i>XXX</i>	<i>£4.5M</i>	<i>March 2017</i>	<i>£500,00</i>
<i>Project A</i>	<i>LCC</i>	<i>XXX</i>	<i>£700,000</i>	<i>April 2017</i>	<i>£100,000</i>
Total Allocation of CIL					£600,000

Step Five

Upon the allocation of the monies to schemes, this will be presented to Council as part of the budget cycle and the successful accountable body (where it is not Chorley Council) will be formally notified of the allocation.

Information regarding the allocation of CIL funds will be published in the annual CIL monitoring report.



Report of	Meeting	Date
Deputy Chief Executive / Director of Early Intervention and Support (Introduced by the Executive Member for Early Intervention)	Executive Cabinet	19 January 2017

PERMISSION TO CONSULT ON THE REVISED PRIVATE SECTOR HOUSING ASSISTANCE POLICY

PURPOSE OF REPORT

1. To obtain permission from the Executive Cabinet to consult on the revised draft Private Sector Housing Assistance policy, with a view to adopt the revised policy from 1st April 2017.

RECOMMENDATION(S)

2. That Executive Cabinet approves the draft revised Private Sector Housing Assistance policy for stakeholder consultation over the period 1st February 2017 to 6th March 2017, including consultation with the Equality Forum at their meeting on 13th February 2017.
3. That any minor changes to the draft policy following the consultation can be approved by the delegated authority of the Executive Member for Early Intervention. Any significant changes arising from the consultation would be brought back to Executive Cabinet on 16th March 2017.

EXECUTIVE SUMMARY OF REPORT

4. The Private Sector Housing Assistance Policy (revised draft included as an attachment to this report) outlines the Council's policy in relation to the provision of information, advice and action to assist home owners and tenants requiring adaptations (both major and minor), energy efficiency advice and assistance, and other support relating to their home.
5. This report sets out the scope of services provided under the Private Sector Housing Assistance policy, and highlights the main changes in terms of funding and service development since the previous policy review in 2014.
6. Executive Cabinet are requested to support the recommendation that the Council pilots the flexible use of its Disabled Facilities Grant (DFG) budget during 2017-18, to facilitate the delivery of adaptations in a way which will address Better Care Fund (BCF) priorities more effectively.
7. Executive Cabinet are requested to support the recommendation for a fee to be charged to each DFG that the Council provides.
8. Executive Cabinet are requested to support the recommendation for the Council to authorise a grant award of up to £10,000 in excess of the DFG mandatory maximum of £30,000, to carry out DFG-eligible work as recommended by an Occupational Therapist.

Confidential report Please bold as appropriate	Yes	No
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Key Decision? Please bold as appropriate	Yes	No
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Reason Please bold as appropriate	1, a change in service provision that impacts upon the service revenue budget by £100,000 or more	2, a contract worth £100,000 or more
	3, a new or unprogrammed capital scheme of £100,000 or more	4, Significant impact in environmental, social or physical terms in two or more wards

REASONS FOR RECOMMENDATION(S)

- 9. Due to the significant changes within the policy landscape it is now necessary to update the Council’s Private Sector Housing Assistance policy and it is also necessary to consult stakeholders on the proposed changes before the Council can adopt the revised policy.
- 10. The revised draft policy reflects the current scope of services available and makes recommendations to enable the Council to address Better Care Fund priorities more effectively.

ALTERNATIVE OPTIONS CONSIDERED AND REJECTED

- 11. Due to the scale of the changes in national and local policy which impact on the operation of the Council’s Private Sector Housing Assistance Policy, it is not appropriate to defer the revision of the Council’s policy.

CORPORATE PRIORITIES

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

Involving residents in improving their local area and equality of access for all	x	A strong local economy	
Clean, safe and healthy communities	x	An ambitious council that does more to meet the needs of residents and the local area	x

BACKGROUND

- 13. The Private Sector Housing Assistance Policy outlines Chorley Council’s policy in relation to the provision of information, advice and action to assist home owners and tenants requiring adaptations (both major and minor), energy efficiency advice and assistance, and other support relating to their home.
- 14. Whilst the policy document is principally aimed at private sector owners, tenants and landlords, the major adaptations section and the section relating to energy switching advice is also relevant to households occupying social housing.

15. The Council takes the view that the home owners are responsible for maintaining their own properties. However, it is recognised that there are circumstances where some owners will have difficulty meeting their responsibility either through lack of resources, lack of knowledge or lack of support. In such cases the Council will be prepared to offer appropriate forms of assistance.

THE COUNCIL'S HOME IMPROVEMENT AGENCY (HIA)

16. The HIA is a team within the Council's Health and Wellbeing Service, which is part of the Early Intervention and Support Directorate.
17. The aim of the HIA is to ensure that vulnerable people can remain living as independently as possible within their own home, whilst maintaining their health and wellbeing. The main client groups assisted by the HIA are older people and people with disabilities, although some of the services facilitated by the HIA are more widely available.
18. The HIA acts as a direct provider, facilitator and enabler of a range of services which are explained further within this report, namely:
 - Disabled Facilities Grant.
 - Integrated Home Improvement Service (IHIS) comprising Minor Adaptations and Handyperson services
 - Cosy Homes in Lancashire <http://www.chil.uk.com/>
 - Affordable Warmth Grant (provided by Lancashire County Council)
 - Energy Switching Support Service
 - Private Landlord Forum

DISABLED FACILITIES GRANT (DFG)

19. The Disabled Facilities Grant (DFG) provides funding to older and disabled people in owner occupied, privately rented and social housing to help them to make changes in their home environment, such as the installation of wet room showers, stairlifts and ramps, which allow them to live more independently in their homes.
20. DFG also has a key role to play in reducing admission to hospitals, providing safer and more effective discharge from hospital, preventing an increase in demand for social care and delaying or reducing admission to residential care.
21. DFG was first introduced as part of the Local Government and Housing Act 1989 and was further developed in the Housing Grants, Construction and Regeneration Act 1996.
22. DFG began as part of a suite of grants use for housing renewal and it remains the responsibility of Housing Authorities.
23. However, one of the difficulties with DFG, particularly in a two tier local government setting, is that it crosses administrative and organisational boundaries.
24. From the customer point of view, this has led to a complicated customer pathway which remains the norm across District/County Council areas.
25. Initial customer requests are taken by Social Care teams (County Council), customer assessments are carried out by Occupational Therapy teams (County Council) and adaptation recommendations are sent to the District Council/HIA teams who then provide casework support, carry out the customer 'test of resources' to establish eligibility, undertake technical surveys, contractor procurement and monitor quality of work.

26. Indeed, in Lancashire, the situation is further complicated by the fact that Lancashire County Council outsource paediatric OT assessments to Lancashire Care Foundation Trust (LCFT) on an agency basis.
27. Whilst these complex arrangements still exist, the introduction in 2014 of the Better Care Fund (BCF), and the consequent substantial increase in central government funding, has given DFG a much more central position in the policy framework.
28. The BCF is a single pooled budget for health and social care services to work more closely together in local areas, based on a plan agreed between the NHS and Local Authorities.
29. The BCF is administered by Health and Wellbeing Boards, which for Chorley is the responsibility of Lancashire County Council (LCC).
30. The *Better Care Fund Policy Framework 2016/17* confirms that upper tier Authorities are required to pass on the DFG funding from the pooled budget to enable Housing Authorities to continue to meet their mandatory duty.
https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/490559/BCF_Policy_Framework_2016-17.pdf
31. Thus District Councils now receive their DFG allocations via the Department of Health (DoH) - delegated to the local Health and Wellbeing Board - whereas until 2015 DFG funding was provided directly to Councils by the Department of Communities and Local Government (DCLG).
32. With the introduction of the BCF, it is possible to join up the previously disjointed pathways and link the DFG to other related health and care services.
33. The 2015 Autumn Spending Review contained a commitment to further raise the DFG budget nationally to £500 Million by 2019/20.

Table 1 illustrates the increase of DFG funding nationally from 2015 onwards:

Table 1: DFG Better Care Fund allocations

Year	BCF Funding	DFG Funding	DFG as % of BCF	% increase in DFG from 2015/16
2015-16	£3.8 Billion	£220 Million	5.8	-
2016-17	£3.9 Billion	£394 Million	10.1	79%
2019-20	£5.3 Billion	£500 Million	9.4	127%

34. Chorley Council's DFG allocations have increased in line with this national picture.
35. In 2014/15 (the final year that the DFG was provided from the DCLG) the Council received £285,619 in DFG funds. In 2015/16 (the first year of the BCF funding arrangements) the Council received £370,000 and for 2016/17 the Council has received £613,972.
36. The additional funding brings with it additional expectations in terms of how the Council is expected to play its part in addressing new conditions set out in the *2016/17 Better Care Fund Policy Framework*, which are:
 - Reducing delayed transfers of care
 - Minimising avoidable hospital admissions and
 - Facilitating early discharge

37. Whilst the *2016/17 Better Care Fund Policy Framework* does not set specific targets for use of DFG, District Councils should be mindful of the BCF objectives which include several which are relevant to DFG services, such as reductions in the number of admissions to residential and care homes, more effective use of reablement, reductions in delayed transfers of care and improvements in the patient/service user experience.
38. Similarly, the *NHS 5 Year Forward View (October 2014)* <https://www.england.nhs.uk/ourwork/futurenhs/> noted that a key condition for transformation across local health economies is a strong primary and out-of-hospital care system, with well-developed planning about how to provide care in people's own homes, with a focus on prevention, promoting independence and support to stay well. Home adaptations play a prominent role in meeting this condition.

Proposals to optimise the use of the Council's DFG allocation

39. The Regulatory Reform (Housing Assistance) (England and Wales) Order 2002 (hereafter abbreviated to the RRO) removed most of the prescriptive housing renewal grant legislation in the Housing Grants, Construction and Regeneration Act 1996, and Article 3 of the RRO introduced wide ranging discretionary powers to develop different forms of assistance to meet local needs.
40. The government issued accompanying guidance about the use of RRO in 2003 <http://webarchive.nationalarchives.gov.uk/20120919132719/http://www.communities.gov.uk/documents/corporate/pdf/145088.pdf>
41. The RRO is not new legislation, but to date the opportunity for the Council to consider more flexible use of DFG funds has been constrained by the financial pressures associated with managing scarce resources.
42. However, the Council is now experiencing unprecedented high levels of DFG funding and, with Government financial support set to increase further during the course of the current parliament to 2020, it is timely to re-examine the opportunities to consider more flexible use of its DFG budget to meet local needs.
43. If the Council is to achieve a faster, more nimble service to speed up hospital discharge and to reduce pressures on health and care services, a more agile approach to its DFG provision needs to be explored.
44. Currently the Council administers DFG applications in a 'traditional' way, in the sense that the HIA carry out a financial assessment ('test of resources') to determine customer eligibility in accordance with the criteria set by the Government.
45. This means that each DFG referral which the Council receives from LCC is assessed in terms of financial eligibility.
46. The exceptions to this are paediatric referrals, which are not required to be assessed, and people in receipt of means tested benefits, who are deemed to possess a 'passported' benefit which makes them automatically eligible for DFG.
47. Each year there are significant numbers of cases which fail the financial assessment and do not proceed as a DFG application. This is abortive work for the HIA team, because staff still need to carry out visits to determine eligibility and liaise with the customer.
48. In 2016/17, as at 8th December 2016, 56 referrals have not proceeded to grant approval, half of which have been due to the customer failing the means test.
49. To put this into context, in the same period 72 DFG applications have been approved.

50. Equally importantly, such customers who are ineligible for DFG still have a clinical need for adaptations. In terms of addressing the BCF agenda, it is difficult to assert that the Council is currently contributing to resolving such customers' needs.
51. Customers who are not eligible for DFG may be deemed to have sufficient funds to pay for their own adaptations under the legislation, but many lack the wherewithal to organise these works themselves. Furthermore, with the HIA team's focus on facilitating DFG work, particularly with such a large budget to use, it has not been possible to devote staffing resources to assist self-funding customers.
52. There are numerous examples of Councils nationally using the RRO to adopt more flexible approaches to the provision of adaptations, partly as a way of dealing with the problem of customers failing the DFG test of resources and partly as a general method of streamlining the process of applying for and obtaining an adaptation.
53. Chorley Council now has an opportunity to use these relatively abundant DFG resources more effectively. It is important to minimise the prospect of failing to utilise these resources and avoid the possibility of unused funds being clawed back by LCC for re-allocation elsewhere.
54. Although LCC has not yet indicated a definitive intention to 'claw back' any unused DFG funds at year-end, it would be prudent for the Council to take action to reduce the prospect of this eventuality.
55. Therefore a number of policy changes are recommended to take effect from 1st April 2017. The recommendations are predicated on an expectation that the current levels of funding for DFG are to be maintained.

Recommendation 1: Removal of means test for certain types of adaptations (where these items are not part of a larger adaptation) for customers across all tenures:

56. To qualify for the non-means tested approach, it is recommended that the required adaptation work would consist of only one item from the list below.
57. If the required work comprised a combination of various items from the list (such as shower and stairlift), the DFG route would be pursued as the combined value of this work would be more significant.
 - Bathroom conversion (ie removal of bath and installation of Level Access Shower/Wet Room)
 - Stairlifts (these are procured via LCC)
 - Through Floor Lifts (these are procured via LCC)
 - Ceiling Track Hoists (these are procured via LCC)
 - Wash-dry toilets (these are procured via LCC)
 - Hospital release cases identified by Health professionals
58. It is also recommended that within this policy the Council should reserve the right, in exceptional circumstances, to consider a more flexible approach by offering customers other adaptation items that are not available under DFG.

59. Clearly there are risks to the loosening of eligibility criteria. However, this would be mitigated by the fact that an Occupational Therapy referral would still be required as a 'gateway' to accessing an adaptation. So we would still be confident that customers being referred to the Council for an adaptation would need them.
60. Similarly, it is undeniable that by loosening the eligibility criteria there will be some customers who will receive an adaptation free of charge when they could comfortably afford to fund the work themselves.
61. However, in terms of addressing the prevention and early intervention agenda, if the Council facilitates the provision of adaptations to a household who would have been disinclined to self-fund, it would still have contributed to the prevention of potential falls in the home and thus helped to prevent lengthy and costly hospital stays.
62. Adaptations provided without carrying out a test of resources would not be classified as a DFG because the full DFG application process would not have been activated.
63. Instead, such adaptations would need to be distinguished from DFG and be known by another title. The recommended suggestion is **Chorley Adaptation Grant**.
64. So far in 2016/17, had the Council been operating in accordance with this recommendation, 41 of the 72 approved cases could have been handled without requiring a means test.
65. In terms of the 2016/17 referrals which have not proceeded due to the customer failing the test of resources, 19 of those cases would have been eligible for adaptations if the policy now being recommended was in operation.
66. Those 19 cases comprise 13 Level Access Showers, 3 Stairlifts, 2 Ceiling Track Hoists and one Through Floor Lift.
67. Given that our average tendered cost of a Level Access Shower to date in 2016/17 has been £4,235, an additional sum of £55,055 could potentially have been spent on provision of showers alone during the first 8 months of the current financial year.
68. Stairlifts have averaged £3,967 in 2016/17, Through Floor Lifts approximately £9,000 and Ceiling Track Hoists are around £3,000.
69. Added to the £55,055 potential spend on showers mentioned above, this further sum of £27,000 would give a total of an additional £82,055 that could have been spent so far this year had the means test regulations been set aside for certain stipulated cases.
70. Thus the relaxation of means test regulations would not only have allowed the Council to address the BCF agenda more effectively, it would also provide a better opportunity to maximise the DFG budget that the Council receives from BCF.
71. The Council's DFG commitment as at 5th January 2017 is £413,609. Whilst it is likely that a full year spend in the region of £510,000 will be possible to achieve by 31st March 2017, that would still leave an underspend of just under £104,000.
72. If this recommendation is accepted, it would be possible in April 2017 to review the list of 2016/17 customers who have failed the test of resources and go back to them to establish whether they would like to be considered for an adaptation under the non-DFG adaptations route.
73. An option to further improve the output rate of the adaptations service would be for a set of fixed prices for Level Access Showers, to be agreed with the HIA contractors, who

would then be invited to carry out adaptations under a partnering arrangement, with contracts awarded on a rota basis.

74. This arrangement would give contractors greater guarantees of work because instead of having to tender, as long as they accepted the fixed prices, they would be invited to undertake the work.
75. In seeking to gain the contractors' agreement to a set of fixed prices, an average of the tendered prices for 2016/17 could be used as the baseline position for 2017/18.
76. There is a precedent for this approach in that this is how the work was procured when the service was outsourced to Anchor between 2006 and 2010.
77. The 'partnering approach' would enable the direct appointment of contractors, would remove the need to tender via the Chest, resulting in a reduced waiting period for customers. Target response times could be built in to the partnering framework to stipulate that a job must commence within a certain timeframe and if the contractor was unable to meet the timeframe the work would be passed on to an alternative contractor.

Recommendation 2: Introduce Provisions to allow additional funds above the DFG maximum (subject to budget availability)

78. The mandatory DFG maximum grant is £30,000. This upper limit has been in place since 2008.
79. To date the Council's policy has reflected the legislation, and under its existing policy 'grant assistance will be limited to the maximum grant in accordance with the legislation which is currently £30,000'.
80. In recent years the Council has handled a small number of complex adaptation cases where the tendered cost of works have exceeded the mandatory DFG maximum of £30,000.
81. Fortunately, some of the cases have been in Registered Provider (RP) properties involving RPs who participate in the Local Adaptations Agreement. This has enabled the Council to recoup 50% of the cost of work which in turn has enabled the amount of the DFG awarded to remain within the £30,000 threshold.
82. In the technical jargon of DFG, additional funds for adaptations above the mandatory DFG limits are sometimes referred to as "Discretionary DFG". This term may give the misleading impression that the recommended works are discretionary. This is not the intention.
83. Rather, the proposal being recommended is that the Council permits the award of a supplementary grant, in cases where the list of works recommended by the OT has been market tested and exceeds £30,000, in order to enable all the recommended mandatory works to be undertaken.
84. As a caveat to ensure that the Council retains financial control of its resources, it is further recommended that the policy should clearly state that this facility would be subject to budget availability and that such additional grant should not exceed £10,000.
85. The facility to be able to call upon up to an additional £10,000 would help to prevent time consuming delays in such cases, which otherwise would stall while other funding solutions were explored.

Recommendation 3: Introduce a 10% fee applicable to each DFG and non-DFG adaptation

- 86. Organising and overseeing the grant process is complex and often involves a considerable amount of work. The legislation permits Councils to apply a management fee which is added to the overall grant amount awarded to each customer.
- 87. From 2006 to 2010, when the Council’s adaptation service was outsourced to Anchor Staying Put, Anchor applied a fixed fee of 10% on each DFG case.
- 88. Prior to 2006, when the DFG service was administered in-house, the Council charged a 12% fee on each DFG case.
- 89. Since April 2010, when the Council’s in-house HIA team was formed, the only cases where fees have been applied have been in properties owned by Registered Providers who participate in the Local Adaptations Agreement. In such cases a 10% management fee is payable by the Registered Provider.
- 90. The Council is unusual across Lancashire in not routinely charging a fee for its DFG work.
- 91. For example, Lancaster Council, who operate an ‘in-house’ HIA service similar to Chorley’s, apply an 18% fee on each DFG. Hyndburn Council charge a 15% fee, West Lancashire charge 12%, whilst Preston and Rossendale both apply a 10% fee. Of all the Councils in Lancashire, apart from Chorley, only South Ribble does not charge a fee.
- 92. Table 2 shows the possible fee income that could have been available to the Council in 2016/17 based on the value of DFG applications approved so far in 2016/17 (figures as at 7th December 2016).

Table 2 – Potential fee income available to the Council for DFGs approved in 2016/17 as at 7th December 2016

Value of DFGs approved	If 10% Fee payable	If 12% Fee Payable	If 15% Fee payable	If 18% Fee Payable
£359,184	£35,918	£43,102	£53,878	£64,653

- 93. It should be noted that the fee as applied by other Councils across Lancashire is not ‘paid’ by the applicant but is deducted from the overall grant provided to the applicant. That is to say the net effect is that it reduces the amount of grant available to the applicant.
- 94. In most cases a 10% fee would not cause any problems in the execution of the work, but in cases which are around the mandatory limit of £30,000, it could cause difficulties. However, the facility to offer an applicant a sum in excess of £30,000 as described in recommendation 2, would address this scenario.
- 95. The fee income could be targeted to enable the Council to assist customers who are not yet on the Council’s radar for requiring adaptations. Such customers could potentially be referred by other agencies who work with them, such as Fire and Rescue Service, ambulance service and Preston Care and Repair (the Council’s Handyperson service provider).

INTEGRATED HOME IMPROVEMENT SERVICES (IHIS)

- 96. The Council entered into a Collaboration Agreement with Lancashire County Council (LCC) to deliver the IHIS service in Chorley for the period 1st July 2015 to 31st March 2018, with LCC retaining an option to extend the contract for a further two years to 31st March 2020.

97. The IHIS service is intended to support the broad aims of improving or maintaining health and quality of life, and maintaining residents' independence.
98. By achieving these broad aims it is anticipated that there will be a corresponding reduction in falls, hospital admissions, residential care admissions and in overall demand for health and social care services.
99. The IHIS service consists of the following elements:
- Core HIA
 - Handyperson
 - Minor Adaptations
 - Retailer of small items of equipment
100. The **Core HIA** service is delivered in-house by the HIA team. The delivery arrangements and service scope have broadly remained the same as they were when the service was funded through LCC's Supporting People funding mechanism.
101. The **Handyperson** service is currently delivered on the Council's behalf by Preston Care and Repair <http://www.carerepair.org/>. They have delivered this service in Chorley since August 2011. Their current contract (which commenced in April 2016) is due to expire on 31st March 2018, with an option to extend to 31st March 2020.
102. The **Minor Adaptation** service is currently delivered on the Council's behalf by Mobility Care Services <http://www.mobcare.co.uk/>. They have delivered this service in Chorley since July 2015. Their current contract (which commenced in April 2016) is due to expire on 31st March 2018, with an option to extend to 31st March 2020.
103. Minor Adaptations are a statutory function for LCC. Customers are not subject to a financial assessment. If customers have clinical needs which can be met by the provision of Minor Adaptations costing less than £1,000 (typically banister rails, external metal rails and adjustments to steps) LCC refer the works instruction to the Council to carry out the work in accordance with a schedule of fixed tariffs detailed in the Collaboration Agreement.
104. Within the IHIS Collaboration Agreement there is an expectation that the IHIS providers be registered as suppliers of **small items of equipment**. These "*Simple Aids for Daily Living*" (SADLs) are items costing less than £100. Typical items include grab rails, raised toilet seats, walking sticks and bath boards.
105. The Council have addressed this issue by including within the current contract with Mobility Care Services a requirement that they will act on the Council's behalf as an accredited retailer of small items of equipment. <http://www.mobcare.co.uk/tces.php>

ENERGY EFFICIENCY: Cosy Homes in Lancashire (CHiL) <http://www.chil.uk.com/>

106. This pan-Lancashire energy efficiency pilot project, under the banner of CHiL, operated from September 2015 to September 2016. Its primary aim was to test the 'business model' of installing energy efficiency and heating improvements in domestic properties through Energy Company Obligation (ECO) funding, and to achieve as many installs as possible into the homes of Lancashire residents, especially those in fuel poverty and/or with cold-related health issues.
107. The scheme failed to deliver the volume of interventions that it had hoped to achieve, and it was agreed to close it after one year.

108. During summer 2015 Blackburn with Darwen Council, acting on behalf of all the Councils in Lancashire, was successful in a £2-million-plus bid to the Department of Energy and Climate Change (DECC) for grant funding for first-time central heating systems. This project is being delivered under the CHiL brand. The scheme did not officially launch until June 2016 and will end at the end of March 2017.
109. The CHiL brand will be retained as an 'umbrella' for other Lancashire-wide energy efficiency projects or funding bids which may be submitted in the future.

ENERGY EFFICIENCY: Affordable Warmth Grant

110. In September 2016 Lancashire County Council agreed to provide a total of £1M allocated equally in £500,000 tranches across 2016/17 and 2017/18 to District Councils to enable them to direct funding towards alleviating Fuel Poverty amongst the most vulnerable groups. <http://council.lancashire.gov.uk/documents/s95061/Report.pdf>
111. The funding distribution to the Districts is based on the relative levels of Fuel Poverty across Lancashire.
112. Under this formula, the Council will receive a total of £35,936 for use in 2016/17 on the following activities, which have been approved by LCC:
- £13,500 on Heating System maintenance incorporating boiler service and gas fire service
 - £4,000 on draught proofing
 - £12,500 to assist customers with ECO funding shortfalls to obtain new boilers
 - £3,000 on cavity wall insulation
 - £2,956 on loft insulation
113. As the funding is secured for two years, the Council can expect to receive a further sum in the region of £35,000 in 2017/18.

ENERGY EFFICIENCY: Energy Switching Support Service

114. The Council launched this service in June 2014 as a corporate strategy project for 2014/15.
115. Additional funding was secured from LCC to enable the service to operate in 2015/16 and unused funds from previous years' LCC funding streams have enabled the service to continue during 2016/17.
116. The service has proved to be very popular with Chorley residents and has generated significant savings for customers, as illustrated in Table 3 below.

Table 3: Energy Switching Results since 1st April 2016 (to 7th December 2016)

Savings achieved (current year)	£50,624
Number of switched clients	172
Average annual savings per switch	£294
Total possible savings (if all clients whom we have seen had switched)	£52,474
Number of customers seen	179
Average possible savings per client	£293

- 117. Sufficient funds are available to enable the service to continue on a once a week basis in 2017/18, and in order to further enhance the service it is proposed that the Council explore the feasibility of some staff within Customer Services to be trained to deliver energy switching support advice.

PRIVATE LANDLORD FORUM

- 118. The Council recognises the strategic role which the Private Landlord Sector plays as part of the overall Housing offer across the Borough.
- 119. The Private Landlord Forum, which currently meets four times a year, provides a regular opportunity for the Council to engage with landlords and Letting agents, and to ensure that forthcoming legislative changes and Good Practice is shared with Landlord Forum members.
- 120. Guest speakers are invited to deliver presentations on issues of topical interest to landlords and Letting agents, and the meeting also gives the Council a communication channel to promote various initiatives of relevance to the private rented sector.
- 121. The Council has developed a productive relationship with the National Landlords Association, whose North West Regional Representative regularly attends the meeting to provide updates on the latest issues affecting the sector.

IMPLICATIONS OF REPORT

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

Finance	x	Customer Services	
Human Resources		Equality and Diversity	
Legal	x	Integrated Impact Assessment required?	x
No significant implications in this area		Policy and Communications	

COMMENTS OF THE STATUTORY FINANCE OFFICER

- 123. The recommendations for the change in the use of the Disabled Facilities Grant (Chorley Adaptation Grant) are within the Better Care Fund guidelines. The recommendations are predicated on an expectation that the current levels of funding for DFG are to be maintained.
- 124. If it is agreed that Chorley Council charge a fee for its DFG and Chorley Adaptation Grant work it will result in a revenue stream to the Council. A decision will have to be made as to whether this is reinvested in the service or taken as a contribution to general balances.
- 125. The recommendations will result in a larger take-up of the DFG. The policies will be flexible enough to manage spend within the annual allocation, and budget availability will continue to be closely monitored.

COMMENTS OF THE MONITORING OFFICER

- 126. No comments

JAMIE CARSON**DEPUTY CHIEF EXECUTIVE & DIRECTOR OF EARLY INTERVENTION AND SUPPORT**

Background Papers			
Document	Date	File	Place of Inspection
Better Care Fund Policy Framework 2016/2017	April 2016	***	https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/490559/BCF_Policy_Framework_2016-17.pdf
Technical Guidance Annex 4: Better Care Fund Planning Requirements for 2016/2017	February 2016		http://www.local.gov.uk/document/s/10180/5572443/Better+Care+Fund+Planning+Requirements+for+2016-17+Technical+Guidance+Annex+4/95d68c2e-8e5f-4ff0-9d5b-0478cd79d118
Government guidance on the use of the Regulatory Reform Order	2003		http://webarchive.nationalarchives.gov.uk/20120919132719/http://www.communities.gov.uk/documents/corporate/pdf/145088.pdf
Lancashire County Council report on Affordable Warmth Funding	September 2016		http://council.lancashire.gov.uk/documents/s95061/Report.pdf
NHS 5 Year Forward View	October 2014		https://www.england.nhs.uk/ourwork/futurenhs/
Care and Repair England: "Home Adaptations for Disabled People: A good practice guide"	September 2013		http://careandrepair-england.org.uk/wp-content/uploads/2014/12/DFG-Good-Practice-Guide-30th-Sept-131.pdf

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Private Sector Housing Assistance Policy

CONSULTATION DRAFT

2017-2018

Housing Grants, Construction and Regeneration Act
1996

The Regulatory Reform (Housing Assistance) (England
and Wales) Order 2002

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INTRODUCTION

This policy document outlines Chorley Council's policy in relation to the provision of information, advice and enabling activities to assist home owners and tenants requiring adaptations, energy efficiency measures and other support relating to their home.

Whilst this document is principally for private sector owners, tenants and landlords, the adaptations section is also relevant to tenants occupying social housing.

The policy reflects current legislation and guidance as set out in documents such as:

"Home Adaptations for Disabled People: A good practice guide"
(Care and Repair England 2013)

"The Disabled Facilities Grant – before and after the introduction of the Better Care Fund"
(Foundations 2016)

Chorley Council (the Council) takes the view that the prime responsibility for maintaining and improving housing rests with home owners and landlords. However, the Council is committed to improving the quality of housing across all tenures, including owner occupation and private renting.

In addition, it is acknowledged that there are some vulnerable homeowners who will need support to enable them to access relevant available assistance to keep their home to a decent standard.

POLICY AIMS

- To provide advice, information and support on repair, maintenance and adaptation of properties.
- To offer a framework of assistance to vulnerable groups/households.
- To facilitate an increase in the number of households able to heat their homes at reasonable cost thereby reducing fuel poverty and helping households to achieve affordable warmth.
- To reduce carbon dioxide (CO₂) emissions in the borough's private housing stock.
- To help to improve the physical conditions of both homes and neighbourhoods.
- To assist disabled people with adaptations to facilitate their movement in and around their home, thereby improving their quality of life.
- To contribute to the aims of the *Better Care Fund*, principally to reduce delayed transfers of care, minimise avoidable hospital admission and facilitate early discharge from hospital.
- In offering assistance the Council is seeking to enable people to help themselves and advise customers of services offered by other organisations.
- To treat individuals fairly regardless of age, sex, gender, disability and sexual orientation and to protect their rights under Data Protection and human rights legislation.

How the policy links to the Council's Corporate Strategy 2016/17 to 2018/19

The policy helps to work towards three priorities of the Corporate Strategy by meeting the objectives as detailed below:

Strategic Objective: Clean, safe and healthy communities**• Reduced health inequalities**

The Home Improvement Agency (HIA) advises people with disabilities and older people about the services which are available to enable them to live independently in their own homes, thereby helping to reduce health inequalities.

• High quality, affordable and suitable housing

The HIA has an enabling role in helping residents live in decent homes as well as facilitating adaptations for people with disabilities.

Strategic Objective: Involving residents in improving their local area and equality of access for all**• All residents are able to take an active part in their community**

The HIA helps residents to live independently in their own homes, and thereby helps them to take an active part within their community.

Strategic Objective: An ambitious Council that does more to meet the needs of the residents of the local area**• An ambitious Council that continually strives to improve**

The policy aims to reduce the number of households in 'fuel poverty'.

DISABLED FACILITIES GRANTS (DFGs)

Under Part 1 of the Housing Grants, Construction and Regeneration Act 1996 the Council has a legal duty to provide specialist adaptations to meet the care and mobility needs of people with disabilities to enable them to live independently with privacy and dignity.

The need for the adaptation is determined by an Occupational Therapist from the Lancashire County Council's Adult Social Care Services Department.

Chorley Council is the lower tier authority responsible for statutory housing functions, whilst Lancashire County Council is the upper tier responsible for social care.

DFGs for Tenants of Registered Social Housing Providers

In legal terms the ultimate responsibility for funding adaptations lies with the Council.

However, Registered Providers also have a duty to their tenants to provide a home which is accessible and safe.

The Homes and Communities Agency's Regulatory Framework ('Home Standard') states:

"Registered Providers shall co-operate with relevant organisations to provide an adaptations service that meets tenants' needs" (the Regulatory Framework for Social Housing in England from April 2012)

https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/419208/Home_Standard_2015.pdf

A number of Registered Providers who operate in Chorley have entered into a Memorandum of Understanding (MoU) with the Council.

The MoU covers major adaptations, classified as those which are expected to cost £1,000 or more.

Tenants of Registered Providers should approach their landlord for assistance in the first instance.

Under the terms of the MoU, the Council and Registered Providers share the cost of major adaptations on a 50/50 basis.

For works which the Council's Home Improvement Agency (HIA) manages, the Council will charge the Registered Provider a 10% fee (based on the total cost of the work) for procuring and project managing the work.

All households who are resident in 'Intermediate home ownership' housing i.e. those living in Shared Ownership, properties purchased with an Equity Loan and Discounted for Sale (such as the Council's Low Cost Home Ownership scheme) properties are classed as 'private' owner occupiers for the purpose of DFG applications, and therefore these customers should approach the Council for assistance in the first instance.

Lancashire County Council Financial Threshold

Where an adaptation will cost under £1,000 and the property is privately rented or owned, the County Council will arrange for the works to be completed as a **Minor Adaptation** under the Integrated Home Improvement Service.

Prioritisation of DFG Applications

All applications are treated in the same way regardless of tenure and are triggered by the receipt of a referral from the Occupational Therapist (OT).

The OT will classify each case into one of the following categories:

- High Priority
- Standard Priority

The Council adheres to these prioritisation categories, in addition to using the date received as a further way of distinguishing between referrals.

Eligibility

A customer who is a disabled person as described by the Housing Grants, Construction and Regeneration Act 1996 is eligible for assistance.

The duty is 'tenure blind', thus adaptations should be provided for those in need, irrespective of the type of home that they live in.

In addition,

- Applicants must be over 18.
- Parents or guardians may apply on behalf of children.
- Landlords may apply on behalf of tenants.
- The property must be a legal residence which includes dwellings, mobile homes, caravans and houseboats.
- Works must be "reasonable and practicable" to carry out, as determined by a designated Council officer in consultation with an OT and the applicant.

DFG Grant Conditions

All applications are dealt with in accordance with the priority awarded them (see above) and in date order. All applications are subject to a test of financial resources in accordance with the Housing Grants, Construction and Regeneration Act 1996 (as amended) to determine the amount to be contributed by the applicant towards the cost of the work.

In accordance with legislation the test of financial resources will not be applied in cases where an application is being made on behalf of a child or young person aged 19 or below.

The Council will add a 10% fee to the value of each DFG application which it processes.

Eligible Works

- To assist entry and exit from the property.
- To aid access into and around the living areas, bedroom, kitchen and bathroom.

- To improve or provide heating and/or light controls.
- To make the dwelling safe for the disabled occupant and other people residing with him/her.
- Access to and from the garden by a disabled occupant.
- Where the existing footprint or layout of the dwelling, including outbuildings and garages, can be adapted or converted to accommodate the facilities required the Council will not consider any extension to the property.
- Where an extension is necessary and there is no other option, the Council will consider the most cost effective method of meeting the applicant's requirements.
- Where the applicant has a preference for works that are over and above those necessary to meet the disabled person's needs (such as an extension rather than the provision of stair lift and level access shower) the Council will only fund the cost of the original recommended works, with the remainder being funded by the applicant.
- Applications for grant aid will not be considered where works have previously been completed.
- Applications for grants where works have started but have not been completed will only be considered where the applicant can demonstrate exceptional circumstances as to why they did not apply and seek approval prior to the start of the work. In such cases any work already completed will be excluded from the subsequent application.

Service standards

- Legislation requires a decision from the Council to approve the grant or not within 6 months of receiving the full application (this includes all necessary information e.g. proof of home ownership or landlord consent); the Council will aim to achieve this within 8 weeks.
- In accordance with legislation, the Council will aim to complete the installation of all disabled adaptations within 12 months from the date of grant approval.
- The Council aims to process applications fairly, efficiently, courteously and promptly.
- The Council aims to pay grant money due within 30 days of a valid claim on certified work.

Legal Charges

In accordance with the legislation set out in the Housing Grants, Construction and Regeneration Act 1996: Disabled Facilities Grant (Conditions relating to approval or payment of Grant) General Consent 2008, where the adaptation is carried out to a property which is privately owned and the cost of the work is £5,000, or more, the Council will place a legal charge on the property through the Land Registry.

The legal charge will last for ten years. If the property is sold or otherwise changes ownership within ten years of the completion date, the Council will require repayment of the grant.

The maximum repayable amount at the change of ownership is £10,000.

The DFG application process: considering alternative options

During the period that the Council is considering the application a number of options will be explored with the applicant as follows:

- Alternative options such as a possible move to a property owned by a Registered Provider or a private sector property.
- If the customer is a Registered Provider tenant, the Council will liaise with the Registered Providers to determine whether it is more cost effective for the applicant to transfer to another property rather than adapt the existing property.
- Complete a financial assessment to determine eligibility for assistance and if a financial contribution will need to be made by the applicant.
- Explore options to assist the applicant in funding any contribution required by them.

Tendering of DFGs

All DFGs are tendered via 'The Chest' website www.the-chest.org.uk

In accordance with the Council's procurement policy, if the anticipated cost of work is lower than £10,000 two quotations are required. If the anticipated cost of work exceeds £10,000 three quotations are required from the Council's list of approved contractors.

The lowest quotation that meets the specification usually wins the tender. However the customer may select a higher value tender provided they are willing to pay the difference between their preferred contractor's quotation and the lowest.

There are exceptions to the tendering process as stair lifts, through floor lifts, step lifts, ceiling track hoists and automatic wash & dry WCs form part of a procurement partnership with LCC, who also arrange installation.

Included within the grant sum paid for such items of equipment is an extended warranty of 5 years which gives the customer reassurance in the event of maintenance issues or breakdown of the item. Once the warranty period has expired, the customer assumes the responsibility for maintaining the item(s) of equipment.

Maximum DFG entitlement

The mandatory maximum that an applicant can be awarded (per application) under the DFG legislation is £30,000.

For 2017/18 the Council is trialling the provision of additional funds (subject to budget availability) of up to a further £10,000 being available to enable all the mandatory DFG-eligible works, as recommended by the Occupational Therapist, to be carried out.

This policy change has been introduced in recognition of the fact that extremely complex adaptation cases, mainly for children, involving ground floor extensions plus specialist equipment, are now resulting in tenders which exceed £30,000.

This facility to draw upon an additional sum of money will enable customers to receive their adaptations without progress being delayed while alternative funding solutions are explored.

Other Options

Registered Providers have the discretion to offer a tenant living in an adapted rented property who no longer needs the adaptations a disturbance grant to help them move into a non-adapted property and for a DFG applicant to move into the existing adapted property.

This policy is voluntary for both the tenant living in the adapted property and the DFG applicant who may be offered the existing adapted property.

There are benefits to this arrangement as it ensures resources within the borough are effectively utilised and may enable needs to be met more quickly. Registered Providers will seek to optimise the use of their stock by facilitating the transfer of an existing tenant whose needs may be better met by a move to more suitable accommodation such as a ground floor flat or bungalow, rather than adapting their existing home.

Applicants should refer to the Registered Provider's policies for further details on this option. The Council will expect the applicant to accept a reasonable offer of suitable alternative accommodation rather than progress a DFG application.

Better Care Fund

From 2015/16 the grant paid from Central Government to Local Housing Authorities to help pay for DFGs has been a named part of the Department of Health's 'Better Care Fund'.

The Better Care Fund is described as a '*single pooled budget for health & social care services to work more closely together in local areas based on a plan agreed between the NHS & local authorities*'.

The Better Care Fund 2016/17 Policy Framework refers to the Better Care Fund as '*the biggest ever financial incentive for the integration of health and social care...it requires Clinical Commissioning Groups and Local Authorities to pool budgets and to agree an integrated spending plan for how they will use their Better Care Fund allocation*'.

The Better Care Fund 2016/17 Technical Guidance

<http://www.local.gov.uk/documents/10180/5572443/Better+Care+Fund+Planning+Requirements+for+2016-17+Technical+Guidance+Annex+4/95d68c2e-8e5f-4ff0-9d5b-0478cd79d118>

confirms that '*the statutory duty on local housing authorities to provide DFG to those who qualify for it will remain. Therefore each area will have to allocate this funding to its respective housing authorities (district councils in two-tier areas) from the pooled budget to enable them to continue to meet their statutory duty to provide adaptations to the homes of disabled people, including in relation to young people*'.

In Lancashire the custodian of the Better Care Fund is the Health and Wellbeing Board

<http://www3.lancashire.gov.uk/corporate/web/?siteid=6715&pageid=40271&e=e>

The Health and Wellbeing Board is administered by Lancashire County Council, and thus it is ultimately via Lancashire County Council that Chorley Council now receives its funding allocation to provide DFGs for residents of Chorley.

The Council intends to use the funding that it receives via the Better Care Fund to help to address the stated Better Care Fund priorities, namely:

- Reducing delayed transfers of care
- Minimising avoidable hospital admissions
- Facilitating early discharge from hospital

CHORLEY ADAPTATION GRANT (CAG)

The Regulatory Reform (Housing Assistance) (England and Wales) Order 2002 (“the RRO”) removed most of the prescriptive housing renewal grant legislation contained in the Housing Grants, Construction and Regeneration Act 1996.

Article 3 of the RRO introduced wide ranging discretionary powers to allow Councils to develop different forms of assistance to meet local needs.

The Council intends to make use of the RRO provisions to enable it to use funds received from the Better Care Fund more flexibly, responsively and effectively from 2017.

From April 2017, and subject to available funding, the Council intends to remove the financial assessment for the following types of adaptation requests submitted by the Occupational Therapy service:

- Level Access Shower
- Stairlifts (procured via LCC)
- Through Floor Lifts (procured via LCC)
- Ceiling Track Hoists (procured via LCC)
- Wash-dry toilets (procured via LCC)
- Hospital release cases identified by health and/or social care professionals

To qualify for the non-means tested route to obtaining an adaptation, the required adaptation work would consist of one item only from the above list.

If the recommended works consist of a combination of items from the above list, or contain items which are not on the above list, the application will follow the DFG route.

The Council also reserve the right, in exceptional circumstances, to consider a more flexible approach by offering customers other adaptation items that are not available under DFG.

There are a number of reasons for the Council introducing an alternative approach to its adaptation service:

- The Council's wish to make best use of the financial resources received from the Better Care Fund.
- The Council's wish to streamline the adaptation service for the benefit of customers.
- The need to address the 'prevention and early intervention' agenda.

- To enable the Council to provide assistance to customers who already have or who would fail the DFG financial assessment, but who still have a need determined by a clinician for an adaptation.

The Council intends to operate the adaptations process for the Chorley Adaptations Grant using some of the same features that are used in processing DFG applications, such as:

- The recommended work must be 'reasonable and practical' using the DFG definition.
- The work would still require landlord's permission where the applicant rents from a private or social landlord.
- The MoU would still be invoked in cases where the work was carried out in properties owned by those Registered Providers who are signatories to the MoU.
- A 10% agency fee, payable to the Council, would be included in the cost of the grant award.
- The Five Year grant period would still apply, meaning that the applicant would not be able to apply for a further Chorley Adaptation Grant from a different address within the Borough within five years of receiving such a grant at the original address.
- The applicant would be eligible to apply for a further 'Chorley Adaptation Grant' in the future should their needs change.

However, the applicant would not be prevented from making a full DFG application if they preferred to do so. Under the RRO the Council is not permitted to deny an applicant the right to make a full DFG application, although in practice such a scenario would be unlikely.

In order to make the Chorley Adaptation Grant more accessible and to further streamline the application process, it is proposed that the Council enters into a partnering arrangement with its adaptation contractors in 2017/18, agreeing fixed prices for Level Access Showers, based on an average cost of showers procured by formal tendering during 2016/17.

Thus it is proposed that contractors would be invited to carry out the work to install Level Access Showers on a rota basis, with the Home Improvement Agency managing these arrangements.

THE HOME IMPROVEMENT AGENCY

The Home Improvement Agency (HIA) is a team within Chorley Council's Early Intervention and Support Directorate.

The aim of the team is to ensure that vulnerable people can remain living as independently as possible in their own homes whilst also maintaining their health and wellbeing.

The main 'client groups' assisted by the HIA are older people and people with disabilities.

As well as facilitating and providing adaptations, the HIA also carries out an important enabling role to assist customers to make informed choices about their housing options, including advice on how to access any available funding streams, including funding to help customers to achieve affordable warmth within their homes.

The HIA aims to prevent the need for residential or domiciliary care, as well as helping people move on from hospital, therefore also assisting health and social care partners.

The HIA strives to extend the healthy life expectancy of older people, reducing the need for intensive emergency services, maximising income by offering advice on benefits, and helping to reduce the fear of crime.

The HIA works in partnership with other Local Authorities and stake holder organisations to improve services in the borough and throughout Lancashire.

ENERGY EFFICIENCY

The Home Energy Conservation Act (HECA) 1995 requires Councils to improve the energy efficiency of homes in their area, i.e. to reduce energy usage and carbon dioxide emissions within the housing stock.

The Council meets its HECA requirements by performing an enabling role by linking Chorley residents to energy efficiency schemes which emanate from the Government's Fuel Poverty Strategy for England ("cutting the cost of keeping warm") published in 2015:

https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/408644/cutting_the_cost_of_keeping_warm.pdf

Since March 2013, HECA has required the Council to publish a biennial progress report setting out measures the Council considers practical and cost effective in improving the energy efficiency in the borough.

'Fuel Poverty' is currently defined (under the 'Low Income, High Costs' definition) as a household whose income is below the poverty line (when energy costs are taken into account) and whose energy costs are also higher than the median for their household type.

In its Corporate Strategy 2016/17 to 2018/19 the Council has set a target that aims to ensure the percentage of households living in fuel poverty remains below the North West average.

Thus, improving the energy efficiency of the borough's housing stock is key to reducing fuel poverty.

The Council will continue to bid for any available funding which will allow its residents to achieve affordable warmth.

Recent examples include the successful bids for "Affordable Warmth Funding" via Lancashire County Council.

It is the responsibility of individual landlords to ensure that privately rented homes are free from 'excess cold'. This can be verified by an Officer from the Council's Regulatory Services team on 01257 515151.

For tenants of Registered Providers of social housing it is the responsibility of the landlord to ensure that the property is free from excess cold and provides a reasonable degree of thermal comfort. Tenants should contact their landlord in the first instance if they do not believe their home does not meet these criteria.

INTEGRATED HOME IMPROVEMENT SERVICE (IHIS)

In July 2015 the Council entered into a Collaboration Agreement with Lancashire County Council to deliver the IHIS service in Chorley for the period 1st July 2015 to 31st March 2018.

LCC have an option to extend the arrangement for a further two years to 31st March 2020.

The IHIS service is an LCC initiative which is intended to support the broad aims of improving or maintaining health and quality of life, and maintaining residents' independence.

By achieving these broad aims it is anticipated that there will be a corresponding reduction in customers experiencing falls, hospital admissions, residential care admissions and overall demand for health and social care services.

The service model is aligned to the health and social care integration agenda, particularly the Better Care Fund plans submitted by the County Council in partnership with the Clinical Commissioning Groups.

The IHIS service consists of a number of features:

- Core HIA service
- Handyperson
- Minor Adaptations
- Retailer of small items of equipment

The **Core HIA service** is delivered by the Council's HIA team. It encompasses services such as helping customers with their housing options, making referrals and signposting to help them to access other local support services, and checking whether customers are entitled to any financial help.

The **Handyperson Service** is currently sub-contracted to Preston Care and Repair www.carerepair.org

The service includes a number of interventions (this is not an exhaustive list):

- Supplying and fitting grab rails and hand rails
- Changing light bulbs
- Fitting draught excluders
- Carrying out small repairs to paths and steps
- Removing clutter in hallway and on stairs
- Putting up and taking down curtains
- Relocating and/or fixing trailing flexes
- Tracking down or taping loose or fraying carpets

Eligibility for Free Handyperson services

The eligibility criteria for the free handyperson service has been set down by LCC as commissioners of the IHIS service. The eligibility criteria are as follows:

Customers in the private sector aged 18 and above must **either** have

- a disability that is, or could be, registered and/or have a diagnosed long term health condition/s that directly affects their mobility or independence to stay safe at home.

Or

- an imminent and/or major risk that will lead to the person having an unscheduled admission to hospital or residential care without intervention.

Or

- The service is needed to facilitate a discharge from hospital where it would not be deemed safe for them to return without intervention

Customers who do not meet these eligibility criteria should contact Preston Care and Repair on 01772 204096 to discuss their Handyperson service for paying customers.

The **Minor Adaptation service** is a statutory function of LCC which provides housing related support to disabled individuals. Minor Adaptations customers are not subject to a financial assessment. If customers have medical needs – as confirmed by an OT assessment – which can be met by the provision of Minor Adaptations costing less than £1000 (typically banister rails, external metal rails and adjustments to steps) LCC send these cases to the Council who arrange for the works to be carried out.

In Chorley the Minor Adaptation service is currently sub-contracted to Mobility Care Services www.mobcare.co.uk

Mobility Care Services are also the Council's appointed accredited retailer of **small items of equipment**. These *Simple Aids for Daily Living* (SADLs) are items costing less than £100. Typical items include grab rails, raised toilet seats, walking sticks and bath boards.

Further details of the availability of small items of equipment are available at www.mobcare.co.uk/tces.php

PRIVATE LANDLORD FORUM

The Council recognises the important role of the Private Rented Sector (PRS) within the overall housing offer in Chorley.

The Council seeks to maintain an effective dialogue with private landlords and lettings agents. To this end the Council facilitates regular meetings with PRS representatives which provide opportunities to share Good Practice, legislative updates and Council initiatives which affect the PRS.

Any private landlord or lettings agent who own or manage privately rented accommodation in Chorley are welcome to attend the Landlord Forum meetings.

For further details please contact the Council's HIA team on 01257 515151.

COMPLAINTS/COMMENTS

Complaints and comments are important feedback on our services. We can use this information to ensure we are responsive to customer needs and concerns. Dealing with customer complaints well will show our commitment to customer care and continuous improvement.

Complaints and feedback may be received in writing, by email or text, or verbally.

- Complaints and feedback will be initially logged in CRM by Customer Services. Wherever possible, things will be put right immediately.
- Where it is not possible to resolve the issue immediately the complaint will be passed to the relevant Service Head or Senior Manager.
- An acknowledgment, including an explanation of the procedure and the name of the person dealing with the complaint, should be sent within 5 working days
- A full response should be sent within 10 working days
- If the response is likely to take longer than 10 working days, the customer needs to be informed why this is and when they can expect to receive a full response.
- A copy of the response should be sent to the Customer Services Manager for recording centrally.
- Where the customer is still not happy the complaint may be escalated to the Chief Executive.

Some complaints, depending on the degree of seriousness, may go directly to the Chief Executive.

- An acknowledgment should be sent within 5 working days and a full response within 10 working days.
- The customer should be advised that if they are still dissatisfied they may refer their complaint to the Local Government Ombudsman and should be sent a leaflet explaining how to do this. These are available from Customer Services.

In all cases it should be considered whether direct contact with the customer is the most appropriate way of dealing with the complaint. It can help to clarify any issues and to quickly reach agreement on an outcome.

LOCAL GOVERNMENT OMBUDSMAN

The Ombudsman will only normally investigate complaints where they have been dealt with by the Council's own complaints procedure:

Contact Details:

Local Government Ombudsman
PO Box 4771
Coventry
CV4 0EH
Tel No 0845 602 1983
Website www.lgo.org.uk
Email advice@lgo.org.uk

MONITORING AND REVIEW

The Head of Early Intervention and Support is responsible for ensuring that Council Officers adhere to this policy and that the policy is effective.

This policy is reviewed on an annual basis. It may be reviewed earlier if there are significant changes in legislation, statutory guidance, local priorities or capital funding.



Report of	Meeting	Date
Director of Business, Development and Growth (Introduced by the Executive Member for Public Protection)	Executive Cabinet	19 January 2017

DRAFT CENTRAL LANCASHIRE EMPLOYMENT SKILLS SUPPLEMENTARY PLANNING DOCUMENT (DECEMBER 2016)

PURPOSE OF REPORT

- To seek approval of the attached draft Central Lancashire Employment Skills Supplementary Planning Document for public consultation.

RECOMMENDATION(S)

- To approve the draft Central Lancashire Employment Skills Supplementary Planning Document (SPD) for public consultation for a 6 week period from Monday 30 January – Monday 13th March 2017.

EXECUTIVE SUMMARY OF REPORT

- This SPD introduces Employment Skills Plans and provides clarity as to how this requirement relates to the relevant policies set out in the Central Lancashire Core Strategy and Local Plan as well as the guidance set out in the National Planning Policy Framework. An Employment and Skills Statement will need to be submitted with a planning application which exceed the thresholds of commercial floorspace (1000sqm) and housing developments (30 units). Criteria set out in in the statement can be individually tailored to ensure the right skills and employment opportunities are provided at the right time to benefit both the developer and local population. The implementation of the Plan will be via a planning condition or subject to an obligation under Section106 of the Town and Country Planning Act 1990 the signing of which will coincide with the grant of planning permission. The draft SPD will be subject to 6 weeks consultation until Monday 13 March 2017.

Confidential report Please bold as appropriate	Yes	No
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Key Decision? Please bold as appropriate	Yes	No
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Reason Please bold as appropriate	1, a change in service provision that impacts upon the service revenue budget by £100,000 or more	2, a contract worth £100,000 or more
	3, a new or unprogrammed capital scheme of £100,000 or more	4, Significant impact in environmental, social or physical terms in two or more wards

REASONS FOR RECOMMENDATION(S)**(If the recommendations are accepted)**

4. To accord with planning legislation on the preparation of an SPD.

ALTERNATIVE OPTIONS CONSIDERED AND REJECTED

5. None

CORPORATE PRIORITIES

6. This report relates to the following Strategic Objectives:

Involving residents in improving their local area and equality of access for all	x	A strong local economy	x
Clean, safe and healthy communities	x	An ambitious council that does more to meet the needs of residents and the local area	x

BACKGROUND

7. Supplementary Planning Documents (SPDs) offer local planning authorities the opportunity to add guidance in specific policy areas. They are documents that must be prepared in consultation with interested parties, and must be subject to a screening process to discover whether a sustainability appraisal would be required. Unlike Development Plan Documents (DPDs) SPDs do not require independent examination before they are adopted. Once adopted, this SPD should be afforded significant weight as a material consideration in determining planning applications.

EMPLOYMENT SKILLS PLANS

8. This SPD introduces Employment Skills Plans and provides clarity as to how this requirement relates to the relevant policies set out in the Central Lancashire Core Strategy and Local Plan as well as the guidance set out in the National Planning Policy Framework.
9. One of Central Lancashire's priorities is to encourage economic growth within Central Lancashire that benefits the people and businesses in the three boroughs. This involves increasing employment opportunities by helping local businesses to improve, grow and take on more staff, helping businesses to find suitable staff and suppliers, especially local ones, and improving the skills of local people to enable them to take advantage of the employing opportunities. The aim of this SPD is to facilitate this by helping businesses already located in Central Lancashire to grow and attract new businesses into the area.
10. The authorities will now be introducing the need for the submission of an Employment and Skills Statement with a planning application (with the exception of outline applications) which exceed the thresholds of:
- Commercial Floorspace 1000sqm
 - Housing Developments 30 units
11. The requirement for the Statement will be included on each authority's validation checklist when they are next revised and will also form part of each Council's pre-application service.

12 The Statement template (as shown on pages 10 – 11 of Appendix 1 of the SPD) will need to be submitted with a planning application. Criteria set out in in the statement can be individually tailored to ensure the right skills and employment opportunities are provided at the right time to benefit both the developer and local population and covers the following areas:

- Creation of apprenticeships
- Recruitment through Job Hub and Jobcentre plus and other local employment vehicles.
- Work trials and interview guarantees
- Vocational training (NVQ)
- Work experience (14-16 years, 16-19 years and 19+ years)
- Links with schools, colleges and university
- Use of local suppliers
- Supervisor Training
- Management and Leadership Training
- In house training schemes
- Construction Skills Certification Scheme (CSCS) Cards
- Support with transport, childcare and work equipment
- Community based projects

13. Once the content of the plan has been agreed as part of the consideration of the planning application, it will be usually be possible to control the implementation of the Plan via a planning condition or subject to an obligation under Section106 of the Town and Country Planning Act 1990 the signing of which will coincide with the grant of planning permission. Specific activities, target numbers, supervision responsibilities and time parameters will be agreed before construction begins. Once adopted, this SPD should be afforded significant weight as a material consideration in determining planning applications.

NEXT STAGES

14. Following individual authority approval of the draft SPD by all the Central Lancashire authorities, the SPD will be subject to 6 weeks consultation which ends on Monday 13th March 2017. The Council will consult with all those individuals and stakeholders on the Local Plan database and members of the Agents Forum The authorities will then respond to any representations and amend the SPD if necessary for Council approval by each authority by May 2017.

IMPLICATIONS OF REPORT

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

Finance		Customer Services	
Human Resources		Equality and Diversity	
Legal		Integrated Impact Assessment required?	
No significant implications in this area		Policy and Communications	

COMMENTS OF THE STATUTORY FINANCE OFFICER

16. As it's a planning policy issue there are no financial implications.

COMMENTS OF THE MONITORING OFFICER

17. No Comments.

MARK LESTER
DIRECTOR OF BUSINESS, DEVELOPMENT AND GROWTH

There are no background papers to this report.

Report Author	Ext	Date	Doc ID
Alison Marland	5281	3 January 2017	***

**Central Lancashire
Employment Skills
Supplementary Planning
Document**

December 2016



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Employment Skills

Supplementary Planning Document

2. Introduction

- 2.1. The SPD has been driven by Preston, Chorley and South Ribble Councils' aspiration to see additional benefits (known as social value) incorporated into their housing and other development opportunities. Social value is defined as "the additional economic, social and environmental benefits that can be created when the Council purchases a good or a service from an outside organisation, above and beyond the value of that good or service". By integrating social value at the planning stage of a project, this can result in significant 'added value' benefits to the residents of Lancashire, particularly in the area of employment and skills (to which this SPD relates). It will also contribute to the Lancashire Employment and Skills Strategic Framework, which details the employment and skills needs within Lancashire.
- 2.2. South Ribble, Chorley and Preston have collaborated extensively in spatial planning terms as the combined area functions as one integrated local economy and travel to work area. It is a single housing market area; and nearly 80% of house moves take place within it. It is appropriate and efficient to consider the similar issues facing Central Lancashire in a collaborative way. To this end Central Lancashire has a combined Core Strategy, Local Plans that develop the vision set out within it, and a series of joint SPDs. It is within this context that this joint Employment Skills SPD has been prepared.

3. Context

- 3.1. The vision for Central Lancashire is set out in the Core Strategy. In summary, it states that by 2026 Central Lancashire will:
- **Be recognised as a highly sought after place to live and work in the North-West**
 - **Play a leading role in Lancashire's world class economy and have sustainable economic growth based on the area's unique assets.**

- **Build on its central location at the hub of a transport network, with green spaces and access to open countryside, making it a place with 'room to breathe'.**
- **Be a driver of sustainable economic growth for the region, marrying opportunity and need**
- **Provide easy access with improved transport connections within Central Lancashire and to wider regional, national and international destinations**

- 3.2. Building on this joint working in September 2013, South Ribble Borough, Preston City and Lancashire County Council signed a City Deal agreement with Central Government.
- 3.3. The city deal will unlock £434 million new investment to help expand and improve Preston and South Ribble's transport infrastructure, at an unprecedented rate. Forecasts suggest 20,000 new jobs will be created and 17,420 homes built - a huge boost to a local economy expected to grow by £1 billion over the next ten years.
- 3.4. This promises to keep the Central Lancashire growth rate booming – bucking national trends – and this in an area already boasting the UK's highest new job creation rates in the last decade, with more than 20,000 new jobs created in the private sector.
- 3.5. The success of the deal reflects the area's excellent location, skilled workforce and local strength in training and education, as well as quality of life. As long as the core infrastructure is developed to provide that extra capacity, this high rate of significant growth will continue.
- 3.6. More than £340 million of the City Deal pot will be invested in a new transport infrastructure, with plans to radically improve access by road to Preston and South Ribble from other parts of Lancashire and the UK. There will be major new road schemes to the north, south and west of Preston and a new junction off the M55 at Bartle, opening up a wealth of new opportunities to create housing and employment.
- 3.7. City Deal Government funding is a 10-year allocation more than twice the term originally envisaged and is key to the delivery of key essential transport links to bring forward development. This will help it move forward with ear-marked priorities like the Preston Western Distributor, South Ribble Western Distributor, Broughton Congestion Relief and Penwortham Bypass projects.
- 3.8. Chorley is a key service centre and is a great place to do business with excellent road and rail links, a skilled workforce; a good mix of housing as well as quality of life. Chorley Council has made economic development one of its main priorities and will make sure companies and developers interested in investing or relocating to Chorley get all the support they need. Chorley's recently adopted Local Plan brings forward a healthy supply of employment land offering a range of sites of all sizes up to 20 hectares for B1,B2,B8 employment uses as well as mixed uses.

- 3.9. Key sites being bought forward include Botany Bay/Great Knowley, a highly accessible 20 hectare site situated adjacent to junction 8 of the M61, which is allocated as a site for sub regionally significant development including B1, B2 and B8 but also retail, housing and leisure. Within close proximity to junction 8 of the M61 is the chosen location for the new Digital Health Village of 13 hectares offering purpose built collaborative office space for digital health businesses and premises for light industrial uses. Other sites under development include proposed office development at Buckshaw Village Office Park comprising new quality development totalling 12,00sq metres and land at east A49, Clayton Le Woods comprising 15 hectares benefitting from good motorway access to the north, south and east of the county, and offering flexible employment space, including incubation and business growth options.

4. Legal Framework

- 4.1. Supplementary Planning Documents (SPDs) were introduced by the Planning and Compulsory Purchase Act 2004 as part of the reforms to the planning system. Although not forming part of the statutory development plan, one of the functions of an SPD is to provide further detail on policies and proposals within the development plan. SPDs must be consistent with national and regional planning policies as well as the policies set out in the development plan.
- 4.2. This SPD is one of a suite of SPDs that have been prepared in accordance with the Local Planning Regulations (SI 2012 No.767) and National Planning Policy Framework (the Framework), conforming and responding to all relevant local and national policies, and based upon a robust and up-to-date evidence base. This SPD forms part of the Local Development Framework (LDF) for the three authorities. It should be considered alongside policy in the Central Lancashire Core Strategy and the Site Allocations and Development Management Policies Development Plan Documents (DPDs) – now referred to as the Local Plan. The SPD guidance should therefore be taken into consideration from the earliest stages of the development process of any site, including any purchase negotiations and preparation of schemes seeking pre-application guidance.

5. Purpose of this SPD

- 5.1. This SPD introduces Employment Skills Plans and provides clarity as to how this requirement relates to the relevant policies set out in the Core Strategy and Local Plan as well as the guidance set out in the NPPF. Once adopted, this SPD should be afforded significant weight as a material consideration in determining planning applications.
- 5.2. One of Central Lancashire's priorities is to encourage economic growth within Central Lancashire that benefits the people and businesses in the three boroughs. This involves increasing employment opportunities by helping local businesses to improve, grow and take on more staff, helping businesses to find suitable staff and

suppliers, especially local ones, and improving the skills of local people to enable them to take advantage of the resulting employment opportunities. The aim of this Supplementary Planning Document (SPD) is to facilitate this by helping businesses already located in Central Lancashire to grow, and attract new businesses into the area.

- 5.3. This is vital in the context of new growth and having regard to issues in Central Lancashire in the past. Namely that a considerable proportion of employment available in Central Lancashire is in lower skilled jobs with the proportion of working-age population with no qualifications being higher than the national average. Those with low or no formal skills often have low incomes or cannot find employment.
- 5.4. Indicators show that employment growth in Central Lancashire is in sectors requiring higher skills (NVQ level 4). Quality higher education, training and skills development are essential to ensure a skilled local labour pool for new and expanding enterprises.
- 5.5. For the purposes of this document a “local person”, is a person living in the area and a “local business” means a business based in, or having a significant permanent physical presence in Central Lancashire.
- 5.6. To complement existing activity and facilitate opportunity in association with the economic growth envisaged the Authorities will now be introducing the requirement for the submission of Employment Skills Plans with certain types of planning applications. This SPD sets the process that will need to be followed and what the Plan will need to cover.

The services and assistance available from each authority currently are set out in the Appendix 2 to this document.

6. Planning Policy

7. National Policy

- 7.1. Guidance on planning policy is issued by central Government in the **National Planning Policy Framework (The Framework)**. Local Planning Authorities have to take the contents of The Framework into account when determining planning applications and preparing documents for the Local Plan

8. The National Planning Policy Framework

8.1. The sections of The Framework most relevant to this Employment Skills SPD are as follows:

7: There are three dimensions to sustainable development: economic, social and environmental. These dimensions give rise to the need for the planning system to perform a number of roles:

An economic role –contributing to building a strong, responsive and competitive economy, by ensuring that sufficient land of the right type is available in the right places and at the right time to support growth and innovation; and by identifying and coordinating development requirements, including the provision of infrastructure;

17. Within the overarching roles that the planning system ought to play, a set of core land-use planning principles should underpin both plan-making and decision-taking. These 12 principles are that planning should:

.....

Proactively drive and support sustainable economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs. Every effort should be made objectively to identify and then meet the housing, business and other development needs of an area, and respond positively to wider opportunities for growth. Plans should take account of market signals, such as land prices and housing affordability, and set out a clear strategy for allocating sufficient land which is suitable for development in their area, taking account of the needs of the residential and business communities;

18. The Government is committed to securing economic growth in order to create jobs and prosperity, building on the country's inherent strengths, and to meeting the twin challenges of global competition and low carbon future.

19. The Government is committed to ensuring that the planning system does everything it can to support sustainable economic growth. Planning should operate to encourage and not act as an impediment to sustainable growth. Therefore significant weight should be placed on the need to support economic growth through the planning system.

20. To help achieve economic growth, local planning authorities should plan proactively to meet the development needs of business and support an economy fit for the 21st century.

21. Investment in business should not be over-burdened by the combined requirements of planning policy expectations. Planning policies should recognise and seek to address potential barriers to investment, including a poor environment or any lack of infrastructure, services or housing. In drawing up Local Plans, local planning authorities should:

- *set out a clear economic vision and strategy for their area which positively and proactively encourages sustainable economic growth;*

- *set criteria, or identify strategic sites, for local and inward investment to match the strategy and to meet the anticipated needs over the plan period;*
- *support existing business sectors, taking account of whether they are expanding or contracting and, where possible, identify and plan for new or emerging sectors likely to locate in their area. Policies should be flexible enough to accommodate needs not anticipated in the plan and to allow a rapid response to changes in economic circumstances;*
- *plan positively for the location, promotion and expansion of clusters or networks of knowledge driven, creative or high technology industries;*
- *identify priority areas for economic regeneration, infrastructure provision and environmental enhancement; and*
- *facilitate flexible working practices such as integration of residential and commercial uses with the same unit*

9. Local Policy

9.1. The Local Plan comprises a suite of documents.

9.2. The **Core Strategy** is the key document as it sets the overarching vision for the area.

Policy 15: Skills and Economic Inclusion is the relevant policy hook for this SPD, it states:

“Improve Skills and Economic Inclusion by:

- *Working with existing and incoming employers to identify skills shortages.*
- *Liaising with colleges, training agencies and major local employers to develop courses and life-long learning and increase access to training, particularly in local communities that are the most deprived in this respect.*
- *Encouraging knowledge based businesses and creative industries associated with the University of Central Lancashire to enable graduate retention.”*

9.3. It is then underpinned by **Preston Local Plan** (Site Allocations) 2012-2026; the **South Ribble Local Plan** (July 2015); and the **Chorley Local Plan** (2012-2026), all of which are in conformity with the Core Strategy. These document includes policies and proposals allocating some land for development whilst protecting others from inappropriate development.

10. Other Relevant Guidance

- 10.1. Controlling Re-Use of Employment Premises SPD – this SPD sets out the Council's approach to dealing with development proposals involving the re-use of existing employment premises and sites in Central Lancashire. It supports the aims of Core Strategy Policy 10 to secure an adequate supply of Employment land in Central Lancashire up to 2026, including the provision and availability of suitable locations for industrial and commercial developments, and provision for a broad range of business types from small start-up business through to large enterprises.

11. Sustainability Appraisal and Habitats Regulations Assessment

- 11.1. Given the relationship between this SPD, the Core Strategy and the Site Allocations DPDs and the level of Sustainability Appraisal (SA) that these documents have undergone together with the anticipated absence of any significant environmental effects arising from this proposal, an independent SA of this SPD is not required. In addition, the Core Strategy has undergone a Habitats Regulations Screening Assessment to determine the likely significant effects of the plan on sites of international nature conservation importance. As the SPD is in conformity with the policies contained within the Core Strategy, a full Screening Assessment of this SPD is not required.

12. Employment Skills Statement

- 12.1. An Employment Skills Statement will need to be submitted in association with certain types of development. The thresholds are set out below.
- 12.2. If a development exceeds the thresholds the Council will adopt a flexible and a pragmatic approach, if, for example, the company developing already has an appropriate training regime in place. In such circumstances, supporting information to demonstrate the company's existing regime will need to be submitted.

13. When will a Statement be required?

- 13.1. Economic Skills Statement will be required to be submitted with the planning applications (with the exception of outline applications) which exceed the thresholds below:

Commercial Floorspace 1000 sqm
Housing Developments 30 units

- 13.2. Applicants are recommended to engage in pre-application discussions with the relevant Council in order to determine the individual requirements for, and content of, an Employment Skills Statement. The details of each Council's pre-application service can be found on their websites.
- 13.3. The requirement for the Statement will be included on each authority's validation checklists when they are next revised and must complete the template in Appendix 1. This provides all the key background factual information associated with the development.

14. What will the statement cover?

- 14.1. These criteria set out in in the statement can be individually tailored to ensure the right skills and employment opportunities are provided at the right time to benefit both the developer and local population and covers the following areas:
- Creation of apprenticeships
 - Recruitment through Job Hub and Jobcentre plus and other local employment vehicles.
 - Work trials and interview guarantees
 - Vocational training (NVQ)
 - Work experience (14-16 years, 16-19 years and 19+ years)
 - Links with schools, colleges and university
 - Use of local suppliers
 - Supervisor Training
 - Management and Leadership Training
 - In house training schemes
 - Construction Skills Certification Scheme (CSCS) Cards
 - Support with transport, childcare and work equipment
 - Community based projects

15. How will it be implemented?

- 15.1. The statement should be submitted with the planning application. Once the content of the plan has been agreed as part of the consideration of the planning application, it will be usually be possible to control the implementation of the Plan via a planning condition or subject to an obligation under Section106 of the Town and Country Planning Act 1990 the signing of which will coincide with the grant of planning permission.
- 15.2. Specific activities, target numbers, supervision responsibilities and time parameters will be agreed before construction begins.

16. Monitoring and Review

- 16.1. More generally the Councils will monitor the effectiveness of this guidance including Core Strategy key indicators and review as appropriate in the light of its performance and future changes in planning law, and policy guidance.

17. Status of SPDs

- 17.1. A Consultation Draft of this SPD was published under SI 2012 N0.767. Responses to the Consultation Draft SPD were taken into consideration within this revised document.

18. Further Information

Preston City Council

www.preston.gov.uk

01772 906949

devcon@preston.gov.uk

Chorley Borough Council

www.chorley.gov.uk

01257 515151

dcon@chorley.gov.uk

South Ribble Borough Council

www.southribble.gov.uk

01772 421491

planningpolicy@southribble.gov.uk

APPENDIX ONE - Employment and Skills Statement

This table needs to be completed by the applicant and submitted with a Planning Application:

Site:
Landowner/Developer:
Proposal:
<p>Opportunities at Construction Phase:</p> <p>The number of jobs (including the labour forecasting tool if available):</p> <p>Type of jobs:</p> <p>Phasing and Timescale:</p>
<p>Opportunities at Occupation Phase</p> <p>The number of jobs (including the labour forecasting tool if available):</p> <p>Type of jobs:</p> <p>Phasing and Timescale:</p>
Contact Details:
Please tick if you are happy that this Statement can be shared with Job Centre Plus

FUTURE WORKFORCE	Indicative Commitment
Working Days committed from business volunteers to support careers education and information and/curriculum development in schools and colleges in Lancashire per year.	
Number of work experience placements (14-16 years, 17-19years and 19years +) based on a placement being one week at Lancashire schools and colleges.	
Number of undergraduate project placements per year offered to Lancashire Universities	
Number of graduate internships per year for graduates living in Lancashire.	
INCLUSIVE WORKFORCE	

Number of employment opportunities offered to Lancashire residents that are unemployed or at a disadvantage (e.g. ex-offenders)	
Number of work placements or trails offered to unemployed Lancashire residents	
Working days committed from business volunteers to mentor NEET (not in education, employment or training) young people 16-18 year olds.	
SKILLED AND PRODUCTIVE WORKFORCE	
Number of apprenticeships	
Commitment to workforce planning and investment in training of employees	
Investment in Leadership Skills	
COMMUNITY BENEFITS	
Projects driven by local communities	
Procurement and commissioning of local small and medium-sized enterprises and social enterprises/third sector organisations	
Construction Skills Certificate Schemes	
Support with transport, childcare and work equipment	

APPENDIX TWO

The Councils currently offer the following services:

In the case of South Ribble:

- Make businesses applying for planning permission aware of the advice and practical support available in the Borough for economic development;
- Inform developers and business of possible sources of funding and grants;
- Encourage the occupiers of new or expanded premises where new jobs are being created to use recruitment methods that will increase the likelihood of recruiting local residents;
- Encourage the use of local organisations to source and help train local residents to work at new or expanded premises, especially through Apprenticeships;
- Encourage applicants to seek information on where to find local construction firms, local construction goods suppliers and local general business to business goods suppliers
- With Preston and Chorley host a bi-monthly Employment Taskforce where 15-20 employment support and training organisations come together to discuss recruitments and opportunities for local people to secure apprenticeships and local employment.

Please follow this link for access to full services:

<http://www.businessinsouthribble.com/business-support>

In the case of Preston:

Preston Council will offer practical support to new businesses, existing businesses and developers wishing to expand in Preston and encourage:

- recruitment methods that will increase the likelihood of recruiting local residents;
- the use of local organisations to source, work, train, offer apprenticeships for local residents;
- applicants to seek information on where to find local construction firms, local construction goods suppliers and local general business to business goods suppliers
- large applications to make contact with Job Centre Plus
- economic diversification by explaining what forms of economic development may be acceptable in the rural area.
- the use of funding and grants available.
- Together with Chorley and South Ribble host a bi-monthly Employment Taskforce where 15-20 employment support and training organisations come together to discuss recruitments and opportunities for local people to secure apprenticeships and local employment.

Please follow the link for access to access the full services:

<http://www.preston.gov.uk/businesses/business-advice/>

In the case of Chorley:

- Has a formal pre-application advice service for planning schemes, only for people who need planning permission. Entering into pre application discussions will help save time, avoid wasted expense and avoid frustration. More information can be found at www.chorley.gov.uk/planning
- Has prepared a validation checklist which outlines the level of detail and the information required for different types of application. This document, together with the necessary application forms, is available on the Council's website at www.chorley.gov.uk/planning.
- Uses the Central Lancashire Re-use of Employment Premises Supplementary Planning Document to explain the Council's approach to dealing with development proposals involving the re-use of existing employment premises and sites:
<http://chorley.gov.uk/Pages/AtoZ/Planning-Policy.aspx>
- Informs developers and businesses of possible sources of all grants, funding and business support via the Chorley Council inward investment website <http://www.choosechorley.co.uk/Pages/default.aspx> and also promoted through the council's website <http://chorley.gov.uk/Pages/AtoZ/Business-Advice-and-Support.aspx>
- New and expanding businesses can access free support, advice and funding from the Council. Businesses that are growing and creating new jobs can access funding from our Chorley BIG (Business Investment for Growth) grant. One criteria of this fund, is for the majority, if not all, new jobs to be filled by Chorley residents. In addition, businesses moving into Chorley utilising support from the Choose Chorley Grant also have to sign up to the Chorley Employment Charter which assists local businesses to recruit local residents.
- Through one to one meetings with our business advisors the Council encourages occupiers to sign up to our Employment Charter, to encourage local employment, see http://chorley.gov.uk/Documents/Business/Employment_charter_2012%20v1.pdf In addition we offer an 8 week placement programme Chorley Works, which gives people who are nearly ready for employment the opportunity to work with a local business before taking up a permanent position.
- Promotes through the Chorley Council website our on-line business directory to encourage local businesses to source goods and services locally at [http://propertysearch4.evolutive.co.uk/toolkitv2/\(S\(vho5jl4kn1cvei20kqxi4ahh\)\)/BDSearch.aspx?siteId=122&bd=true&partnerid=4](http://propertysearch4.evolutive.co.uk/toolkitv2/(S(vho5jl4kn1cvei20kqxi4ahh))/BDSearch.aspx?siteId=122&bd=true&partnerid=4)
- Has a programme of business events available to view at <http://chorley.gov.uk/Documents/Business/BUSINESS%20EVENTS%20LATEST%20VERSION.pdf>
- Encourages the use of local organisations to source and help train local residents to work at new or expanded premises, especially through Apprenticeships. The Council can assist with funding for a local organisation to operate an Employment Support Fund, to provide financial assistance (excluding wages) to remove barriers to encourage employers to create more apprenticeship opportunities and young people to take up these roles. Funding is towards travel expenses, uniform, essential tools and IT workstations.
- With Preston and South Ribble host a bi-monthly Employment Taskforce where 15-20 employment support and training organisations come together to discuss recruitments and opportunities for local people to secure apprenticeships and local employment.
- Hold quarterly networking events where businesses from all sectors across Chorley and neighbouring districts attend to network and make new business connections.

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Report of	Meeting	Date
Director of Customer and Digital (Introduced by the Executive Member for Streetscene Services)	Executive Cabinet	19 Jan 2017

STREETSCENE STRATEGY 2017-2020

PURPOSE OF REPORT

1. To present the new Streetscene Modernisation Strategy for 2017-20.

RECOMMENDATION(S)

2. That the report is noted and the new strategy is approved.

EXECUTIVE SUMMARY OF REPORT

3. This paper presents the new Streetscene Modernisation Strategy at Appendix A which includes:
 - i. Identification of 6 key areas for review.
 - ii. 24 areas recommended for change.
 - iii. Key actions
 - iv. A high level action plan
 - v. Information in respect of council related assets
4. Key areas of focus for 2017/18 are:
 - i. review of policies
 - ii. grass cutting
 - iii. digital systems review
 - iv. performance reporting and data quality
 - v. standards and quality checking
 - vi. workforce related issues
 - vii. resourcing/productivity
 - viii. asset maintenance
5. Procurement rules and financial regulations will be followed and financial implications expected during the life of the strategy will be presented to the Executive Member, if appropriate, for approval at the relevant time.
6. Overall this is a substantial programme of work expected to take a minimum of three years to complete.

7. This paper also provides a high level update on the progress made from the expired 2012-15 strategy and other areas within the service which were not covered by the strategy.
8. Detailed working papers are available to support the findings in this paper.

Confidential report Please bold as appropriate	Yes	No
--	-----	-----------

Key Decision? Please bold as appropriate	Yes	No
--	-----	-----------

Reason Please bold as appropriate	1, a change in service provision that impacts upon the service revenue budget by £100,000 or more	2, a contract worth £100,000 or more
	3, a new or unprogrammed capital scheme of £100,000 or more	4, Significant impact in environmental, social or physical terms in two or more wards

REASONS FOR RECOMMENDATION(S)

(If the recommendations are accepted)

9. To ensure that the streetscene service is fit for purpose, utilising resources appropriately and managing and meeting customer expectations.

ALTERNATIVE OPTIONS CONSIDERED AND REJECTED

10. To extend the timeline of the existing strategy and continue delivering it. Following organisational changes in 2016 the service has a changed management structure and further review and development is essential for the successful modernisation and development of service.

CORPORATE PRIORITIES

11. This report relates to the following Strategic Objectives:

Involving residents in improving their local area and equality of access for all	A strong local economy	x
Clean, safe and healthy communities	An ambitious council that does more to meet the needs of residents and the local area	x

BACKGROUND

12. The streetscene service base revenue budget for 2016/17 is £2,086m which represents 14.84% of the council's total revenue budget of £14,059m.
13. During 2016/17 56.6 FTE staff have been employed which represents 18.23% of the total FTE staff of 310.5.
14. The original streetscene modernisation strategy covered the period 2012-15 and concentrated mainly on the areas of management, culture change and business development opportunities.

15. A development action plan was included in the strategy divided into four sections:
 - i. Leadership Development
 - ii. Modern Working Arrangements
 - iii. Service Delivery and Support Service Issues
 - iv. Business Development Opportunities

16. In addition to this there are a number of service areas that have now become significant enough to be included separately in a refreshed strategy such as cemeteries and trees.

17. The new strategy will also focus on process and dealing with specific operational challenges such as the health and safety of employees and the public.

18. A high level programme of work, expected to last at least three years and designed around change themes is available.

19. The detailed milestones, actions and timescales will be managed using the corporate project management system.

20. The new waste contract procurement exercise which will also involve a substantial amount of work over the next 18 months will be managed and reported separately.

STREETSCENE MODERNISATION STRATEGY 2012-15

21. This strategy has expired but had an overriding objective to:
 “Ensure that the Streetscene service remains fit for purpose by adopting modern and efficient working practices that meet the needs of customers over the next 3 years”

22. Although some progress has been made, a recent assessment concluded that a number of the 40 actions have been partially completed and following review will be included in the new strategy:

Development Actions	Total	Complete	Partially Complete	Incomplete
Leadership Development	10	1	7	2
Modern Working Arrangements	13	1	6	6
Service Delivery and Support Service Issues	9	4(need review)	1	4
Business Development Opportunities	8		8	
Total	40	6	22	12

ASSETS

23. A major element of the new strategy is to establish a clear understanding of the volumes and scope of maintenance of council related assets.

24. An accurate, up to date asset register is essential to ensure that schedules are correct and complete and that the workforce is clear where council priorities lie.

25. Any discrepancies in data relating to council ownership, maintenance, scheduling and receipt of income for external works need to be identified and rectified.
26. An exercise to assess the resources required to fully match current demands, factor in enough resilience for unavoidable absences and to meet future demands will be undertaken as part of the staffing review.
27. This will be the first time such a comprehensive exercise has been undertaken and as a consequence, critical decisions in terms of policy and financing of the service is likely to be required.
28. Investigating the possibility of utilising external support and in some cases extending this to ensure that all assets are maintained to the appropriate standards will be considered and may include:
 - i. Private Contractors
 - ii. Voluntary Groups
 - iii. Community Groups
 - iv. Parish Councils
29. A review of winter work is also recommended to ensure resources are effectively scheduled, managed and available to support additional programmed work .e.g. memorial safety testing and tree and shrub work.
30. Current information relating to assets maintained by the council is included in the strategy.

CHANGE THEMES

31. During the analysis of the service, 24 separate areas were identified aimed at modernising the service. These have been organised in six key themes:
 1. Review of key policies including:
 - a. Tree policy
 - b. Memorial policy
 2. Performance including:
 - a. Quality Control
 - b. Benchmarking
 - c. Customer Satisfaction
 3. Technology including:
 - a. Mobile Working
 - b. Digital Systems Review
 - c. Information Management
 4. Resources and Service Staffing including:
 - a. Supplies and Contracts Budget
 - b. Staffing Structure
 - c. Workforce Stability and Succession Planning
 - d. Training and Workforce Development
 - e. Health and Safety

- f. Public Realm Agreement
 - g. Resourcing for Events
 - h. Fees and Charges
5. Internal Asset Management including:
- a. Depot
 - b. Fleet Management
 - c. Fuel
 - d. Stores
6. External Asset Management including:
- a. Tree Management
 - b. Memorials
 - c. Playgrounds
 - d. Cemeteries
32. Additionally key actions relating to these key areas of work have been identified in the strategy and a high level timetable showing estimated dates for completion is available.
33. The full detailed programme of work will be recorded in the corporate projects system.

CONCLUSION AND NEXT STEPS

34. There is a considerable amount of work to do to successfully deliver the new strategy and to effectively meet current and future needs efficiently and economically.
35. A project team with disciplines from across the council will deliver the programme of work.
36. It is vital to ensure that asset management and maintenance is aligned with appropriately skilled and qualified staff. Planning for the future will require a comprehensive review of staffing roles and responsibilities.
37. Financial remodelling of the service will be necessary as service priorities are realigned.
38. High profile aspects of the service such as grass cutting will be given priority. A review of the technology used will be required to support this.
39. Overall, a co-ordinated approach to performance, cost and customer service will be required to achieve the vision.

IMPLICATIONS OF REPORT

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

Finance	X	Customer Services	
Human Resources	X	Equality and Diversity	X
Legal		Integrated Impact Assessment	

		required?	X
No significant implications in this area		Policy and Communications	

COMMENTS OF THE STATUTORY FINANCE OFFICER

41. As the details of the strategies identified in the report are worked up further, the budget implications will be analysed, communicated and approved subject to the Council's financial and procurement regulations.

COMMENTS OF THE HEAD OF POLICY AND GOVERNANCE

42. The Streetscene service is a critical frontline delivery function and this strategy will ensure that the service is able to respond to future demand through the effective management of organisational resources and capacity. The strategy forms part of the council transformation programme and any decisions or policy changes arising from the implementation of the strategy will be assessed using the council's Integrated Impact Assessment and reported accordingly. Decisions resulting in structural or staffing change will be subject to established HR policy and procedure.

ASIM KHAN
DIRECTOR OF CUSTOMER & DIGITAL

Background Papers			
Documents	Date	File	Place of Inspection
Streetscene Mod. Folder	01/11/2016	***	Shared Drive
Report Author	Ext	Date	Doc ID
Asim Khan	5448	02/01/2017	***

Appendix A

Chorley
Council

STREETSCENE STRATEGY

2017 - 2020



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Introduction - Overall vision

The overall vision of the strategy is to ensure that the streetscene service continues to evolve by streamlining the structure and adopting modern, efficient process and digital changes that meet the needs of all stakeholders over the life of the strategy.

Background and Context

The streetscene service base revenue budget for 2016/17 was £2,086m representing 14.84% of the council's total revenue budget of £14,059m.

During 2016/17 the service employed 56.6 FTE staff representing 18.23% of the total FTE staff of 310.5.

The original streetscene modernisation report covered the period 2012-15 and concentrated mainly on the areas of management, culture change and business development opportunities without direct reference to specific service or process issues.

A development action plan was included in the original strategy divided into four sections which have been analysed as part of this update, namely:

1. Leadership Development
2. Modern Working Arrangements
3. Service Delivery and Support Service Issues
4. Business Development Opportunities

Analysis has also shown that there are a number of service areas that have now become significant enough to be included separately in an up to date strategy such as cemeteries and tree management.

Health and Safety for both employees and the public will also need to be addressed.

Key elements of the new strategy for the streetscene service are shown at Appendix A.

A high level action plan, expected to last at least three years and designed around change themes is attached at Appendix B.

The detailed milestones, actions and timescales will be managed using the corporate projects system.

Information, from the GIS system, in respect of council related assets is shown at Appendix C.

The new waste contract which will also involve a substantial amount of work over the next 18 months will be managed and reported separately.

Current Position

There have been several positive findings in the analysis of the service:

1. The streetscene service has received a number of accolades in the past few years the most recent being in 2016:
 - a. Britain in Bloom North West – Gold Medal Best Small City for Chorley in Bloom
 - b. Lancashire Tourism – Winner Small Tourism Event Award for the Chorley Flower Show
 - c. Green Flag Awards for 5 Parks

2. Customer satisfaction is also a critical aspect of service provision and although responses to the corporate customer satisfaction survey show, by percentage, a higher level of satisfaction than dissatisfaction, this is a very limited survey. As at the end of September 2016, no responses were received in respect of parks and open spaces and only 18 in respect of street cleaning.

Concentration on the numbers and types of complaints and service requests received from the general public appears to be a better indicator of satisfaction with services. Since My Account was set up in early 2014, only 71 (1.74%) complaints have been received about street cleaning and 194 (4.76%) about grounds maintenance of the total 4,074 complaints to the council.

3. The role of streetscene staff in these achievements is acknowledged along with the skills and local knowledge of employees and their ability to adapt and respond to the unforeseen demands they are set. The recent Chief Executive Making it Happen awards recognised the creativity, dedication and versatility of one officer for driving efficiencies in his role.

Although these successes are to be commended the intention now is to build on the positive elements and extend them across the entire service.

At the moment value for money information and service cost comparison data is limited and needs to be developed to fully understand service costs and productivity.

Aims

The streetscene strategy has been drawn up as a result of discussions and input from a range of key stakeholders including staff at all levels. It establishes a clear way forward for the next 3 years together with a high level action plan for the development of the streetscene service. Implementation over the next 12-18 months is key to the success of the strategy. The approach is designed to develop a modern, efficient and fit for purpose service, well positioned to meet the challenging times faced by local government in the years ahead. The strategy covers the period from 2017 until 2020 and will be subject to ongoing review.

The streetscene service aims to introduce a number of change themes designed to challenge current working practices and modernise and introduce improvements to deliver high quality services that delivered in a co-ordinated way.

Changes in behaviour and culture together with a greater focus on performance and productivity will be required to achieve these aims. The strategy and its priorities will be shared fully with streetscene staff.

Key stakeholders such as parish councils and community groups will also play an important part.

Underlying Principles

There are a number of guiding principles which underline the implementation of the streetscene strategy:

1. Modernising the service to meet increased demands and ensuring that up to date thinking, technology and latest methods are applied in practice.
2. Improving productivity and increasing output particularly in relation to high profile service areas.

3. Realigning and prioritising budgets in line with the strategy and council financial performance.

Assets

A major element of the new strategy is to establish a clear understanding of the volumes and scope of maintenance of council owned and related assets.

An accurate, up to date asset register is essential to ensure that schedules are complete and that the workforce is clear where council priorities lie.

An exercise to assess the resources required to fully match current and future demands and factor in enough resilience for unavoidable absences will be undertaken as part of the staffing review.

High level information relating to current assets maintained by the council is shown at Appendix B.

Key Measures

The improvements and new ways of working will be reflected in the following corporate and service level management indicators:

No	Description	Target
1	Grass cutting schedule work completed on time	80%
2	Street cleansing schedule routes completed on time	80%
3	Scheduled litter bins emptied on time	80%
4	Grounds maintenance service requests completed on time	80%
5	Streetscene service requests completed on time	80%
6	Call backs completed on time	100%

Key Actions

The delivery of the strategy revolves around six key areas. A visual representation can be found at Appendix A:

Delivery of the strategy will take place over three years with prioritisation, in the first instance, being given to measures to improve performance particularly in the grass cutting service.

The key actions below will be incorporated into work packages and detailed actions included in the corporate projects system.

KEY ACTIONS

- 1. Review key policies**
 A number of key policies, including in particular the tree and memorial policies are now out of date or need approving.
 A review of these policies is essential to ensure that operational procedures correspond with approved council policies.
- 2. Performance**
 - a. Produce accurate work schedules and performance reports**
 Work to fulfil this key action will involve a number of streetscene and ICT staff. Grass cutting schedules, particularly Public Realm work, will be prioritised and improvements made during 2017/18.

KEY ACTIONS

Assets not currently included in work schedules will form part of Phase 2 of a system review exercise.

b. Introduce formalised quality control procedures.

Quality checking has so far relied on an ad-hoc system of checks by co-ordinators or customer reporting. A formalised checking and reporting routine, with the increased involvement of supervisors, will be introduced during 2017/18.

c. Customer Satisfaction

Ensuring that work schedules are adhered to and customers are responded to promptly is critical for customer satisfaction and minimising the amount of customer contact with the council.

Customer satisfaction will be measured through the corporate customer satisfaction survey and by monitoring the volume and type of complaints received from the public.

d. Benchmarking

Although formal benchmarking exercises are no longer in place visits to other authorities to learn from their experiences may, if appropriate, help changes to council processes.

3. Technology

There is still scope for expansion in the use of technology and a review of its use by the service is necessary. Business intelligence related to understanding demand, capacity and resources relies heavily on technology producing information that is accurate and reliable. Issues around the culture of the streetscene service and current methods of working will also need to be addressed as part of this initiative.

4. Resources and Staffing

a. Budget

Several areas of budget spend are due for review including:

- a. Overtime
- b. Grounds maintenance contractors
- c. Fuel
- d. Public Realm agreement – LCC reimbursement
- e. Fees and charges

b. Supplies and Contracts

An analysis of the revenue spending patterns on street scene supplies and contracts highlighted a number of points for consideration. A more in depth analysis of spending habits needs to be undertaken to ensure that contracts are procured efficiently.

c. Training and Workforce Development (including improved joint working with other services)

An exercise to ensure that current requirements are adequate, establish future needs and compile and deliver a training programme is required.

This will involve mentoring and shadowing exercises to help integrate operational staff with other council services.

Asset management and maintenance, aligned with appropriately skilled and qualified staff is an essential part of planning for the future.

d. Health and Safety

As part of the streetscene service one year work plan for the Executive Member a health and safety action plan was agreed in June 2016. Much of it has been implemented but health and safety needs to remain a priority for all staff as it is an area of significant risk. Compliance with health and safety requirements will also be picked up as part of the onsite quality checks.

e. Staffing

A review of the establishment is essential to ensure that the aims of the service are able to be fulfilled. This should include resourcing for corporate events currently

KEY ACTIONS

undertaken and funded by either the streetscene service or other directorates. A realignment of work with other service areas will be included.

f. Workforce Stability and Succession Planning

The establishment review will concentrate on the stability and resilience of the workforce which has a high percentage of older staff and significant sickness absence. Succession planning is key to delivering the service aims.

5. Internal Asset Management

The streetscene service has a number of significant internal assets to manage and maintain. Actions to review, change or improve the processes surrounding these assets are due and will be included in detail in the corporate projects system. Internal assets include:

- a. Depot
- b. Fleet Management
- c. Fuel
- d. Stores

6. External Asset Management

The streetscene service also has a considerable number of external assets to manage and maintain. Actions to review, change or improve the processes surrounding these assets are due and will be included in detail in the corporate projects system. External assets include:

- a. Tree Management
- b. Cemeteries
- c. Memorials
- d. Playgrounds
- e. Reservoirs

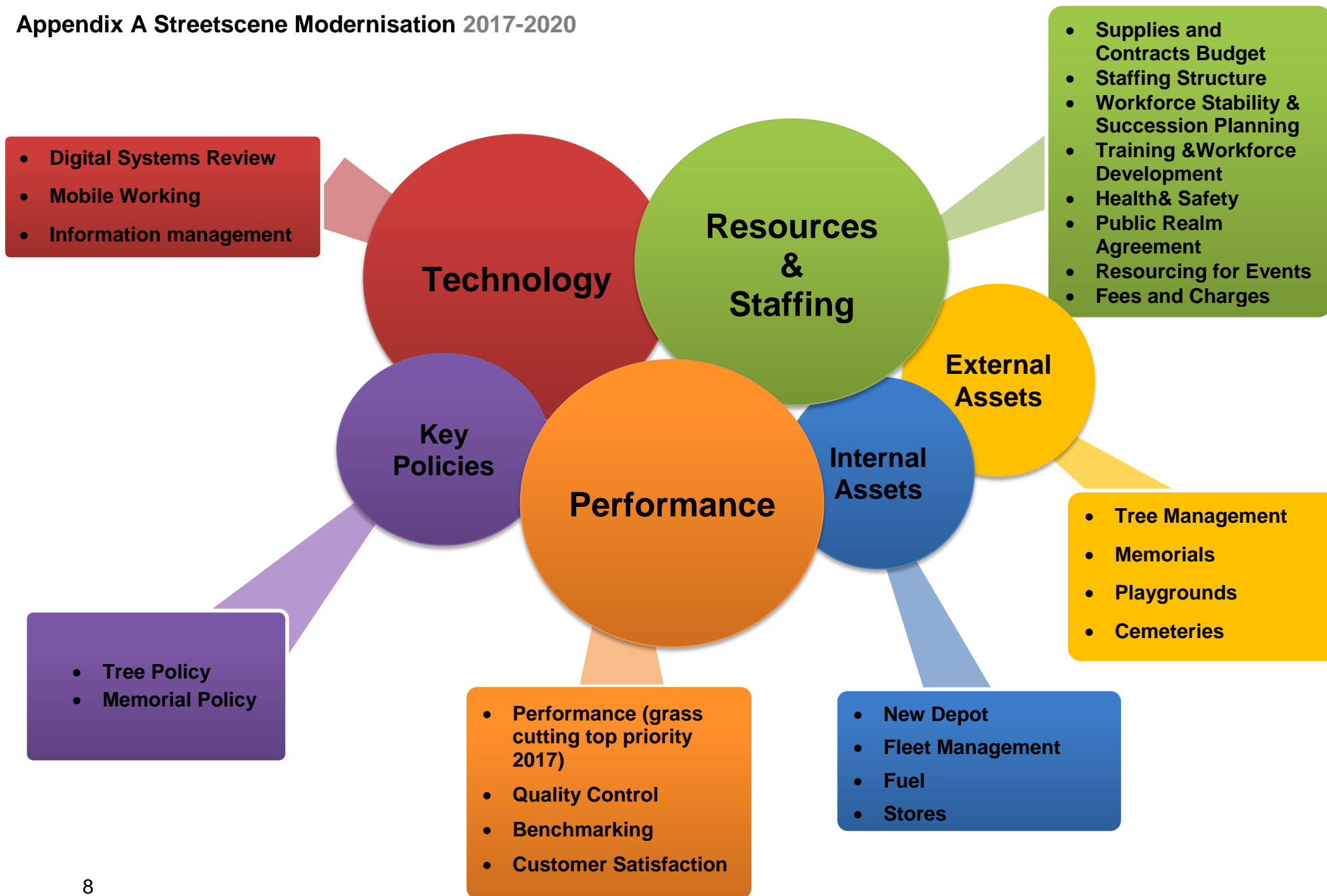
Next Steps

There is a considerable amount of work to do to successfully deliver the new strategy and to effectively meet current and future needs efficiently and economically.

The approach set out in this strategy will lead to a modern service well positioned to meet the challenging times faced by local government over the next three years.

A project team with disciplines from across the council will be established to deliver the programme of work set out in this strategy.

A high level action plan has been drawn up. Dates included are estimates and are subject to change as the project develops.



Appendix B Assets

Asset	Total Number Recorded In GIS System	Council Maintained	Council Owned	Scheduled
Alley Gates SC	123	123	123	0
Benches	345	302	0	0
Boardwalk	2	2	0	0
Bollards	206	206	0	0
Boundary Signs	35	22	22	0
Bowling Greens SC	24	6	2	6
Bridges	79	79	0	0
Buildings	54	54	54	0
Bus Shelters SC	165	83	83	0
Car Parks SC	14	14	14	0
Car park assets	60	0	60	0
Cemeteries SC	7	2	2	0
Cricket Pitches	25	1	0	1
Cycle Racks	12	12	1	0
Depot SC	1	1	1	0
Disabled Fishing Pegs	3	0	0	0
Dog Fouling Hotspots	87	87	8	87
Feeder Pillars	2	0	0	0
Fences	18	17	17	0
Football Pitches	96	0	4	0
Football Pitches Poly	88	18	15	0
Garages	170	0	170	0
Gates	132	131	0	0
Grit Bins SC	6	0	0	0

Ground Maintenance (Grass)	2634	2013	944	2013
Ground Maintenance (Shrubs)	1951	1471	859	1464
Gullies and Culverts	67	0	0	0
Handcarts	60	60	0	60
Hanging Baskets	2	1	0	0
Height Barriers	4	0	0	0
Highway Verges	1277	1277	0	1278
Hockey Pitches	2	0	0	0
Lamp Columns	0	0	0	0
Lamp Post Baskets	0	0	0	0
Landownership	2694	1415	1415	0
Lifebelts	9	9	0	0
Memorial Benches Plaques	94	0	0	0
Monuments	7	0	0	0
Nature Reserves Woodlands	22	21	21	8
Open Spaces Tractor Mowing	20	20	20	19
Park Paths	28	28	26	0
Pedestrian Orderly Route	241	241	0	0
Picnic Benches	35	0	0	0
Planters	58	0	0	0
Play Areas SC	83	50	39	50
Proactive Team	128	128	22	47
Rails	47	0	47	0
Rec Grounds	8	8	8	0
Rec Grounds Polygons	12	8	11	6
Rugby Pitches	6	0	1	0
Rural Litter Picking	54	54	12	0
Shelter Belts	560	560	258	0
Signs	185	151	0	0
Spraying Schedules	1388	1388	0	1388

Stiles	6	6	0	0
Street Lighting	206	0	0	0
Street Name Signs	3813	3472	3472	0
Summer Spring Bedding	281	281	281	0
Sweeping Schedules	1995	1995	2	1483
Tennis Courts	16	3	3	0
War Memorials and Monuments	11	4	2	0
Waste Bins SC	1364	1339	1336	1334
Water Related Features	191	191	191	7
Wooden Barrels	0	0	0	0
Total	21313	17354	9546	9251

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