

# Public Document Pack



**Cherwell**

DISTRICT COUNCIL  
NORTH OXFORDSHIRE

**Committee: Executive**

**Date: Monday 6 January 2025**

**Time: 6.30 pm**

**Venue Bodicote House, Bodicote, Banbury, Oxon OX15 4AA**

## **Membership**

**Councillor David Hingley  
(Chairman)**

Councillor Tom Beckett  
Councillor Jean Conway  
Councillor Ian Middleton  
Councillor Rob Pattenden

**Councillor Lesley McLean (Vice-Chairman)**

Councillor Chris Brant  
Councillor Nick Cotter  
Councillor Rob Parkinson

## **AGENDA**

### **1. Apologies for Absence**

### **2. Declarations of Interest**

Members are asked to declare any interest and the nature of that interest that they may have in any of the items under consideration at this meeting.

### **3. Petitions and Requests to Address the Meeting**

The Chairman to report on any requests to submit petitions or to address the meeting.

### **4. Minutes (Pages 7 - 18)**

To confirm as a correct record the Minutes of the meeting held on 2 December 2024 and the reconvened meeting held on 5 December 2024.

### **5. Chairman's Announcements**

To receive communications from the Chairman.

## **6. Transformation Contract Extension (Pages 19 - 76)**

Report of Corporate Director Resources and Transformation

### **Purpose of report**

To outline a fourth phase of work to progress the Councils transformation programme and obtain approval to extend the contract with our partner to deliver this next phase.

### **Recommendations**

The Executive resolves to:

- 1.1 Award a short contract extension to PA Consulting for a fourth phase and final phase of work to the value of £ 116,090.
- 1.2 Approve the transfer of £116,090 from the reserves earmarked for transformation, to fund this additional phase of work.
- 1.3 Receive the "Case for Change" and associated outputs, once delivered, to consider whether and how to take forward the proposed transformation programme.

## **7. New Housing Allocations Scheme 2025 (Pages 77 - 182)**

Report of Assistant Director Wellbeing and Housing

### **Purpose of report**

To seek approval for a new Housing Allocations Scheme.

### **Recommendations**

The Executive resolves:

- 1.1 To approve the new Housing Allocations Scheme.

## **8. Traffic Regulation Order in Pioneer Square (Pages 183 - 190)**

Report of Assistant Director Property

### **Purpose of report**

To promote an off-street Traffic Regulation Order on land the Council owns and has responsibility for outside the entrances to Franklin House including the Travelodge Hotel in order to mitigate the risks to the public at large and to the Council itself caused by unsafe parking and traffic movements in the area.

### **Recommendations**

The Executive resolves:

- 1.1 To approve the promotion of an off-street Traffic Regulation Order on land the Council owns and has responsibility for outside the entrances to Franklin House including the Travelodge Hotel in order to mitigate the risks to the public at large and to the Council itself caused by unsafe parking and traffic movements in the area.
- 1.2 To authorise the Assistant Director Property to start formal consultation on the proposed off-street Traffic Regulation Order, and, following due consideration of any representations received at the consultation stage and in consultation with the Monitoring Officer and relevant portfolio holder, to make any decisions and exercise all powers necessary in respect of whether or not to make and/or seal the proposed Order.

**9. Finance Monitoring Report November 2024 (Pages 191 - 226)**

Report of Assistant Director Finance (Section 151 Officer)

**Purpose of report**

To report to Executive the council's forecast financial position as at the end of the November 2024.

**Recommendations**

The Executive resolves:

- 1.1 To consider and note the contents of the council's financial management report as at the end of November 2024.
- 1.2 To approve the reprofiling of capital projects beyond 2024/25 (section 4.2.3 and Appendix 1) and the subsequent update to the programme budget for this financial year 2024/25.
- 1.3 To approve to virement of £1.031m from Policy Contingency to services for the Cost of Living award for 2024/25 as agreed in November.
- 1.4 To approve the allocation of £0.500m Policy Contingency to cover the cost of appeals.

**10. Council Tax Base 2025/2026 (Pages 227 - 248)**

Report of Assistant Director Finance (Section 151 Officer)

**Purpose of report**

To provide Council tax Base for 2025/26.

**Recommendations**

The Executive resolves to

- 1.1 Approve the report of the Assistant Director of Finance for the calculation of the Council's Tax Base for 2025/26.
- 1.2 Agree that, in accordance with the Local Authorities (Calculation of Council Tax Base) (England) Regulations 2012, the amount calculated by Cherwell District Council as its Council Tax Base for the year 2025/26 shall be 59,853.6.
- 1.3 Agree for the parishes which form part of its area shown in Appendix 1, the amount calculated as the Council Tax Base for the year 2025/26 in respect of special items shall be as indicated in the column titled Tax Base 2025/26.
- 1.4 Agree for the Flood Defence Areas which form part of its area, the amount calculated as the Council Tax Base for the year 2025/26 for the purposes of levies on Oxfordshire County Council by River Authorities, shall be:

Thames Flood Defence Area	57,459.5
Anglian (Great Ouse) Flood Defence Area	1,941.6
Severn Region Flood Defence Area	452.5
<b>TOTAL</b>	<b>59,853.6</b>

## 11. Urgent Business

The Chairman to advise whether they have agreed to any item of urgent business being admitted to the agenda.

**Councillors are requested to collect any post from their pigeon hole in the Members Room at the end of the meeting.**

## Information about this Agenda

### Apologies for Absence

Apologies for absence should be notified to [democracy@cherwell-dc.gov.uk](mailto:democracy@cherwell-dc.gov.uk) or 01295 221534 prior to the start of the meeting.

### Declarations of Interest

Members are asked to declare interests at item 2 on the agenda or if arriving after the start of the meeting, at the start of the relevant agenda item.

### Local Government and Finance Act 1992 – Budget Setting, Contracts & Supplementary Estimates

Members are reminded that any member who is two months in arrears with Council Tax must declare the fact and may speak but not vote on any decision which involves budget setting, extending or agreeing contracts or incurring expenditure not provided for in the agreed budget for a given year and could affect calculations on the level of Council Tax.

### Local Authorities (Executive Arrangements) (Meetings and Access to Information) (England) Regulations 2012

This agenda constitutes the 5-day notice required by Regulation 5 of the Local Authorities (Executive Arrangements) (Meetings and Access to Information) (England) Regulations

2012 in terms of the intention to consider an item of business in private.

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### **Webcasting and Broadcasting Notice**

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If you make a representation to the meeting, you will be deemed by the council to have consented to being recorded. By entering the Council Chamber or joining virtually, you are consenting to being recorded and to the possible use of those images and sound recordings for webcasting and/or training purposes.

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### **Queries Regarding this Agenda**

Please contact Natasha Clark, Democratic and Elections [democracy@cherwell-dc.gov.uk](mailto:democracy@cherwell-dc.gov.uk), 01295 221534

**Shiraz Sheikh**  
**Monitoring Officer**

Published on Monday 23 December 2024

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## **Cherwell District Council**

### **Executive**

Minutes of the reconvened 2 December 2024 meeting of the Executive held at Bodicote House, Bodicote, Banbury, Oxon OX15 4AA, on 5 December 2024 at 1.00 pm

#### Present:

Councillor David Hingley (Leader of the Council & Portfolio Holder for Strategic Leadership) (Chairman)  
Councillor Lesley McLean (Deputy Leader of the Council and Portfolio Holder for Finance, Property & Regeneration) (Vice-Chairman)  
Councillor Tom Beckett, Portfolio Holder for Greener Communities  
Councillor Chris Brant, Portfolio Holder for Corporate Services  
Councillor Jean Conway, Portfolio Holder for Planning and Development Management  
Councillor Nick Cotter, Portfolio Holder for Housing  
Councillor Ian Middleton, Portfolio Holder for Neighbourhood Services  
Councillor Rob Parkinson, Portfolio Holder for Safer Communities  
Councillor Rob Pattenden, Portfolio Holder for Healthy Communities

#### Also Present:

Councillor John Broad  
Councillor David Rogers

#### Also Present Virtually:

Councillor Dr Isabel Creed, Chair, Overview and Scrutiny Committee

#### Officers:

Ian Boll, Corporate Director Communities  
Michael Furness, Assistant Director Finance & S151 Officer  
Shiraz Sheikh, Assistant Director Law & Governance and Monitoring Officer  
David Peckford, Assistant Director Planning & Development  
Christina Cherry, Planning Policy, Conservation & Design Manager  
Maria Dopazo, Principal Planning Policy Officer  
Natasha Clark, Governance and Elections Manager

#### Officers Attending Virtually:

Stephen Hinds, Corporate Director Resources and Transformation  
Holly Jones, Planning Policy Officer

78 **Reconvening of Meeting**

The Chairman welcomed Members and officer to the reconvened meeting.

79 **Proposed Cherwell Local Plan 2042**

The Assistant Director Planning and Development submitted a report to seek approval of the Proposed Cherwell Local Plan 2042 for the purpose of inviting representations.

In introducing the report, the Portfolio Holder for Planning and Development thanked the Assistant Director Planning and Development, Planning Policy, Conservation and Design Manager and all officers who had contributed to the proposed Cherwell Plan 2042 and all accompanying documents.

The Chair of the Overview and Scrutiny Committee, Councillor Dr Creed, addressed Executive to report on the deliberations of the Committee which had considered the proposed Cherwell Local Plan 2042 in detail at their extraordinary 12 November meeting and 26 November meeting, adjourned to 3 December. The Committee had agreed comments and recommendations to Executive on the content of the Plan and recommended Executive approve the proposed Cherwell Local Plan 2042 for the purpose of inviting representations under Regulations 19 and 20 of The Town and Country Planning (Local Planning) (England) Regulations 2012 (as amended).

On behalf of Executive, the Chairman thanked Councillor Creed and the Overview and Scrutiny Committee for their thorough review, comments and recommendations.

The Portfolio Holder for Planning and Development and Assistant Director Planning and Development explained that the proposed changes to the Plan arising from the Overview and Scrutiny Committee's deliberations had been considered by officers, in consultation with the Portfolio Holder for Planning and Development, and were set out at Appendix 9 to the report (annex to the Minutes as set out in the Minute Book).

The Chairman referred to correspondence from developers that had he had received and had also been sent to a number of Members, including Overview and Scrutiny Committee members, and officers and confirmed that the council had responded to all correspondence. The responses had been shared with the Overview and Scrutiny Committee.

In response to Executive comments, the Assistant Director Planning and Development provided clarification in respect on Oxford's unmet housing need and, referring to the Duty to Cooperate, confirmed there was, and would continue to be, liaison with West Oxfordshire District Council.

In considering the report, Members commended the work that had been undertaken building on and improving the previous version of the Cherwell Local Plan.



## **Resolved (unanimously)**

- (1) That, having considered and noted the comments made by the Overview and Scrutiny Committee meetings on 12 November 2024 and 4 December 2024 (reconvening of adjourned 26 November 2024 meeting) the following change be made to paragraph 8.5. of the Proposed Local Plan:

“ We need to carefully manage development pressures in the interest of seeking housing delivery which benefits local communities, does not lead to unacceptable pressure on local infrastructure **including health care facilities which must meet the needs of our rural communities**, and can be supported by sustainable and active travel options and which does not cause damage to the environment that makes our rural areas attractive and distinctive.”

- (2) That the Proposed Cherwell Local Plan 2042 (Annex to the Minutes as set out in the Minute Book), as amended by Appendix 9 to the report and resolution (1) above, be approved for the purpose of inviting representations under Regulations 19 and 20 of The Town and Country Planning (Local Planning) (England) Regulations 2012 (as amended).
- (3) That it be agreed that the Assistant Director – Planning and Development be authorised to approve the final presentation of the Plan and to make any necessary minor administrative amendments and corrections to it prior to formal publication and in consultation with the Portfolio Holder for Planning and Development.
- (4) That it be agreed that the Assistant Director – Planning and Development be authorised to publish any necessary supporting documents, including an Infrastructure Delivery Plan, and other background papers in consultation with the Portfolio Holder for Planning and Development.

## **Reasons**

A Proposed Local Plan has been prepared in the interest of having up to date planning policies which respond positively and effectively in meeting development needs and the planning issues that the district and our local communities face. An up-to-date Local Plan is important for a plan-led approach to decision making and contributing to the achievement of sustainable development. Preparation of the Plan has been informed by three formal public consultations, continuous engagement and cooperation and evidence gathering. Officers recommend that representations now be invited under Regulations 19 and 20 of The Town and Country Planning (Local Planning) (England) Regulations 2012 (as amended).

## **Alternative options**

Option 1: To delay consideration of the Proposed Local Plan and to not invite representations at this time.

Delaying would have the advantage of waiting for the final, revised version of the National Planning Policy Framework (NPPF). However, the Government has stated, '*We propose transitional arrangements to maintain the progress of plans at more advanced stages of preparation, while maximising proactive planning for the homes our communities need*'. As the Proposed Local Plan has been prepared under the existing NPPF and can comply with the suggested transitional arrangements, officers do not recommend delay.

Option 2: To reconsider the content of the Proposed Local Plan

The Proposed Local Plan has been prepared having regard to statutory requirements, evidence and national planning policy and guidance. If Members do not agree with significant aspects of the Plan, officers would need to consider the planning reasons for any changes and the implications for the evidence base including the Sustainability Appraisal. There would be delay to the programme. Whether the Council would need to continue the Plan under the forthcoming NPPF would require consideration.

80

## **Local Development Scheme**

The Assistant Director Planning and Development submitted a report to seek approval of an updated Local Development Scheme (LDS) to produce the Council's key planning policy documents.

On behalf of Executive, the Portfolio Holder for Planning and Development thanked the Assistant Director Planning and Development, Planning, Policy Conservation & Design Manager and all officers in the Planning Policy Team and wider support for their hard work in the drafting of the updated Local Development Scheme.

### **Resolved (unanimously)**

(1) That the updated Local Development Scheme (LDS) be approved.

### **Reasons**

An updated LDS is a legal duty for the council as it is stated under section 15 of the Planning and Compulsory Purchase Act 2004 (as amended). It provides a programme for completion of the Cherwell Local Plan Review and a potential Community Infrastructure Levy. The LDS will be used by officers, the public, partners and developers and other stakeholders to monitor the production of documents and to plan for associated consultations. Approval of the LDS is needed to assist project management and ensure that the Council meets its statutory responsibilities for planning. The LDS will be reviewed again if there is a further, significant change in circumstances.

### **Alternative options**

Option 1: Not to approve the LDS.

The Council has a statutory responsibility to maintain an LDS. If the Council did not prepare its own LDS the Secretary of State could impose one. Aside from legal duty, not to approve the LDS could undermine the confidence of the public and stakeholders about the Council's plan-making programme. The LDS would need to be re-presented to the Executive at a future meeting.

Option 2: To reconsider the content of the LDS.

The LDS has been prepared having regard to the Council's statutory responsibilities and current resources. It is considered by officers to be appropriate for the present and foreseeable circumstances.

The meeting ended at 1.35 pm

Chairman:

Date:

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## **Reasons**

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## **Alternative options**

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Option 2: To reconsider the content of the Proposed Local Plan

The Proposed Local Plan has been prepared having regard to statutory requirements, evidence and national planning policy and guidance. If Members do not agree with significant aspects of the Plan, officers would need to consider the planning reasons for any changes and the implications for the evidence base including the Sustainability Appraisal. There would be delay to the programme. Whether the Council would need to continue the Plan under the forthcoming NPPF would require consideration.

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Option 2: To reconsider the content of the LDS.

The LDS has been prepared having regard to the Council's statutory responsibilities and current resources. It is considered by officers to be appropriate for the present and foreseeable circumstances.

The meeting ended at 1.35 pm

Chairman:

Date:

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<b>This report is public</b>	
<b>Transformation Contract Extension</b>	
<b>Committee</b>	Executive
<b>Date of Committee</b>	6 January 2025
<b>Portfolio Holder presenting the report</b>	Portfolio Holder for Customer Focus, Councillor Chris Brant
<b>Date Portfolio Holder agreed report</b>	17 December 2024
<b>Report of</b>	Corporate Director Resources and Transformation, Stephen Hinds

## Purpose of report

To outline a fourth phase of work to progress the Councils transformation programme and obtain approval to extend the contract with our partner to deliver this next phase.

### 1. Recommendations

The Executive resolves to:

- 1.1 Award a short contract extension to PA Consulting for a fourth phase and final phase of work to the value of £116,090.
- 1.2 Approve the transfer of £116,090 from the reserves earmarked for transformation, to fund this additional phase of work.
- 1.3 Receive the “Case for Change” and associated outputs, once delivered, to consider whether and how to take forward the proposed transformation programme.

### 2. Executive Summary

- 2.1 As part of the Council’s need and desire to transform its services and the way it works to be more efficient and effective, the council appointed a partner with a proven track record to undertake a piece of work to help our services identify these opportunities. The original 3-phase piece of work was carried out at an intense pace and is now complete, leaving the council with a solid evidence base to move forward in our transformation and change journey.
- 2.2 The work carried out in those three phases identified effectiveness changes totaling **£4.1m** over the projected project period, alongside **£2.4m** of additional income, whilst identifying cross-cutting effectiveness themes that would generate further income – thus showing the size of the prize if the Council operates and invests in an

effective transformation programme. In addition to the effectiveness and income changes, various service level options were developed with an option identified here generating a value of **£4.5m**, leaving the Council with options totaling **£11m** against a target of **£8.375m**. These figures are indicative and future work will be carried out to articulate the expected figures. As with all work, there is an element of “optimism” in those potential savings identified at this early stage. Following the government green book approach, it would be prudent to reduce our expectations of the amounts that can be delivered by 10%, thereby equating to a totality of circa **£10m**. As programmes are developed, these figures will be more accurately forecast in their savings delivery.

- 2.3 Driving this scale of transformation forward, which is needed to manage the financial challenges set out in the MTFS will require the council to have the right infrastructure and resources in place. This phase of work will help to confirm whether or not the Council has the right infrastructure and resources to drive this scale of transformation forward and which it needs to manage the financial challenges faced in the medium-term financial plan whilst improving how the Council operates and delivers its services.
- 2.4 The council also does not have the capacity to address some of the significant cross-cutting issues that have been identified throughout its transformation work to date.
- 2.5 These foundations include the development of a high-level business case that clearly sets out the costs and benefits of change, including a transformation road map that enables the delivery of the Council’s strategy and how to mobilise the programme with appropriate governance. As the transformation programme moves forward, further due diligence and validation will be required through the development of additional business cases for specific investments as our programme progresses.
- 2.6 During the procurement process and identification of a suitable partner for the initial three pieces of work, the council included an option to extend the initial three phases of work in the contract to a fourth phase if there was mutual agreement to do this based upon the ongoing findings (from the first three phases).
- 2.7 The recommendations are therefore to utilise the expertise, knowledge and capacity of the current partner by extending their contract for a fourth phase of work and to approve the transfer of £140k to fund this work to begin as soon as possible to ensure that valuable time is not lost and momentum for change is continued at the Council. An Executive decision is required as a fourth phase would exceed the contract value threshold for operational decisions to be taken by officers (£500k).

## Implications & Impact Assessments

Implications	Commentary
Finance	Phases 1-3 were due to cost the council £400k net, £480k gross. The following table shows the costs of phases 1-3 and then the additional proposed cost of phase 4.

	<b>Net £000</b>	<b>VAT £000</b>	<b>Gross £000</b>
Original Contract	400	80	480
Additional Work	25	5	30
<b>Sub Total 1-3</b>	<b>425</b>	<b>85</b>	<b>510</b>
Phase 4	140	139	139
<b>Forecast Total</b>	<b>541</b>	<b>113</b>	<b>649</b>

Cost overruns on phases 1-3 took the gross cost of the contract over £500k.

A further £116k transfer from the transformation reserve is required to fund the fourth phase of work.

The following table shows how the Transformation Reserve has been utilised in 2024/25 and what level of reserve is forecast to be left at the end of the year and available to support transformation in the future.

<b>Transformation Reserve</b>	<b>£000</b>
Opening Balance	(1,705)
Budgeted use 2024/25	573
Forecast overspend (to be approved)	116
Phase 4	116
<b>Forecast Closing Balance</b>	<b>(900)</b>
Current Planned Spend 2025/26	575
<b>Forecast Closing Balance 2026/07</b>	<b>325</b>

Michael Furness, Assistant Director Finance (Section 151 Officer),  
12 December 2024

**Legal**

This report concerns extension and award of the Cost Based Assessment Contract with PA Consulting for the additional phase as set out in the report. In terms of compliance with the procurement rules, the original contract specification refers to phase 4 in the following terms - *The Council is open to the possibility of a fourth phase of work which would be a mutually agreed piece of work implementing the outputs of the three prior phases.* This phase did not form part of the tender evaluation process hence no price was provided for this phase. It is important that this achieves value for money. In aggregate this piece of work also is above key decision threshold of £500k as the original contract value of £480k has exceeded and this extension would bring the value well above the £500k limit. In terms of procurement, a further transparency/award notification should be considered, or may indeed be required, in respect of the proposed phase 4 should it be awarded. It is therefore recommended that an appropriately informed direct award justification report/

	statement be compiled by Corporate Director and approved by Procurement – prior to award. Shiraz Sheikh – Monitoring Officer/Assistant Director Law & Governance, 23 December 2024			
<b>Risk Management</b>	This contract extension will provide the council with the additional resource and expertise to expedite the delivery of identified transformation changes, in turn support delivery of the transformation programme and future financial sustainability for the council. Celia Prado-Teeling – Performance Team Leader			
<b>Impact Assessments</b>	Positive	Neutral	Negative	Commentary
<b>Equality Impact</b>		X		N/A
<b>A</b> Are there any aspects of the proposed decision, including how it is delivered or accessed, that could impact on inequality?		X		Neutral
<b>B</b> Will the proposed decision have an impact upon the lives of people with protected characteristics, including employees and service users?		X		Neutral
<b>Climate &amp; Environmental Impact</b>				N/A
<b>ICT &amp; Digital Impact</b>				N/A
<b>Data Impact</b>				N/A
<b>Procurement &amp; subsidy</b>				See Legal section above.
<b>Council Priorities</b>	This paper supports all Council Priorities			
<b>Human Resources</b>	N/A			
<b>Property</b>	N/A			
<b>Consultation &amp; Engagement</b>	N/A			

## Supporting Information

### 3. Background

- 3.1 Cherwell District Council is an ambitious authority, with a wide range of strategic priorities to improve the lives of our residents, develop our offer to business and make the district a great place to live, work and visit. As with many Councils, there are financial pressures that we need to address, not only regarding inflation and the cost of living crisis, but pressures on funding and our desires to achieve our ambitious district improvement programme. The Council recognises that we need to modernise our ways of working, improve our organisational maturity and ability to be more agile in the way we operate. This is recognised across all areas of the organisation.
- 3.2 The council recognises it must change how it works and transform across the whole organisation, empower its committed workforce, and embrace the opportunities that allow for more effective and efficient services.
- 3.3 As part of the Council's desire to transform our services and the way we work, the council sought a partner with a proven track record to undertake a consolidated 3-phase piece of work coordinated across all council service areas, running in conjunction/alongside our annual budget setting process.
- 3.4 The procurement programme for this acquiring a partner organisation was carried out utilising the Crown Commercial Services Framework (MCF3). A note on the Crown Commercial Services Framework (MCF3) can be found in Appendix 2.
- 3.5 The scope for the work was developed by the Corporate Director – Resources & Transformation and the Assistant Director – Customer Focus. This scope was reviewed by an independent professional to ensure the Council and was signed off by the Council's procurement professionals.
- 3.6 To ensure transparency in any appointment, the appointment panel consisted of the Assistant Director of Finance (S151 Officer), the Head of Finance (Deputy S151 Officer) and the Transformation Programme Lead. There was also a presentation element at which two members of the procurement team were in attendance and an independent professional.
- 3.7 Work commenced in July 2024, with the third phase being completed in November 2024.
- 3.8 With respect to project governance, the project was managed through a Project Board consisting of the following Council Officers:
- Corporate Director – Resources and Transformation (SRO)
  - Assistant Director – Customer Focus
  - Corporate Director – Communities
  - Assistant Director – Finance
  - Assistant Director – Law and Governance

Also, in attendance from the Council was the programme PM Officer. The meetings were also attended by key members of the PA Consulting Team alongside an independent professional. Note that the Panels who sat at the end of each phase consisted of the Project Board and the Assistant Director of Human Resources (as a non-voting panel member). It should also be noted that the Assistant Director of Customer Focus deputised for the SRO in their absence when required.

- 3.9 The project board met formally on a weekly basis, with the ability to meet as an when required outside of these weekly meetings.
- 3.10 After each phase was completed, an additional “closing” meeting was undertaken with the project board and the Assistant Director of Human Resources (who was a non-voting panel member) to ensure that actions, recommendations and conclusions were recorded before moving onto the next phase. A summary of these findings can be found in paragraphs 3.14 – 3.16
- 3.11 In addition, this transformation work was reported to Corporate Leadership Team (CLT) as a standing item at the weekly CLT meeting. Regular communications to staff were received via all-staff briefings and email communications.
- 3.12 Members were kept abreast of the programme through updates at the monthly Executive Business Planning Meeting (BPM) (as a standing item as required) meetings, monthly Chief Executive Briefing meetings and relevant portfolio holder updates. There was also a presentation to members at the CLT/Executive awaydays on 10 July and 12 September 2024. It was agreed that a briefing would be given to a panel of members regarding the process and ways forward, in advance of a full Executive away day in January.

### **Summary of Work**

- 3.13 The initial work was split into 3 phases, each phase being detailed below:
- **Phase 1.** Created a services catalogue and costed baseline for all service areas. Quantitatively defined service outputs and outcomes, allocated staff effort and budgets to provide a clear view of current services and their delivery costs.
  - **Phase 2.** Identified potential changes to baselines relating to the below levers of cost:
    - Demand Changes. These related to decisions outside of the budget holder’s control that will drive upward movement in the baseline data, agreed as part of Phase 1 (such as increases in service demands leading to increased cost pressures, increasing costs for existing provision etc).
    - Effectiveness Changes – providing current service levels more efficiently and/or effectively. These related to the following types of effectiveness opportunities:
      - Service area specific effectiveness changes (e.g., HR only).
      - Common effectiveness changes (e.g., same action relating to two or more service areas commonly relating to non-staff cost reductions such as printing).



- Cross-cutting effectiveness opportunities that have dependencies with one or more additional service areas.
- Areas given a blanket “stretch” target of 20% of controllable spend
- **Phase 3.** Considered a range of service level options that could be provided (at a high level for each service). This provided insights to inform where to prioritise to ensure resources are best aligned to the strategic priorities. It should be noted that the outcome of Phase 3 is indicative only. It is recognised that any changes to service levels would require member approval. At this stage the report confirms initial indications from officers, should future savings be required from service level reductions

3.14 As part of the initial phase, Panel 1 provided a description of current staff (as full-time equivalents or “FTE”) and non-staff costs; the services being delivered and a costing for each service.

Service Areas also presented initial thinking of Demand and Effectiveness changes, which the Panel provided a steer on ahead of Phase 2.

- A total of **108** indicative Demand and Effectiveness Changes were presented at Panel 1;
- Of which, **51** were progressed into Phase 2.

3.15 Using the approved baseline of services (agreed at Panel 1), proposals for Demand and Effectiveness Changes were developed by the Service Leads and supporting teams on the basis that they maintained current service levels. Demand Changes were developed based on robust analysis of the drivers of current activity and the quantification of what changes will impact the Council in the future. Effectiveness Changes identified different ways to deliver the same level of service, at lower cost. The teams applied analysis of existing processes and data, comparing against good practice and consideration of the drivers of inefficiency. These **proposals** were presented at Panel 2:

- A total of **24 Demand Changes** and **82 Effectiveness Changes** were presented at Panel 2, including the 51 progressed from Phase 1;
- A total of **16 Demand Changes** and **53 Effectiveness Changes** were agreed at Panel 2.

Demand and Effectiveness Changes requiring further work following Panel 2

In addition to the Demand Changes, several opportunities identified by the Service Leads required an uplift in resourcing but did not fit the qualification criteria. These were not presented at Panel 2. The Service Leads and supporting teams were instead directed to bring these back as improved service level options at Panel 3. There were several Effectiveness Changes that either could not be quantified at the time or were dependent on certain events or decisions taking place. These will provide our Council with greater opportunity in the future to develop.

3.16 Using the approved proposals for Demand and Effectiveness Changes from phase 2, current service level costs were re-calculated and agreed. Service Leads, in

working with their teams, produced and costed up six different service levels options (minimum, intermediate 1, intermediate 2, current, improved 1, and improved 2):

- Minimum is defined as the minimum level of service that fulfils legal and statutory requirements (and “acceptable” requirements).
- Intermediate service level options are step changes in service between minimum and current
- Improved service level options offer up to two levels of investment to increase levels of service above current.

Risks associated with different service level options were defined and scored using the Council’s scoring matrix.

At Panel 3, Service Leads presented the proposed service levels, with definitions of the services offered, total cost, FTE and, where applicable, income for each plus their risk profile.

- 3.17 Accompanying these phases, work was undertaken to understand the Council’s levels of activities carrying out various tasks and duties, which is vital in identifying how cross-cutting effectiveness and new ways of working can be implemented, alongside being a critical input into the development of the new Target Operating Model (TOM), the findings of which are included in that stream of work. The programme of work also looked at organisational culture, taking various streams of activities the Council has undertaken and summarised a high-level view on organisational culture at Cherwell.
- 3.18 Upon completion, the primary 3-phase piece of work was carried out at an intense pace and is now complete, having identified an indicative £4.1m of effectiveness changes (as outlined in table 1, with the draft summary report included in Appendix 1), plus additional income streams over the life of the programme whilst maintaining current service levels of circa £2.4m (as outlined in table 2, net of associated costs correct at the time of the data being produced), leaving the council with a solid evidence base to move forward in our transformation and change journey. There were a number of cross-cutting initiatives. It should be noted that some effectiveness changes and income streams were able to be brought online for the 2025/26 financial year to assist with the coping of budget pressures, and these have been presented via the annual budget setting process. The work carried out in Panel 3 identified how the Council could, if it needed to and wanted to, select levels of service delivery, and the indicative example developed through this process showed how an additional £4.5m of savings could be made through changes in service levels throughout the organisation. Whilst a significant element of the additional income is derived from a new government funding stream, there are high level of uncertainty relating to its continuous deployment, especially taking into account future local government funding reforms.
- 3.19 As with all work, there is an element of “optimism” in those potential savings identified at this early stage. Following the government green book approach, it would be prudent to reduce our expectations of the amounts that can be delivered by 10%, thereby equating to a totality of circa £10m. As programmes are developed, these figures will be more accurately forecast in their savings delivery.

Table 1: Summary of Effectiveness Changes across the Council

2025/26 to 2027/28 (Cherwell District Council)	Saving Target Aim @ 20%	Effectiveness Saving	Income Generates
<u>Service Area</u>			
Customer Focus	551,000	-278,759	0
Digital Innovation	313,000	-84,584	0
Environment 1		-1,075,081	-175,000
Environment 2	2,527,000	-49,990	-6,400
Finance	835,000	-645,000	0
Growth & Economy	159,000	0	0
Housing & Wellbeing	1,253,000	-447,349	364,256
Human Resources	248,000	-115,738	0
Law & Governance	469,000	-40,000	0
Planning & Development	936,000	-474,385	-314,400
Property	753,000	-751,474	0
Regulatory Services	334,000	-55,039	0
	<b>8,378,000</b>	<b>-4,017,400</b>	<b>-131,544</b>

Table 2: Additional Income Streams

Cherwell District Council	Additional Income
<u>Service Area</u>	£'000
Customer Focus	-5
Environmental Services (1)	-1,944
Planning and Development	-443
<b>Total</b>	<b>-2,392</b>

3.20 With respect to the Cultural aspect, the review showed that the Council has staff that are committed to providing the best services possible, but the findings, and those behaviours observed through the exercise identified that further work is needed to ensure our transformation journey is successful. Three key areas were identified relating to siloed ways of working, delegation and accountability and resistance to change.

## 4. Details

4.1 After the findings of the first two phases, and in the build up and delivery of Phase 3, a number of work streams were needed to be urgently undertaken to ensure that the Council can maintain delivery momentum by creating effective delivery planning (including budget sizing and resources planning), thus identifying work that needed to be carried out in the potential fourth phase of work

4.2 It is important that the Council needs to agree our ambition for change, develop a high-level business case that clearly sets of the costs and benefits of change, including a transformation road map that enables the delivery of the Council's strategy and how to mobilise the programme with appropriate governance. This being the case, the Council has identified the following activities that are required to achieve this in the first instance and due to the need to expedite our transformation work, to keep momentum and create capacity to deliver, the Council requires external support to do this.

4.3 The Council identified four key activities that would enable this, and these four activities are:

**Activity 1: Support Development for a high-level case for change**  
 Support the Council to (soft) mobilise the transformation streams identified in the Transformation review process by creating a programme initiation document and support the development for the Council’s case for change.

**Activity 2: The agile delivery for process automation**  
 Support the Council in identifying the best way to deliver the agile work programme based on the findings where we have identified areas where process automation could bring the biggest benefits.

**Activity 3: Shifting Culture**  
 Provide support to the Council to help better understand the organisation’s cultural context and help the Council move towards its new vision.

**Activity 4: Addressing off-contract spend**  
 Provide practical support to address the issue surrounding off-contract spend (where we have identified over 200 suppliers who are not on the contracts register with spend totalling over £21m).

4.4 Referring back to the original tender, the contract specification identified that the Council anticipated additional work may be needed to maximise the benefit of the process and enable the Council to deliver its new significant transformation schemes. Section 2 of the contract specification, the section relating to the scope of the contract, it states that “ The Council is open to the possibility of a fourth phase of work which would be a mutually agreed piece of work implementing the outputs of the three prior phases” and that section three stating “Tenderers should base their proposals on achieving the key deliverables within a maximum 4 months term for the three primary phases...”. These two sections are clear on the ability to carry out a fourth element as the 4 months is clearly defined to the first three phases, and the fourth phase being mutually agreed and based on what comes out from the first three phases.

4.5 On this basis, the Council requested that our current partner build a proposal that addressed the four activities, with the deliverables outlined in the table below.

Title	Description
Programme set up & support development of a high-level case for change – Development of a PID	Supporting the Council to soft mobilise the programme developing a programme initiation document (PID) identifying the following information: <ul style="list-style-type: none"> <li>• resource approach</li> <li>• procurement options, if appropriate</li> <li>• governance arrangements</li> <li>• RAID approach to development</li> <li>• change management process</li> <li>• future programme team roles and responsibilities</li> </ul>

Programme set up & support development of a high-level case for change – Case for change	To support the Council’s transformation team in producing a high-level case for change. Please note this will be a document produced by the Council but requires the support of our procured partner.
Process Automation	Produce value stream maps, creating related prioritisation programmes which has a consolidation of relevant outputs.
Shifting culture	<p>To build upon the analysis completed during the cost-based services review by:</p> <ul style="list-style-type: none"> <li>• Running engagement activities with leadership and staff across the Council to generate greater insight on leadership sentiment.</li> <li>• Identify steps the Council needs to consider developing a culture that enables its One Council vision, such as: Identifying the levers, the Council can pull. This could include social levers such as; power structures and communities and organisational levers such as communications and learning &amp; development (not an exhaustive list)</li> <li>• Identifying behaviours (particularly in relation to leadership) to embed the Council values and to support the One Council vision.</li> </ul> <p>This would then cumulate in a report for the Council reviewing the points above.</p>
Review of Contracts	Following on from the contract analysis in the cost-based services review, the Council would like practical recommendations to improve our contract management – encapsulating governance, processes and structures. This should take the form of a simple report with observations and recommendations regarding the organisation, processes and governance.

4.9 The quote for the scope of work, delivering to our requirements is £116k. It should also be noted that the work regarding contracts would cost £12k, therefore, whilst an extremely useful piece of work (the Council has identified £21m of “off-contract” spend), the cost is potentially prohibitive and will not be taken forward and would be looked to delivered potentially internally.

4.10 As outlined in the delivery requirements, this work will produce a Case For Change and identify the future governance arrangements (including member approvals) for the future, organisation-wide overarching transformation programme. At this point the Executive would be asked to approve a new transformation programme on the base of the Phase 1-3 report and the case for change with a clearer understanding of the costs of the change programme management. Also note that further due

diligence and business cases would then follow for specific work elements that would require approval in the normal governance and approval mechanisms.

- 4.11 If, through the findings and recommendations of this work any further external report is required to support and enable the delivery of the transformation programme, a new procurement exercise would be undertaken. This thereby ensures that the Executive has the fullest possible information before being asked to approve a new programme of work.

## **5. Alternative Options and Reasons for Rejection**

- 5.1 The following alternative options have been identified and rejected for the reasons as set out below.

**Option 1:** Undertake a new competitive procurement exercise for the key deliverables outlined in paragraph 4.5 above (the Case for Change). The council could undertake a new competitive procurement exercise.

### **Benefits**

- Would give other suppliers an opportunity to tender for this work.

### **Dis-benefits**

- A new partner would lack the tacit knowledge and understanding that the current partner has gained through the initial three phases of work.
- A competitive procurement exercise would take at least 4-weeks to undertake once Executive approval obtained on 6 January 2025, require more council resources and lead to a loss in momentum.
- A new procurement exercise is unlikely to attract much interest from suppliers as only two including our current partner tendered for the original contract and the other party (if interested) is unlikely to be happy to follow another suppliers approach and they would be required to pick up where they left.
- Opportunity for current partner to challenge this process (phase 4) as it was scoped as an option in their existing contract

This option was discounted due to the dis-benefits outweighing the benefits.

**Option 2:** Progress with existing resources and without external expertise

### **Benefits**

- No immediate budget requirement

### **Dis-Benefits**

- The council does not have the expertise and capacity to deliver this next phase so it is likely to take significantly longer as resources will need to develop the necessary capability and this would lead to a loss in momentum. Given this, the assurances on outputs could not be at a level that where the risk of potentially jeopardising the transformation outcomes is minimised, thereby increase the risk of reliance on reducing service levels to meet our financial requirements.

- Additional time would be required to mobilise resources without negatively impacting service delivery, which could include back filling posts to create the capacity needed. A budget would be needed for any back-fill arrangements

This option was discounted due to the need for the council to progress with delivery of the transformation as quickly as possible in order to deliver change with proper skills and resources to enable the transformation.

## 6 Conclusion and Reasons for Recommendations

- 6.1 In conclusion, the council has identified the key activities required to drive forward transformation. Maintaining momentum is essential to delivering transformation and achieving long-term financial sustainability.
- 6.2 The council possesses a significant amount of capability and knowledge with regard to service delivery and this will be key to transformation. Supported by the expertise and capacity of a trusted partner will ensure that the council is best placed to drive this next phase of transformation forward whilst also achieving best value.

### Decision Information

<b>Key Decision</b>	Yes
<b>Subject to Call in</b>	Yes
<b>If not, why not subject to call in</b>	N/A
<b>Ward(s) Affected</b>	N/A

### Document Information

<b>Appendices</b>	
<b>Appendix 1</b>	PA Consulting Draft Summary Report on Transformation
<b>Appendix 2</b>	Information on Crown Commercial Services
<b>Background Papers</b>	None
<b>Reference Papers</b>	None
<b>Report Author</b>	Stephen Hinds, Corporate Director Resources and Transformation
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<b>Corporate Director Approval (unless Corporate Director or Statutory Officer report)</b>	N/A - Report of Corporate Director
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**Draft Version 3**

# Cherwell District Council Cost Based Service Review

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December 2024

**Bringing Ingenuity to Life.**  
[paconsulting.com](http://paconsulting.com)

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# Executive summary

## Context

As with many councils, there are financial pressures that Cherwell District Council (“CDC”, “Cherwell”, “the Council”) needs to address, not only regarding inflation and the cost-of-living crisis, but pressures on funding as well as its desires to achieve an ambitious district improvement programme.

The Corporate Leadership Team identified a need to undertake a comprehensive review to enable the Council to address a range of pressing matters, including:

- The need to develop a compelling Vision and robust Strategy
- Exploring options around how best to transform current ways of working to improve service effectiveness and set the conditions for growth without the need to increase staffing numbers
- Uplifting capability to meet changing requirements (e.g., Zero Based Budgeting “ZBB” skills and experience)
- Developing an understanding of how the organisation’s culture can be enhanced to best enable changing requirements, as well as improving collective values-based behaviours
- Developing a clear understand of available service level options (including risks and impacts) should the Council need to reprioritise its budget allocations.

Addressing these matters directly would enable members to make far more informed choices through the MTFP, Budget and Annual Planning Process for 2025/26 and beyond. It would also enable them to understand where best to focus transformation effort in the Council to achieve improvements for the residents, communities and businesses of Cherwell.

In July 2024, CDC undertook a competitive tendering process to commission a cost-based service review, engaging PA Consulting to:

1. Facilitate a comprehensive evaluation of current services provided, costs, and efficiency options to clearly understand the risks and impact of changes in levels of funding.
2. Provide insights to inform its ongoing transformation journey.
3. Provide supporting financial data to inform the annual budget setting process.
4. Potentially provide further support to help the Council to implement the outputs of the review.

Concurrently, the Council commissioned support to develop a refreshed Vision and Strategy. This was to make sure it had the right ‘building blocks’ in place to shape the development of a target operating model and comprehensive transformation programme, after the conclusion of the cost-based service review. Both sets of outputs have been developed interdependently to ensure alignment<sup>1</sup>.

## Financial sustainability consideration

The cost-based service review is separate from the Council’s “Mid-term Financial Planning” (MTFP) and budgeting process, but its outputs provide options to inform future decisions for FY2025/26, FY2026/27 and FY2027/28<sup>2</sup>.

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<sup>1</sup> While this report refers to the Vision and Strategy, they are not a PA Consulting deliverable.

<sup>2</sup> Also referred to as Year 1, Year 2 and Year 3 respectively.

Potential effectiveness and efficiency and service level options that have been generated through this review, will be considered through the annual MTFs, budget and planning process. This will include consultation and member decision wherever it is required.

A key focus for the review was the Council’s identified worst case scenario budget position for FY2026/27, which reflected a potential gap of £8.378m, and how it might be met should it materialise.

At the end of the 17-week review, the Council had identified options to meet the potential gap, totalling c. £11.1m, with material scope to increase this through further transformation work. These options were made up of c.£8.6m of realisable potential savings via improved service effectiveness and service level saving, plus, an additional £2.4m of income for FY2025/26.

1. Operational and transformational efficiency savings of c.£4.1m<sup>3</sup> (options identified during Phase 2 of the cost-based service review).
2. Service level choices of up to c.£4.5m (options identified during Phase 3 of the cost-based service review).
3. Additional income of c.£2.4m (options identified during cost-based service review).

Noting there is high confidence that further transformational opportunities discussed during the review, will provide more options for financial savings, as they are developed during the design and implementation of transformational change. Further income opportunities will also be identified during the MTFP cycles for FY2026/27 and FY2027/28.

The Council now has a range of options to consider in meeting the £8.378m budget gap across FY2025/26 and FY2026/27 should it materialise:

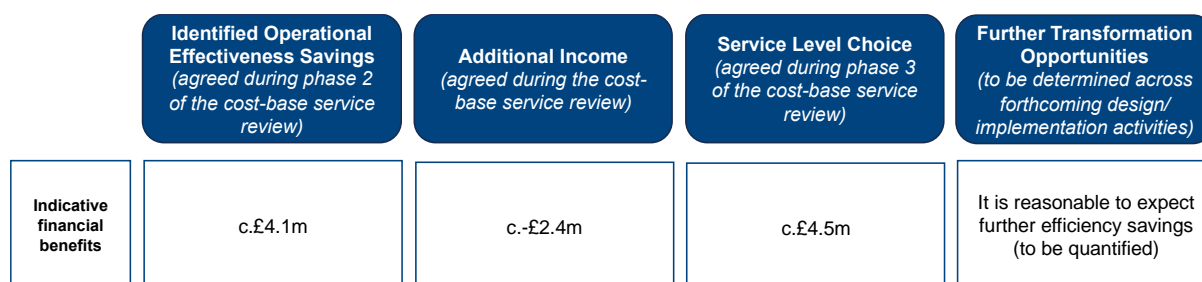


Figure 1<sup>4</sup>: Breakdown of potential savings and income options to help meet the worst-case budgetary position of FY2026/27

## Purpose of this report

This report formally documents the cost-based service review process, providing the Council with a record of decisions made.

Its purpose is to outline the approach, record staff and non-staff cost savings and document decisions made by the Panel<sup>5</sup> (a select group of senior officers<sup>6</sup> with delegated responsibility to oversee the end-to-end review process).

<sup>3</sup> Each effectiveness opportunity was supported by a breakdown of relevant information (e.g., rationale, risks, assumptions, indicative staff and non-staff savings, interdependencies, enabling activities and earliest implementation date) to enable informed decision making.

<sup>4</sup> Noting that this is a conservative savings forecast based on the options explored. As this is not a case for change/ business case, non-financial savings have not been considered, nor have implementation costs. Income is shown as a negative amount.

<sup>5</sup> Central to the process were the end-of-phase Panel sessions (see Section 3.4). The purpose of those sessions was to review, and ‘challenge’. The Panel’s role was to confirm proposals were credible, implementation of them was achievable, the risks were appropriately assessed, and the potential benefits realistic.

<sup>6</sup> Panel membership: Stephen Hinds (Corporate Director - Resources & Transformation), Ian Boll (Corporate Director – Communities), Michael Furness (Assistant Director - Finance & Section 151), Shona Ware (Assistant Director - Customer

Additionally, this report includes links to supporting documentation (e.g., working documents, briefing presentations, decisions, and actions) developed during the review process.

## Project scope

All service areas were deemed in-scope. Due to the breadth of activities covered by Environment, a decision was taken to split it in two service areas<sup>7</sup>:

1. Environment (“Env”)
2. Growth & Economy (“G&E”)
3. Planning & Development (P&D”)
4. Regulatory Services (“Reg”)
5. Housing & Wellbeing (“H&W”)
6. Customer Focus (“CF”)
7. Digital & Innovation (“D&I”)
8. Finance (“Finance”)
9. Human Resources (“HR”)
10. Law and Governance (“L&G”)
11. Property Services (“Property”)

## Chosen approach

The Council wanted to undertake a process that provided a services-based breakdown of the organisation. The methodology gave panel members an evidenced understanding of how the Council delivered its services, the actual cost of ‘doing business’ and offered panel members valuable insights to inform decision making (including associated risks and impacts) across the three phased approach (described below):

- **Phase 1.** Created a services catalogue and costed baseline for all service areas. Quantitatively defined service outputs and outcomes, allocated staff effort and budgets to provide a clear view of current services and their delivery costs.
- **Phase 2.** Identified potential changes to the cost baselines relating to<sup>8</sup>:
  - Demand Changes. These related to decisions outside of the budget holder’s control that will drive movement in the baseline data (agreed as part of Phase 1).
  - Effectiveness Changes – efficiencies in the way current service levels are provided. These included:
    - Service area specific effectiveness changes (e.g., HR only).
    - Common effectiveness changes (e.g., same action relating to two or more service areas commonly relating to non-staff cost reductions such as printing).
    - Cross-cutting effectiveness opportunities that have dependencies with one or more additional service areas.
- **Phase 3.** Considered a range of service levels that could be provided. Provided insights to inform where to prioritise to ensure resources are best aligned to the strategic priorities.

In addition to panel members (see Footnote 5), the many other CDC were directly involved in delivery of the process. This division of effort ensured the review was **not** ‘done to’ the organisation and helped foster a culture of ownership.

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Focus), Shiraz Sheikh (Assistant Director - Law, Governance & Monitoring Officer), Claire Cox (Assistant Director, Human Resources & Organisational Development) (non-scoring Panel member).

<sup>7</sup> Environment 1 (Waste Services, Streetscene, & Fleet Management) and Environment 2 (Landscapes & Climate Action).

<sup>8</sup> The process considers the three key drivers of cost (demand, effectiveness and levels of service).

## Key outputs

The key outputs of the services review were:

1. **Baselined cost-of-delivery and identification of common activities.**
  - a. Provided the Council with an agreed definition of service areas breaking down individual services, their costs and the resources each service used.
  - b. In addition, the Council also completed a common activity analysis exercise to better understand where colleagues prioritised time across the organisation. This analysis helped to identify areas that generated higher than expected levels of effort. It was used to help identify cross-cutting change opportunities that would enable the Council to reduce effort by addressing associated inefficiencies.
2. **Evidence base.** Providing the Council with a bottom-up view of the baseline for in-scope service areas that clearly shows how its cost base directly aligns to service delivery. It is expected that this information will inform the budgeting process going forward into FY2025/26 and beyond<sup>9</sup>.
3. **Identified Demand and Effectiveness Changes.** Detailed option proposals for potential changes to the cost base that can be considered through the Council budget process. As noted in the Approach section, Effectiveness Changes were split into three categories.
4. **Service level options.** Provided the Council with service level scenario options and to identify where CDC could realign current service levels, if it had to respond to possible future financial challenges. These options would help members to make more informed decisions about changes to service levels should that need arise.
5. **Implementation guidance.** Provided a high-level view as to when it is anticipated that identified efficiencies could be realised and wider implementation considerations, subject to budgeting process decisions.
6. **Zero Based Budgeting (“ZBB”).** The Council has successfully delivered this methodology, a variation of ZBB. It now has the tools and skills to integrate it into future transformation, business and financial planning cycles<sup>10</sup>.

Customer Journey and Front Line Administration (143.6 FTE 25.3%)											
	Handling Enquiries	Service requests & applications	Appointments	Complex Assessment	Checking Eligibility	Simple rules based assessment	Data entry and records	Invoicing & payments	General admin	Planning workload & staffing	Managing staff
FTE	15.2	14.1	11.0	28.5	10.4	10.3	14.5	12.6	8.0	8.2	10.9
% of Total	2.7%	2.5%	1.9%	5.0%	1.8%	1.8%	2.5%	2.2%	1.4%	1.4%	1.9%
Service Delivery											
	Service Delivery										
FTE	224.8										
% of Total	39.6%										
Strategic and Support (199.8 FTE 35.2%)											
	Strategy & Policy	QA, Performance Management & Improvement	Business Information & Reporting	Governance & Decision Making	Democratic & Member Support	Marketing, PR & External Communications	Partnership Management	Legal & Advisory Services	Internal Communications	IT	Programme & Project Management
FTE	25.8	9.6	7.8	10.3	15.5	4.3	3.3	11.4	1.7	17.4	12.8
% of Total	4.5%	1.7%	1.4%	1.8%	2.7%	0.8%	0.6%	2.0%	0.3%	3.1%	2.3%
	Master Data Management	Health & Safety	HR	Workforce Planning	Management & Supervision	Organisation Design & Development	Financial Management	Payroll Services	Commissioning	Procurement & Contracting	Contract Management
FTE	8.8	6.2	5.7	2.9	8.4	2.1	18.7	0.6	1.4	5.9	3.0
% of Total	1.5%	1.1%	1.0%	0.5%	1.5%	0.4%	3.3%	0.1%	0.2%	1.0%	0.5%
	General Administration	Data Entry & Records	Asset & Investment Management	Stores & Distribution	Property, Estates & Facilities Management						<b>TOTAL</b>
FTE	7.6	5.1	0.8	0.0	2.9						FTE 568.2
% of Total	1.3%	0.9%	0.1%	0.0%	0.5%						

Figure 2: Common activity analysis overview

<sup>9</sup> Documented within individual service-area workbooks.

<sup>10</sup> The Council should periodically revisit the process during future financial planning cycles. This ensures that planned changes are reflected in an updated services catalogue and baseline, supporting continuous improvement and oversight of identified changes.



## Summary baseline position

The main baseline related information is:

- Baseline for all service areas totalled £87m, of which £39.2m was deemed addressable (inclusive of staff and non-staff costs).
- Demand Changes, that were accepted as valid by the Panel, will potentially increase costs by £414k (£98k in FY2025/26 and £316k in FY2026/27).
- On the assumption that all the Effectiveness Change options that were accepted by the Panel as valid, are delivered the Council will potentially be able to realise cost savings of £4.1m over a three year period<sup>11</sup> The Drawing of the Line working session (post-Panel 3) considered three potential scenarios. On guidance from Panel, a fourth scenario (titled “Scenario 3b”) was developed showing the service level provision if the Council had to rely completely on reducing operating costs to fully address the target of £8.378m, while maintaining key income generating capabilities (see Section 4.5).
- Potential new income initiatives totalling c.£2.4m have also been identified through this process for FY2025/26<sup>12</sup>.

The cost-based service review captured the financial year in which it is expected identified changes could be realised, dependent on the Council’s internal governance processes as well as consultation and member decision wherever it is required.

The charts below, show the potential phasing of the impact on the cost baseline across Years 1 to 3. This can be used as input into the Council’s annual MTFs, budget and planning processes. It is expected that the Council will further develop the information relating to demand and effectiveness changes for Years 2 and 3, increasing the range of potential opportunity presented below.

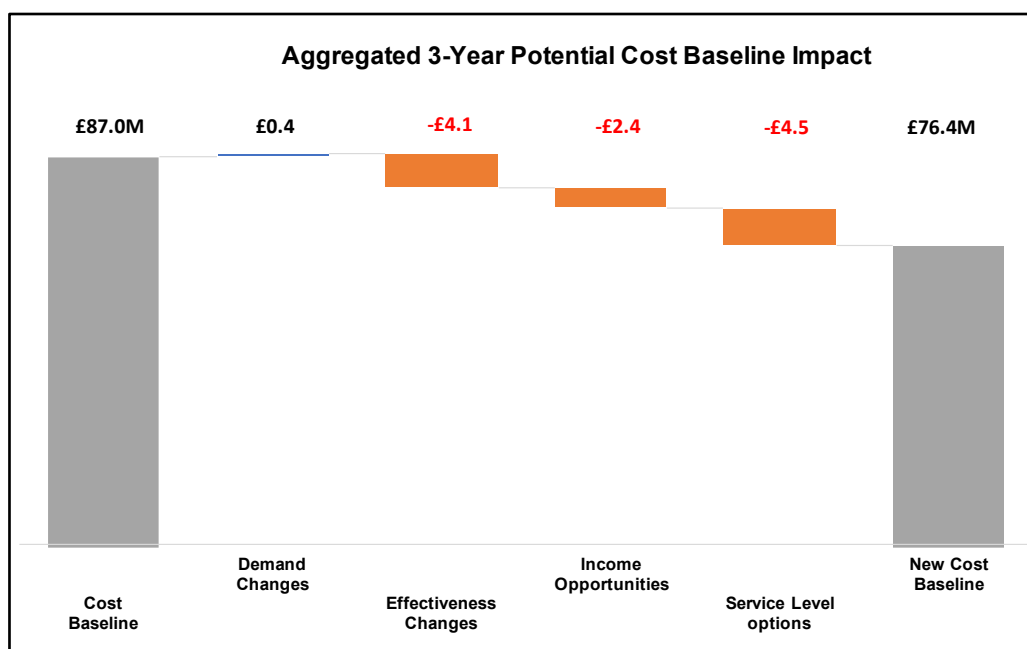


Figure 3: 3-year potential baseline impact dependent on internal governance, consultation and member decisions (as required)

<sup>11</sup> As previously stated, the indicative potential savings are deemed to be conservative. There is an expectation that the identified effectiveness changes for Years 2 and 3 will be further developed and added to over year 1 of the transformation programme that is expected to mobilise in early 2025.

<sup>12</sup> Again, noting that further income opportunities are expected to be identified for Years 2 and 3. Likewise, Demand Changes will be revised in forthcoming MTFP cycles.

## Transformational opportunity

- Agreeing the Council’s transformation ambition.** The Council’s current operational maturity was assessed to be low. This view was informed by the nature of the service descriptions and effectiveness changes being discussed and comparison with other organisations. The Council has developed a revised Vision and Strategy, it now needs to agree and commit to its transformation ambition:

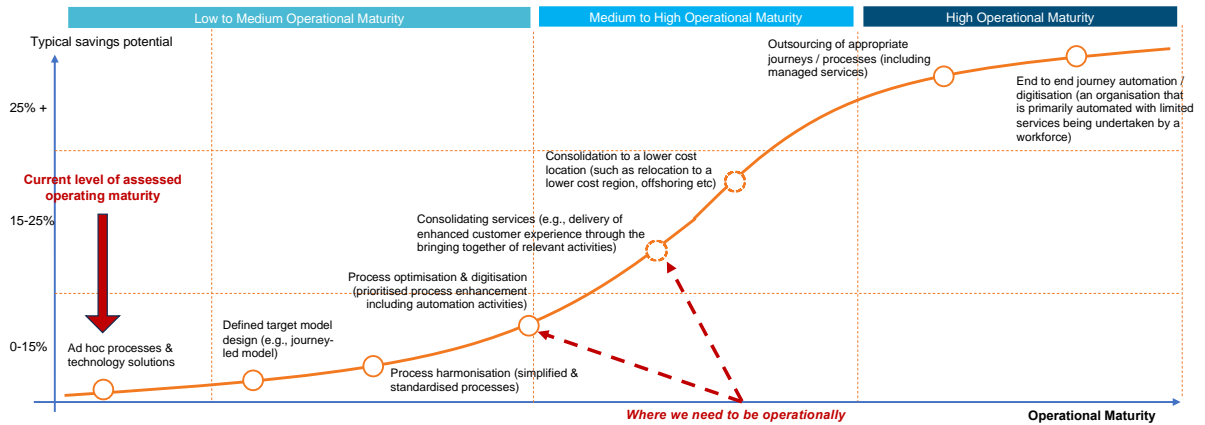


Figure 4: Operating maturity assessment and indicative transformational ambition (see Figure 14 for a larger version)

- Presenting transformation opportunities.** Recurring themes were process inefficiencies and activity duplication (e.g., customer engagement occurring across various teams), presenting significant opportunity to deliver effectiveness gains and realise savings through the simplification and standardisation of processes (including automation) and the consolidation of duplicated effort. This is expected to be a key consideration for the target operating model development as well as the process redesign work (to include automation as required). Below are the 10 transformational themes identified during the second phase of the process:



Figure 5: Presenting operational change & strategic choice themes from Panel 2<sup>13</sup>

<sup>13</sup> Blue coloured boxes relate to strategic choice themes, and the green relate to operational change themes. See Section 3.8 for more information on presenting transformation opportunities.

# 1 Introduction and approach

## 1.1 Objectives and aims

The Council's objective for the cost-based service review was to provide a better understanding of:

1. Current service provision across the organisation, associated costs and presenting opportunities to transform and generate realisable efficiency options.
2. Viable service-level options to help shape the debate on the impact of any future changes in levels of funding.
3. A future operating model for the Council to enable delivery of the refreshed Vision and Strategy<sup>14</sup>.
4. The outputs of the review will be used to inform the FY2025/26 MTFP process and beyond.

Through the process, colleagues from across the 11 in-scope service areas were brought together to review and assess how the Council delivered services.

The Council's related aims were to:

- Provide CDC colleagues with the opportunity to put forward ideas and receive considerable skills transfer.
- Embed organisational excellence and a culture of continuous improvement.
- Make the Council more effective so it could give an overall better offer and experience to residents, businesses, and other third parties.
- Create a knowledge base to be able to replicate the approach in future years.

The Corporate Leadership Team (CLT) elected to wait until the baseline was agreed before setting efficiency targets for individual service-areas.

The CLT confirmed an overall target of c.21%, prorated for each service area dependent on budget size, against an addressable spend total of £39.2m<sup>15</sup>.

## 1.2 What is a services review?

The repeatable and structured method that was applied for this review is based on the principles of ZBB that shifts focus from a structural organisational view towards a focus on services delivered.

Firstly, a service catalogue and costed baseline was developed so that resources and costs could be mapped to defined services. The rationale for this was to develop detailed insights across services in terms of outputs as well as effort and cost, not just budget lines. This analysis was supplemented by the completion of a common activity analysis exercise enabling the identification of potential areas of interest in terms of effort expended across the organisation. The service catalogue information was aligned to the activity analysis enabling the Council to make informed decisions on where to prioritise focus regarding potential cross-cutting effectiveness opportunities in the next phase of the review.

Once this information was agreed, the process considered whether there are any known reasons why service demand may change (known as a "Demand Change") over the short-term, and whether efficiencies could be made in the way that services are currently being delivered (known as an "Effectiveness Change"). The process provided the Council with a greater level of insight and understanding with regards to productivity across its service

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<sup>14</sup> In parallel the Council has refreshed its vision and strategy in preparation for a council wide transformation programme of work. The outputs of this project dovetailed into this wider undertaking where appropriate.

<sup>15</sup> The addressable spend included third party spend.

areas. This work reinforced the need to adopt an ethos of delivering ‘value for money’ both for the Council itself and its citizens.

The process then considered a range of service levels that could be provided, allowing the Council to be able to consider associated risks and impact should additional efficiencies be required, or investment be provided through the budgeting process. This provided options that could help to align resources to services on a prioritised basis.

The key activities were:

- Detailed descriptions of the services delivered, including who used them, for what purpose, and the value that this gives to the Council (and by extension the Council’s residents).
- Clarification of the baseline budget and allocation of costs to services delivered based on activity.
- Testing hypotheses regarding cost drivers, and identification of Demand and Effectiveness Change options (including cross-cutting) without impacting service levels.
- Consideration of different service levels and their associated costs and risks.

The options developed through the review can be used to inform MTFP, budget and business planning choice involving consultation and member decisions as required.

### 1.3 Further supporting analysis

The Council undertook further analysis to supplement the cost-based service review as detailed below.

#### AI contracts review

A diagnostic review of the Council’s top 20 prioritised contracts (representing c.90% of total contracted 3<sup>rd</sup> party spend) using an AI-based tool. Due to illness of key staff, it has not been possible to complete this review in time to be included in this report – so the findings will be provided to the Council separately.

#### Common Activity Analysis

The Council also collected quantitative data on how colleagues prioritise time across a set of pre-agreed common activities (Common Activity Framework) that underpin all the services that are delivered.

A top-down exercise was completed by Assistant Directors which involved allocating the approximate percentage of effort across relevant activities in relation to each of their service titles (see output image below).

This information helped to better understand collective work patterns across the Council and informed:

1. Phase 2 (service review) productivity and efficiency opportunities, particularly cross-service areas.
2. Future operating model choices and scale and nature of associated potential benefits.

Steps	Key activities
Discovery & mobilisation	1. Agree priority focus areas and specific contracts 2. Triage hypotheses agreed (to aid AI and human insight testing) 3. Azure environment stood up and access permissions sorted 4. In-scope contract documents uploaded 5. Triage plan agreed and signed up to by all parties
AI insights	1. AI triage analysis completed on 20 prioritised contracts 2. Follow up questions/ issues flagged for further AI analysis &/ or complementary human analysis (HA) 3. Consolidated AI insights provided to PA experts for human analysis & insights
Human insights	1. PA experts complement AI analysis (including testing key issues with CDC contract &/ or business experts as appropriate)
Report findings	1. AI & HA results consolidated into a single draft report 2. Clear options set out for next steps 3. Draft report shared and iterated with CDC experts
Review & next steps	1. Review final report 2. Review meeting held between CDC & PA team to discuss findings and potential next steps

Customer Journey and Front Line Administration (143.6 FTE 25.3%)											
	Handling Enquiries	Service requests & applications	Appointments	Complex Assessment	Checking Eligibility	Simple user based assessment	Data entry and records	Invoicing & payments	General admin	Planning workload & staffing	Managing staff
FTE	15.2	14.1	11.0	28.5	10.4	10.3	14.5	12.6	8.0	8.2	10.9
% of Total	2.7%	2.5%	1.9%	5.0%	1.8%	1.8%	2.5%	2.2%	1.4%	1.4%	1.9%
Service Delivery											
FTE	324.6										
% of Total	58.6%										
Strategic and Support (199.8 FTE 35.2%)											
	Strategy & Policy	QA, Performance, Management & Improvement	Business Information & Reporting	Governance & Decision Making	Democratic & Member Support	Marketing, PR & External Communications	Partnership Management	Legal & Advisory Services	Internal Communications	IT	Programme & Project Management
FTE	25.8	9.6	7.8	10.3	15.5	4.3	3.3	11.4	1.7	17.4	12.8
% of Total	4.5%	1.7%	1.4%	1.8%	2.7%	0.8%	0.6%	2.0%	0.3%	3.1%	2.3%
	Master Data Management	Health & Safety	HR	Workforce Planning	Management & Supervision	Organisation Design & Development	Financial Management	Payroll Services	Commissioning	Procurement & Contracting	Contract Management
FTE	8.8	6.2	5.7	2.9	8.4	2.1	18.7	0.6	1.4	5.9	3.0
% of Total	1.5%	1.1%	1.0%	0.5%	1.5%	0.4%	3.3%	0.1%	0.2%	1.0%	0.5%
	General Administration	Data Entry & Records	Asset & Investment Management	Stores & Distribution	Property, Estates & Facilities Management						TOTAL
FTE	7.6	5.1	0.8	0.0	2.9						568.2
% of Total	1.3%	0.9%	0.1%	0.0%	0.5%						

## 1.4 Project scope

A decision was taken to split Environment into two separate areas<sup>16</sup> for the purpose of this exercise (as detailed below). Subsequently, the 12 areas were then split into two groups of six services, Communities (1 to 6) and Resources (7 to 12) in line with the current Corporate Directorship structure:

1. Environment 1 (Env 1)
2. Environment 2 (Env 2)
3. Growth & Economy (G&E)
4. Planning & Development (P&D)
5. Regulatory Services (Reg)
6. Housing & Wellbeing (H&W)
7. Customer Focus (CF)
8. Digital & Innovation (D&I)
9. Finance (Finance)<sup>17</sup>
10. Human Resources (HR)
11. Law and Governance (L&G)
12. Property Services (Property)

## 1.5 Key outputs

A primary function of the review was to challenge current thinking. The proposals presented have been developed by representatives from each of the twelve service areas listed above, with senior managers<sup>18</sup> selected to be SLs. Their role was to present outputs to the Panel at the end of each phase. The service areas were also supported by the Finance and HR teams and by members of the Panel. This ensured all opportunities for realisable efficiencies were explored and that decisions, and the resulting budgetary impact is both realistic and bought-in at all levels.

The key outputs of the process were:

1. **Baselining the cost-of-delivery.** Providing the Council with an agreed and explicit view of the services provided by the in-scope services, associated costs, and resources each service consumes.
2. **Creating an evidence base.** Providing the Council with a bottom-up view of the budget for in-scope services that will inform the MTFP process for FY2025/26 and beyond, documented within the workbooks for each service area.
3. **Identifying Demand and Effectiveness Changes.** Detailed proposals for options to change the cost base that could be considered through the Council budget process. These were developed by the SLs and provided a view of the rationale, associated costs, risks, interdependencies, and enablers of each proposal<sup>19</sup>.
4. **Providing service level options.** Providing the Council with scenario options to help members to make informed decisions about how resources are best allocated to different services.
5. **Implementation guidance.** A high-level view as to when it is anticipated the identified efficiencies could be realised and any wider implementation considerations.

<sup>16</sup> Due to the scale, diversity and complexity of services undertaken across Environment it was decided to split Waste and Streetscene from the other services.

<sup>17</sup> Noting that the Executive Matters budget was deemed non-addressable spend (i.e., out of scope) for this review.

<sup>18</sup> Each service area was represented by at least one SL. Some service areas employed two or more to ensure consistency across the entire process.

<sup>19</sup> There were three forms of Effectiveness Change. The first related to individual service area change opportunities. The second related to changes that were common across two or more service areas (typically relating to common non staff cost e.g., printing that appeared in all budgets). The third related to cross cutting opportunities affecting two or more service areas.

## 1.6 Purpose of this report

This report formally documents the process followed and provides a record of the outputs of each of the three phases. Its purpose is to outline the approach taken, document staff and non-staff cost efficiency opportunities and record the views of the Panel. Copies of working documents, analysis and wider themes identified during the review for exploration once the project ends, are stored in the CDC Teams site and referred to where necessary throughout this report.

## 1.7 Method

The repeatable method used for the review offered a structured and detailed approach to examining cost drivers and their links to services, enabling the Panel to develop a strong set of options. These can be used to inform the budgeting process and to help members better understand the risks and impacts associated with difficult decisions around service levels, if required. The process set the conditions to harness the support of key stakeholders and provided a full understanding of risks and impacts.

SLs and supporting colleagues as well as the broader leadership team were engaged throughout, leading to improved proposals and options that are both realistic and understood at all levels.

## 1.8 Project timeline

The review started on Monday 8 July 2024 and concluded on Friday 15 November 2024.

Key milestones were:

- **Phase 1 (6-weeks).** The first phase concluded with Panel 1 on 20 August 2024.
- **Phase 2 (7-weeks).** Beginning from the end of Phase 1 and concluding with Panel 2 on 8 and 9 October 2024. The original timetabled Phase completed on 4 October; however, the Panel took the decision to push back the Panel Session to allow more time to prepare the Demand and Effectiveness Change proposals to their fullest capability.
- **Phase 3 (4-weeks).** Beginning from the end of Phase 2 and concluding with Panel 3 on 6 and 7 November 2024.
- **Final Report.** The final report was drafted after Panel 3 and shared with the Panel on 21 November 2024.

## 1.9 Core delivery team

The Panel consisted of:

- Stephen Hinds, Corporate Director - Resources and Transformation (*SRO and Chair*)
- Ian Boll, Corporate Director – Communities
- Michael Furness, Assistant Director - Finance and Section 151
- Shona Ware, Assistant Director - Customer Focus (*Deputy Chair*)
- Shiraz Sheikh, Assistant Director - Law, Governance and Monitoring Officer
- Claire Cox, Assistant Director, Human Resources and Organisational Development (*non-scoring Panel member*).

## 1.10 The Panel process and governance

The 'Panel' was central to this methodology. Three Panel sessions were held, one at the end of each phase of the project (referred to as Panels 1, 2 and 3). The purpose of the Panels was to review and challenge proposals submitted by the SLs who were acting as representatives of the different in-scope services.

The Panel's role was to confirm proposals were credible, implementation of them was achievable, the risks were correctly assessed, and the expected benefits are realistic.

Panels 2 and 3 were chaired by Stephen Hinds. Panel 1 was chaired by Shona Ware in Stephen's absence.

The Panel sessions were open to the four review managers and Alex Robinson, providing EA support to the Chair.

Analysis and documentation for the Panel Sessions was developed collaboratively between SLs, their contributing teams, and the review Project Team. The Panel were informed and consulted throughout.

SLs presented findings relating to their areas of responsibility at Panel. As required, they answered clarification questions from the Panel members, whose primary role was to explore the evidence presented, and if appropriate, redirect effort and/ or provide support. The Panel are a key part of the review's governance framework.

The qualitative and quantitative evidence that underpinned the Panel was documented in Excel 'workbooks', alongside supporting presentations and information for evaluation.

To ensure overall governance, and delivery momentum, the process was supplemented by a weekly status report as well as a weekly Project Board, attended by Panel members and PA Consulting. The standing agenda for the Project Board covered:

- Actions from previous meetings
- Progress update
- Risks and issues
- Live lessons learnt
- Communications.

The Panel process is summarised in Figure 6 (below).



Figure 6: Overview of the Panel process

## 1.11 Panel 1

Panel 1 provided a description of current staff (as full-time equivalents or “FTE”) and non-staff costs; the services being delivered and a costing for each service<sup>20</sup>.

Service Areas also presented initial thinking of Demand and Effectiveness changes, which the Panel provided a steer on ahead of Phase 2.

- A total of **108** indicative Demand and Effectiveness Changes were presented at Panel 1
- Of which **51** were progressed into Phase 2.

## 1.12 Panel 2

Using the approved baseline of services (agreed at Panel 1), proposals for Demand and Effectiveness Change options were developed by the SLs and supporting teams on the basis that they maintained current service levels.

Demand Changes were developed based on robust analysis of the drivers of current activity and the quantification of what changes will impact the Council in the future. Effectiveness Changes options were identified different ways to deliver the same level of service, at lower cost. The teams applied analysis of existing processes and data, comparing against good practice and consideration of the drivers of inefficiency. These proposals were presented at Panel 2.

- A total of **24 Demand Changes** and **82 Effectiveness Change options** were presented at Panel 2, including the 51 progressed from Phase 1.
- A total of **16 Demand Changes** and **53 Effectiveness Change options** were agreed as viable at Panel 2.

### Demand and Effectiveness Changes requiring further work following Panel 2

In addition to the Demand Changes, several opportunities identified by the SLs required an uplift in resourcing but did not fit the qualification criteria (defined in Section 3.1). These were

<sup>20</sup> The baseline consisted of anonymised data that was provided from Payroll and the General Ledger. The Council was the data custodian and therefore responsible for data accuracy etc with PA Consulting performing the role of data processor. Both parties agreed a robust change process to ensure the ability to undertake reconciliation, if required over duration of the review.



not presented at Panel 2. The SLs and supporting teams were instead directed to bring these back as improved service level options at Panel 3.

There were several Effectiveness Change options that either could not be quantified at the time or were dependent on certain events or decisions taking place. These will provide the Council with further opportunity in future years.

All Demand and Effectiveness templates produced are stored on the Council SharePoint . This repository includes the templates that were agreed at Panel 2 as well as those that were not progressed at this time. Further detail on these potential changes can be found in the Panel 2 presentation slides (also on the Council SharePoint).

## 1.13 Panel 3

Using the viable options for Demand and Effectiveness Changes, new costs were calculated for the current service level. SLs then produced and costed up six different service levels (minimum, intermediate 1, intermediate 2, current, improved 1, and improved 2):

- Minimum was defined as the minimum level of service that fulfils legal and statutory requirements
- Intermediate service levels were step changes in service between minimum and current
- Improved service levels offer up to two levels of investment to increase levels of service above current.

Risks associated with different service levels were defined and scored using the Council's scoring matrix (see Figure 7).

At Panel 3, SLs presented the proposed service levels, with definitions of the services offered, total cost, FTE and, where applicable, income for each plus their risk profile.

Assessing probability

Scale / Level	Descriptor	Description
1 Remote		May only occur in exceptional circumstances (P < 2%)
2 Unlikely		Is unlikely to occur, but could occur at some time (2% < P < 25%)
3 Possible		Fairly likely to occur at some time, or in some circumstances (25% < P < 50%)
4 Probable		Will probably occur at some time, or in most circumstances (50% < P < 75%)
5 Highly		Probable is expected to occur in most circumstances (P > 75%)

Description and definition of the impact of the risk should it occur (these are a guide)

Effect - Service Delivery	Effect – Financial	Effect -Health & Safety	Effect – Environment	Effect – Reputation
<b>5 – Catastrophic</b>				
Catastrophic disruption. Loss of service delivery for more than seven days	Huge financial loss >£1,000,000	Loss of life. Intervention by HSE	Significant local, national and/or international environmental damage	Extensive coverage in the national press and broadsheet editorial, and/or a national TV item
<b>4 – Major</b>				
Major disruption. Serious damage to ability to provide service. Loss of service for more than 48 hours but less than 7 days	Major financial loss >£100,000 - <£1,000,000	Extensive / multiple injuries. Intervention by HSE	Major damage to the local environment	Coverage in national broadsheets, the press, and/or low national TV reporting
<b>3 – Moderate</b>				
Noticeable disruption, some customers would be affected. Loss of service no more than 48 hours	High financial loss >£25,000 - <£100,000	Violence, threat or major injury – medical treatment required. Intervention by HSE	Moderate damage to the local environment	Coverage in the national tabloid press and/or extensive front page coverage in local press/ TV
<b>2 – Minor</b>				
Some disruption to internal business only – no loss of customer service	Medium financial loss >£5,000 - <£25,000	Minor injury – first aid treatment only required	Minor damage to the local environment	Minimal reputation damage. Minimal coverage in the local press
<b>1 – Insignificant</b>				
Insignificant disruption to internal business – no loss of customer service	Low financial loss <£5,000	No injuries	No, or insignificant environmental damage	No reputational damage

	1	2	3	4	5
1	20%	30%	40%	50%	60%
2	30%	40%	50%	60%	70%
3	40%	50%	60%	70%	80%
4	50%	60%	70%	80%	90%
5	60%	70%	80%	90%	100%

Figure 7: Examples of the Council’s risk approach which this process applied

## 2 Phase 1 – establishing the baseline

### 2.1 Overview and objectives

The purpose of setting the baseline during Phase 1 is to describe in detail the in-scope services delivered by the Council, and their associated costs.

The supporting 'workbook' captured the baseline that was developed comprising budgeted full staff costs, non-staff costs and income alongside actuals for FY2023/24.

The Council's Finance team provided the relevant information and SLs/ contributing team members worked with the combined project team to agree the finalised baseline for the in-scope services.

### 2.2 Baseline methodology and assumptions

The following principles and assumptions were agreed:

1. Cost shunting. Simply moving activities from one individual service area to another, would not constitute a saving.
2. Budget hierarchy. Data fields were added to the workbook for the cost allocation process (see Section 2.4) to be undertaken accurately.
  - a. For staff cost, the fields were agreed as:
    - i. Service area
    - ii. Team (if applicable)
    - iii. Job title
    - iv. Grade and FTE
  - b. For non-staff cost, the fields were:
    - i. Service area
    - ii. Cost Category
  - c. For income, the fields were:
    - i. Service area
    - ii. Income Category

### 2.3 Baseline treatments and rules

At the start of the baseline definition process several 'rules' were agreed with Finance to ensure consistency:

- Budget figures for FY2024/25 and actuals for FY2023/24 were to be used for baseline analysis meaning 1<sup>st</sup> April 2024 will be used as the 'cut-off start date' for this review, unless otherwise agreed through change control.
- Significant staff changes e.g. re-structures, that took place after the cut-off date have been built in as Demand Changes in Phase 2.
- Agency / contractor spend were to be treated as non-staff costs.
- Overtime, bonus payments, callouts were treated as non-staff costs.
- Staff costs are full on costs (i.e., NI, pension etc).
- Vacant posts are budgeted posts that are unfilled.
- Allocation of costs has been done at increments of 5% (5%, 10% ...100%).

## 2.4 Service definitions

'Services' in this process describe the inputs, activities, outputs, and outcomes achieved across the in-scope Council service areas. SLs agreed and described the complete range of services. Resource captured in the baseline of each service area workbook were then allocated against each of the areas' defined services to give fully costed services.

The service descriptions and allocation of costs enabled the review to gain an understanding of what is delivered for the resources used, by quantifying the volume of work, demand and performance achieved for each service. Services and their costs were developed bottom up by the SLs and supporting teams, with assistance from the combined project team. The Assistant Directors for each of the service areas were involved in the review process. The finalised service titles, descriptions and resource allocations were presented at Panel 1.

## 2.5 Baseline sign-off – Panel 1 and post Panel 1

Each nominated SL presented their baseline and services to the Panel. All baselines and services were agreed by Panel following discussion and clarification.

The SRO provided direction on prioritisation of areas of interest for each service area after Panel 1 which informed the focus of the Phase 2 work.

## 2.6 Panel 1 baselines (total cost and income)

Table 1 below shows the Council services baseline (total staff and non-staff costs combined, and income) that were agreed through Panel 1.

2025/26 Budget Baseline	FTE*	Staff costs	Non Staff Cost	Non Staff Income	Net
<b>Service Area</b>					
CF	60	2,613,805	263,263	-249,100	2,627,968
D&I	20	1,004,411	666,909	-60,022	1,611,298
Env 1	167	7,068,302	3,313,388	-6,064,193	4,317,497
Env 2	13	697,415	1,650,814	-958,702	1,389,527
Finance (incl Exec Matters)	60	3,252,894	43,269,887	-30,957,860	15,564,921
G&E	12	833,457	1,416,996	-1,579,000	671,453
H&W	88	3,873,802	3,957,236	-5,799,554	2,031,484
HR	11	606,644	172,209	0	778,854
L&G	26	1,507,914	675,436	-2,965	2,180,384
P&D	71	3,838,430	901,207	-2,990,039	1,749,597
Property	18	1,096,243	2,666,865	-8,400,967	-4,637,858
Reg	27	1,351,763	337,704	-558,651	1,130,816
	<b>573</b>	<b>27,745,079</b>	<b>59,291,913</b>	<b>-57,621,053</b>	<b>29,415,939</b>

\*Includes effect of vacancies

Table 1: Overview of Council's costed services

## 2.7 Decisions and actions from Panel session 1

Actions from Panel 1 were reviewed by the Project Team and ratified by Panel.

## 3 Phase 2 – Demand and Effectiveness Changes

### 3.1 Overview and objectives

The purpose of Phase 2 was to identify ways to best deliver existing service levels more efficiently and/ or more effectively.

Each SL worked with their teams to identify:

- **Demand Changes.** Quantifiable external factors that were expected to have an impact on the level of demand for services over the next two years.
- **Effectiveness Changes.** Improvement ideas which enable current services to be provided at a reduced cost. Commonly the focus was on policies, process simplification, removal of duplication, analysis of roles and vacancies and increased use of, or improvements to, technology.

In addition, at Panel 2, SLs were given the opportunity to test minimum viable service levels with the Panel, who provided direction as appropriate.

### 3.2 Information capture

Each Demand and Effectiveness Change was supported with a completed template<sup>21</sup> that presented all relevant information to allow the Panel members to be able to assess whether individual opportunities were credible in line with the qualification criteria set out in Section 3.1. The templates<sup>22</sup> were not meant to replace the need for business cases, were appropriate (e.g., procurement of technology solutions).

### 3.3 Demand, Effectiveness and additional Income headlines

Figure 8 below provides an overview of potential baseline changes across the next three financial years.

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<sup>21</sup> The standard template structure was revised to meet the Council's MTFP information capture requirements.

<sup>22</sup> The template structure was identical for Demand and Effectiveness Changes as well as new Income opportunities.

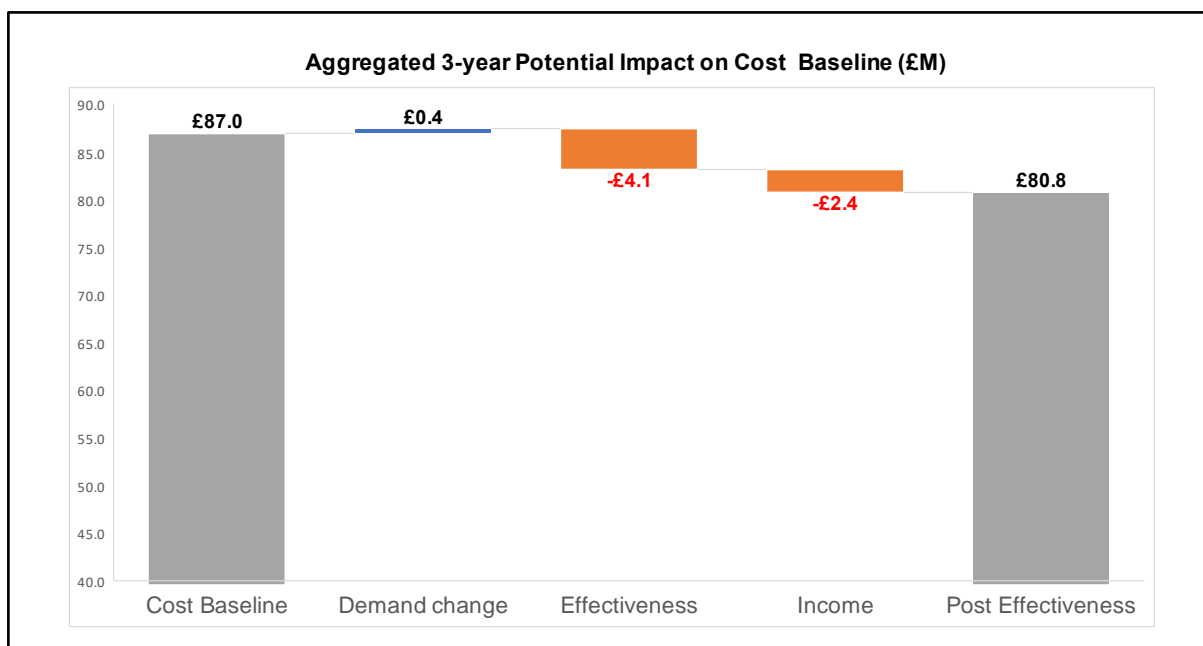


Figure 8: Breakdown of potential impact on the baseline, aggregated across each of the next 3 financial years

### 3.4 Demand and Effectiveness Changes breakdown against service area savings targets

Table 2 below provides a breakdown of Demand and Effectiveness Changes by service area (including associated income impacts) with performance against allocated c.21% savings targets for FY2025/26 onwards.

CLT noted this level of saving would be a real stretch for many of the service areas, particularly those that had significantly reduced costs over the recent past. There was explicit direction that service areas should return to previous analytical work that had not been progressed (e.g., the Environment report) to help address saving targets.

It should be noted that while the review prioritises transforming an organisation’s cost-base, many service areas were also able to offer additional income, providing the Council with alternate options to address forthcoming budget pressures.

2025/26 to 2027/28 (Cherwell District Council)	Saving Target Aim @ 20%	Demand Asks	Income Generates	Effectiveness Saving	Income Generates	Net	Shortfall to Target	% reached (before imp costs)
<b>Service Area</b>								
Customer Focus	551,000	32,920	0	-278,759	0	-245,839	305,161	45%
Digital Innovation	313,000	10,530	0	-84,584	0	-74,054	238,946	24%
Environment 1	2,527,000	355,490	0	-1,075,081	-175,000	-894,591	1,619,389	36%
Environment 2		43,370	0	-49,990	-6,400	-13,020		
Finance	835,000	7,600	0	-645,000	0	-637,400	197,600	76%
Growth & Economy	159,000	0	0	0	0	0	159,000	0%
Housing & Wellbeing	1,253,000	-336,778	28,472	-447,349	364,256	-391,399	861,601	31%
Human Resources	248,000	127,089	0	-115,738	0	11,351	259,351	-5%
Law & Governance	469,000	73,764	0	-40,000	0	33,764	502,764	-7%
Planning & Development	936,000	138,405	-105,000	-474,385	-314,400	-755,380	180,620	81%
Property	753,000	3,822	0	-751,474	0	-747,652	5,348	99%
Regulatory Services	334,000	34,649	0	-55,039	0	-20,390	313,610	6%
	<b>8,378,000</b>	<b>490,861</b>	<b>-76,528</b>	<b>-4,017,400</b>	<b>-131,544</b>	<b>-3,734,611</b>	<b>4,643,389</b>	<b>45%</b>

Table 2: Demand and Effectiveness Change options across FY2025/26 to FY2027/28 by service area (£k), inclusive of impacted income

## 3.5 Further supporting Demand Change information<sup>23</sup>

### Common Demand Changes

A common demand change was applied to all affected Services which had declared and approved uplift based increments for the FY2025/26 FTE remuneration budget.

This impacted total staff budget by c.£170k per annum (pa).

### Net Demand Changes<sup>24</sup>

For FY2025/26 a total of 11 Demand Changes were agreed.

The Demand Changes could result in an additional cost of £523k pa, and an anticipated increase in related income of £77k (excluding the impact of an accounting adjustment for H&W Museum of -c.£348k). No Demand Changes were identified for FY2027/28:

- £446k for FY2025/26 - this is the net position inclusive of the relevant demand related increased income.
- £316k for FY2026/27 - there was no identified demand related income impact.

## 3.6 Further supporting Effectiveness Change information

The Council identified, and Panel members agreed, staff and non-staff efficiency savings options of c.£4.1m across FY2025/26 to FY2027/28.

## 3.7 Running additional innovation working sessions to support development of a comprehensive set of Effectiveness Changes<sup>25</sup>

Fifty three Effectiveness Change options were accepted at Panel 2, with a further nineteen brought back to Panel 3 due to incomplete supporting data (e.g., some had missing indicative staff and/ or non-staff cost savings).

To complement service-area specific support, several additional working sessions were held to ensure the Council could fully explore know 'pain points' that affected organisational performance.

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<sup>23</sup> For associated indicative implementation costs for Demand and Effectiveness Changes refer to individual workbooks.

<sup>24</sup> Panel also directed that several Demand Changes were to be progressed outside of the process.

<sup>25</sup> Where SLs have provided implementation dates for Effectiveness Changes, the majority of these have a 12 to 24-month implementation horizon (savings across FY2025/26 to FY2026/27).

1. **Cross-cutting.** At the start of the second phase two working groups were held with SLs to identify and explore cross-cutting opportunities. This activity generated a total of 64 Effectiveness Changes (see Figure 9).

2. **Process automation.** Several briefings were held with SLs, Assistant Directors and Panel members to discuss process automation. The working sessions were facilitated by a joint presenting team from PA supported by an alliance partner. The sessions included art of the possible case studies to bring to life easily relatable examples so that attendees could relate that information to their own areas to consider how automation could enhance the effectiveness of their services.

Service Area	Number of allocated cross-cutting ECs
Environment 1	1
Environment 2	2
H&W	1
P&D	2
G&E	1
Regulatory	0
HR	8
L&G	11
Finance	1
Property	0
D&I	11
Customer Focus	12
All	14
<b>Total</b>	<b>64</b>

Figure 9: Potential cross cutting Effectiveness Changes

Figure 10 details some high-level recommendations from the sessions. Below are a few observations from the review:

- a. There was limited common understanding of the Council's processes.
- b. Process redesign of the Council's core processes has the potential to deliver significant return and enable the realisation of efficiencies beyond those identified in the review.
- c. While the Council is in the late stages of procuring some limited RPA capability, time spent understanding the Council's wider requirements is required if it is to get the 'best bang for its buck'.
- d. At present, there is limited insight into which technologies best fit the organisation's needs and where it should prioritise efforts.



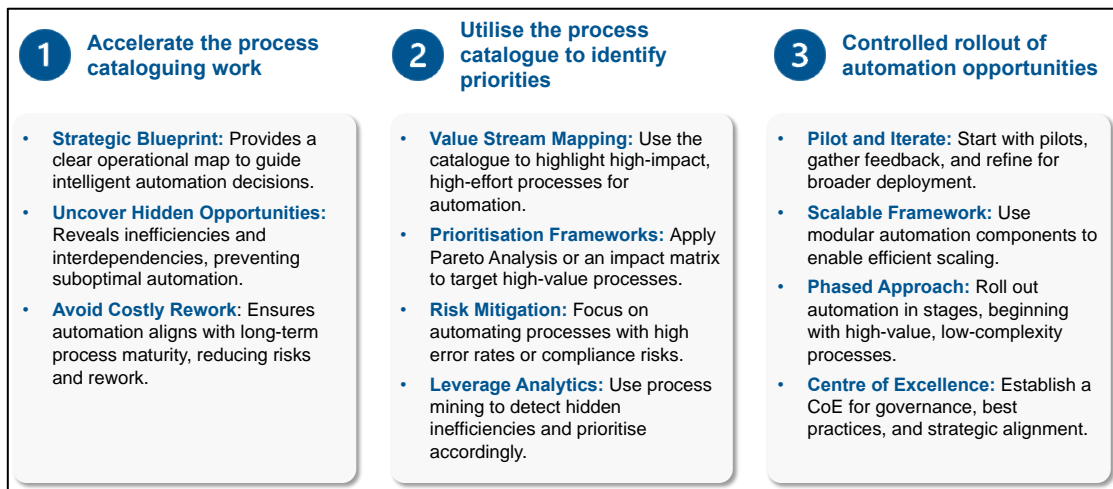


Figure 10: Potential cross cutting Effectiveness Changes

3. **Customer operations transformation.** A working session with the Customer Focus team highlighted a range of effectiveness and efficiency opportunities. It is anticipated that this will be a focus area for the target operating model as the scale of potential transformation is material for the Council.

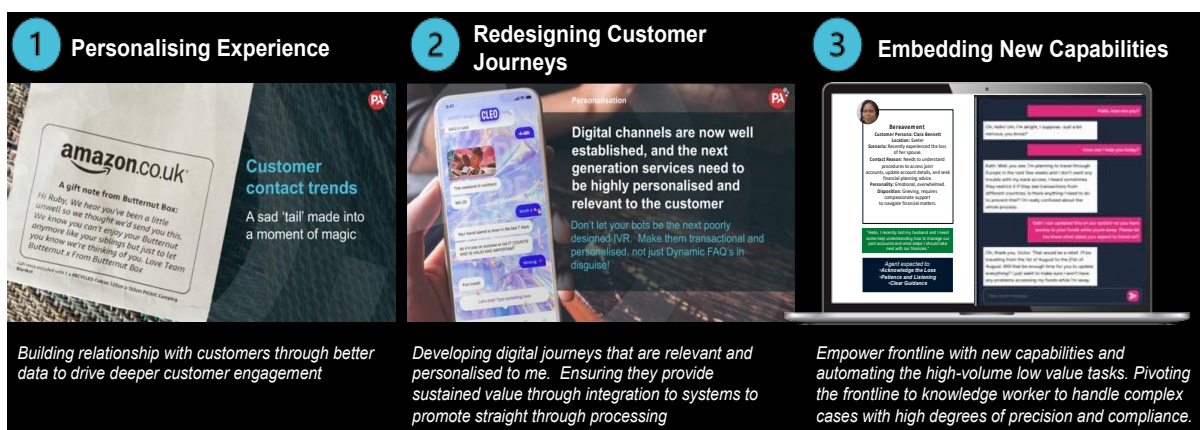


Figure 11: Customer operations – a presenting area for transformation

4. **Alternative service delivery model options.** The fourth additional working session considered presenting opportunities for moving services to alternative service delivery models (e.g., hubs, arm's length organisations, managed services, shared services, outsourcing etc). Overall, there was little appetite from workshop attendees to explore these options. That said, Environment 1 were supportive of moving to an arm's length organisation for the delivery of Waste services and included this as one of their Effectiveness Change options.

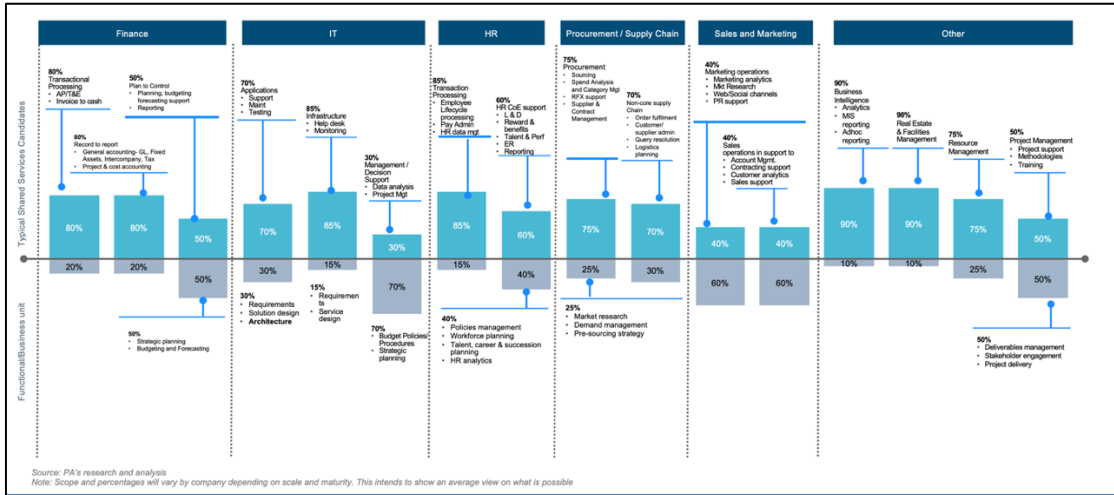


Figure 12: Example process splits within a shared services delivery model

### 3.8 Further transformation potential

Most of the Effectiveness Change options identified in Phase 2 offer a chance for the Council to make operational changes to enhance current ways of working (Figure 12, green shading) and further transformation potential was also discussed requiring more strategic choices (blue shading).

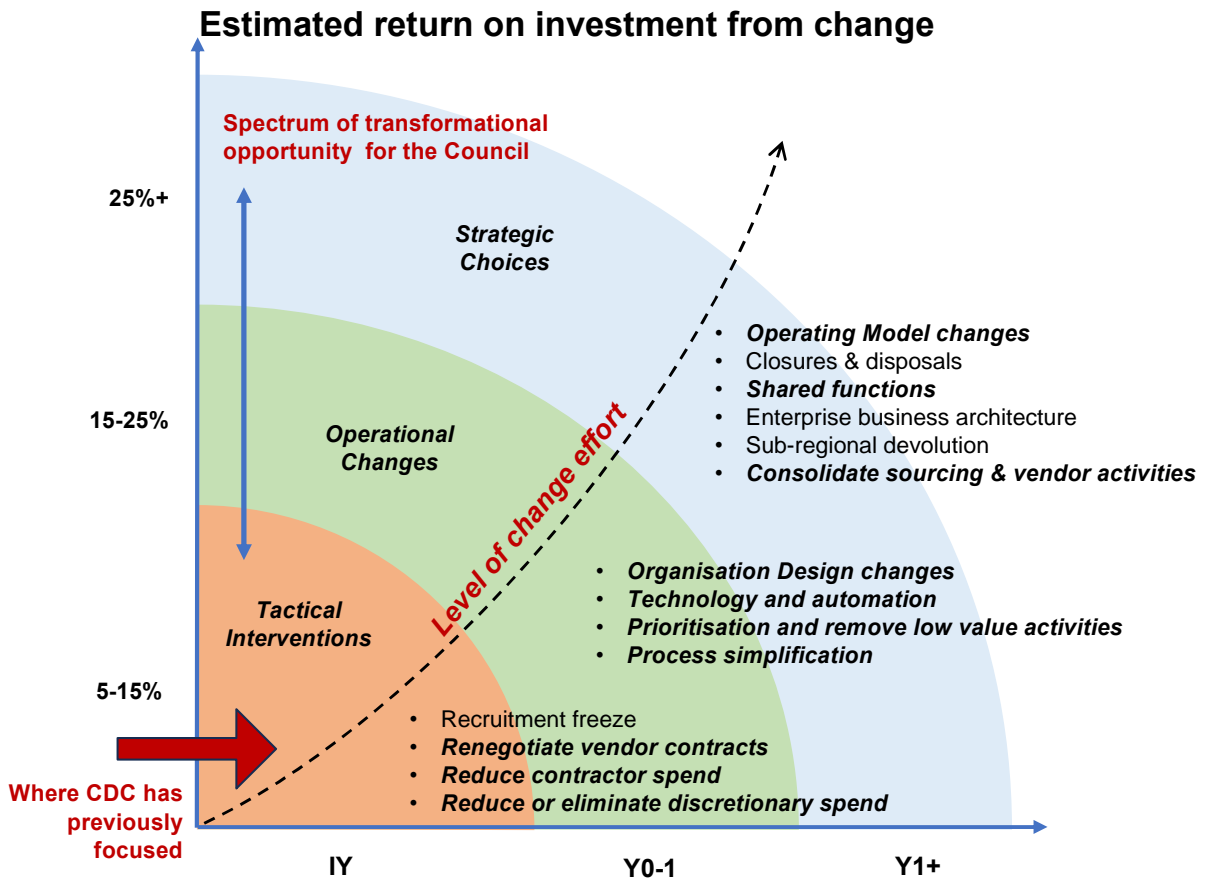


Figure 13: Spectrum of potential transformational opportunities for the Council (bold italics show the type of change CDC could undertake)

Ten key themes from the second phase coloured to reflect operational change/ strategic choice are presented below.



Figure 14: Potential operational change & strategic choice themes from Panel 2

Drawing on evidence presented, professional judgement and what has been seen elsewhere, the Council is assessed to be at a low level of operational maturity overall (see Figure 15 below). Hence, there is view that the efficiencies quantified through the review are conservative, and that the Council should be able to overperform against the current £4.1m aggregated potential savings figure, through further transformational activity.

### 3.9 Decisions and actions from Panel 2

Actions from Panel 2 were reviewed by the Project Team and ratified by the Panel.

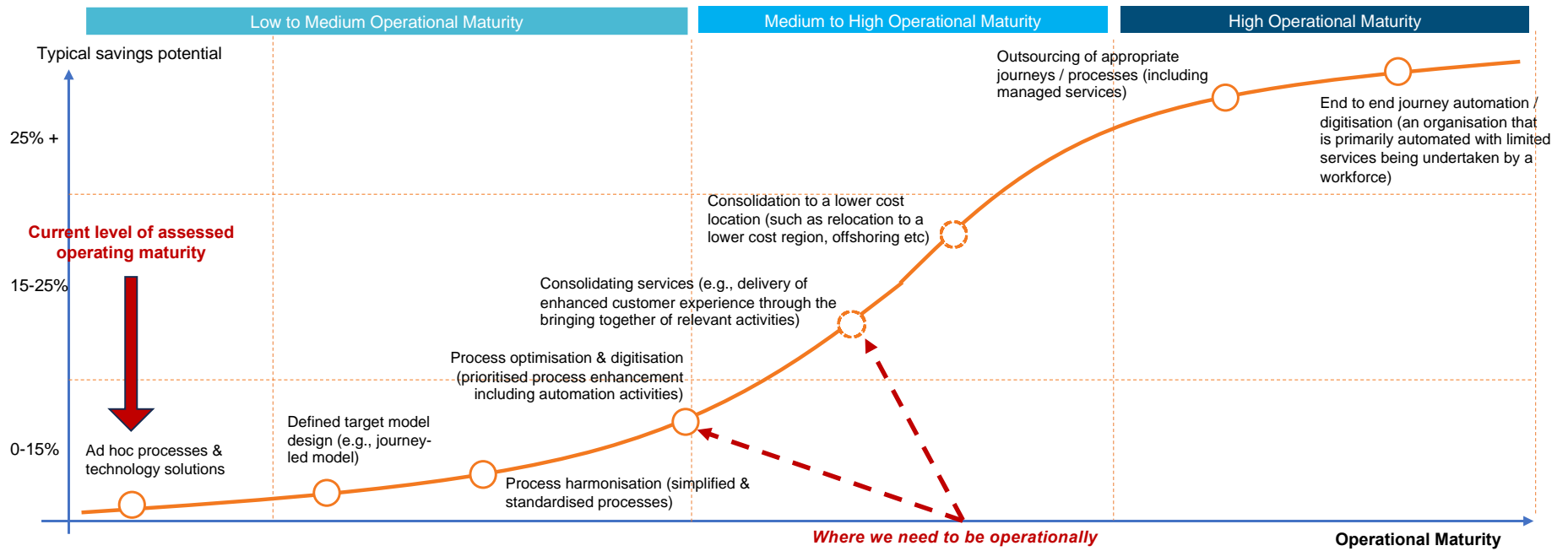


Figure 15: Operating maturity assessment and indicative transformational ambition

## 4 Phase 3 – Scenarios for Service level options

### 4.1 Overview and objectives

The primary focus of Phase 3 was the development of different service level options for the Council including associated risks, impact (FTE and cost), and interdependencies.

The service level options assumed the implementation of all Demand and Effectiveness Changes as agreed by the Panel as part of Phase 2, as a starting point.

The “Current” service level detailed at Phase 3 is the most cost-efficient version (i.e., baseline costs agreed at Panel 1 minus Demand and Effectiveness Changes agreed at Panel 2).

The presentation of these service level options at Panel 3 allowed the Panel to evaluate the different options by using a transparent, evidence-based assessment of the benefit, impact, and associated risk to the Council for each level.

The draft scenarios for SLs were directed to develop a range of six different service level options, beginning with minimum and building upwards via intermediate, to current and improved, articulating what additional service will be provided for additional cost, and how each build will mitigate risks.

### 4.2 Development of service levels

The purpose of identifying different levels of service provision was to offer the Panel a range of potential choices across the in-scope areas (be that investment, disinvestment or the reprioritisation of resources). SLs were encouraged to provide the Panel with as broad a range of costed service levels as possible. This involved:

- Defining the services to be provided at each level, described in Table 3 (below).
- Identifying related staff and non-staff costs, including consideration of the staffing model that would be needed to deliver services at each defined level.
- Defining risks and how they reduce in line with increasing service levels.
- Defining the implementation dates and costs of each service level option (due to time constraints this will need to be progressed outside of the process).

Costs increase from minimum through the intermediate service level builds to current and improved.

When defining the lowest possible level of service, SLs were asked to reflect what the organisation would find viable (i.e., a level of service the Council could function at, accepting the level of risk would not be at all desirable). SLs were asked to base this on the work Council does, legal requirements, statutory minimum standards and commitments that had been made (to residents, central government, etc).

Service level options were then presented at Panel 3.

## 4.3 Service level costs

Table 3 details the costs of the different service level options offered at Panel 3 for consideration and Figure 15 shows the aggregated cost of each service level.

Service Area	Total cumulative Cost (£m)					
	Min	Int 1	Int 2	Current	Imp 1	Imp 2
Customer Focus	0.97	2.03	2.56	2.63	2.75	2.57
Digital & Innovation	1.07	1.32	1.45	1.66	1.79	1.88
Environment 1	8.10	9.45	9.66	10.31	10.98	10.98
Environment 2	2.10	2.20	2.27	2.34	2.38	2.38
Finance	45.60	45.61	45.77	45.94	46.37	46.62
Growth & Economy	1.46	1.63	1.85	2.13	2.29	2.29
Housing & Wellbeing	3.77	6.32	7.15	7.04	7.83	7.83
HR	0.60	0.66	0.77	0.78	0.82	0.82
Law & Governance	2.10	2.17	2.20	2.28	2.64	2.69
Planning & Dev	2.75	3.69	4.49	4.54	4.27	4.27
Property	1.85	1.85	2.50	3.23	3.34	3.41
Regulatory	1.47	1.57	1.58	1.67	1.88	1.88
	<b>71.84</b>	<b>78.50</b>	<b>82.25</b>	<b>84.55</b>	<b>87.34</b>	<b>87.62</b>

Note: Finance includes Executive Matters ~£16.7M and Rent Allowances ~£25M

Table 3: costed service level options presented at Panel 3

Figure 16 below shows that the Council's services could be provided for a cost of between £71.8m to £87.6m, depending on the choices made about quality and risk. This information could be used to inform the budgeting process in future years, as required. Note that the costs presented are after all agreed Demand and Effectiveness Changes have been considered.

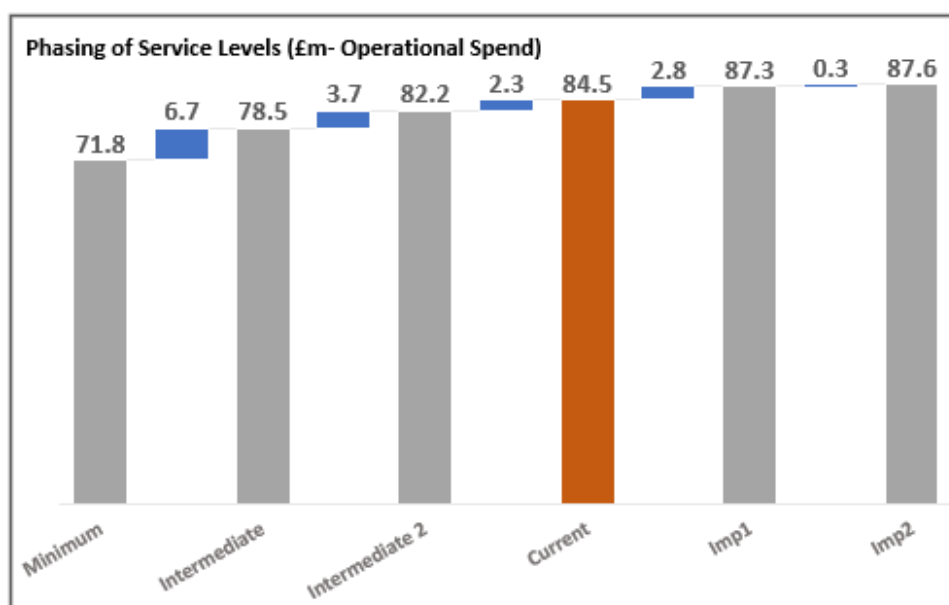


Figure 16: Aggregated cost of service level options presented at Panel 3 (£m)

## 4.4 Risk profile

As noted, each service level option build presented to the Panel had a series of risks relating to that level of activity. SLs, and supporting teams, defined a set of key risks for the Council, and scored them in line with the Council's risk matrix. This gave an overall risk score for each of the risks. The risk profiles were presented and discussed at Panel 3.

As the amount of resource and activity increased between the service level options, the associated level of risk decreased. The approach helped the Panel to understand what risk was either being 'bought out' by choosing a higher level of service or accepted by choosing a lower level of service.

## 4.5 Scoring of service levels, and decisions and actions from Panel 3

At Panel 3, Panel members were invited to score each of the presented service level options for each service area using the below scale:

Score	Description
10	Essential - unavoidable corporate or legal requirement
9	Critical – unavoidable without substantial loss or damage
8	Very attractive, important and productive level of service
7	Important - hard to see how they could be dropped
6	Significant benefits but could conceivably be dropped
5	Desirable but first to be dropped if funding curtailed
4	Marginal but first to be supported if funding available
3	Possible but only if significant increased funding available
2	Doubtful – not sufficient justification at present
1	Unlikely ever to be funded

*Table 4: Criteria used by the Panel members to score individual service level options*

Panel members initially scored individually, then scores were moderated (ensuring no more than 2 points separated Panel member scores) to understand explore and significant differences of opinion by members and determine a set of consensus scores.

Panel members subsequently met to discuss the application of this scoring to several scenarios, whereby the impact on budgets of including all service levels options above a particular score were considered. The following scenarios were used:

- **Scenario 1.** Keeping budgets at existing levels, but reinvesting the savings made through effectiveness changes into improved services.
- **Scenario 2.** Taking the effectiveness changes to reduce the cost baseline, keeping service levels broadly as current (with some limited rebalancing to reflect changed priorities).
- **Scenario 3a.** Taking the effectiveness changes and reducing service levels (based on the scoring above) to achieve the desired target in terms of meeting the potential budget gap.

- **Scenario 3b.** ‘Fine-tuned’ Scenario 3a to increase service levels in three service areas<sup>26</sup> that produced a positive marginal contribution (i.e. increase in income greater than increases in cost).

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<sup>26</sup> Finance, Planning & Dev and Property.



# 5 Implementation

## 5.1 High-level roadmap

The proposed high-level implementation plan (Figure 16) shows the key activities that will be required to deliver the efficiencies associated with the proposed Demand and Effectiveness Change options.

Implementation dates have been taken from the information provided in phases 2 (e.g., Effectiveness Change templates) and 3. This information is reflective of the SLs' and supporting staffs' professional judgement.

Where there has been a level of uncertainty, a conservative estimate has been taken. All implementation dates will need to be tested. There will also be opportunity to accelerate some of the delivery timelines, dependent in resource prioritisation.

The levels of complexity shown below are based on an assessment made by the combined project team following Panel 2. The Council will need to firstly confirm the assessed level of complexity during the design phase of delivery. Secondly, CDC will need to consider how best to plan for and manage delivery complexity as many of the identified savings will be dependent on enabling activities/ co-dependent on other change initiatives.

The core principle which has driven the sequence of activities is that of 'save to spend' (i.e., achieving cashable savings early to fund investment). The plan also includes enabling assumptions and enabling factors such as technology, governance, and programme management (as identified in the Effectiveness Change templates). A larger version of the Demand and Effectiveness Change implementation plan can be found at Appendix 3.

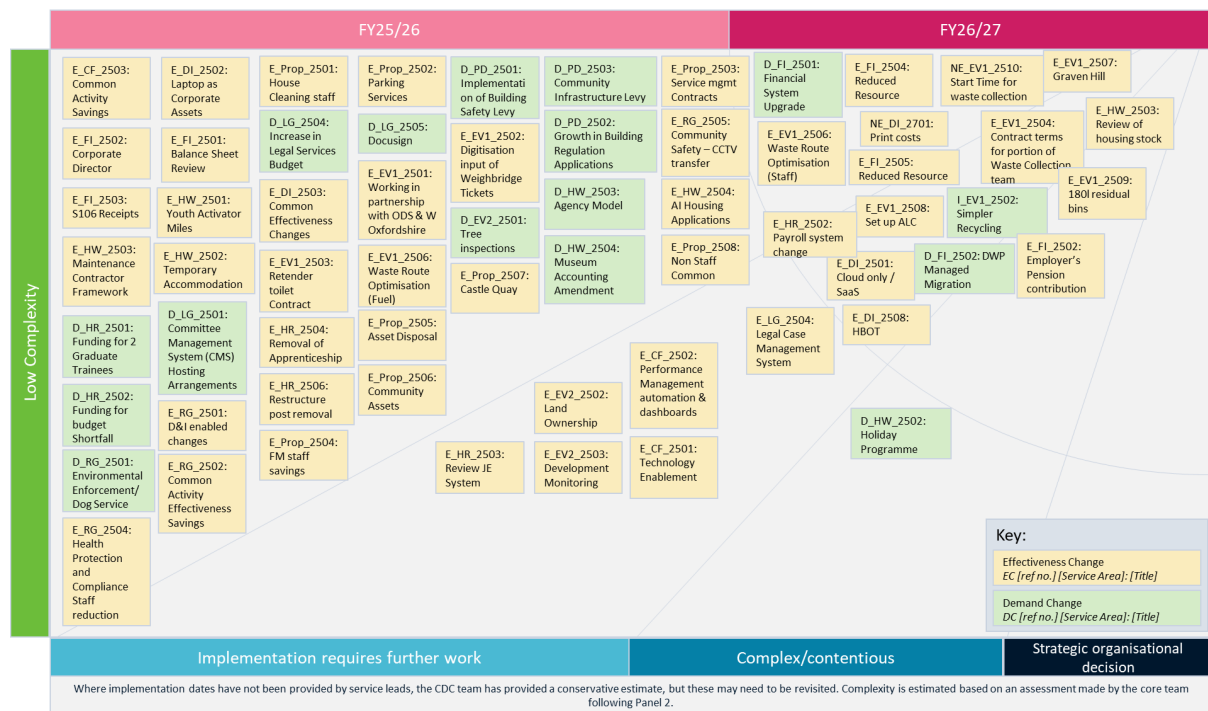


Figure 17: Indicative high-level Demand and Effectiveness Change implementation plan (see Appendix 3)

## 5.2 Implementing the Demand and Effectiveness Changes

Of the 106 proposals presented at Panels 2 and 3, 16x Demand and 53x Effectiveness Changes were deemed viable, with a further four<sup>27</sup> awaiting a judgement out of process.

The opportunities were deemed to be viable all have implementation dates within the next 12 to 24-months (FY2024/25 or FY2025/26) so can be actioned in the short-term.

For each Demand and Effectiveness Change a template has been completed. The templates provide supporting information such as rationale, associated costs, risks, interdependencies, and enablers.

The implementation date is the individual SL's assessment of the point at which the change to the budget will be fully realised and is underpinned by several assumptions and risks developed during the Panel process. These assumptions include:

- **Budgeting process.** It is assumed that through the budgeting process the Council will discuss the Demand Changes and Effectiveness Change options, and other associated identified investment factors, to ensure the Council has a set of services appropriately balanced to meet its needs in FY2024/25 and going forward.
- **Programme set up.**

It is assumed the implementation will be incorporated with appropriate governance, set out in Section 5.3. This will include the allocation of appropriately experienced resources to support design and implementation of the new target operating model and associated changes that have been agreed as part of this review.

  - It is also assumed that the programme will be delivered in line with a detailed delivery plan. Any changes should undergo robust change control to assess the impact on the scale and timing of both savings and investments to maintain a net cost saving over time. This point is applicable to the review and all constituent design elements of any forthcoming transformation programme.
- **Consultation and Member Decision.** It is assumed that the Council will assess (and take appropriate steps) whether there is a requirement to undertake a consultation process and/ or seek Member Decision ahead of implementing some of the proposals.
- **Alignment of post mapping and reallocation of resources.** Where relevant, it is assumed that every effort will be made to minimise staff impact and align resources of the right grade and skillset to new posts, as agreed in the budgeting process.
- **Organisation Design.** It is assumed the Council will consider how the target operating model work will incorporate the proposed changes from the review.
- **Implementation costs.** It is assumed the Council will need to:
  - Further refine the Effectiveness templates/ service level options. Developing business cases (were appropriate) to capture revised costs and benefits<sup>28</sup>.
  - Fund implementation costs as part of the budgeting process for upcoming financial years.
- **Programme Delivery.** It is assumed that all accepted changes are deliverable and realisable. The majority of these can be actioned through business as usual. Where this cannot take place, the appropriate leadership team will be responsible for actioning and implementing agreed changes (either through the budgeting process outcomes or in addition to them).

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<sup>27</sup> E\_EV1\_2501, HR Supplementary x3 (Professional subscriptions, agency costs and overtime) will be reviewed post Panel 3 at CLT. This delay is due to short timelines between Panel 2 and Panel 3 impacting the Service Leads ability to address the points raised.

<sup>28</sup> Good practice is to refine business cases (high and detailed) through the design phases ahead of implementation.

## 5.3 Governance

The Efficiencies and Service Level changes (if agreed through the appropriate internal governance process) will only come from successful implementation. Setting the right level of governance and control from the outset is a critical element of achieving desired outcomes.

There are two elements to this:

- Establishing an appropriate governance framework.
- Embedding the governance of this review into the wider Council portfolio of change.

The high-level implementation plan (Figure 16) has been developed post Panel Session 3 and should be considered a first version of a live document. It will need to be maintained and updated under the governance and control arrangements established to manage the budgeting process decisions.

Given the types of initiatives identified through the review the Council may wish to consider the two governance approaches outlined below that match the structure of the high-level implementation plan.

<b>Type of initiative</b>	Short-term initiatives contained within service area workbooks.
<b>Governance Lead</b>	Cost based Services Review Project Board or the Corporate Leadership Team.
<b>Responsible Owner</b>	Assistant Directors
<b>Description</b>	These are initiatives expected to be realised during FY2024/25 or FY2025/26. Typically, these initiatives are 'quick wins' and/ or can be addressed as part of business as usual. They may require an update to the FY2025/26 budget, to match the cost changes that have been realised. Budget holders are responsible for the delivery of these savings.

<b>Type of initiative</b>	Medium to long-term initiatives and/ or those that are complex/ sensitive (e.g., organisation design changes).
<b>Governance Lead</b>	Cost based Services Review Project Board, a newly formed Transformation Board or the Corporate Leadership Team.
<b>Responsible Owner</b>	Business case owner(S) and/ or relevant corporate/ assistant directors
<b>Description</b>	These are initiatives that are expected to be enabled over the next 1 to 3 financial years. Service areas will be accountable for the delivery of the initiatives and the realisation of benefits. A programme board and other forums (e.g., a Design Authority) will be required and expected to fulfil a central coordination and governance role.

## 5.4 Roles and responsibilities

Adequately resourcing the delivery team and providing robust governance and control will be fundamental to success. It is suggested that they report to a Programme Board, who are responsible for delivering all aligned savings.

# Appendices

## Appendix 1 – List of viable Effectiveness Change options

Below is a breakdown of agreed Effectiveness Changes by service area.

The financial year information was provided by the respective SLs and is their estimate as to when the effectiveness savings could be realised.

Ref Number	Service Area	Description Title	Total Saving	Earliest implementation date
E_CF_2501	CF	Technology Enablement	-193,493	1yr CRM 2-3yr
E_CF_2502	CF	Performance Mgmt automation and Dashboards	-53,594	18mths/2 yrs
E_CF_2504	CF	Common Activity Savings	-31,672	Apr-25
E_DI_2502	D&I	Laptops as Corporate Assets	-9,750	Apr 25
E_DI_2503	D&I	Common Effectiveness Changes	-10,534	Apr 25
E_DI_2501	D&I	Cloud only /SaaS	-20,300	2026/27
NE_DI_2701	D&I	Controlling uncontrollable non staff costs	-12,500	2026/27
NE_DI_2701	D&I	Controlling uncontrollable non staff costs	-20,000	2027/28
NE_DI_2701	D&I	Controlling uncontrollable non staff costs	-11,500	2027/28
E_EV1_2501	Env 1	Working in Partnership with ODS & W. Oxfordshire	-45,000	01/04/2025. Additional potential savings for 2026/27 (Staff)
E_EV1_2502	Env 1	Digitisation input of Weighbridge Tickets	-21,789	Apr-25
E_EV1_2503	Env 1	Retender toilet Contract	-10,000	Apr-25
E_EV1_2504	Env 1	Contract terms for portion of Waste Collection team	-29,047	Ref Summary for 2026/27 & 2027/28
E_EV1_2506	Env 1	Waste Route Optimisation	-9,000	Apr-25
E_EV1_2501	Env 1	Working in Partnership with ODS & W. Oxfordshire	-300,000	2026/27
E_EV1_2507	Env 1	Graven Hill [Placeholder as savings commence 26/27 and not 25/26]	-80,000	2026/27

E_EV1_2507	Env 1	Graven Hill [Placeholder as savings commence 26/27 and not 25/26]	-185,000	2027/28
E_EV1_2508	Env 1	Set up ALC [ Placeholder as savings commence 26/27 and not 25/26]	-30,000	2026/27
E_EV1_2508	Env 1	Set up ALC [ Placeholder as savings commence 26/27 and not 25/26]	-100,000	2027/28
E_EV1_2504	Env 1	Contract terms for portion of Waste Collection team	-38,000	2026/27
E_EV1_2504	Env 1	Contract terms for portion of Waste Collection team	-48,000	2027/28
NE_EV1_2510	Env 1	Start Time for waste collection	-162,381	2026/27
NE_EV1_2510	Env 1	Start Time for waste collection	-162,381	2027/28
E_EV1_2506	Env 1	Waste Route Optimisation	-29,482	2026/27
E_EV2_2502	Env 2	Land Ownership	-49,990	3-6mths post completion 2025/26
E_EV2_2503	Env 2	Development Monitoring	-6,400	3-6mths post completion 2025/26
E_FI_2501	Finance	Balance Sheet Review	-240,000	Apr-25
E_FI_2503	Finance	Corporate Director	-140,000	Apr-25
E_FI_2504	Finance	S106 receipts	-174,000	Apr-25
E_FI_2505	Finance	Reduced Resource	-34,936	01/04/2025 with portion in 2026/27
E_FI_2505	Finance	Reduced Resource	-18,064	2026/27
E_FI_2508	Finance	HBOT [Placeholder 26/27]	-38,000	2026/27
E_HW_2501	H&W	Youth Activator Mileage	24,426	Apr-25
E_HW_2502	H&W	Temporary Accommodation - Housing	-400,000	1/4/25 & on-going
E_HW_2504	H&W	Maintenance Contractor Framework	-5,000	Apr-25
E_HW_2505	H&W	AI Housing Applications	-36,775	Jan-26
E_HW_2503	H&W	Review of Housing Stock	334,256	2026/27
E_HR_2503	HR	Review JE system	-10,000	Apr-25
E_HR_2504	HR	Removal of Apprenticeship	-25,073	Jun-25

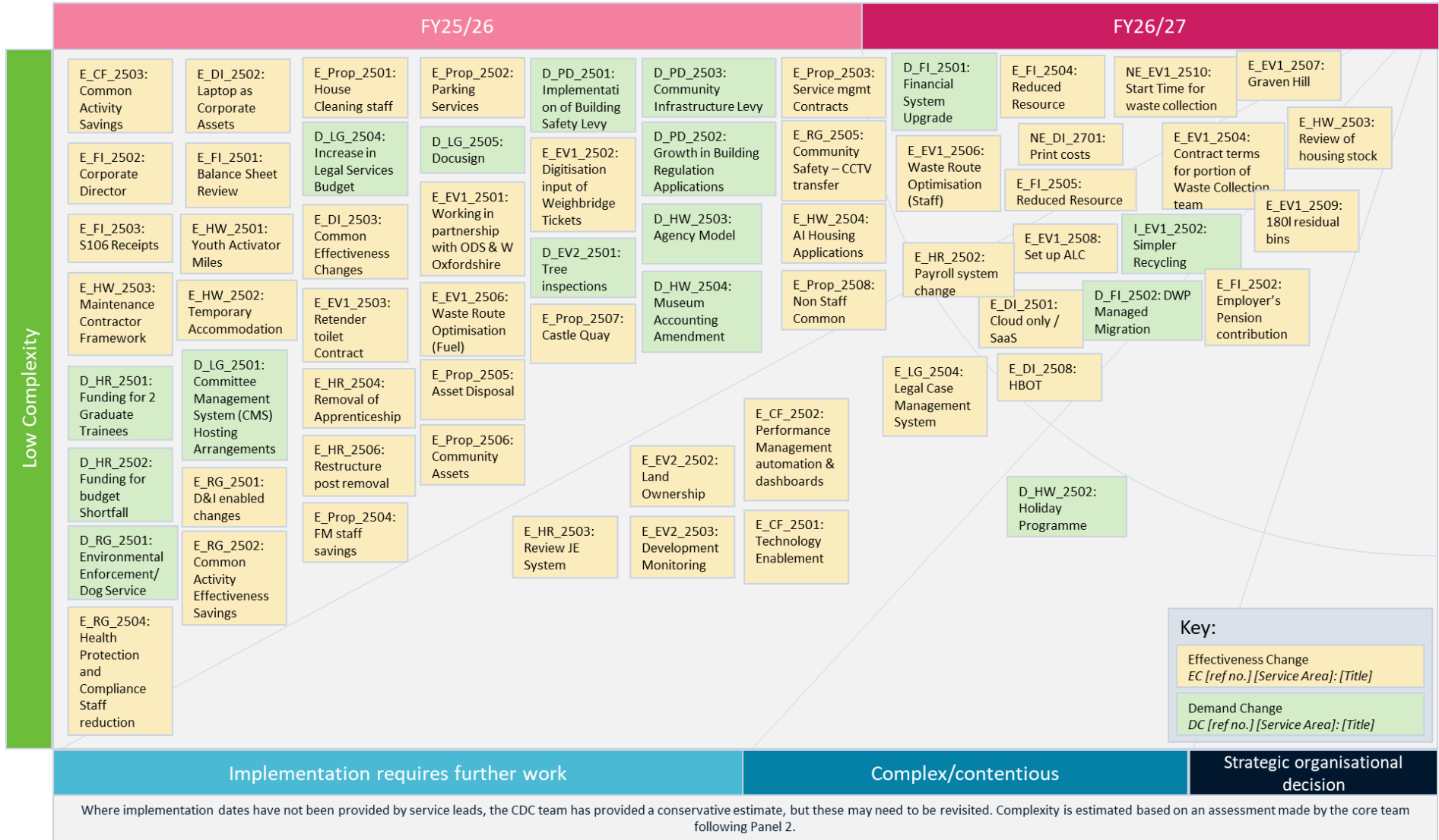
E_HR_2502	HR	HR/Payroll system change	-80,665	2026/27
E_PD_2501	P&D	Planning Application Focus	-646,930	MTFS period
E_PD_2504	P&D	Self Service	-103,728	MTFS period
E_PD_2506	P&D	Restructure post removal	-38,126	Apr-25
E_Prop_2501	Property	House Cleaning staff	-88,422	Apr-25
E_Prop_2502	Property	Parking Services	-98,000	Apr-25
E_Prop_2503	Property	Service Management Contracts	-48,165	Apr-25
E_Prop_2504	Property	FM staff savings	-18,087	Apr-25
E_Prop_2505	Property	Asset Disposal	-19,200	Apr-25
E_Prop_2506	Property	Community Assets	-5,000	Apr-25
E_Prop_2507	Property	Castle Quay	-250,000	01/04/2025 & on going
E_Prop_2508	Property	Non Staff Common	-4,600	Apr-25
E_Prop_2503	Property	Service Management Contracts	-70,000	2026/27
E_Prop_2503	Property	Service Management Contracts	-70,000	2027/28
E_Prop_2504	Property	FM staff savings	-40,000	2026/27
E_Prop_2504	Property	FM staff savings	-40,000	2027/28
E_RG_2501	Reg	D&I enabled changes [Will be held to deal with increments]	-18,509	Apr-25
E_RG_2502	Reg	Common Activity Effectiveness Savings	-700	Apr-25
E_RG_2504	Reg	Health Protection and Compliance Staff reduction	-25,830	Apr-25
E_RG_2505	Reg	Community Safety – CCTV transfer	-10,000	Apr-25

## Appendix 2 – SharePoint Site Contents

Content was organised into several Teams channels within the “PA Consulting – Cherwell District Council” Teams site.

Channel	Contents	Notes
01. PAC – Cost Service Review	Ad-hoc working area for the review team	
02. PAC – Project Board	Slide packs used for Project Board Meetings Weekly Reports	Slide packs and weekly reports filed by date.
03. Panel Members	Folder for each of the Phases containing: <ul style="list-style-type: none"> <li>• The slide pack used for each Panel meeting</li> <li>• Notes, actions and decisions for each Panel meeting</li> <li>• Detailed templates and workbooks for each service area (in separate folders)</li> </ul> Report from PA’s Culture Insights Review (provided as a value-add)	
Service Area Channels	Main working area for each of the service area, each with folders for: <ul style="list-style-type: none"> <li>• Service descriptions</li> <li>• Demand and effectiveness changes</li> <li>• Service levels</li> <li>• The final and archive versions of the underlying workbook</li> </ul>	

# Appendix 3 – Implementation Roadmap







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## Appendix 2

The Crown Commercial Service (CCS) Management Consultancy Framework (MCF) Lot 3 is specifically designed for complex and strategic projects that require expert consultancy services.

### **Mechanisms for Ensuring VFM in MCF Lot 3**

#### 1. Competitive Supplier Selection

**Rigorous Tender Process:** Suppliers on Lot 3 have been vetted through a competitive process, demonstrating their ability to provide high-quality services at reasonable costs. This typically includes providing evidence of cost-effectiveness, ensuring a baseline level of VFM.

All suppliers are pre-qualified based on their capability, experience, and adherence to public sector procurement standards. This reduces the risk of poor performance or hidden costs, which can erode VFM.

**Pre-negotiated Rates:** Suppliers are required to offer transparent and competitive day rates, which are benchmarked during the tender process to avoid inflated costs. Pricing models in the framework often include capped rates, which help control costs.

#### 2. Mini-Competitions

Buyers can run mini-competitions among pre-approved suppliers to secure the most cost-effective solution tailored to their specific needs.

These competitions allow public sector bodies to consider price, quality, and delivery times, which supports achieving optimal VFM.

#### 3. Expertise for Complex Projects

Lot 3 specializes in complex, high-value, or high-risk projects, where expertise is critical to prevent costly errors and delays.

Engaging experts for strategic decision-making can lead to better long-term outcomes and cost savings.

#### 4. Centralised Terms and Conditions

Pre-negotiated contracts with standardized terms reduce legal and administrative costs.

Suppliers are bound by the terms to adhere to agreed-upon deliverables and performance standards.

#### 5. Transparency and Reporting

The framework encourages open-book accounting and clear reporting mechanisms, allowing buyers to monitor costs and supplier performance.

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<b>This report is public</b>	
<b>New Housing Allocations Scheme 2025</b>	
<b>Committee</b>	Executive
<b>Date of Committee</b>	6 January 2025
<b>Portfolio Holder presenting the report</b>	Portfolio Holder for Housing, Councillor Nick Cotter
<b>Date Portfolio Holder agreed report</b>	5 December 2024
<b>Report of</b>	Assistant Director Wellbeing and Housing – Nicola Riley

## Purpose of report

To seek approval for a new Housing Allocations Scheme.

### 1. Recommendations

The Executive resolves:

- 1.1 To approve the new Housing Allocations Scheme.

### 2. Executive Summary

- 2.1 The Allocations Scheme is the Policy that ensures the fair allocation of social housing properties within District and is used for the administration of the waiting list for social housing, which is part of our statutory duties.
- 2.2 The Council reviews its scheme regularly to ensure it remains compliant with legislation and is also still meeting the needs of applicants in the best way

## Implications & Impact Assessments

Implications	Commentary
<b>Finance</b>	There are no new financial implications outlined in the report as the existing arrangement is captured in the base revenue budget Kelly Wheeler, Finance Business Partner, 26 November 2024
<b>Legal</b>	There are no direct legal implications arising from this report or the new scheme. Shahin Ismail, Interim Head of Legal Services, 27 November 2024
<b>Risk Management</b>	As it is part of our statutory housing duties, to not review the policy to ensure it is compliant with legislation, is fair and inclusive and is meeting the needs of the district would present a risk.

	Therefore, a regular review of this policy is prudent as part of mitigating actions for this risk. This and any further risks will be managed through the Service Operational Risk and will be escalated to the Leadership Risk Register as and when deemed necessary. Celia Prado-Teeling, Performance Team Leader, 26 November 2024			
<b>Impact Assessments</b>	Positive	Neutral	Negative	Commentary
<b>Equality Impact</b>	x			An Equalities and Climate Impact Assessment is included as an Appendices of the report
<b>A</b> Are there any aspects of the proposed decision, including how it is delivered or accessed, that could impact on inequality?	x			The Allocations Scheme provides a framework of how social housing is allocated within Cherwell. It ensures the prioritisation of certain household circumstances based on what the legislation or on local demand factors. The work of the team and support provided ensures that vulnerable groups are able to access the services of the team.
<b>B</b> Will the proposed decision have an impact upon the lives of people with protected characteristics, including employees and service users?	x			Many vulnerable groups assisted by the team and who are accessing the waiting list for housing will have protected characteristics. As part of any application, all protected characteristics that an applicant may have are captured as part of this process. This is primarily for monitoring purposes, but it does allow for adjustments to be made.
<b>Climate &amp; Environmental Impact</b>		x		Policy does not relate to delivery of new homes or the quality of existing property
<b>ICT &amp; Digital Impact</b>		x		Not applicable
<b>Data Impact</b>		x		Not applicable
<b>Procurement &amp; subsidy</b>		x		Not applicable
<b>Council Priorities</b>	Housing that meets your needs			
<b>Human Resources</b>	Not applicable			
<b>Property</b>	Not applicable			
<b>Consultation &amp; Engagement</b>	The scheme has undergone public and stakeholder consultation, as outlined within the report.			

## Supporting Information

### 3. Background

- 3.1 As part of its statutory duties, the Council manages the waiting list for social housing and also allocates social housing properties within Cherwell on behalf of Registered Providers of social housing that have housing stock within the district. The Council no longer has a significant stock holding of its own following a transfer of its housing stock to what is now Sanctuary Housing. The waiting list comprises around 2000 households that have varying degrees of housing need. The prioritisation of this need is set out within the Allocations Scheme.
- 3.2 The Allocations Scheme provides the framework for assessment and prioritisation of housing applicants. The Allocations Scheme just covers allocation of social housing and does not cover temporary accommodation, supported accommodation, Extra Care or Shared Ownership schemes.
- 3.3 The prioritisation and administration of housing applications and applicants is outlined within legislation. However, Council's do have some flexibilities to be able to manage and administer their own schemes and prioritise certain applicant circumstances.
- 3.4 The Allocations Scheme was last reviewed in 2021. It is good practice to regularly review schemes to ensure they are compliant with legislation but also to respond to emerging trends and needs.
- 3.5 Following the Executive meeting in July 2024, public and stakeholder consultation commenced throughout August and September 2024. This included its discussion at the September meeting of Overview and Scrutiny.

### 4. Details

- 4.1 The report and its appendices detail the principal changes that the new Allocations Scheme makes to the existing scheme that is currently in operation. This includes a summary table of the main changes and the rationale for the change being made.
- 4.2 Below is a brief summary of some of the main changes proposed:
- An increase in priority for those who are homeless
  - A creation of a banding for survivors of Domestic Abuse.
  - A review of the income and savings thresholds, which dictate who may be eligible to join the register
  - A change in the way overcrowded households are administered
  - Additional preference given to those covered by the Armed Forces Covenant
- 4.3 Comments that were received as part of the consultation, as well as comments made by the Overview and Scrutiny Committee, are summarised within Appendix 4 of the report. Where the policy has been changed as a result of consultation is also outlined within this Appendix.

4.4 There were over 50 responses to the consultation and consultees were positive about the changes that have been proposed.

## 5. Alternative Options and Reasons for Rejection

5.1 The following alternative options have been identified and rejected for the reasons as set out below.

Option 1: Not bring forward a new Allocations Scheme. This is rejected as it is important that the Council has Policies that are up to date with legislation and can respond to current challenges.

## 6. Conclusion and Reasons for Recommendations

6.1 It is important that the Council has up to date policies and procedures for its statutory and key service areas and it is important that they are legislatively and operationally sound. A periodic review of policies is therefore appropriate.

### Decision Information

<b>Key Decision</b>	Yes
<b>Subject to Call in</b>	Yes
<b>If not, why not subject to call in</b>	N/A
<b>Ward(s) Affected</b>	All Wards

### Document Information

<b>Appendices</b>	
<b>Appendix 1</b>	New Cherwell District Council Allocations Scheme 2025
<b>Appendix 2</b>	New Allocations Scheme – Summary of main changes
<b>Appendix 3</b>	Equalities and Climate Impact Assessment
<b>Appendix 4</b>	Consultation results and responses to comments made
<b>Background Papers</b>	None
<b>Reference Papers</b>	None
<b>Report Author</b>	Richard Smith – Head of Housing
<b>Report Author contact details</b>	richard.smith@cherwell-dc.gov.uk 01295 221640



<b>Corporate Director Approval (unless Corporate Director or Statutory Officer report)</b>	Ian Boll, Corporate Director – Communities
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Appendix 1



# Housing Allocation Scheme

January 2025

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## 1. Introduction and Overview

### 1.1 Introduction

Cherwell District Council (CDC) transferred its housing stock, which is now owned by Sanctuary Housing Group, through a Large Scale Voluntary Transfer (LSVT). Therefore, it is important to note that with the exception of a small number of units this Housing Allocation Scheme relates primarily to housing owned by Registered Providers (RPs) of social housing.

In Cherwell, the demand for social housing is greater than the number of homes available. This Housing Allocation Scheme describes how CDC prioritises housing applicants and ensures that those in greatest housing need, including as described by the legal definition of Reasonable Preference in the Housing Act 1996 (as amended by the Homelessness Act 2002, the Localism Act 2011 and the Homelessness Reduction Act 2017) (the Act), are given appropriate priority to access available social housing. Whilst CDC will nominate applicants to housing that is owned by RPs, in accordance with this Housing Allocation Scheme, RPs will also have due regard to their own lettings policies when letting their properties.

This Housing Allocation Scheme applies to:

- new applicants
- current applicants
- existing tenants of a RP who want to transfer either with their current landlord or to another RP

This Housing Allocation Scheme sets out in detail who is eligible and who will qualify to join the housing register as well as how this assessment is made. It also sets out how applicants can apply for and access housing and what service standards an applicant can expect from CDC.

The vast majority of the housing that CDC allocates under this Housing Allocation Scheme is through a Choice Based Lettings (CBL) system ([www.cherwell-homechoice.org.uk](http://www.cherwell-homechoice.org.uk)) which allows applicants to view available properties and express interest by making bids.

### 1.2 Aims and objectives

The key objectives of this Housing Allocation Scheme are to:

- provide housing applicants in Cherwell with a fair and transparent system by which they are prioritised for affordable housing
- help applicants most in housing need
- promote the development of sustainable, mixed communities and neighbourhoods of choice
- encourage residents to access employment, education and training
- make efficient use of CDC's resources and those of its partner RPs

CDC designed this Housing Allocation Scheme to meet all legal requirements and to support and contribute towards the objectives of its Housing Strategy. CDC's Housing Strategy, and the ways in which it provides advice and assistance to home seekers on a whole range of housing options, including access to the private rented sector and low cost homeownership, can be found on CDC's website at [www.cherwell.gov.uk](http://www.cherwell.gov.uk).

### 1.3 The legal context

Part VI of the Act requires local authorities to make all allocations and nominations in accordance with a Housing Allocation Scheme. A summary of the Housing Allocation Scheme must be published and made available free of charge to any person who asks for a copy. A summary of this Housing Allocation Scheme is available at CDC's offices and on CDC's website. This document is the full version of the Housing Allocation Scheme and is available for inspection at CDC's main office.

The Act requires local authorities to give Reasonable Preference in their Housing Allocation Scheme to people with specific needs. This includes homeless people, those who need to move on welfare or medical grounds, people living in unsatisfactory housing and those who would face hardship unless they moved to a particular locality within the local authority's area.

The Act also requires local authorities to state within their Housing Allocation Scheme what its position is on offering applicants a choice of housing or offering them the opportunity to express preference about the housing to be allocated to them.

This Housing Allocation Scheme complies with the requirements of the Act and takes into account the various codes of guidance issued by the Ministry for Housing, Communities and Local Government including:

- Providing social housing for local people (December 2013)
- Right to Move and social housing allocations (March 2015)
- Improving access to social housing for victims of domestic abuse (January 2022)
- Improving access to social housing for members of the Armed Forces (June 2020)
- Allocation of Accommodation: guidance for local housing authorities in England (October 2023)

The Housing Allocation Scheme is drafted to ensure that it is compatible with CDC's equality duties, under the Equality Act 2010, including the duty to eliminate unlawful discrimination and to promote good relations between persons who share a relevant protected characteristic and those who do not. The 9 protected characteristics are age, race (including ethnic or national origins, colour or nationality), disability, sex, pregnancy and maternity, sexual orientation, religion or belief, marriage and civil partnership, and gender reassignment.

Further, this Housing Allocation Scheme has taken into account all other relevant legislation and case law, CDC's Homelessness Strategy and Tenancy Strategy and CDC's duties under the Care Act 2014.

In summary this Housing Allocation Scheme has considered:

- CDC's statutory obligations and discretion as to who is eligible for housing allocation
- CDC's statutory obligation to provide Reasonable Preference to certain categories of applicants set out by law
- CDC's statutory obligations and discretions to grant 'additional preference' and/or to determine priority between applicants with Reasonable Preference
- the general and specific statutory discretions CDC can exercise when allocating housing in support of its Housing Strategy
- the local flexibility offered through the Localism Act (2011)

This Housing Allocation Scheme, or the manner in which CDC allocates housing under this Housing Allocation Scheme, may be amended and updated from time to time to take account of any new or updated procedures, guidance, regulations and legislation. CDC will always act in accordance with the most up to date guidance, regulations and legislation which are relevant to this Housing Allocation Scheme and will endeavour to reflect those changes in formal written updates as soon as possible.

#### **1.4 Advice and assistance**

CDC acknowledges that this Housing Allocation Scheme requires the active participation of housing applicants and to reflect this, CDC aims to provide advice and assistance to ensure that no person is disadvantaged by the way the scheme operates.

This full version of the Housing Allocation Scheme outlines:

- the procedures for applying to the Housing Allocation Scheme and for bidding for available homes
- how applicants are prioritised under this Housing Allocation Scheme
- how successful applicants will be selected by CDC
- rules on how homes will be advertised including bidding cycles and restrictive labelling
- review procedures

Applicants will also be provided with information regarding their own application which will include:

- what band is applied to their application under this Housing Allocation Scheme
- what size properties they are eligible for
- what information and documentation they need to provide for CDC to verify their circumstances and when this information will need to be provided
- the reasons for a disqualification and the period of time the applicant will be disqualified for.

In partnership with RPs, CDC endeavours for all property advertisements to provide relevant property information so that applicants can make informed choices. The CBL scheme promotes informed choices and expects to guide applicants to bid only for properties they would like to secure. Advertisements are expected to include as a minimum:

- location
- property type, size and floor level
- nature of tenancy on offer
- type of heating
- whether the property has a garden
- whether parking is available
- the amount of rent and any other charges that are payable
- at least one photo of the property
- the Energy Performance Certificate rating
- The landlord (RP)

Applicants who have any difficulty reading or understanding this Housing Allocation Scheme will be offered the following services, where required:

- an interpretation service if their first language is not English
- signing if speech or hearing is impaired
- provision of documents in large print if an applicant is visually impaired

- a face to face or telephone appointment to explain the content of this document and information about where independent advice can be obtained about this Housing Allocation Scheme

As there are likely to be many more applicants than properties available, CDC will also provide information about other housing options. This will include:

- advice on RPs allocations outside of this Housing Allocation Scheme
- advice on renting in the private sector
- advice on available low-cost home ownership options
- advice on welfare benefits, employment, education and training
- Enhanced Housing Options Service – self-help tool via the website at [www.cherwell-homechoice.org.uk](http://www.cherwell-homechoice.org.uk)



## **2. Allocations and how to apply**

### **2.1 How to make an application**

To apply to join the housing register applicants must complete a housing register application form. This can be completed online at [www.Cherwell-HomeChoice.org.uk](http://www.Cherwell-HomeChoice.org.uk).

Assisted completion of an application form over the phone is available for those who do not have internet access or those who require additional help to complete the online form.

CDC aims to assess applications and notify applicants of the outcome of their housing register application within 15 working days of the application being submitted. If further information or documentation is required, CDC aims to notify applicants of the outcome within 15 working days of all required information or documentation being submitted.

If the required supporting information or documentation is not provided by the applicants, the application cannot be made active. If the information is not received within 15 working days of the application being submitted the application will be closed.

More information about how to apply for social housing in Cherwell is available on CDC's website.

An applicant who requires assistance should call CDC's Customer Service Team on 01295 227004 or email [housingregister@cherwell-dc.gov.uk](mailto:housingregister@cherwell-dc.gov.uk).

### **2.2 Bidding for available properties**

Once applicants are accepted onto the housing register they can start bidding for properties. CDC advertises all properties through its nomination agreements with partner RPs through its Choice Based Letting (CBL) scheme. The eligibility of applicant's bids received will be checked against the labelling used in the advertisement. Any ineligible bids will be skipped. Where multiple bids are received for the same property, the allocation of that property will be based on the Band applied to the application and waiting time. See section 7.3 for more information on how applications are prioritised.

### **2.3 What are 'Allocations' under this scheme?**

An 'allocation' of accommodation under this Housing Allocation Scheme is the nomination by CDC of a person to be an Assured or an Assured Shorthold tenant of a RP's housing accommodation. Often the tenancy offered by the RP will be a 'Starter Tenancy' meaning that the RP will grant an Assured Shorthold Tenancy for a set 'probationary' period (usually 12 months). Provided that the tenant successfully completes the 'probationary' period the RP will grant an Assured Tenancy.

### **2.4 Exempt Allocations – Accommodation provided for lettings that is not covered by this scheme**

The following are not 'allocations' under this scheme:

- a) an introductory / starter tenancy becoming a secure / assured tenancy
- b) provision of non-secure temporary accommodation in discharge of any homelessness duty or power

### **3. Choice and constraints**

#### **3.1 Policy on expressing choice of rehousing area**

The choice of housing that CDC can offer is limited by the housing available and the responsibilities it has to some groups in housing need, such as those found to be statutorily homeless.

Most applicants will be able to bid using Choice Based Lettings (CBL) to apply for properties they have been assessed as eligible for across Cherwell. There are some circumstances in which this will not apply which are outlined in section 9.1 (auto-bidding).

CDC requests that applicants state those areas where they believe they cannot live due to fear or actual violence, harassment or domestic abuse at the point they make an application to the housing register. When considering if offers of housing are reasonable, CDC must be satisfied that such actions would likely to be carried out in those areas. Consideration must also be given as to how an allocation in Cherwell would provide a place of safety for those at risk.

#### **3.2 Statutory Homeless Applicants**

All statutory homeless households owed the homeless relief duty as defined in Section 189B of the Act will be placed on automatic bidding at the point a relief duty is accepted.

To discharge a statutory homeless duty the local authority will make 1 final offer of housing. To be deemed a final offer the accommodation must be reasonable and suitable for the needs of the household. This may be social housing, private rented or supported accommodation. An application to the Housing Register will be suspended until the suitability and reasonableness of the final offer is confirmed. Refusal of a reasonable and suitable final offer will result in the housing register application being closed and the applicant being disqualified from re-joining the housing register for a period of 6 months.

Whilst we consider each applicant's personal circumstances; given the good transport links and access to employment, education, health and support services throughout our district it is likely an offer anywhere within Cherwell will be considered suitable as a final offer.

As above, applicants must state if there are areas where they believe they cannot live due to fear or actual violence, harassment or domestic abuse at the point they make an application to the housing register. When considering if offers of housing are reasonable and suitable, CDC must be satisfied that such actions would likely to be carried out. Consideration must also be given as to how an allocation in Cherwell would provide a place of safety for those at risk.

#### **3.3 Move-on from Supported Accommodation**

CDC has protocols in place with providers of supported accommodation to assist clients who are ready to move-on to independent living. A Band 2 will be applied to the applications of households who are approved for move-on from supported accommodation which acknowledges that such accommodation is a scarce resource and should be made available as soon as possible for the next household who requires support.

Auto-bidding will be applied to applications of those approved for Move-on.

## **4. Eligibility and qualification criteria**

This section provides detail on how CDC determines whether any applicant is eligible and qualifies to join the housing register.

### **4.1 Who can apply to the Housing Register**

Anyone can apply to join the housing register. On receipt of an application to join the housing register, CDC will consider:

- whether the applicant/s are eligible for an allocation of social housing
- whether the applicant/s meet the qualification criteria (outlined in section X)

### **4.2 Young person under 18 years**

In order to qualify to join the housing register, any applicant or joint applicant aged 16 or 17 years old must meet one or more of the following conditions as being:

- accepted as homeless under Part VII of the Housing Act 1996
- over the age of 16 where a referral for assistance has been made by Social Services authorities under Section 27 of the Children Act 1989
- a young person who is deemed a relevant or eligible child under the Children (Leaving Care) Act 2000 as amended.

In each case, CDC will undertake a joint assessment with Social Services of the applicant's housing, care and support needs to ensure that adequate support is available.

In order to secure accommodation any person under 18 years of age must provide details of a suitable guarantor who will sign the applicant's tenancy agreement. Applicants under the age of 18 who are eligible can only be considered for supported accommodation provided by CDC's RP partners unless accepted as statutory homeless or in exceptional circumstances.

### **4.3 Care leavers**

Any person over the age of 18 who is a care leaver, having been looked after by Oxfordshire Children's Services under Section 20 of the Care Act 2014, and has been accommodated anywhere within the county of Oxfordshire, or outside the district, will be treated as if they have a local connection to Cherwell District and therefore qualify to apply for housing accommodation under this Housing Allocation Scheme. Care leavers who have been placed in the district by another local authority for a considerable period will also be given consideration.

### **4.4 Councillors, employees and their close relatives**

This Housing Allocation Scheme is designed to ensure that CDC (and any relevant organisation) is transparent and equitable when letting homes to staff, its Councillors or any of their relatives. This Housing Allocation Scheme is open to any eligible applicant who meets the qualification criteria. Council staff, Councillors and their relatives are treated as any other applicant and will not gain any advantage or any preferential treatment in the course of their application, nor shall they be disadvantaged. For further information see Appendix 2.

### **4.5 Members of the Armed Forces**

Certain members of the Armed Forces community are exempt from any residency requirements, which prevents local authorities from applying a local connection test to disqualify such applicants from their housing registers and this is reflected in our local connection criteria. We retain discretion to deal with individual cases where there are exceptional circumstances and are aware that such circumstances may arise in relation to the wider Armed Forces community. We recognise that the requirement for Service personnel to move from base-to-base can impact on other family members, including for example adult children who also may no longer be able to remain in the family home.

Local authorities are required to frame their Housing Allocation Scheme to give additional preference to certain members of the Armed Forces community, where they fall within one or more of the reasonable preference categories and have urgent housing needs. These are:

- a) Former members of the Regular Armed Forces
- b) Serving members of the Regular Armed Forces who are suffering from a serious injury, illness or disability which is wholly or partly attributable to their service.
- c) Serving or former members of the Reserve Armed Forces who are suffering from a serious injury, illness or disability which is wholly or partly attributable to their service.
- d) Bereaved spouses or civil partners of those serving in the Regular Forces where (i) the bereaved spouse or civil partner has recently ceased, or will cease, to be entitled to reside in Ministry of Defence accommodation following the death of their Service spouse or civil partner, and (ii) the death was wholly or partly attributable to their service.

To give this additional preference, CDC will seek to allocate a suitable home through a direct match for members of the Armed Forces community as outlined above in cases where a Band 1 (urgent housing need) has been applied to their application.

#### **4.6 Who can and cannot be included on a housing register application**

The persons who can be included on a housing application must be members of the applicant's immediate family who normally live with the applicant. Any other person will only be included on an application if CDC is satisfied that it is reasonable for that person to live with the applicant. This will exclude lodgers or anyone subletting from the applicant. Anyone over 16 years included on an application as part of a household will also be included in the full assessment of the applicant and any joint applicant's income, savings, capital and assets.

For the purposes of this Housing Allocation Scheme a child is defined as someone who is either under the age of 16 or who is still dependant on the applicant e.g. due to continuing education.

#### **4.7 Who cannot be accepted onto the Housing Register**

CDC will refuse an application to join the housing register in the following circumstances:

## 4.8 Those who are not eligible

### Persons from abroad

A person may not be allocated accommodation under Part VI of the Act 1996 if he or she is a person from abroad who is ineligible for an allocation under s.160ZA.

There are two categories for the purposes of s.160ZA:

- i. a person subject to immigration control - such a person is not eligible for an allocation of accommodation unless he or she comes within a class prescribed in regulations made by the Secretary of State (s.160ZA(2)), and
- ii. a person from abroad other than a person subject to immigration control - regulations may provide for other descriptions of persons from abroad who, although not subject to immigration control, are to be treated as ineligible for an allocation of accommodation (s.160ZA(4)).

The regulations setting out which classes of persons from abroad are eligible or ineligible for an allocation are the Allocation of Housing and Homelessness (Eligibility) (England) Regulations 2006 (SI 2006 No.1294) ('the Eligibility Regulations').

Persons who can produce evidence of an in-time appeal of their leave to remain will be treated as though they continue to have leave to remain.

## **4.9 Those who are disqualified**

### **4.9.1 Unacceptable behaviour**

CDC will disqualify an applicant from the housing register if the applicant, or any member of their household, has behaved in an unacceptable way as described in this Housing Allocation Scheme and at the time of their application to the housing register, they are still considered by CDC to be unsuitable to be a tenant by reason of that behaviour.

CDC considers that unacceptable behaviour includes the following circumstances:

#### **Fraud or deception**

Applicants will not qualify to join the housing register in cases where they have:

- Obtained a tenancy by deception, including by making false, misleading or omissive statement(s).
- Paid money or money's worth to obtain a social tenancy including by exchanging properties with another social tenant.
- Made false, misleading or omissive statement(s) in connection with a housing register application, homelessness application or benefit claim or award.

#### **Convictions, anti-social behaviour and breaches of tenancy**

Applicants will not qualify to join the housing register in cases where they have:

- Been evicted from private or social rented housing for any form of anti-social behaviour or illegal subletting, or where there has been formal action taken by the landlord in relation to the applicant, the applicant's household or his/her visitors for causing a nuisance, annoyance or otherwise anti-social behaviour to others including, but not limited to neighbours, visitors, the landlord or a person employed in connection with the exercise of the landlord's management functions.
- Used their property for an immoral or illegal purpose.
- Been convicted of a criminal offence that makes the person unsuitable to be a tenant, including in relation to domestic violence.
- Been subject to an injunction or order in relation to their anti-social behaviour inside or outside of the home.
- Assaulted, threatened or abused the landlord, a person employed in connection with the exercise of the landlord's management functions, CDC or one of the CDC's partner agencies including, but not limited to, providers of housing and housing related support services.
- Been responsible for the deterioration of a property, its fixtures, fittings or furniture provided for use under the tenancy and the deterioration was due to neglectful or deliberate acts by applicant, the applicant's household or his/her visitors.

#### **Rent arrears and other housing related debts**

Applicants will not be disqualified from the housing register for having housing related debt including but not limited to rent arrears, service charges, chargeable repairs (including Cherwell Bond Scheme or temporary accommodation debt) or associated court costs and fees.

However, applicants must ensure that a repayment plan is in place to reduce any housing related debt as this must be cleared or substantially reduced before an offer of accommodation can be made by a provider of social housing.

Applicants will not be nominated to an RP for a potential offer of accommodation unless outstanding housing related debt is cleared in full or the applicant can evidence that substantial efforts have been made to address their housing related debt.

Substantial efforts would typically include a sustained repayment pattern over a period of at least 12 months and with any housing related debts outstanding being no more than the equivalent of 8 weeks' rent.

CDC will be sympathetic toward former service personnel or former partners of service personnel who have accrued mesne profit debt. Occupants of Service Families Accommodation who remain in residence following the expiry of a notice to vacate and have become irregular occupants can be charged mesne profit charges for trespass. This may occur after service personnel leave the Armed Forces, or estranged partners remain in occupation after a relationship breakdown. CDC understands that housing costs support for mesne profit charges is not available within Universal Credit, nor is Housing Benefit available to those living in a Crown Property. As a result, occupants may accrue mesne profit debt. Occupants may provide a copy of their notice to vacate or Certificate of cessation of Entitlement to Service Families Accommodation as evidence that they are no longer able to occupy their home.

#### 4.9.2 Duration of disqualification

Other than in exceptional circumstances, the maximum period of disqualification will be 5 years from the date of the last incident of, or conviction for, unacceptable behaviour as defined by this Housing Allocation Scheme. The minimum period of disqualification will be 12 months.

CDC will use the following matrix as a guide for officers to determine the appropriate period of disqualification for unacceptable behaviour:

	Low culpability	Medium culpability	High culpability
Low harm	12 months	24 months	36 months
Medium harm	24 months	36 months	48 months
High harm	36 months	48 months	60 months

The following examples may be used by officers to determine the levels of culpability and harm in applying the above matrix, however, the list is not exhaustive and other matters can be taken into account at the officers' discretion. Any reference to an applicant also includes the joint applicant and any member of his or her household:

#### Example of factors indicating higher culpability:

- Applicant has a previous history or pattern of unacceptable behaviour or convictions
- Failure to respond to warnings in relation to unacceptable behaviour
- Applicant knowingly and purposefully provided false, misleading or ommissive information
- Abuse of power or position of trust
- Gratuitous violence or wilful damage or vandalism caused



- Use of weapons, or involvement in gangs

**Examples of factors indicating lower culpability:**

- First or only one incident of unacceptable behaviour
- Applicant has carelessly but inadvertently provided inaccurate information
- Actions were as a result of a negative environment or circumstances and evidence demonstrates that this has now positively changed.

**Examples of factors indicating a higher degree of harm:**

- Multiple or vulnerable people were directly affected or targeted including minority groups or those with protected characteristics.
- A person has been physically, psychological or emotionally harmed or threatened by the applicant or his/her actions
- Sustained behaviour or incident
- The offence or incident was directed at public sector workers or workers acting in connection with the landlord's management functions.
- High value of damage to property

**Examples of factors indicating lower degree of harm**

- No act of violence or lasting psychological harm on another person
- A high degree of provocation was directed at the applicant
- Mental illness or disability affected the decisions made
- The direct role taken in carrying out the action/s was minimal
- Full cooperation and remorse following the incidents
- Accidental or low value of damage to property

If further unacceptable behaviour occurs during the period where the applicants are disqualified, further periods of disqualification from the housing register may be applied in relation to that behaviour.

After the relevant period of disqualification from the housing register has elapsed, the applicants must re-apply to the housing register for an up to date assessment of their eligibility, qualification and housing circumstances to be completed.

If the applicant has a change in their circumstances during a period of disqualification from the housing register, they may submit a new application for this to be assessed and considered. Any further application will be assessed in accordance with this Housing Allocation Scheme.

#### **4.9.3 No local / district connection to Cherwell**

Applicants without a local connection to Cherwell will not qualify to join CDC's housing register. In order to be considered to have a local connection to Cherwell applicants will need to either:

1. have resided in Cherwell for a period of at least 6 out of the last 12 months continuously prior to an application to join the housing register
2. have previously resided in Cherwell for 3 out of the past 5 years
3. have a contract of employment to work within Cherwell for a minimum of 16 hours per week excluding short-term, marginal, temporary and voluntary work. Employees on 'zero hour' contracts must demonstrate a consistent previous record of, or clear expectation to work for a minimum of 16 hours per week.

4. have a contract of employment as a Category 1, 2, 3 or 4 key worker (as defined by section 7.4 of this scheme) to work in Oxfordshire for a minimum of 16 hours per week excluding short-term, marginal, temporary and voluntary work. Employees on 'zero hour' contracts must demonstrate a consistent previous record of, or clear expectation to work for a minimum of 16 hours per week.
5. have immediate family members, who currently live in Cherwell and have lived in Cherwell for at least the last 5 years, where there has been frequent contact and there is a clear commitment to, and / or dependency on, those family members immediately prior to the date of application.
6. be a household with a Right to Move
7. be leaving the care of Oxfordshire Children's Services;
8. be a household who CDC has a duty or agreement to secure accommodation for through a national Government resettlement scheme
9. be living in a refuge or other form of safe temporary accommodation in the district having escaped domestic abuse in another local authority area.
10. be part of an agreed reciprocal arrangement with another local authority. Or
11. have a special reason for needing to live in the area

Exceptions to the above local connection requirements are:

- Those who are currently serving in the Regular Armed Forces or who have served in the Regular Forces.
- Bereaved spouses or civil partners of those serving in the Regular Forces where (i) the bereaved spouse or civil partner has recently ceased, or will cease, to be entitled to reside in Ministry of Defence accommodation following the death of their Service spouse or civil partner, and (ii) the death was wholly or partly attributable to their service.
- Serving or former members of the Reserve Armed Forces who are suffering from a serious injury, illness or disability which is wholly or partly attributable to their service.
- Divorced or separated spouses or civil partners of Service personnel who need to move out of accommodation provided by the Ministry of Defence following a breakdown in their relationship with their Service spouse or partner.
- Existing social housing tenants, who need to move into CDC's district, either from another local authority area in England, or from one location to another within Cherwell, for work related reasons to avoid hardship (Right to Move Applicants).

Immediate family members are defined by CDC as parents, children, siblings, grandparents or grandchildren (in each case including step relatives and fostered or adopted children), where there is evidence of frequent contact, commitment to, and/or dependency on, those family members.

In order to establish a local connection to Cherwell through a period of residence as above this must be a settled address of the applicant's own choice. As such a period of residence will not contribute towards establishing a local connection for the purpose of this Housing Allocation Scheme when the applicants reside in Cherwell because they are:

- in prison
- resident in a bail hostel or other such accommodation
- detained under the Mental Health Act
- receiving hospital treatment
- in occupation of a mobile home, caravan or motor caravan which is not placed on a registered residential site

- in occupation of a holiday letting, this includes a permanent building, hotel or bed and breakfast accommodation for the purposes of a holiday
- placed in temporary or private sector accommodation by another housing authority
- placed in supported accommodation by another local authority
- a rough sleeper who moved to Cherwell from another district and who retained a local connection to another authority at the time of moving.

Applicants should note that the above list is illustrative only and not exhaustive. CDC retains discretion to determine whether any individual applicant can establish a local/district connection or not based on each applicant's individual circumstances.

Some homes in Cherwell will be built with the purpose of meeting the unmet housing needs of Oxford. As such CDC will seek to allocate these homes on the first letting to those who have a local connection to Oxford. For this purpose, the local connection criteria outlined in this section is applicable to those with Oxford connections as well as Cherwell connections and where the word Cherwell is detailed in this section this can be read to also include Oxford. Applicants with a connection to Oxford will receive additional preference for the first letting of those homes built to meet Oxford's unmet housing needs. Those with a local connection above which is not connected to Oxford will receive additional preference over those who do not for all other homes.

#### **4.9.4 Homeowners**

Regardless of the level of equity held, applicants or members of their household who already own their own home (including freehold, leasehold, under a mortgage, shared ownership or having marital rights to any of these) will not, subject to the exceptions below, qualify to join the housing register.

- Owner occupiers aged 55 and over who cannot stay in their own home as it does not meet their medical or mobility needs, require sheltered or extra-care housing and do not have sufficient financial resources to meet their housing needs in the private sector or elsewhere and could not resolve this by selling their owned home. These applicants will qualify for sheltered or extra care accommodation only.
- Owner occupiers who can demonstrate that their specific circumstances mean that they need to apply for social housing as detailed in a medical and/or social/welfare need assessment which stipulates the nature of the accommodation that is required which can be provided by social housing but cannot be obtained by the applicant in the private sector and this could not be resolved by the applicant selling his/her owned home.
- Owner occupiers who are experiencing financial hardship and are unable to financially sustain their accommodation and have been assessed by the Housing Options or Housing Allocations Team who have confirmed this to be the case based on the evidence supplied.

CDC will also take into consideration any previous disposal of assets which will include disposals for nil (for example, transfer of ownership) or below market rate value. Previous homeowners who have transferred or disposed of their home, as above, will not qualify to join the housing register.

Applicants will be asked to provide evidence of their income, savings and assets if an affordability assessment is required. If applicants fail to provide sufficient evidence, then their application cannot be assessed and will not progress further.

If an assessment has to be made, for example on medical grounds, consideration will be given to the following:

- whether the applicant can sell their current home
- the expected equity after the proposed sale of the property
- the applicant's current financial circumstances and commitments
- whether the applicant could obtain a mortgage
- the supply and affordability of private rented or other forms of accommodation suitable for the applicant's specific needs
- whether the applicant's housing need can be met in the private sector, taking into consideration the cost of housing in Cherwell

Homeowners who qualify to join the housing register because of exceptional circumstances must make best endeavours to ensure that the owned property is sold within 12 months of accepting an offer of social housing.

#### **4.9.5 Sufficient financial resources**

Applicants with financial assets (including capital, savings, stocks, bonds, shares and unit trusts but not including disability related welfare benefits) that when combined with their gross annual household income exceeds £60,000 will not qualify to join the housing register. For applicants who require 3-bedroom homes or larger the cap on financial assets and gross annual household income is £80,000.

This calculation will take into account the gross annual household income and financial assets of the main applicant, joint applicant and their spouse, civil partner and/or partner where they are to reside in the accommodation together as well as any other adult household members who are not in full-time education. A combination of income and financial assets in excess of £60,000, or £80,000 for households who require 3-bedrooms or larger is sufficient to enable applicants to secure accommodation in the private sector.

This assessment does not apply to existing social housing tenants in Cherwell who are seeking to down-size.

Special consideration and exception may be given to applicants who require larger or more specialist accommodation in cases where it can be evidenced that the typical accommodation required cannot be obtained in the private sector based on the level of income and financial assets they have. Special consideration and exception may also be given to existing tenants of social housing who need to move for significant medical or social/welfare reasons.

Any lump sum received by a member of the Armed Forces as compensation for an injury or disability sustained on active service will be disregarded for the purpose of this assessment.

Where appropriate CDC will take into account any previous disposals of financial assets which will include disposals for nil (for example, transfer of ownership) or below market rate value.

Applicants will be asked to provide evidence of their income and financial assets and if this is not provided an application cannot be assessed and will not progress further.

The £80,000 financial assets and gross household income cap as detailed above for applicants who require 3-bedrooms or more is in line with the gross household income cap for grant funded affordable home ownership as set out in Home England's Capital Funding Guide (as at October 2024). As such the £80,000 cap in this Housing Allocation Scheme may be increased or decreased to remain in line with any updates to this guidance.

#### **4.9.6 Refusal of offers from the Housing Register**

Applications will be disqualified from the housing register for six months in cases where an offer of accommodation which the council considers to be suitable has been refused in the following circumstances:

- All households accepted by CDC under the Homeless Relief Duty or Main Duty who have refused one suitable offer of accommodation and to whom the homelessness duty has been discharged by CDC under Part VII of the Act 1996.
- All other applicants who have refused three suitable offers of accommodation

In these cases, applicants will be advised of their right to request a review of the suitability of the accommodation offered.

#### **4.9.7 How serious offenders are dealt with under this scheme**

At the time an application is made, an applicant must declare if they or anyone who will be residing with them has a conviction of a criminal offence or anti-social behaviour order. These will be taken into consideration when assessing if an applicant qualifies to join the housing register.

CDC will take advice and guidance from other agencies, including the police and probation services, to assess the risk to the community of any applicant who has been convicted of an offence and who may present a risk to potential neighbours and/or communities.

CDC's housing department must cooperate with the Multi-Agency Public Protection Arrangements (MAPPA) in Oxfordshire. Applicants subject to MAPPA arrangements can apply for properties in the normal way. If successful, the Responsible Authority will decide if the property is a suitable allocation for the individual.

Applicants have the right to request a review of any decision made by CDC regardless of whether they are subject to MAPPA. For more information on reviews see section 11.

## 5. The Banding Scheme

CDC determines the relative priority that is applied to each application to the housing register. CDC is required to give Reasonable Preference in this Housing Allocation Scheme to certain categories of applicant. These Reasonable Preference categories cover:

- People who are homeless as defined by Part VII of the Act
- People who are owed a duty by CDC under section 190(2), 193(2) or 195(2) of the Act.
- People occupying insanitary, overcrowded or otherwise unsatisfactory housing
- People who need to move on medical or welfare grounds (including grounds relating to a disability) (for further information see Appendix 4 and 5)
- People who need to move to a particular locality within Cherwell to avoid hardship to themselves or others

### 5.1 The Structure of the Banding Scheme

The banding scheme consists of four bands as summarised in this section.

- Band 1 – **Urgent** need to move
- Band 2 – **Significant** need to move
- Band 3 – **Moderate** need to move
- Band 4 – **Low** need to move

## **5.1.1 Band 1 Categories – Urgent need to move**

### **Hospital discharge**

Those who are in hospital or a drug or alcohol rehabilitation centre and cannot be discharged because they need a secure base to continue their recovery and are homeless. Or, have a home but cannot be discharged because it is unsuitable for their recovery or medical needs and cannot be made suitable through adaptations due to cost, structural difficulties or the property cannot be adapted within a reasonable amount of time. Therefore the applicant cannot be discharged until suitable housing is secured.

### **Urgent Health or disability**

See health and disability table Appendix 4.

### **Urgent Social, Welfare and Hardship**

See social, welfare and hardship table Appendix 5.

### **High Risk Domestic abuse**

High risk victims of domestic abuse, subject to a Multi-Agency Risk Assessment Conference (MARAC) when this is part of an agreed safety plan with CDC.

### **Urgently overcrowded lacking 2 or more bedrooms**

The household is lacking 2 or more bedrooms in order to have a separate bedroom for each:

Married or cohabiting couple

Adult aged 16 years or older

Pair of children aged 0-15 years of the same gender

Pair of children aged under 10 years regardless of gender

### **Under-occupation of social tenancies in Cherwell**

RP tenants who under-occupy social housing and who wish to move to a property with fewer bedrooms than their current home, in cases where the larger property will be re-allocated to Cherwell residents who are eligible to join CDC's housing register.

### **Ex Armed Forces personnel who have sustained serious injury, medical condition or disability during service**

Existing or former member of the armed forces or reserve forces who needs to move to suitably adapted accommodation because of a serious injury, illness, medical condition or disability which he or she, or a member of their household, has sustained which is wholly or partly attributed to their service. This category only applies where the applicant's current accommodation does not have the adaptations or facilities required in relation to the medical condition and cannot reasonably be adapted to meet the required needs.

### **Private sector properties subject to Prohibition Order, Demolition Order or Overcrowded Notice**

Prohibition or Demolition Order served, preventing the applicant (who is a legitimate tenant or owner of the dwelling and would otherwise have rights to occupy) from occupying the whole dwelling or let room. Or Overcrowding Notice served, requiring the applicant(s) to cease occupation of their sleeping accommodation.

### **Safeguarding Children / Vulnerable Adults**

Serious threat to the well-being of a child or vulnerable adult and their accommodation is a contributory factor to the risk. These are cases where a move is required to mitigate the risk to the child or vulnerable adult as confirmed by a Senior Manager in Children's Services / Adult Service or equivalent subject to a Child / Adult Protection Conference and agreed by the Housing Options or Allocations Manager.

### **Elderly social housing tenants in Cherwell who wish to move to sheltered accommodation**

Elderly applicants who will be releasing general needs social housing.

### **Release of adapted social housing**

Where a tenant does not require the adaptations in their current social housing property and will therefore be releasing an adapted property by moving and there is a suitable applicant on the housing register for the adapted property which will be released through a move. Band 1 may be applied if the applicant still requires adaptations provided the adaptations required are different from those in their current home.

### **Approved move-on from Care**

Band 1 will be applied in accordance with protocols between CDC's Housing service and Oxfordshire County Council's Children's service department. The applicant must be a former relevant child as defined by the Children's Leaving Care Act 2002 and be a young person at risk.

### **Approved adopter or foster carer lacking adequate bedrooms**

Approved or current long-term foster carer or adopter lacking one or more bedrooms in order to commence or continue with the arrangement. Long-term fostering is a fostering arrangement for a period of 3 years or more. Adopters or long-term foster carers must provide supporting documentation from social care that confirms they have been approved to adopt/foster and alternative accommodation is required or that they will be approved to adopt/foster once satisfactory accommodation is obtained. Short-term foster arrangements and 'kinship' arrangements will be considered on a case-by-case basis if a letter of support is provided by the Service Manager of Fostering Services outlining an urgent need for alternative accommodation.

### **Statutory Homeless Households**

All accepted statutory homeless households as defined by Part VII of the Act who are owed a Relief or Main Housing Duty under section 189b or 193(2).



## **5.1.2 Band 2 Categories – Significant need to move**

### **Homeless households found not to be in priority need**

A verified homeless applicant that has approached CDC for assistance under homelessness relief duties or the relief duty has expired and CDC is satisfied that the applicant is homeless, not in priority need and not homeless intentionally (section 192 of the Act).

### **People at risk of homelessness**

Those owed a Prevention Duty under section 192 of the Act, as at risk of homelessness within 56 days as determined by the council's Housing Options Team. This will be reviewed as part of on-going case work at least every 28 days.

### **Significant Health or Disability**

See health and disability matrix Appendix 4.

### **Significant Social, Welfare and Hardship**

See social, welfare and hardship matrix Appendix 5.

### **Domestic abuse**

Victims or survivors of domestic abuse who are at significant risk of experiencing further domestic abuse in their current home and it is therefore unreasonable for them to continue to occupy the accommodation. Applicants who do not wish to make a homeless application or move to temporary or refuge accommodation will be referred for safety planning. A move to another area of Cherwell must be agreed with CDC in accordance with a safety plan to acceptably reduce the level of risk.

### **Significant overcrowding**

The household is lacking 1 bedroom in order to have a separate bedroom for each:

Married or cohabiting couple

Adult aged 18 years or older

Pair of children aged 0-17 years of the same gender

Pair of children aged under 10 years regardless of gender

### **Armed Forces with discharge date**

Those who are due to be discharged or have already been discharged from the regular armed forces who will cease to be entitled to MoD accommodation following their discharge OR

Those who were serving in the regular armed forces at any time in the 5 years preceding their application for an allocation of social housing and have been unable to secure suitable settled accommodation OR

Bereaved spouses or civil partners of those serving in the regular forces where (i) the bereaved spouse or civil partner has recently ceased, or will cease to be entitled to reside in Ministry of Defence accommodation following the death of their spouse or civil partner, and (ii) the death was wholly or partly attributable to their service.

A Band 2 under this category can be applied 12 months prior to the official discharge date – documentary evidence will be required.

### **Unsatisfactory Housing**

A suitably qualified officer of CDC (typically an Environmental Health Officer (EHO) or Environmental Health Technical Officer (EHTO)) has either:

- Assessed the property using the Housing Health and Safety Rating System (HHSRS) and identified one or more Category 1 or Category 2 hazards and has confirmed that the occupant(s) cannot be reasonably expected to remain in the property whilst the required works are carried out or the works cannot be carried out within a reasonable timescale. Or
- Identified breaches of Management Regulations in a House of Multiple Occupation (HMO) and has confirmed that the occupant(s) cannot be reasonably expected to remain in the property whilst the required works are carried out or the works cannot be carried out within a reasonable timescale.

### **Households with a Right to Move**

An existing social housing tenant who needs to move to Cherwell to avoid hardship and a move to Cherwell would resolve the hardship because the tenant works or has been offered work in Cherwell and has a genuine intention and expectation to take up the work. Work of a short-term, marginal, ancillary or voluntary nature is excluded for this purpose but apprenticeships are included.

### **Approved Move-On from Supported Housing**

An applicant who is considered ready to move to independent accommodation on the recommendation of the allocated support worker and in agreement with CDC's Housing Options Team. Information will need to be provided by the support worker to demonstrate that the applicant has acquired the necessary skills to live independently and have this approved by the Housing Options Team. Ongoing support needs must also be assessed and, where appropriate, a support plan must be in place. Auto-bidding will be applied to applications approved for Move-on

### **5.1.3 Band 3 Categories– Moderate need to move**

#### **Moderate overcrowding**

The applicant's household is overcrowded as per the bedroom standard in Appendix 3 and lacking 1 bedroom, because one of a pair of children of the same gender have reached the age of 16 years, but both children are still under 18 years.

#### **Tied Accommodation**

Applicants living in tied accommodation relating to their employment, and who have received formal notice of termination of their employment and tenancy through no fault of their own. This category will only apply where there is clear documentary evidence that the employer is terminating the employment and the use of the accommodation within 12 months.

#### **Agricultural workers**

CDC will apply Band 3 to displaced agricultural workers in accordance with the requirements of the Rent (Agriculture) Act 1976. In reaching a decision on whether an applicant is to be prioritised for housing on these grounds, CDC will need to be satisfied that:

- the dwelling from which the agricultural worker is being displaced is needed to accommodate another agricultural worker and the farmer cannot provide suitable alternative accommodation for the displaced worker
- the displaced worker needs re-housing in the interests of efficient agriculture
- the farm is sold and the property will no longer be available

#### **Intentionally homeless**

Applicants who qualify to be on the Housing Register but have been deemed to have made themselves intentionally homeless as defined by the Act. If an applicant is still on the housing register 12 months after the decision that they are intentionally homeless, their application will be reviewed and re-assessed with the appropriate Band then applied to reflect their current housing circumstances.

#### **Moderate Health or Disability**

See health and disability matrix Appendix 4.

#### **Moderate Social, Welfare and Hardship**

See social, welfare and hardship matrix Appendix 5.

#### **5.1.4 Band 4 Summary – Low need to move**

Applicants who are eligible and qualify to join the housing register but do not meet the criteria for any further priority to be applied under the terms of this Housing Allocation Scheme.

## **6. Types and sizes of properties that applicants will be considered for**

When deciding the size and type of property that applicants will be eligible for, CDC will normally allocate accommodation in accordance with bedroom standard outlined in Appendix 3. There are, however, circumstances in which CDC may deviate from this and these circumstances are detailed in this section.

### **6.1 Social and welfare**

Applicants with a need to move on social and welfare grounds will be required to provide supporting information and be assessed in line with the social and welfare table in Appendix 5. Applicants who are considered to have a need to move based on requirements for specific adaptations, property sizes or types due to assessed social or welfare issues will only be considered for properties that will meet those requirements and therefore resolve the need to move.

### **6.2 Medical assessment and adapted homes**

Applicants who have a medical need will be asked to complete an online medical form, which will be assessed by CDC. For further details see Appendix 4. Applicants who are considered to have a need to move based on requirements for specific adaptations, property sizes or types due to assessed medical reasons will only be considered for properties that will meet those requirements and therefore resolve the need to move.

### **6.3 Pregnant applicants**

CDC will take an expected child into account in determining the minimum/maximum bedroom need of an applicant, subject to evidence of the pregnancy at 25 weeks. A decision on a housing register application based on the sex of a child (such as a decision involving band or bed need) will not be made until the child is born and the sex of the child is therefore confirmed.

### **6.4 Extra room allowed for non-resident, overnight carers**

Applicants with a disability or a long-term health condition who have a non-resident, overnight carer may be allocated an extra bedroom.

To qualify for an extra bedroom, they will need to show:

- they reasonably require overnight care and that this care is provided, and
- supporting evidence that shows the need for an overnight carer, this could be in the form of a support plan that has been formulated by adult social care that evidence that overnight care is required, and
- one or more persons regularly stay overnight to provide care there is a need for an extra bedroom that is used by a carer or carers for overnight stays as part of caring for the applicant or the applicant's partner, and
- that they receive Personal Independence Payments or Attendance Allowance which highlight the need for care tasks during the night or show why they do not apply/ have chosen not to claim.

If an applicant does not receive Personal Independence Payments or Attendance Allowance they must provide CDC with sufficient evidence, as requested on a case by case basis, to show that overnight care is required.

**Note:** Although applicants can choose to apply for a property larger than their needs so they can accommodate carers, carers may not always be taken into account for housing benefit or universal credit payments for extra bedrooms unless the carer is actually in residence at the property.

## 6.5 Children / access to children

For the purpose of this Housing Allocation Scheme, a child is defined as someone who is under the age of 18 . See Section 3.2 for information regarding applications from 16-17 year olds.

Where parents do not live together the children will be treated as living with the parent who provides their main or principal home. This is for CDC to determine. CDC will not allocate a bedroom in more than one home for each child/children unless there are exceptional circumstances. In cases where parents have shared care arrangements in place, these will be considered on a case-by-case basis taking into account any formal arrangement, court order and/or social service involvement. The recipient of child benefit and/or universal credit child element, or other child related welfare benefits will be a relevant consideration when CDC determines the main or principal home of each child for the purpose of housing allocation.

## 6.6 Fostering and adoption

Families undertaking long term fostering may be able to include foster children as part of their application to ensure that they are eligible for the appropriate sized property. Long term fostering is fostering for a period in excess of three years (not necessarily involving the same child or children). It is essential that written confirmation of the fostering arrangement is obtained from Social Services. Consideration will be given to this in assessing the application. Short term fostering will normally be discounted but will be considered on a case-by-case basis.

Families who are in the process of adopting a child may be able to include adopted children as part of their application to ensure that they are eligible for the appropriate sized property. In order to have an adopted child included in the household, applicants will be required to have applied to an appropriate adoption agency and be able to provide proof and supporting documentation that the applicant has been approved as a prospective adopter or is in the final stages of obtaining approval.

**Note:** Although applicants can choose to apply for property larger than their needs so they can foster, foster children may not always be taken into account for housing benefit or universal credit payments for extra bedrooms unless the foster child is actually in residence at the property.

## 7. Choice Based Lettings (CBL) Scheme

### 7.1 Statement on choice

Applicants to the housing register are able to play an active role in choosing which available properties they want to be considered for by being in control of placing 'bids' through the CBL website [cherwell-homechoice.org.uk](http://cherwell-homechoice.org.uk).

The Housing Allocation Scheme:

- allows a range of applicants to be considered for accommodation
- gives applicants a choice of locations within Cherwell
- allows applicants to consider a range of property types
- applies auto bidding (see section 9.1 for further details) and time limited priority to certain applicants for further details see section 9.

### 7.2 Overview

CDC's CBL scheme process is as follows:

- a. available properties are advertised weekly (over a six day period)
- b. applicants apply for properties that meet their housing needs
- c. applicants can apply for up to three properties in any advertising cycle
- d. when the advertising cycle is complete shortlists are created from those who have applied and sorted into priority order (as defined in the Housing Allocation Scheme – see section 7.3 and 7.5)
- e. the applicant (normally the one at the top of the list) is selected to be nominated by CDC to the landlord for a provisional offer to be made
- f. the landlord accepts or rejects the nomination
- g. the landlord offers the property to the successful applicant
- h. the applicant accepts or rejects the offer
- i. the results of shortlisting are published on CDC's website

If the landlord rejects the nomination or the applicant rejects the offer,

- a. the property will either be offered to the next eligible applicant on the shortlist in which case the process outlined above will be followed until either:
  1. the landlord accepts a nomination and an eligible applicant accepts an offer in which case a tenancy will be entered into; or
  2. there are no further eligible applicants on the shortlist; then
- b. the property will be advertised in the next lettings cycle. Landlords are only required to advertise a property on 2 cycles and if the property remains not let after 2 cycles can let the property through other means.

Properties may be re-advertised if shortlists become out of date before a nominee has been accepted by the landlord. This is because the shortlist will need to be refreshed as multiple applicants within the shortlist will have had changes in their circumstances (such as a change to the Band applied to their application) and new applicants will have joined the housing register. This will only happen when shortlists are over 6 weeks old.

### 7.3 Priority order

Once the advertising period has closed the system will automatically create a shortlist of applicants for each property into priority order (as determined in accordance with this allocations scheme – see below in this section 7.3 for more information). The successful applicant for each property will normally be the one who is eligible for the size and type of property being offered and who is in the highest band. Where there is more than one applicant in that band, priority will be decided by the date the band was effective.

Shortlists can also be ordered with additional priority given to the following:

1. Specific applicant types (Transfers, Homeless, Approved Move-On)
2. Those with a parish or village connection
3. Medical needs for ground floor accommodation
4. Medical need for level access showers (Mobility 1) or Wheelchair accessible accommodation (Mobility 2)
5. Keyworkers
6. Right to Move applicants
7. District Connections to Cherwell or Oxford
8. Size of household
9. Those in employment, education or training

#### **7.4 Date order**

There are two dates used to determine the order of priority when deciding which applicant to nominate for a property. These are:

**the Registration date** – the date the application is received by CDC

**the Effective date** - the date that the information, or where necessary all supporting documentation is received by the council to enable CDC to determine the application and a band 1, 2, 3 or 4 is applied. (This will be the same as your registration date if your application goes straight into bands 1, 2, 3 or 4)

This will help ensure that if applicants with the same Band bid on the same property, the applicant with the longest waiting time will receive an offer of accommodation first.

Where two applicants with the same effective date in the same band apply for the same property the applicant with the earliest registration date will be given priority for an offer of accommodation. If both applicants also have the same registration date then a Senior Housing Officer will determine which applicant is given priority on a case-by-case basis.

#### **7.5 Moving between Bands**

If applicants move down from a higher Band (e.g. 1 or 2) to a lower Band (e.g. 2 or 3), the effective date that the earlier higher Band was applied will be retained as the effective date of the new, lower Band.

If applicants move from a lower Band to a higher Band then the effective date of the higher Band will be the date on which the higher Band is applied or, if sooner, the date on which the information was provided that resulted in a higher Band being applied.

Regardless of any previous changes in Band, the effective date of a Band 4 will be the



date on which the most recent application was submitted.

## **7.6 Direct match**

It may be necessary to nominate a particular applicant directly to a particular property to make best use of housing stock and to resolve cases involving significant or uncommon housing needs.

Direct matches will typically account for less than 5% of all lettings each year and must be authorised by a Senior Housing Officer or more senior officer. Indicative examples of when a direct match may be carried out include:

- A low demand property that has been advertised on one letting cycle and has not been successfully let but would resolve the housing need of an applicant who is homeless or at risk of homelessness.
- A property that is immediately ready to let and would meet the needs of an applicant who is homeless or at risk of homelessness and is able to move immediately.
- A disabled adapted property that would meet the specific, uncommon disabled housing needs of an applicant, such as a family with a disabled household member that requires a ground floor room with a level access shower.
- A property that has been adapted with disabled facilities to meet the needs of a specific applicant or his/her household.
- A 1 or 2-bedroom property that would meet the needs of an under-occupier of 3+ bedroom social housing within the district where the move would allow the larger property to be re-allocated through the housing register.
- A property that is let through the Housing First scheme, or similar schemes introduced from time-to-time, in order to accommodate applicants within specific cohorts such as specific refugees or those with a history of rough sleeping.

Note: Allocation of Extra-Care Housing is subject to separate allocations arrangements (see Appendix 6) and whilst direct matches of applicants are carried out these will not be advertised as having been let on the choice-based lettings website.

## 7.7 Nominations

Subject to the exceptions set out in section 7.5 of the Housing Allocation Scheme CDC would normally nominate the applicant at the top of the shortlist, providing they meet the criteria specified in the advert, still qualify and are eligible to be on CDC's housing register.

If an applicant is next on the shortlist for more than one property they will be contacted and asked to express a preference for the property they would like to be considered for. Nominated applicant's details will be made available to the RP of the property. Applicants will be unable to place further bids once they have been nominated until an offer is rejected or accepted.

Applicants should note that the RP which owns the property that they are nominated to will consider their own policy and eligibility criteria when making the decision as to whether an offer of the accommodation can be made.

## 7.8 Quota arrangements

CDC groups applications into the following three primary categories:

- a. General Needs
- b. Transfers
- c. Statutorily Homeless

CDC uses these categories to determine how to apply quotas for allocations of affordable housing.

The three categories can be broken down into:

### **Transfer applicant**

A transfer applicant is a secure tenant or an assured tenant of CDC or CDC's RP partners who lives in Cherwell and whose application has been accepted onto CDC's housing register.

### **Statutorily Homeless applicant**

This will include those who have been accepted for the Homeless Relief Duty, Main Housing Duty or those without a priority need once the 56 day Relief Duty has expired, if verified to be homeless and who did not become homeless intentionally.

### **General needs applicant**

General register applicants are all other applicants who have been accepted onto CDC's housing register.

When advertising available housing, preference can be given to different categories of applicant including, for example:

- a. transfer applicants
- b. homeless applicants
- c. applicants in particular Bands
- d. applicants in employment, education or training

As a guide, CDC uses the following quotas when advertising available housing:

General needs (including 3% to key workers and 1% to social tenants needing to move for work)	40%
Transfers	30%
Statutorily Homeless	30%

CDC is keen to encourage applicants to seek employment, education or training and to achieve this, adopts a guide quota of 30% of all advertisements each year to give preference to applicants in employment, education or training.

Property adverts will clearly identify when preference is being allocated in this way.

## 7.9 Key workers

For the purpose of this Housing Allocation Scheme a key worker is defined as: An employee in a role that provides a vital local service that is essential to the wellbeing of society and for which there is a demonstrable shortage of local labour. This includes the following categories of key workers:

Category No.	Type	Examples of the roles that are likely to be considered key workers under this Housing Allocation Scheme (this is a non-exhaustive list. Examples are illustrative only and may change over time)
Category 1	<b>National Health Service</b>	All clinical staff.
Category 2	<b>Support workers in health roles</b>	Care assistants, healthcare support workers, maternity support workers, nursing assistants, occupational therapy assistants, physiotherapy assistants, assistant practitioners, radiography assistants, speech and language therapy assistants, senior care assistants.
Category 3	<b>Adult social care roles</b>	Day care assistants, day care officers, domiciliary care workers, activities workers, home care workers, nursing assistants in nursing homes or hospices, personal assistants, reablement assistants, residential care workers, senior home care workers, support workers.
Category 4	<b>Local authority and Government agency workers</b>	Including social workers, occupational therapists, educational psychologists, rehabilitation officers, planning officers, environmental health officers, Connexions personal advisors, clinical staff.
Category 5	<b>Fire and rescue staff</b>	Uniformed fire and rescue staff below principal level.
Category 6	<b>Teachers and nursery nurses</b>	Qualified teachers in any Local Education Authority school or sixth form college, or any state-funded Academy or Free School; qualified nursery nurses in any Oxfordshire County Council nursery or pre-school.

Category 7	<b>Universities and colleges</b>	Lecturers at further education colleges; lecturers, academic research staff and laboratory technicians at Oxford Brookes University or any college or faculty within the University of Oxford.
Category 8	<b>Police and probation officers</b>	Police officers and community support officers; probation service officers and other operational staff who work directly with offenders; prison officers including operational support.
Category 9	<b>Ministry of Defence staff:</b>	Servicemen and servicewomen in the Navy, Army or Air Force; clinical staff.

A person in a role that is not included on the above list may apply to be given key worker status under this Housing Allocation Scheme. Such applications must be made in writing and will be considered by the Housing Options and Allocations Manager or Senior Officer, taking into account the definition stated and evidence provided from the person's employer.

### **7.10 Additional priority or preference**

In some cases, greater priority in shortlists will be given to applicants who meet certain criteria. This may be to make best use of housing stock (for example, larger homes, ground floor or adapted homes), meet these needs of specific groups (for example key workers or homeless households) or meet the needs of local communities (for example those in rural locations or areas experiencing anti-social behaviour).

The following preference categories may be applied to property adverts which will result in those applicants within each category receiving additional priority in the shortlist for those properties:

- a) transfer applicants
- b) homeless applicants
- c) applicants approved for move-on from supported accommodation
- d) applicants with a medical need for ground floor accommodation
- e) larger households
- f) Applicants with a need for a level access shower or similar (Mobility 1)
- g) Applicants with a need for wheelchair accessible accommodation or similar (Mobility 2)
- h) applicants in employment, education and training
- i) social tenants with a Right to Move
- j) key workers
- k) applicants in need of sheltered accommodation
- l) applicants with a local connection to Cherwell
- m) applicants with a local connection to Oxford City
- n) applicants with a local connection to specific village locations
- o) Applicants within specified age ranges

### **7.11 Local Lettings and Sensitive Lettings Plans**

CDC may from time to time agree a Local Lettings or Sensitive Lettings Plan for specific properties, areas or developments to reflect local circumstances. Any Local Letting Plan will have regard to housing management considerations such as the social mix of

tenants, density, age range, community stability and specific housing management issues being experienced in the local area.

Where a property is advertised in accordance with a Local Lettings or Sensitive Lettings Plan, the letting will be made to the applicant with the highest band (and oldest effective date where more than one application is within the same band) and who meets the eligibility criteria of the Local Lettings or Sensitive Lettings Plan.

## **8. Applicants with an urgent or significant housing need**

Applicants who are considered to have an urgent or significant housing need will be monitored for a three-month period from the date Band 1 or 2 is applied to their application. During this time applicants are reasonably expected to place bids for suitable properties which are advertised.

After three months, if the applicant has not received an offer of accommodation CDC will review the application. In conducting the review CDC will take into consideration the following factors:

- a) Has the applicant placed any bids for advertised properties?
- b) Have there been any properties advertised that would have met the applicant's needs?  
If so, CDC will consider the reasons why they chose not to bid or investigate why they were unsuccessful.
- c) Does the applicant have a specific need for property that has not been available in the time period?
- d) Have they received appropriate support and help in accessing the Choice Based Letting scheme?
- e) Do the person's circumstances remain the same or has the need for alternative housing reduced?

Having considered the above factors, CDC may re-assess the Band applied to the application or extend the priority for a further three months. The Band applied to an application can be reviewed and changed at any time if the applicant's circumstances change.

### **8.1 Automatic bidding for homeless and move-on applicants**

When an application is placed on automatic bidding, the applicant is still able to place three bids on available properties of their choice. However, if there are suitable properties available and the applicant has not used their three bids, CDC's computer system will place up to three bids per letting cycle on properties the applicant is eligible for on the applicant's behalf. Properties that the computer system bids on may be outside of the areas of choice that an applicant wishes to live in. There may be areas that are excluded by agreement that are unsuitable for an applicant and a nomination to properties in those areas will not be made.

Auto bidding will be applied to all applicants who are accepted by CDC under the Homeless Relief Duty or Main Duty who from the date the homelessness duty is accepted and to those applicants who are approved for Move-on from supported accommodation.

Vulnerable applicants who do not have an advocate to bid on their behalf can also request that automatic bidding is applied to their application to ensure that bids are placed.

## **9 Rural housing**

### **9.1 Rural lettings schemes**

To help sustain rural communities, on the initial letting of properties on new affordable housing developments in rural areas which are not rural exception sites, a target of 50% of all lettings will be advertised with additional priority given to applicants who have a connection with the village in-line with the terms of the Section 106 agreement or Section 10.3 below and have been accepted onto CDC's housing register. If there are no eligible applicants with a connection to the village, priority may then be given to applicants from surrounding villages if this is stipulated in the Section 106 agreement for the housing development.

On the re-letting of existing affordable housing properties in rural areas a target of one in three properties will be advertised with additional priority given to applicants who have a village connection in line with the Section 106 agreement or Section 10.3 below and accepted onto CDC's housing register. If there are no eligible applicants with a connection to the village, priority may then be given to applicants from surrounding villages if this is stipulated in the Section 106 agreement for the housing development. If there are no eligible applicants in those surrounding villages, the property will be available to all other eligible applicants as normal.

Should there be no local connection parameters detailed within a S106 the default assessment of local connection will be that as expressed within this Housing Allocation Scheme detailed below in section 10.3.

### **9.2 Rural exception sites**

Rural exception sites are developments which are outside the village boundary, which would not normally be given planning permission but CDC has determined to grant planning permission as an exception because of a specific need for affordable housing, for local people who cannot afford market priced housing in that area. The housing is granted planning permission on the basis that it must remain affordable in perpetuity.

When affordable housing is built on rural exception sites, or planning obligations are attached to other affordable housing developments, there may be restrictions on the occupancy of these homes. These restrictions are intended to help ensure that applicants with a village connection and who are in housing need as defined in the Housing Allocation Scheme have first priority for nomination to any social or affordable rented properties.

This means that applicants must not only meet the eligibility / qualification criteria for joining the housing register but also the requirements detailed in the S106 agreement or nominations agreement for each individual site.

Should there be no local connection parameters detailed within the S106 or nominations agreement then the default assessment of local connection will be that expressed within the allocations scheme as detailed in section 10.3 below.

### **9.3 Village or parish connection for rural lettings**

To establish a qualifying village or parish connections the applicant (or joint applicant) must meet at least one of the following criteria:

- have lived in the village for the last five years
- be employed in the village for a minimum of sixteen hours per week and the employment is not of a short-term nature
- have ten years previous residence in the village if not currently residing there
- be over 55 or with a disability requiring support on health grounds from close relatives currently living in the village
- have close relatives (as defined at section 3.6.2.3) living in the village for a period of at least the last five years.

Where applicants have a strong connection with a village, CDC will ask them to detail this on their application. This will enable the connection to be verified and for the applicant to be given additional priority where applicable, for any social housing in areas where they hold such a connection. If an applicant is successful, they will be required to provide proof of their connection before they can be approved for the nomination.



## **10. Refusal of offers, reviews and complaints**

### **10.1 Refusal of offers**

In circumstances where an applicant has successfully bid but has refused three suitable offers of accommodation their application will be closed and they will be disqualified from re-applying to join the housing register for 6 months from the date of the third refusal.

If an applicant successfully bids for a property but the RP is unable to contact the applicant using the telephone and email contact details recorded on the application within 2 working days of the first attempted contact, this will be considered as a refusal of an offer. The applicant who is uncontactable will be skipped and the next eligible applicant on the shortlist will be nominated.

The exception to this rule is for homeless household where CDC has accepted a Homeless Relief Duty or Main Duty , who are eligible for one offer of accommodation only and refusal of their offer will result in the discharge of the council's homelessness duty. Homeless applicants will have a right of review under sections 202 and 204 of the Act.

### **10.2 Reviews procedure**

A request for review must be made in writing within 21 days of the applicant being notified of CDC's decision. CDC will determine the review within 8 weeks of the request or such longer period as may be agreed with the applicant.

The review must be considered on the basis of policy, law and known fact at the date of review. When conducting the review, CDC will consider any representations, written or otherwise, made by the applicant or on the applicant's behalf.

If further information is required, the review period within which the decision should be made may be extended by agreement with the applicant. Reviews will be carried out by a senior member of staff at CDC or delegated to an appropriate organisation or officer who was not involved in the original decision.

If the applicant is still dissatisfied, a report can be prepared for consideration by the Strategic Housing Team Leader.

In the event of an applicant remaining aggrieved, the next step to be considered is a complaint via CDC's Corporate Complaints Procedure or to Local Government and Social Care Ombudsman.

Applicants may have a right to challenge CDC's decisions via the courts and should seek independent legal advice in the event that they are aggrieved with any decision made by CDC.

### **10.3 Review of suitability / discharge of duty for homeless applicants**

Whether or not a Homeless applicant accepts an offer of accommodation to discharge a homeless duty, they have the right to request a review of the suitability of the accommodation they have been offered, under section 202 and section 204 of the Act.

## **10.4 Annual review of applications**

In order to keep the housing register up to date all applications are subject to an annual review. The review is intended to ensure the applicant still wishes to be considered for accommodation and that the most up to date information about their housing circumstances is held. Applicants who fail to respond to either the review or reminder letter within 28 days will have their application closed.

## **10.5 Complaints**

An applicant who is not satisfied with the service that they receive may register a complaint with CDC's complaint procedure by telephone, e-mail or in person. All complaints will be acknowledged and investigated in accordance with CDC's complaints procedure.

If you have a complaint, please use one of the following methods to contact CDC:

- Complete the compliment/comment/complaint form available from the website
- Visit one of CDC's offices
- Write to Complaints, Customer Service Centre, Cherwell District Council
- e-mail [complaints@cherwell-dc.gov.uk](mailto:complaints@cherwell-dc.gov.uk)

## **11 Fraud and deliberately worsening circumstances**

### **11.1 Misleading or fraudulent Information**

Under Section 171 of the Act, it is a criminal offence for an applicant to knowingly or recklessly give false information or knowingly withhold information which a local authority has reasonably required her/him to provide. Where there is suspicion or an allegation that an applicant, or any person acting on behalf of an applicant, has either provided false information or has withheld information, the application will be suspended whilst an investigation into that application is conducted.

If the outcome of any investigation is that the applicant, or any person acting on behalf of an applicant, did not provide false information or there was no withholding of information or such was not found to be withheld knowingly, then the application suspension will be lifted and reinstated to its previous position within the Housing Allocation Scheme meaning that the applicant should not be disadvantaged as a result of the investigation.

If CDC discovers an applicant directly, or through a person acting on his or her behalf, has given false information or deliberately withheld required information CDC will consider legal action. If CDC takes legal action and an applicant is found to be guilty of an offence under this section, the applicant will be liable on summary conviction to a fine not exceeding level 5 on the standard scale (£5,000). CDC will disqualify the applicant from the housing register for a period of up to five years.

In addition to the potential for legal action and disqualification from the housing register ground 5 in Schedule 2 of the Housing Act 1985 (as amended by Section 146 of the Act) enables a landlord to seek possession of a tenancy which it has granted as a result of a false statement by the tenant or a person acting at the tenant's instigation.

### **11.2 Deliberately worsening housing circumstances**

In cases where an applicant or members of their household acted in good faith by moving from more suitable housing circumstance to less suitable housing circumstances this will not affect the Band applied to the application.

In cases where a deliberate act or omission is identified that was carried out with the intention to receive greater priority for alternative housing, the change to less suitable circumstances will be disregarded by CDC. The Band applied to the application will instead be determined by the applicant's previous housing circumstances, before the deliberate act or omission was carried out.

## **12. Allocations outside of the Housing Allocation Scheme and non-general needs housing**

### **12.1 Sheltered and extra care housing**

Only applicants that meet the minimum age criteria can be considered by CDC for nomination to sheltered accommodation. Applicants will also need to meet any additional eligibility criteria specified by the landlord. For further details see Appendix 6.

### **12.2 Supported Accommodation**

Supported housing will be available only for applicants who are eligible for that particular type of accommodation and the related support. For example, some supported housing is provided exclusively for people with learning difficulties, or for young people leaving care. Where accommodation is available only for applicants who satisfy such special criteria, this will be clearly labelled on advertisements placed on the CBL website (HomeChoice).

### **12.3 Oxford City Council's unmet housing needs**

Some social housing in the Cherwell has been built, or will be built in future, on specific sites to meet Oxford City's unmet housing needs. When these properties are allocated, priority will be given to housing applicants who have a local connection to Oxford. Cherwell housing register applicants who wish to also be prioritised for these properties must have a local connection to Oxford.

### **13. Confidentiality, data protection and information sharing**

Any information provided as part of the application process is handled sensitively and subject to appropriate confidentiality in accordance with the General Data Protection Regulations.

CDC shall comply with the requirements of the Data Protection Legislation and any equivalent or associated legislation in relation to the storing, processing and sharing of Personal Data in connection with this Housing Allocation Scheme and will not knowingly do anything or permit anything to be done which might lead to a breach of the Data Protection Legislation.

Applicants have the right to request a copy of any personal information held by CDC. This is known as a Subject Access Request.

#### **13.1 Sharing personal information**

Personal information obtained from or about an applicant that applies to the housing register will only be used in ways that the applicant reasonably expects to process their application. All applicants must read and agree to Cherwell District Council's Privacy Notice in order to submit an application to join the housing register.

Applicants are made aware at point of application to the housing register that by submitting a housing register application their data will be stored, processed and shared as expected in order for CDC to provide the services requested, to assess their eligibility, qualification and priority for housing in accordance with this Housing Allocation Scheme.

The details provided by the applicant in relation to each housing register application and documents provided, either directly or via other professionals, will primarily be used in the following ways:

- to assess the application for social housing and determine the level of housing need in accordance with this scheme
- shared with other statutory and voluntary agencies including other housing providers, health trusts, support providers, police, probation, social services and other local authorities as appropriate in order to assess the housing register application
- shared with Private RPs of social housing (e.g. Housing Associations) prior to an offer of social housing being made
- shared with private rental landlord(s), past or present as necessary to request tenancy references in relation to the applicant/s or members of his/her household.
- Shared with other CDC departments.
- For statistical recording and reporting including to government departments such as the Department for Levelling Up, Communities and Housing.

## **14. Monitoring and evaluation**

To help ensure that the Housing Allocation Scheme meets its aims and objectives it will be monitored and evaluated on an annual basis. Any major amendments to the allocations scheme in response to evaluation will only be made following consultation with all relevant stakeholders in accordance with s.168 (3) of the Act.

### **14.1 Publication of results**

The results of shortlisting are published on the choice-based lettings website (HomeChoice). The information provided can be used to help applicants decide which properties to apply for, by giving them a better idea how popular a particular property or area is and how long they would normally have to wait. The results which are published will not contain any personal details relating to the applicant. The results of the shortlist which are published are not in any order and will not reveal which applicant was successful.

Applicants who have expressed an interest in the particular property but are unsuccessful may request more personalised feedback on why they were unsuccessful.

### **14.2 Equality and diversity**

CDC is committed to promoting and facilitating equality of access to social and affordable housing regardless of a person or household's age; disability; gender reassignment; marriage and civil partnership status; pregnancy and maternity; race including ethnic or national origins, colour or nationality; religion or belief; sex; and sexual orientation. CDC can provide performance data to help evidence how we meet these requirements. Where concerns arise on individual cases, the monitoring will include a review of the data or issue of concern, and an action plan agreed where necessary. Any concerns should be raised with Head of Housing Services, stating the grounds for their concern.

### **14.3 What discretion is built into the scheme?**

From time to time a situation may arise that is not predicted by this Housing Allocation Scheme but the needs or circumstances are exceptional or significant.

Where a case is considered exceptional or significant by the Strategic Housing Team Leader or Head of Housing Services and a higher or lower priority should therefore be justifiably applied rather than the band which the housing Housing Allocation Scheme would typically indicate should be applies, CDC retains discretion to apply a different level of priority.

The Strategic Housing Team Leader or Head of Housing Services may also withdraw adverts/properties from being advertised in justifiable circumstances not predicted by this Housing Allocation Scheme, including where a letting/advertisement cycle has already ended. Such cases are expected to be exceptional and therefore few in number.

## Appendix 1: Definition of Terms

<b>Affordable housing</b>	Housing that you rent or part rent / buy from a council or registered provider
<b>Allocation</b>	<ul style="list-style-type: none"> <li>The selection process by which a person becomes a secure or introductory tenant of housing accommodation held by a housing authority <i>or</i></li> <li>The nomination process by which a person becomes an assured or assured shorthold tenant of housing accommodation held by a registered provider.</li> </ul>
<b>Children</b>	Are defined as dependents, in a household, under the age of 18 or who are still dependant on the applicant e.g. due to continuing education
<b>Choice Based Lettings</b>	The advert-based system that CDC uses so that applicants on the housing register can apply for properties. Applicants are assessed, properties are advertised and applicants apply for them
<b>Disabled adapted properties</b>	Disabled adapted properties are properties that have been specially built or adapted for people with disabilities
<b>Effective date</b>	Date used to prioritise applications in a band based on the date that CDC assess which band an applicant should be placed in
<b>General needs properties</b>	General needs properties are suitable for applicants who do not have a need for sheltered accommodation or specially built or adapted properties. They include bedsitters and house, flats and maisonettes of any size
<b>General register applicant</b>	Applicants who have been accepted onto our housing register as being eligible to apply for social housing
<b>Homeless applicant</b>	Applicants found to be homeless, in a priority need group and where a duty to offer housing has been accepted under sections 193 or 195 of Part VII of the Act
<b>Housing Register</b>	The housing register is the waiting list administered by the council to identify applicants who it will nominate for housing from its partner RPs.
<b>Joint Applicants</b>	<p>Joint applicants may be:</p> <ul style="list-style-type: none"> <li>married couples</li> <li>partners living together</li> <li>others who wish to set up home together</li> </ul>
<b>Approved Move-on</b>	Applicants who have been assessed by a support worker as ready to move-on from supported accommodation where the council have an agreed move-on protocol
<b>Nomination agreement</b>	A legal agreement between CDC and the RP which states how applicants will be nominated for vacancies by CDC, the number of vacancies that must be offered to CDC for nomination and any special priorities such as village or local connection

<b>Registration date</b>	The date the applicant's Housing application was submitted
<b>Registered Provider (RP)</b>	The official name for housing associations, housing co-operatives and housing companies that are registered with Homes England
<b>Right to Move Applicant</b>	Social housing tenants who have a reasonable preference because of a need to move to Cherwell to avoid hardship, and need to move because the tenant works in the district or they need to move to take up an offer of work
<b>Section 106 Agreement</b>	An agreement between CDC and a property developer governing the development of residential housing within the district
<b>Secure tenancy</b>	Tenancies granted by local authorities whenever granted and tenancies granted by registered providers before 15 January 1989
<b>Sheltered housing</b>	Sheltered housing is housing with visiting or residential staff
<b>Social housing</b>	Affordable housing that you rent or part rent / buy from a council or RP
<b>Tied accommodation</b>	Accommodation provided for and subject to employment
<b>Transfer applicant</b>	A transfer applicant is a secure tenant or an assured tenant of one of our partner RPs who lives in Cherwell and whose application has been accepted onto CDC's housing register



## **Appendix 2: Councillors, board members, employees and their close relatives**

Staff, board members, councillors and their relatives are treated as any other applicant and will not gain any advantage or any preferential treatment during the application process, nor shall they be disadvantaged.

The following procedure will be undertaken to ensure that any nomination will be subject to a high level of scrutiny:

- The staff member who is applying to the housing register must have no direct input into any decisions regarding their application. This includes not inputting or assessing any information in relation to their application onto the housing allocations system or changing or amending any details at any time.
- Staff members must also have no involvement in the inputting of the application or awarding of priority for any of their relatives
- Applications should be clearly marked on the housing allocation system that the application is that of a staff member, board member, councillor or any of their relatives
- When such an applicant has bid for a property and is next in line to be nominated to an available property, the details of the nomination must be scrutinised and signed off by CDC's Strategic Housing Team Leader or Housing Services Manager.

If an offer of a property is to be made to an officer at Assistant Director level or above then the offer must be agreed by the Assistant Director of Wellbeing.

## Appendix 3: Bedroom and Space Standard

### 1.0 Bedroom Standard

For the purpose of allocating accommodation in accordance with this Housing Allocation Scheme, the council will allocate a separate bedroom to each:

Married or cohabiting couple
Any other single adult aged 16 years or older
Pair of children aged 0-15 of the same gender
Pair of children aged under 10 years regardless of gender
Overnight carer – see section 5.4

The table below gives examples of the bedroom entitlement for adults and children:

Household size	Number of bedrooms to be allocated (if any eligibility criteria is met)
Single person under 35	Studio or 1 bedroom
Single person over 35	Studio or 1 bedroom
Adult Couple	1 bedroom
2 applicants not couple	2 bedrooms
Household with 1 child	2 bedrooms
Household with 2 children	2 or 3 bedrooms depending on age/sex of children
Household with 3 children	3 bedrooms

A former adult couple formerly considered to require one bedroom will not be considered to require two bedrooms, or therefore be considered overcrowded if the relationship has ended and two separate bedrooms are not available.

Applicants with a need for an additional bedroom due to the medical needs of the household will be assessed on a case-by-case basis taking into account the supporting documents provided. For children who are unable to share bedrooms due to medical needs applicants are encouraged to provide information to help assessing officers conclude this assessment, including:

- Evidence of a medical diagnosis
- Evidence that the child is in receipt of DLA or PIP
- Supporting statements from specialist medical professionals which detail the need for the separate bedroom

An offer of a larger property than the bedroom standard in these cases will be subject to an affordability assessment before an offer can be made. Applicants should also ensure that the property will be affordable for themselves.

Please note: households in receipt of benefits to pay their rent will only receive payment for property up to a maximum of 4 bedrooms.

## 2.0 Space standard

The space standard below is used as a guide to determine if bedroom sizes are inadequate:

Room's floor space in square metres	Number of people able to occupy
4.6 - 6.4	0.5
6.5 - 8.3	1
8.4 - 10.1	1.5
10.2	2

Anyone aged 10 or over counts as 1 person

Children aged 1 to 9 count as 0.5

Children under 1 year count as 0

### Discretion for low demand properties and under-occupiers

CDC may on occasion relax bedroom standard restrictions for low demand properties including those which have not been successfully let on an initial letting cycle or to help encourage and facilitate under-occupiers of social housing to downsize. This may include allowing under-occupation of properties and where properties are advertised may include giving priority to certain categories of applicant such as applicants who are already under-occupying social housing who are moving to downsize. For example, a single applicant moving from a 3-bed to a 2-bed property. Applicants nominated to a property will need to pass an affordability assessment carried out by the RP, as normal, prior to receiving an offer of a tenancy.

### Definition of Household types

Single person under 55	One person household with no resident children A woman who is less than 25 weeks pregnant
Couple	Married, Cohabiting, Civil Partnership & same sex couples without resident children or with a woman who is less than 25 weeks pregnant
Family	Single parent or couple (as defined above) with minimum of one dependent child, who lives with parent(s) as the main or principal home. A woman who is 25 weeks or more pregnant
Insecure Households	Separate households sharing accommodation with no formal rights to occupy
Older Persons	One person household and couples over 55 years
Other	Any other household group including friends, sibling and families with non-dependent children

## Appendix 4: Health and disability assessments

Applicants should complete CDC’s medical form in order to allow for a thorough assessment of medical needs. The below table will be used by CDC as a guide to determine the level of priority that should be applied to an application based on medical needs and gives illustrative rather than exhaustive guidance. In line with the guidance in the table, CDC will consider the severity and impact of the housing situation on the medical condition rather than only the severity of the medical condition itself.

Any supporting information that is provided alongside the application and medical form, including information from medical professionals, will also be considered and given appropriate importance when considering which band may apply in accordance with the table below.

	<b>Band 3</b>	<b>Band 2</b>	<b>Band 1</b>
<b>Mental Health</b>	Prescribed medication alongside short-term, time-limited secondary care intervention. For example, Talking Space. Or referred to, or previous intervention received from a secondary care service with medication ongoing. In all cases housing must be the cause or significant aggravating factor in the mental health issue.	Anti-depressant or anti-psychotic medication with sustained secondary care input. The care that is provided is vital to maintain community living and the housing situation is a significant factor in the illness and mental health is likely to deteriorate if housing need is not addressed. Secondary care input to be considered when no medication prescribed due to other factors e.g. pregnancy, conflict with other medication.  Alternatively a mental health specialist planned treatment programme where housing is a significant factor in the plan and some support is needed to prevent admission into a psychiatric unit, or immediate deterioration in their health where housing issues are directly related to illness and relationships within the household are seriously affected by mental health issues.	Immediate discharge from a psychiatric hospital following treatment where housing is a significant factor in the treatment plan or cannot be discharged to previous accommodation due to high risk. High support needs required to prevent re-admission.

<p><b>Mobility</b></p>	<p>Home slightly unsuitable to meet their needs with low risk of harm e.g. some difficulty accessing essential facilities such as the toilet, bathroom, bedroom. Adaptations would be feasible.</p>	<p>Home is increasingly unsuitable to meet their needs with moderate risk of harm e.g. increased difficulties accessing essential facilities e.g. toilet, bathroom, bedroom – or are unable to access essential facilities. Care or severely modified living is required and housing is a significant factor in maintaining community living. Adaptations are not an option or have been refused by the landlord.</p>	<p>Home not suitable following discharge from hospital in relation to a permanent medical condition where no adaptations are possible and applicant is at risk of serious harm. Or unsuitability of home is preventing discharge.</p>
<p><b>Children – Physical disability</b></p>	<p>Children who have difficulty accessing essential facilities e.g. bathroom, toilet bedroom or a child’s disability restricts use of the house by other family members e.g. increased bathroom usage. Health and safety not affected. Adaptations would be feasible.</p>	<p>A child who has increasing difficulty or already cannot access essential facilities e.g. toilet, bathroom, bedroom without assistance and health and safety is affected. The Occupational Therapy Service or Physiotherapist has made recommendations that adaptations are required but are not possible or practicable.</p>	<p>Home not suitable following discharge from hospital in relation to a permanent medical condition where no adaptations are possible, and child is at risk of serious harm. Or unsuitability of home is preventing discharge.</p>
<p><b>Children / Vulnerable Adult – Behavioural</b></p>	<p>Behavioural problems which affect the household and are made worse by the housing situation. Health care professional, health visitor and/or family support worker involvement to provide some individual care to child/vulnerable adult and/or parents/carers/family.</p>	<p>Behavioural problems which affect the household and are made worse by the housing situation – and which could potentially cause moderate harm to self and household. Involvement from community paediatrician, consultant, social services, education or health services.</p>	<p>Children / vulnerable adult with behavioural problems have caused, or is continuing to cause, serious harm to the child or the household. Ongoing multi-agency involvement from community paediatrician, psychologist, social services, education or health services.</p>

<p><b>Independence (relates to giving or receiving care)</b></p>	<p>Independence is affected by inability to access essential facilities. Need occasional informal care / support from family or home carer.</p>	<p>Independence is affected by inability to access essential facilities without a high level of care / support from family or home carer.</p> <p>Qualifies for County Council care provision, but the County Council are unable to provide the care due to the applicant's accommodation.</p>	<p>A high level of formal medical care / support is needed and cannot be sustained in the medium term due to current accommodation.</p>
<p><b>Carer</b></p>	<p>Currently living arrangements for carer have a negative impact on quality of life and would be improved by a move to more suitable accommodation.</p>	<p>Carer's health deteriorating due to currently living arrangements/ housing making it difficult to continue with care arrangements. Supported by medical evidence.</p>	<p>Carer's health is deteriorating due to currently living arrangements/ housing and there is an imminent breakdown of care arrangements. Supported by medical evidence.</p>
<p><b>Sensory environmental</b></p>	<p>There are some concerns that the accommodation is affecting sensory medical issues. Adaptations would be feasible.</p>	<p>There are serious and sustained concerns with sensory medical issues that can be mitigated by moving home. Adaptions may be possible but not practicable. Health services are involved and support a move.</p>	<p>There is an urgent need to prevent serious harm from occurring, due to sensory medical issues. Adaptions are not possible. Health services are involved and support a move.</p>

## Appendix 5: Social, Welfare and Hardship assessments

The below table will be used by CDC as a guide to determine the level of priority that should be applied to an application based on social, welfare or hardship issues and gives illustrative rather than exhaustive guidance.

<b>Band 1</b>	
Emergency cases due to fire, flood or other disaster	
Exceptional need not covered elsewhere in the scheme as directed by Head of Housing or Assistant Director	
Family member of social tenant in the district with at least 12 months verified prior residence with the family member and no right of succession to the property (or to the property size) following the death of the tenant in cases where a move would prevent homelessness or exceptional hardship.	
Emergency cases due to fire, flood or other disaster	
<b>Band 2</b>	
There is a significant need to move in order to give or receive essential care, support or access specialised medical treatment.	
Significant need to move not covered elsewhere in the scheme.	
The applicant or a member of their household has a physical or learning disability which is significantly impacted by their current housing	
Key workers who need to move to take up or continue with an existing permanent position within Oxfordshire.	
Need for sheltered housing only	
The existing home moderately limits the care and support that can be provided to the applicant or someone in their household.	
<b>Band 3</b>	
Accommodation is required with appropriate care and support and the applicant could not be expected to find their own accommodation, such as young adults with learning difficulties who wish to live independently in the community	
The environment around the home has moderate detrimental effect on the quality of life of the household	
Inadequate room sizes: The household has an adequate number of bedrooms as per the bedroom standard, but the bedroom sizes are inadequate by at least 1 person, as per the space standard taking into account all bedroom sizes the applicant's household has access to. See appendix 3	
Split households with insufficient bedrooms: The property has a sufficient number of bedrooms to accommodate all occupiers as per the bedroom standard, but two or more households are sharing, and the applicant's household is left short of a bedroom due to genuine and justifiable bedroom allocation. This may also include an adult couple with access to only one bedroom where the relationship has ended.	
Financial hardship: Current accommodation is financially unsustainable, and a long-term resolution is unlikely. More affordable accommodation is a key factor in resolving the financial situation.	
Need to move to take up employment, education or training within the district.	
No Fixed Abode. Cases where the applicant has no principal, settled address but is not deemed to be homeless.	
Accommodation is required with appropriate care and support and the applicant could not be expected to find their own accommodation, such as young adults with learning difficulties who wish to live independently in the community	

## **Appendix 6: How sheltered and extra care housing is allocated**

### **1. Sheltered housing**

Applicants with evidenced support needs who meet the minimum age criteria can be considered for sheltered accommodation. They will also need to meet the eligibility criteria specified by the landlord which may on occasion state that no support needs are required. Applicants also need to be eligible and qualify for social housing as per this housing Housing Allocation Scheme.

Some sheltered housing in Cherwell is allocated directly by RPs of social housing who will maintain their own waiting list for each sheltered housing scheme. Applicants who are seeking sheltered housing are therefore encouraged to register with social housing providers that have sheltered schemes in the district. CDC's website ([www.cherwell.gov.uk](http://www.cherwell.gov.uk)) contains information about the sheltered schemes in the district including contact details.

It is sometimes a condition of sheltered housing schemes that tenants agree to take the Care Line or Warden Services. Separate charges are made for these services on top of the rent.

### **2. Extra Care Housing**

Extra care housing provides older people who have care needs with their own home and tenancy within a support and care environment. This helps ensure that appropriate personal and housing support are available as required. CDC has nomination rights to some extra-care schemes in Cherwell. A tenant may move into a scheme with no or low needs but can access further care as and when the need arises as they get older or frailer. Extra care housing can remove the need for residential care for older people in some cases.

People who have assessed care needs will have them provided for by either a Personal Care Support Team, who are based on site 24 hours a day, and will be able to give care to tenants when this is required, or a support team of their choice.

The allocations panel will have to take a number of things into consideration when allocating a property. These factors include, but are not limited to, the nominations agreement for each scheme, individual circumstances, available care hours, existing needs and numbers of tenants with dementia in the Extra Care Scheme.

All applicants will be registered and assessed for housing in line with CDC's housing Housing Allocation Scheme and must be eligible to access social housing.

To be eligible for Extra Care Schemes applicants must:

- Be over 55 years of age or meet the eligibility criteria specified by the landlord
- Be eligible for social housing as per this Housing Allocation Scheme
- Be assessed by the Extra Care Scheme Manager for support that is provided.
- Be deemed suitable for the Extra Care Scheme, without support needs that are unable to be met or would be detrimental to the scheme itself or other tenants
- Be prepared to agree to the Extra Care Scheme tenancy agreement



- Be made aware of the costs of moving into the Extra Care Scheme before a letting is carried out. This is especially in regard to care costs where these will not be covered by Housing Benefit.

Residents in the Extra Care Scheme will be offered the opportunity to have their care provided by the contracted care provider.

It should be noted that for couples where one partner is below 55 years of age the couple may be granted a tenancy but it will be a sole tenancy only in the name of the person who is over 55 and therefore meets the criteria above. The younger partner would not be granted succession to the tenancy unless the partner meets the criteria detailed above, at the point at which an application for succession is made.

### **3. Extra Care Housing Allocations Panel**

The Extra Care Housing Allocations Panel (the Panel) will require an up to date social care assessment in an agreed format outlining the prospective tenant's housing and social care needs and a medical/social history to enable the Panel to arrive at an informed decision as regards whether their needs can be met within the scheme.

The Allocations Panel comprises:

- a. A Scheme Manager
- b. A CDC Housing Officer
- c. A representative of Adult Social Care

When considering a referral for an applicant with care needs the panel will take into account as a minimum:

- a. the housing and support need of the applicant
- b. care hours required and the balance of needs within the Extra Care Scheme
- c. which property size is most appropriate for the applicant, taking into account the size of property in which the applicant has expressed as a preference
- d. whether the applicant has a local connection to the area
- e. the nominations agreement that applies to the extra-care scheme

An allocation to an extra-care scheme will only be made via this Panel and will be completed via a direct match as opposed to being advertised on the CBL website ([www.cherwell-homechoice.org.uk](http://www.cherwell-homechoice.org.uk)). This panel will convene, either in person or using any form of information communication technology whenever a vacancy arises.

A potential tenant must also undertake a pre-offer interview with the Extra Care Scheme Manager and be shown the facilities at the Extra Care Scheme to ensure that all parties are comfortable with the responsibilities and expectations of a tenancy within an Extra Care Scheme. This also gives the prospective tenants an opportunity to find out more about the Extra Care Scheme and to make an informed decision about moving. On completion of a successful Extra Care Scheme visit a tenancy is offered and paperwork completed by the Extra Care Scheme Manager.

If this visit raises issues as to the suitability of a tenancy, every step will be taken to resolve the situation in discussion with all parties. A further assessment or Panel discussion may be convened, or further housing related support may be necessary.

If identified issues cannot be resolved (or resolved within an agreed timescale with the provider), the tenancy will be offered to the next suitable person identified by the Panel or Rehousing Officer – again subject to a successful home or Extra Care Scheme visit.

The Extra Care Scheme Manager will inform all applicants refused an offer of a tenancy and will give reasons for the decision. An appeals process can be invoked where any party wishes to dispute the decision reached by the Panel.

#### **4. Property type and size**

All applicants are eligible for a one or two bedroom property and are invited to express their preference. However, the final decision on the size of property allocated to the applicant will be made by the Panel, taking into account the applicant's preference, affordability and the government's guidance on bedroom allowance.

**CDC Housing Allocation Scheme review 2024**

**Summary of proposed key revisions**

Various revisions and updates to the Housing Allocation Scheme are proposed which add further detail to existing policies, clarify processes or remove duplication.

Below are the key revisions proposed which represent a change to policy:

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Section and summary of change	Proposed wording	Rationale
<p><b>Section 3.5 (New Section) “Armed Forces”</b> Allow a direct allocation of housing to certain members of the Armed Forces who have urgent housing needs.</p> <p><b>Section 4.9.3. Local connection criteria:</b> Make an exception to the local connection criteria for all Veterans so they may join the housing register, no matter when they last served.</p>	<p>The proposed key wording in this section is as follows:</p> <p><i>“To give this additional preference, CDC will seek to allocate a suitable home through a direct match for members of the Armed Forces community as outlined above in cases where a Band 1 (urgent housing need) has been applied to their application.”</i></p> <p><i>“Exceptions to local connection requirements are: Those who are currently serving in the Regular Armed Forces or who have served in the Regular Forces.”</i></p>	<p>This revision helps ensure compliance with Section 166A(3) Housing Act 1996 which requires local authorities to give additional preference to certain members of the Armed Forces community, where they fall within one or more of the reasonable preference categories and have urgent housing needs. The proposed wording ensures that all those members of the Armed Forces community with Urgent Housing Needs (Band 1) will be given this additional preference through CDC allocating housing through a direct match.</p> <p>The current scheme makes an exception to the local connection criteria for Veterans who have left the armed forces within the last 5 years preceding their application. In line with updated statutory guidance, we have proposed removing the reference to 5 years so that all Veterans may apply to join no matter when they last served, whether they meet another local connection criteria or not.</p>
<p><b>Section 3.6.2.3 Qualification Criteria Local Connection criteria: Special reasons</b></p> <p>Specifically include within the local connection criteria those applicants living in domestic abuse refuges or</p>	<p>The following additions to the local connection criteria are proposed:</p> <p><i>“8. be a household who CDC has a duty or agreement to secure accommodation for through a national Government resettlement scheme.</i></p>	<p>Currently cases which meet these categories will typically qualify to join the housing register as they are considered to meet the existing criteria of “have a special reason for needing to live in the area”.</p> <p>Separately outlining these categories will provide consistency and clarity to those applicants that they will qualify to join the</p>

<p>being accommodated through national resettlement schemes.</p>	<p><i>9. be living in a refuge or other form of safe temporary accommodation in the district having escaped domestic abuse in another local authority area.”</i></p>	<p>CDC housing register, rather than needing to be considered as a special case.</p>
<p><b>Section 3.6.2.3 Qualification Criteria Local connection criteria: Oxford City residents</b></p> <p>Extend the local connection criteria to include applicants with a connection to Oxford City so that housing due to be built in Cherwell to meet Oxford’s needs can be allocated to them.</p>	<p>The following additional wording is proposed:</p> <p><i>“Some homes in Cherwell will be built with the purpose of meeting the unmet housing needs of Oxford. As such CDC will seek to allocate these homes on the first letting to those who have a local connection to Oxford. For this purpose, the local connection criteria outlined in this section is applicable to those with Oxford connections as well as Cherwell connections and where the word Cherwell is detailed in this section this can be read to also include Oxford. Applicants with a connection to Oxford will receive additional preference for the first letting of those homes built to meet Oxford’s unmet housing needs. Those with a local connection above which is not connected to Oxford will receive additional preference over those who do not for all other homes.”</i></p>	<p>Some housing which is due to be built in Cherwell is being built for the purpose of meeting Oxford City’s unmet housing needs. CDC will allocate these homes in accordance with this housing allocation scheme. Those with a connection to Oxford City will be prioritised for an allocation of these homes. As such, those with a connection to Oxford City (whether or not they have a connection to Cherwell) will need to be able to join the CDC housing register. Those with a connection to Cherwell (whether or not they have a connection to Oxford) will receive priority for all other homes allocated so will not be disadvantaged by Oxford City residents joining the CDC housing register.</p>
<p><b>Section 3.6.2.5 Qualification criteria: Financial resources</b></p> <p>Increase the household assets/income cap from £60,000 to £80,000 for those applicants who require 3+ bedroom homes.</p>	<p>Additional wording in section 3.6.2.5 as follows:</p> <p><i>“For applicants who require 3-bedroom homes or larger the cap on financial assets and gross annual household income is £80,000.</i></p> <p><i>The £80,000 financial assets and gross household income cap as detailed above for applicants who require 3-bedrooms or more is in line with the gross household income cap for grant funded affordable home ownership as set out in Home England’s Capital Funding Guide (as at 29 February 2024). As such the £80,000 cap in this Housing</i></p>	<p>Currently applicants are disqualified from joining the housing register if they have financial assets that when combined with their annual gross annual household income exceeds £60,000. This applies to all applicants irrespective of the size of the accommodation they require and has not increased for a number of years despite inflationary pressures. £60,000 is still sufficient to secure 1 or 2-bedroom private accommodation in Cherwell however can be insufficient to secure larger family homes in some locations.</p> <p>An £80,000 cap is therefore proposed for those requiring 3+ bedrooms which is also consistent with the qualification</p>

	<i>Allocation Scheme may be increased or decreased to remain in line with any updates to this guidance.”</i>	criteria set by Homes England for other forms of low-cost home ownership (such as shared ownership or First Homes).
<p><b>Section 4.1.1</b>  <b>Band 1 Categories:</b>  <b>Statutory Homeless Households</b></p> <p>Increase the priority for Statutory Homeless Households from Band 2 to Band 1.</p>	<p>The proposal is to move the below category from Band 2 to Band 1:</p> <p><b>“Statutory Homeless Households</b>  <i>All accepted statutory homeless households as defined by Part VII of the Act who are owed a Relief or Main Housing Duty under section 189b or 193(2).”</i></p>	<p>Moving statutory homeless households up from Band 2 to Band 1 acknowledges that these household have more urgent housing needs than those in the other Band 2 categories such as those who are at risk of homelessness but not yet homeless. Applicants in this category are likely to be occupying emergency or temporary accommodation and so need to be able to move-on to secure settled accommodation as soon as possible.</p>
<p><b>Overcrowding Sections:</b></p> <p><b>4.1.1 Band 1 Categories</b>  <b>Urgent overcrowding</b></p> <p><b>And</b></p> <p><b>4.1.2 Band 2 Categories</b>  <b>Significant overcrowding</b></p> <p><b>And</b></p> <p><b>4.1.3 Band 3 Categories</b>  <b>Moderate overcrowding</b></p> <p>Separate overcrowded households into 3 categories with differing levels of priority</p>	<p>The 3 new categories proposed for overcrowded households are:</p> <p><b>“Band 1: Urgently overcrowded lacking 2 or more bedrooms</b>  <i>The household is lacking 2 or more bedrooms in order to have a separate bedroom for each:</i>  <i>Married or cohabiting couple</i>  <i>Adult aged 16 years or older</i>  <i>Pair of children aged 0-15 years of the same gender</i>  <i>Pair of children aged under 10 years regardless of gender</i></p> <p><b>Band 2: Significant overcrowding</b>  <i>The household is lacking 1 bedroom in order to have a separate bedroom for each:</i>  <i>Married or cohabiting couple</i>  <i>Adult aged 18 years or older</i>  <i>Pair of children aged 0-17 years of the same gender</i>  <i>Pair of children aged under 10 years regardless of gender</i></p> <p><b>Band 3: Moderate overcrowding</b></p>	<p>Overcrowding is the most common reason for applicants to apply to join the housing register. The current scheme groups the majority of overcrowded households into Band 2 which results in the same waiting times for overcrowded households. Waiting times for larger family homes (3 and 4-bedroom homes) have become particularly long. However, some households are more significantly overcrowded than others.</p> <p>The proposed separation of overcrowding categories gives greater priority (Band 1) to applicants who are lacking 2 bedrooms or more to allow for a separate bedroom for each:</p> <ol style="list-style-type: none"> <li>1. Married or cohabiting couple</li> <li>2. Child who has reached the age of 16.</li> <li>3. Pair of children aged 0-15 years of the same gender</li> <li>4. Pair of children aged under 10 years regardless of gender</li> </ol> <p>A Band 2 or 3 will apply if applicants are lacking 1 bedroom as above.</p>

	<p><i>The applicant’s household is overcrowded as per the bedroom standard in Appendix 3 because one of a pair of children of the same gender have reached the age of 16 years, but both are still under 18 years.”</i></p>	<p>A Band 3 will only apply in cases where applicants are lacking 1 bedroom because they do not have two separate bedrooms for two children of the same gender where one child has reached the age of 16, but is not yet 18 years old.</p>
<p><b>Section 4.1.2 Band 2 Categories: Domestic Abuse</b></p> <p>Introduce a new category to increase the options and choice for survivors of domestic abuse who may wish to remain in their homes.</p>	<p>Proposed addition of new Band 2 category:</p> <p><b><i>“Domestic abuse</i></b>  <i>Victims or survivors of domestic abuse who are at significant risk of experiencing further domestic abuse in their current home and it is therefore unreasonable for them to continue to occupy the accommodation. Applicants who do not wish to make a homeless application or move to temporary or refuge accommodation will be referred for safety planning. A move to another area of Cherwell must be agreed with CDC in accordance with a safety plan to acceptably reduce the level of risk.”</i></p>	<p>Applicants who are at risk of domestic abuse may wish to make a homeless application with any local authority (including CDC) but this is not always an appropriate or suitable solution for them. For example, not all survivors of domestic abuse will want or need to be accommodated in a refuge or temporary accommodation away from their current home. Some will also want to retain a greater level of control and choice regarding their temporary and/or future home than that which can be offered when applicants are homeless. The proposed introduction of this new category means that those applicants who want or need to, may remain in their current home, with appropriate safeguards in place, until they secure more appropriate housing through the housing register. Those applicants who are high risk and subject to a Multi-Agency Risk Assessment Conference (MARAC) may be eligible for Band 1 as normal or may wish/need to make a homeless application to be temporarily accommodated away from their current home.</p>
<p><b>Appendix 3: Bedroom and Space Standard: Discretion for low demand properties</b></p> <p>Extend the discretion to relax bedroom standard restriction to encourage under-occupiers of social housing to downsize.</p>	<p>A revision to this section is proposed to include provisions for under-occupiers of social housing so that the section now reads:</p> <p><b><i>“3. Discretion for low demand properties and under-occupiers</i></b></p> <p><i>CDC may on occasion relax bedroom standard restrictions for low demand properties including those which have not been successfully let on an initial letting cycle or to help</i></p>	<p>Larger homes are in short supply which means that waiting times to secure 3 and 4-bedroom homes are particularly long. The intention of this proposed revision is to help ensure that under-occupiers are encouraged and assisted to downsize to smaller accommodation so that their larger home can be re-allocated to an applicant who needs it. Where appropriate, a home could be allocated to an under-occupier of social housing that is outside of the bedroom standard. For example, a tenant who would usually be eligible to apply for only 1-bedroom homes could be assisted to secure a 2-bedroom</p>

	<p><i>encourage and facilitate under-occupiers of social housing to downsize. This may include allowing under-occupation of properties and where properties are advertised may include giving priority to certain categories of applicant such as applicants who are already under-occupying social housing who are moving to downsize. For example, a single applicant moving from a 3- bed to a 2- bed property. Applicants nominated to a property will need to pass an affordability assessment carried out by the RP, as normal, prior to receiving an offer of a tenancy.”</i></p>	<p>home if this means that the applicant could then return a 3 or 4-bedroom home to be re-allocated.</p>
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**Cherwell District Council  
Equality and Climate Impact Assessment**

**Cherwell District Council Housing Allocations Scheme**

Appendix 3

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## Section 1: Summary details

<p><b>Directorate and Service Area</b></p>	<p>Wellbeing and Housing – Housing Services</p>
<p><b>What is being assessed</b> (e.g. name of policy, procedure, project, service or proposed service change).</p>	<p>Cherwell District Council Housing Allocation Scheme 2025</p>
<p><b>Is this a new or existing function or policy?</b></p>	<p>Revised policy to cover existing service function</p>
<p><b>Summary of assessment</b> Briefly summarise the policy or proposed service change. Summarise possible impacts. Does the proposal bias, discriminate or unfairly disadvantage individuals or groups within the community?  (following completion of the assessment).</p>	<p>The Housing Allocation Scheme sets out how Cherwell District Council will process and prioritise applications for social housing. It sets out the criteria for determining whether a household is eligible for social housing and what level of priority the household will be given based on housing need.</p> <p>The allocation of social rented housing is the responsibility of the District Council as the housing authority.</p> <p>Revisions are proposed to the Housing Allocation Scheme to take account of statutory guidance, best practice and evolving local housing needs in the district. It is best practice to keep the scheme under regular review and respond to local housing needs and pressures.</p> <p>The proposed revisions have both direct and indirect impacts on groups within the community but the proposals do not bias, discriminate or unfairly disadvantage these groups or individuals.</p> <p>The proposed revisions will have several positive impacts on those individuals or groups who are directly affected as set out in this impact assessment. However, due to the finite number of homes available to be allocated, each individual or group that may have an increased chance of securing housing through the housing register will have a knock-on effect for others.</p>

<b>Completed By</b>	Paul France
<b>Authorised By</b>	Richard Smith
<b>Date of Assessment</b>	December 2024

## Section 2: Detail of proposal

<p><b>Context / Background</b></p> <p>Briefly summarise the background to the policy or proposed service change, including reasons for any changes from previous versions.</p>	<p>CDC’s Housing Allocation Scheme was last amended in December 2021 with the changes being approved by the Executive. It is important to review the Scheme regularly to help ensure that it aligns with current housing needs in the district and to respond to changing patterns of need.</p> <p>The Domestic Abuse Act 2021 contained provisions to ensure the appropriate prioritisation of applicants fleeing abuse and to ensure they have secure accommodation. As such, we have proposed revisions to our Housing Allocation Scheme to help make our response to domestic abuse clear, streamlined and promote better choice and outcomes for those who have experienced abuse or are at risk of harm.</p> <p>We have also reviewed and reaffirmed our commitment to assist members of the armed forces and propose to make clear how we will give additional preference for housing to this group as required by Housing Act 1996. A new section to outline our approach is proposed.</p> <p>In terms of responding to changing needs, the housing service has seen an increase in homeless presentations and households occupying temporary accommodation since the last review. The number of homes available to let through the housing register have not been as high in recent years and as such we propose increasing the level of priority given to those households who are homeless and in Priority Need to help ensure those households can secure settled housing as early as possible.</p> <p>The longest waiting times to secure housing since the scheme was last reviewed is for larger homes and the main reason for applicants applying to join our housing register is a need for larger accommodation. Those who are overcrowded in their current home make up the largest portion of applicants on the housing register. To help ensure</p>
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	<p>that those who are more severely overcrowded secure a suitable home more quickly, we propose to split the large number of overcrowded households; giving those who are lacking two bedrooms a greater level of priority over those who are lacking only one bedroom. We also propose to introduce measures to help encourage under-occupiers to downsize and free up larger homes for households who need them.</p>
<p><b>Proposals</b></p> <p>Explain the detail of the proposals, including why this has been decided as the best course of action.</p>	<p>A summary table outlining the proposed changes to the Housing Allocation Scheme and the rationale for those changes is contained in Appendix 2.</p>
<p><b>Evidence / Intelligence</b></p> <p>List and explain any data, consultation outcomes, research findings, feedback from service users and stakeholders etc, that supports your proposals and can help to inform the judgements you make about potential impact on different individuals, communities or groups and our ability to deliver our climate commitments.</p>	<p>A 4-week public consultation to gather feedback on the proposed revised Housing Allocation Scheme has been carried out. Stakeholders also contributed to the consultation.</p> <p>Consultation responses were considered and further revisions to the Housing Allocation Scheme were made in accordance with the responses received.</p> <p>As of 1 April 2024 there were 1,944 household on the Cherwell District Council housing register and 1,127 of these had an identified housing need in accordance with the Housing Allocation Scheme. Just under half of all households in housing need were affected by some level of overcrowding.</p>

<p><b>Alternatives considered / rejected</b></p> <p>Summarise any other approaches that have been considered in developing the policy or proposed service change, and the reasons why these were not adopted. This could include reasons why doing nothing is not an option.</p>	<p>The following alternative options have been identified and rejected for the reasons as set out below.</p> <p>Option 1: Not bring forward a new Allocations Scheme. This is rejected as it is important that the Council has Policies that are up to date with legislation and can respond to current challenges.</p>
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**Section 3: Impact Assessment - Protected Characteristics**

Protected Characteristic	No Impact	Positive	Negative	Description of Impact	Any actions or mitigation to reduce negative impacts	Action owner* (*Job Title, Organisation)	Timescale and monitoring arrangements
<b>Age</b>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	The proposal to allow under-occupiers of social housing to downsize to a property which would be larger than they would normally be eligible for (e.g. a single person household downsizing to a 2-bedroom home) is likely to impact older households. This is because under-occupiers of social housing are often older households.		Strategic Housing Team Leader	Annual monitoring
<b>Disability</b>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	The scheme reflects an applicants vulnerabilities and disabilities in its banding system and prioritises according to their impact on housing need. Suitable accommodation offers according to their individual needs.		Strategic Housing Team Leader	Annual monitoring

Appendix 3

<b>Gender Reassignment</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A	N/A	N/A
<b>Marriage &amp; Civil Partnership</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A	N/A	N/A
<b>Pregnancy &amp; Maternity</b>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	The risk of domestic abuse is known to increase for those who are pregnant or have recently given birth. As such, this group will be positively affected by the changes proposed to improve outcomes for those who are at risk or who have experienced domestic abuse.	N/A	Strategic Housing Team Leader	Annual monitoring



<p><b>Race</b></p>	<p><input checked="" type="checkbox"/></p>	<p><input type="checkbox"/></p>	<p><input type="checkbox"/></p>	<p>The data on ethnicity of those on the housing register appears to show that the proportion of white applicants is lower than the proportion of the Cherwell and Oxfordshire population. The proportion of Black/African/Caribbean/Black British also appears to be higher. This is when compared to Census data.</p> <p>Any changes to the Housing Allocation Scheme may therefore affect those in ethnic minority groups, both positively and negatively, more so than a change affecting the whole of the population of Cherwell.</p>	<p>Annual monitoring and comparisons of housing register ethnicity data to monitor potential impacts.</p>	<p>Strategic Housing Team Leader</p>	<p>Annual monitoring</p>
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<p><b>Sex</b></p>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<p>As stated in the previous section, the proposed revisions to our Housing Allocation Scheme will help make our response to domestic abuse clear, streamlined and promote better choice and outcomes for those who have experienced abuse or are at risk of harm. Women are far more likely to experience domestic abuse than men and as such are more likely to be positively affected by these proposals.</p>	<p>N/A</p>	<p>Strategic Housing Team Leader</p>	<p>Annual monitoring</p>
<p><b>Sexual Orientation</b></p>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<p>Research by the Albert Kennedy Trust found that LGBT young people are more likely to find themselves homeless than their non-LGBT peers, comprising up to 24% of the youth homeless population. There should therefore be some positive impacts on the LGBT community by the increased priority given to homeless households.</p>		<p>Strategic Housing Team Leader</p>	<p>Annual monitoring</p>

Appendix 3

<b>Religion or Belief</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A	N/A	N/A
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### Section 3: Impact Assessment - Additional Community Impacts

Additional community impacts	No Impact	Positive	Negative	Description of impact	Any actions or mitigation to reduce negative impacts	Action owner (*Job Title, Organisation)	Timescale and monitoring arrangements
Rural communities	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	The future housing development sites in Cherwell allocated to meet Oxford City's unmet housing needs are located in the more rural southern area of the Cherwell District. The proposed changes to the Housing Allocation Scheme allows CDC greater control over the allocation of housing on those sites to applicants who qualify to join the CDC housing register. This gives CDC greater control and influence over the future letting of these homes.	N/A	Strategic Housing Team Leader	N/A
Armed Forces	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	The proposal is to make clear how CDC gives additional preference for housing to those armed forces or ex-armed forces members who have urgent housing needs, as required by s.166A(3)	None	Strategic Housing Team Leader	Annual Monitoring

Additional community impacts	No Impact	Positive	Negative	Description of impact	Any actions or mitigation to reduce negative impacts	Action owner (*Job Title, Organisation)	Timescale and monitoring arrangements
				Housing Act 1996. As such, those Armed Forces members will be positively affected.			
<b>Carers</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		None	N/A	N/A
<b>Areas of deprivation</b>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	The proposals include giving greater priority to those who are more severely overcrowded in their current home than others. This is likely to affect areas of deprivation more where overcrowding is more likely to occur. The proposals are also intended to better facilitate under-occupiers of social housing to downsize. Some of the larger social housing homes where under-occupation is likely to occur are within areas of deprivation such as the Brighter Futures area where there are some higher concentrations of social housing.	N/A	N/A	N/A

## Section 3: Impact Assessment - Additional Wider Impacts

Additional Wider Impacts	No Impact	Positive	Negative	Description of Impact	Any actions or mitigation to reduce negative impacts	Action owner* (*Job Title, Organisation)	Timescale and monitoring arrangements
Other Council Services	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A	N/A	N/A
Providers	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	The proposed wording changes will positively affect social housing providers as they are designed to help enable those tenants who are more severely overcrowded to move to a more suitable home more quickly. The provisions to facilitate under-occupiers to downsize will also positively affect social housing providers.	Annual monitoring	Strategic Housing Team Leader	N/A
Social Value <sup>1</sup>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Overall the proposed changes to the housing allocation scheme will have a positive impact as the allocation scheme should be more easily understood by residents and	Annual monitoring of the housing allocation scheme and number successfully securing housing, or not, following an application. Housing Options and	CDC Housing Options and Allocations Team	Annual Monitoring

<sup>1</sup> If the Public Services (Social Value) Act 2012 applies to this proposal, please summarise here how you have considered how the contract might improve the economic, social, and environmental well-being of the relevant area

Additional Wider Impacts	No Impact	Positive	Negative	Description of Impact	Any actions or mitigation to reduce negative impacts	Action owner* (*Job Title, Organisation)	Timescale and monitoring arrangements
				<p>seeks to prioritise those applicants who need or warrant social housing most, such as homeless households. However, with each individual or group given additional priority or eligibility to join the housing register there will be another that is negatively affected as a result due to the finite number of homes available.</p>	<p>Allocations Teams will continue to promote alternative housing options such as private rented and low-cost home ownership and deliver initiative and incentives such as those currently delivered through the Cherwell Bond Scheme.</p>		

### Section 3: Impact Assessment - Climate Change Impacts

OCC and CDC aim to be carbon neutral by 2030. How will your proposal affect our ability to reduce carbon emissions related to

Climate change impacts	No Impact	Positive	Negative	Description of impact	Any actions or mitigation to reduce negative impacts	Action owner (*Job Title, Organisation)	Timescale and monitoring arrangements
Energy use in our buildings or highways	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A	N/A	N/A
Our fleet	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A	N/A	N/A
Staff travel	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A	N/A	N/A
Purchased services and products (including construction)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A	N/A	N/A
Maintained schools	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A	N/A	N/A



We are also committed to enable Cherwell to become carbon neutral by 2030 and Oxfordshire by 2050. How will your proposal affect our ability to:

Climate change impacts	No Impact	Positive	Negative	Description of impact	Any actions or mitigation to reduce negative impacts	Action owner (*Job Title, Organisation)	Timescale and monitoring arrangements
Enable carbon emissions reduction at district/county level?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A	N/A	N/A

### Section 4: Review

Where bias, negative impact or disadvantage is identified, the proposal and/or implementation can be adapted or changed; meaning there is a need for regular review. This review may also be needed to reflect additional data and evidence for a fuller assessment (proportionate to the decision in question). Please state the agreed review timescale for the identified impacts of the policy implementation or service change.

<b>Review Date</b>	Annual
<b>Person Responsible for Review</b>	Strategic Housing Team Leader
<b>Authorised By</b>	<b>Head of Housing</b>

## **Appendix 4: Cherwell District Council (CDC) Housing Allocation Scheme consultation results summary**

Thank you to those who participated in the CDC Housing Allocation Scheme consultation.

### **Introduction**

This consultation was undertaken to help CDC review and revise its Housing Allocation Scheme.

The Council is required to consult key partners and the wider public when revising its Housing Allocation Scheme and afford those persons a reasonable opportunity to comment on any proposed revisions. This includes registered providers of social housing (RPs) with which we have nomination arrangements.

### **Methodology**

The 8-week consultation ran during August and September 2024. The consultation was carried out in the form of an online survey that was available on the Council's website. Press and social media communications were used to promote the survey and encourage responses. Key partner agencies were directly approached to participate, and an online event was held for RPs to hear more about the proposals.

The proposed revisions to the Housing Allocation Scheme were also discussed at the Council's Overview and Scrutiny Committee during the consultation period.

The survey asked for views on the key proposed revisions to the Housing Allocation Scheme. Respondents were also asked to state if there were any other changes that they would like CDC to consider or if they had any other comments.

Respondents were asked to score the extent to which they agreed with each of the following four proposals:

1. Allowing greater options for survivors of domestic abuse who are at risk but wish to remain in their current home (with safeguards in place).
2. Separating overcrowded households so that those who are more significantly overcrowded than others (such as those who are short of 2-bedrooms rather than 1-bedroom) are given greater priority.
3. Increasing the household savings/assets/income cap from £60,000 to £80,000 for applicants who require 3 or more-bedroom homes.
4. To help encourage existing under-occupiers of social housing to downsize by allowing them to move to a home with fewer bedrooms but retain a spare bedroom.

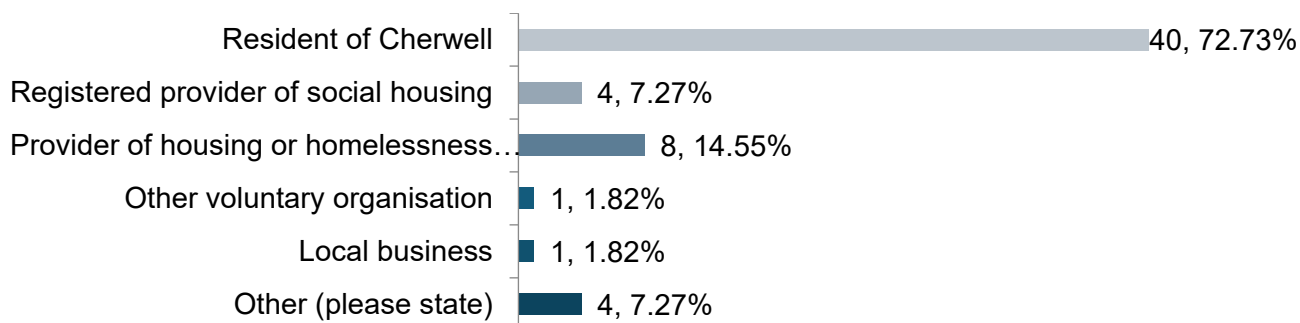
The responses were graded out of 10 and respondents were asked to choose one, from 1 (strongly disagree) to 10 (strongly agree)

Surveys were anonymised to ensure impartial views were obtained. Documents were made accessible and other ways to participate were made available if and when requested.

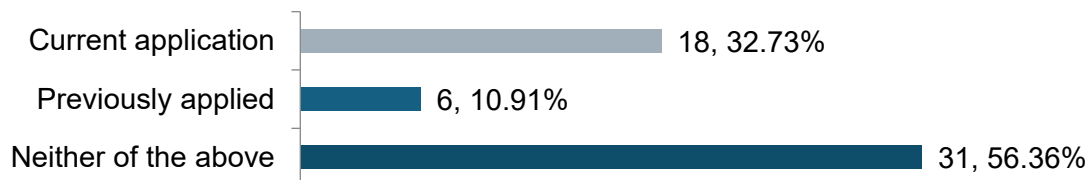
## **Survey Response and Results**

A total of 55 responses were received to the consultation. Thank you, to everyone who took part.

The responses came from a variety of different sources with the majority responding as residents of Cherwell:

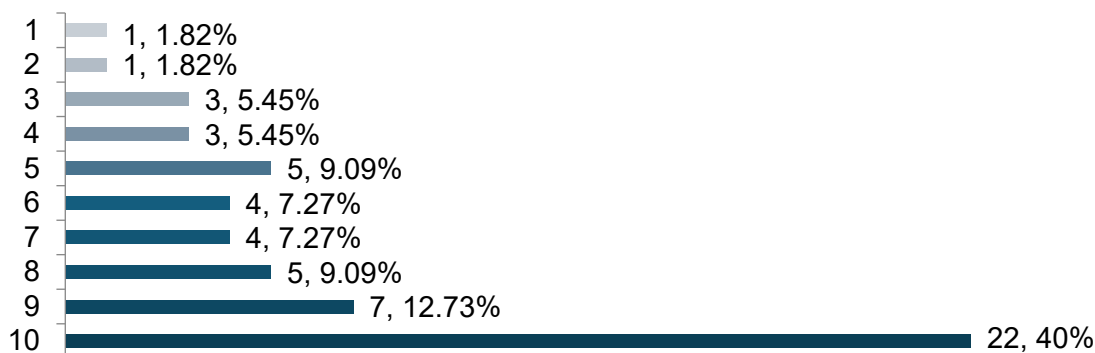


Whilst some respondents had a current housing register application or had previously applied, over half of respondents had not had either:



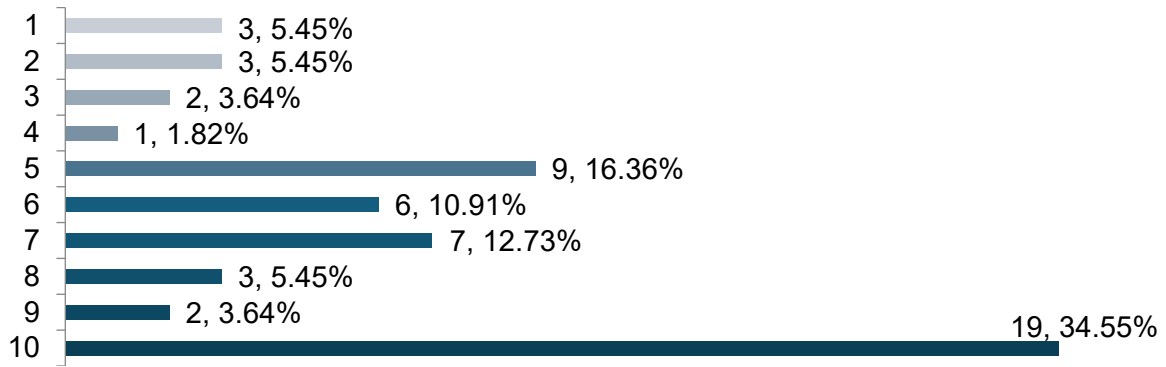
In response to the four proposed revisions to the Housing Allocation Scheme, respondents were broadly supportive. The responses to these are shown in the charts below:

### **1. To what extent do you agree with the proposal to allow greater options for survivors of domestic abuse who are at risk but wish to remain in their current home (with safeguards in place)?:**



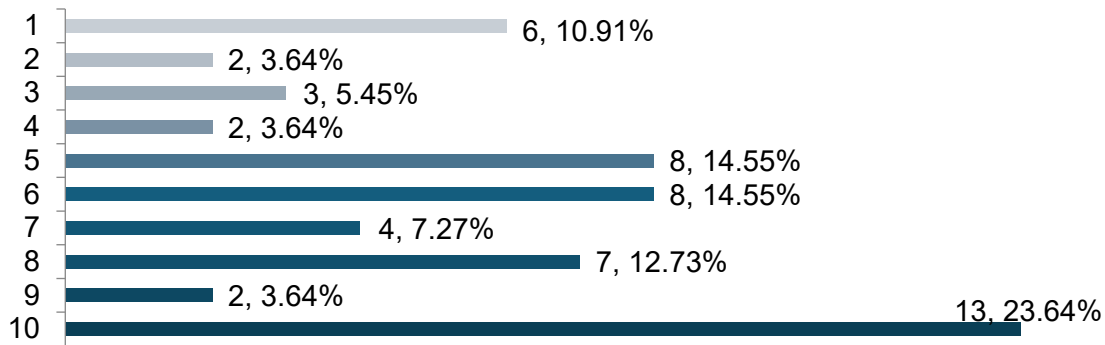
The majority of respondents agreed with the proposals with the largest portion of respondents indicating that they strongly agreed (40%).

### **2. To what extent do you agree with the proposal to separate overcrowded households so that those who are more significantly overcrowded than others (such as those who are short of 2-bedrooms rather than 1-bedroom) are given greater priority?:**



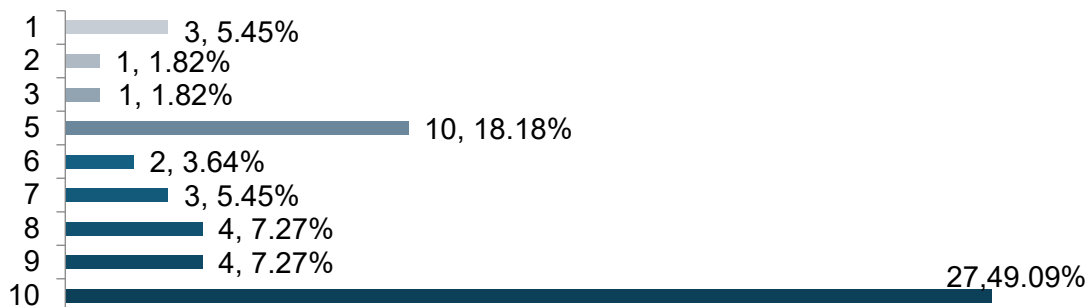
The largest portion of respondents again strongly agreed with the proposals (34.55% giving a maximum score of 10) with some neutral responses (with those scoring 5 or 6 making up 27.27% of responses).

**3. To what extent do you agree with the proposal to increase the household assets/income cap from £60,000 to £80,000 for those applicants who require 3 or more-bedroom homes?:**



More respondents were positive about this proposal than not; however, many respondents gave a neutral response (with those scoring a 5 or 6 making up 29.1% of responses). Whilst 10% strongly disagreed with the proposal, 23.64 strongly agreed.

**4. To what extent do you agree with the proposal to help encourage existing under-occupiers of social housing to downsize by allowing them to move to a home with fewer bedrooms but retain a spare bedroom?:**



Respondents were strongly in favour of this proposal with 49.09% of respondents scoring a 10, demonstrating strong support.

## **How the consultation feedback has helped to shape final proposals**

The feedback that the Council has received as part of the consultation has been supportive of the proposed revisions to the Housing Allocation Scheme.

As a result of the responses received above and comments which are summarised on the following pages, the following changes have been made to the final proposals:

- The application of automatic-bidding for applicants who are approved for move-on from supported accommodation has been reviewed, as well as the number of offers of housing these applicants can receive. CDC agree that applying automatic-bidding and allowing only one offer of housing is too restrictive on choice for these applicants. The revised proposal is to retain automatic-bidding to help prevent delays in moving applicants on from the limited supported accommodation schemes available; however, those approved for move-on from supported accommodation will receive 3 offers, in line with other housing register applicants.
- The proposed £80,000 cap on gross household income has been further reviewed.

As part of the consultation process respondents were asked to state if there were any other changes that they would like CDC to consider or if they had any other comments. A summary of these comments is provided below. Where multiple comments have been received that are similar, this is indicated.

**Are there any other changes to the Housing Allocation Scheme that you would like to be considered, or do you have any other comments to make?**

**Summary of comments made by respondents  
(from 51 responses)**

**Officer Response**

**Comment theme: Who should be eligible/qualify**

“Not allow people who abuse others to be in social housing”.

Any person who has been convicted of a criminal offence that makes the person unsuitable to be a tenant, including in relation to domestic violence, may be disqualified from the housing register (see Section 4.9).  
However, applicants cannot be disqualified from the housing register indefinitely for past behavior. CDC must consider when convictions are spent and must also have regard to our statutory duties and the requirement to give reasonable preference to some categories of applicant.

“If someone is earning £80,000 they can afford private rented or a mortgage they do not need social housing”.

Any person earning £80,000 will not qualify to join the housing register. A lower £60,000 cap will apply to applicants who require 1 or 2-bedroom homes. The calculation takes into account all financial assets (including savings) and combines this with gross household income of all adult household members.

The increased cap for applicants who require 3+ bedroom homes acknowledges the cost to rent larger homes on the open market in Cherwell and is in line with the national eligibility criteria for intermediate affordable housing such as First Homes or Shared Ownership. (see Section 4.9.5)

“People who continue to break the law should not be allowed to register on the housing allocation”.

CDC will disqualify an applicant from the housing register if the applicant, or any member of their household, has behaved in an unacceptable way as described the Housing Allocation Scheme and

	<p>they are still considered by CDC to be unsuitable to be a tenant by reason of that behaviour. This includes fraud, deception, convictions, anti-social behaviour and breaches of tenancy. (see Section 4.9)</p>
<p>“When homelessness is broached, it is not freely advised that this will include economic immigrants who have entered the UK illegally. These people stay in hotels for 2+years while they wait for approval to remain (therefore reaching the threshold for having a "local connection"). Once given rights to remain, they then become "homeless". I don't think these people should have priority over people already on the housing list. In a world of fairness and equality, I don't think it is fair. The UK is being taken advantage of and it should not be encouraged.”</p>	<p>The Allocation of Housing and Homelessness (Eligibility) (England) Regulations 2006 set out which classes of persons from abroad are eligible or ineligible for an allocation housing, rather than this being set locally by CDC.</p> <p>The proposed Housing Allocation Scheme is framed to give greater priority to applicants who are in more urgent housing need, rather than their country of origin or who has waited the longest.</p> <p>However, applicants who have the same level of priority based on their housing needs will then be prioritised based on the amount of time they have waited on the housing register.</p>
<p>“I do not support the continued apparently preferential arrangements for those seeking asylum in the UK, for instance by the wholesale allocation of the Town Centre House building to this need. Integration, tolerance and support could be improved by provision of housing throughout the CDC estate.”</p>	<p>Where central government funding is secured to deliver housing for specified cohorts, the housing delivered must then be allocated in line with the funding arrangements.</p>
<p>“Any foreign people legal or illegal need to be put at the bottom of any lists. People born in this country should have a right to a place to live before we let anyone else. Army veterans need to be the top priority.”</p>	<p>Army veterans who have urgent housing needs will be further prioritised under the proposals in this revised Housing Allocation Scheme (see Section 4.5).</p> <p>The proposed Housing Allocation Scheme is framed to give greater priority to applicants who are in more urgent housing need, rather than their country of origin.</p>



<p>“Think about our own homeless such as veterans that are living on the street before housing any immigrants”</p>	<p>Army veterans who have urgent housing needs will be further prioritised under the proposals in this revised Housing Allocation Scheme (see Section 4.5).</p>
<p>“Should only be given to British citizens”</p>	<p>The Allocation of Housing and Homelessness (Eligibility) (England) Regulations 2006 set out which classes of persons from abroad are eligible or ineligible for an allocation housing, rather than this being set locally by CDC.</p>
<p>“Allocation of 2 bed properties to joint single homeless applicants is something I would have hoped to see making an appearance, given that single homelessness takes up such a huge proportion for demand on accommodation.”</p>	<p>For many households who are eligible for a 1-bedroom home, a 2-bedroom home would not be affordable, in part due to housing benefit regulations. 2-bedroom homes are in high demand from applicants who need 2-bedroom homes. As of September 2024, 678 households on the CDC housing register require 2-bedrooms.</p>
<p><b>Comment theme: Who should be prioritised</b></p>	
<p>“People with young kids who are in need to be put first”</p>	<p>Family sized homes (i.e. homes with 2+ bedrooms) will be allocated to applicants who require this number of bedrooms. This need can arise from younger children, adult children, or other adult household members.</p> <p>The Housing Allocation Scheme is framed to give greater priority to those with more urgent housing needs, rather than giving greater priority to those with younger children who may have less urgent needs.</p>
<p>“Higher priority given to households with teenage children needing their own bedroom. Teenage children need their own space much more than younger children, who can cope with sharing for longer”.</p>	<p>Children who reach the age of 16 will be eligible for their own bedroom if they are sharing with a sibling. Children of the same gender under the age of 16 will be expected to share, in line with benefit regulations. Additional priority will apply when the child reaches the age of 18 if he/she is sharing a bedroom with a sibling. Children of different genders sharing a bedroom will be eligible for their own bedroom and be given greater priority at an earlier stage, when one child reaches the age of 10.</p>

	This is in line with statutory guidance regarding the allocation of social housing. Additionally, see response above.
"Families with disabilities should be given priority."	Families with disabilities who require specific adaptations or a specific type of home (e.g. who have a need for a ground floor home, a level access shower, or a wheelchair accessible home) will receive greater priority for the homes which meet these needs, over those applicants who do not have these needs.
"If a baby is expected they should be treated as having a child already maybe. Moving just after giving birth is hard for particularly single parents"	Applicants who are pregnant will be treated as already having a further child after the 25 <sup>th</sup> week of pregnancy (third trimester). This allows the applicant to be considered as being in need of an additional bedroom for the unborn child (if applicable) prior to the child being born.
"I find it very disappointing that NHS staff are not prioritised too".	<p>The Housing Allocation Scheme is framed to give greater priority to those with more urgent housing needs, rather than giving greater priority to those with specific forms of employment. However, the scheme does give significant priority to key workers who need to move to take-up or sustain a key worker role.</p> <p>Additionally, some homes are advertised to give greater priority to those in work or who are key workers. Key workers in roles across Oxfordshire will qualify to join the CDC housing register rather than only those who work in Cherwell, however, key workers currently make up only a very small portion of all those on the CDC housing register (less than 1%).</p>
"Give to people who work" + 1 similar response	Applicants who work in Cherwell (generally this includes those who work over 16 hours p/week) will qualify to join the housing register whether or not they have any other form of connection with Cherwell. Additionally, see response above. Homes are generally allocated based on need however those in work will be given greater priority for some homes.

<p>“People who have social housing already and are waiting for a larger property should wait longer than those who are living with family/sleeping on sofas”</p>	<p>The Housing Allocation Scheme is framed to give greater priority to those with more urgent housing needs, rather than giving greater priority to those who are not already in social housing.</p> <p>Enabling those already in social housing to move when they need to move to a larger home often means that their current home can then be reallocated to those on the housing register who need it. This benefits all those on the register.</p>
<p>“Assurance that people in step-down from hospital supported accommodation (out of hospital care model for homelessness) are encompassed in Band 1. Step-down is critical part of the bed-base of hospitals as now provides significant route out of hospital for people who are homeless. They need to have priority as if still in hospital as failure to move-on in timely manner will result in others not being discharged from hospital.”</p>	<p>Those in step-down accommodation will continue to be assessed in line with homeless legislation and if owed relief/main duty will now be Band 1 under the revised scheme, rather than Band 2. There may also be cases where a Band 1 under our hospital discharge category would be appropriate, however the result would be the same level of priority.</p> <p>Therefore, the proposed revisions should improve both consistency of outcome and speed for those in step-down accommodation securing housing through our housing register.</p>
<p>“There is a risk that by increasing the priority from Band 2 to Band 1 it will be harder to prevent homelessness from other applicants particularly those in Band 2 or 3 if they see their only realistic chance of getting Band 1 as presenting as homeless. The draft Allocations Scheme states quotas are used for applicants – including the statutory homeless – e.g., 30% to the Homeless List and allows preference to homeless applicants on CBL. An alternative approach could be more advert labelling to the homeless list to ensure this quota is met without increasing priority from Band 2 to 1 and potentially making some homeless prevention work harder.”</p>	<p>Advert labelling to give greater priority to certain categories of applicant (such as homeless applicants) for specific properties only allows a short-term solution to reduce waiting times to secure the individual properties which are labelled. As such, applying greater priority to the whole category is a more sustainable solution. The risk of increased homeless presentations will need to be monitored. Band 1 will only apply to accepted statutory homeless households who are owed a Relief or Main Housing Duty under section 189b or 193(2). Those who are owed a prevention duty or who are found not to be in priority need will remain in Band 2.</p>
<p>“Why are all the Houses always given to the homeless? I think that flats should be given to the homeless because they are cheaper. People with children who do not have a place at home and struggle with fungus during the winter are not considered”.</p>	<p>In the year 2023/24 11% of all housing let through the housing register was let to Homeless applicants. Homeless applicants can express choice over which properties they wish to be considered for however are also subject to “auto-bidding” if all available bids are not placed. This makes Homeless applicants more likely to receive an offer of</p>

	housing which is in lower demand and therefore quicker to secure.
<p>“To support people more with medical needs and to be offered the four beds or three beds quicker not should not be going by activation date</p> <p>When it comes to Mobility also given out disabled houses to people without actually any additional needs were no as people who are on the shortlisting with disabilities and never get put forward for the houses.”</p>	<p>Applicants who have needs for accessible housing due to health issues or disability are given greater priority for accessible homes than applicants who do not require them. This includes 3 and 4-bed homes when they have accessible features such as a stair lift or level access shower.</p>
<p>“Families who want to remain living on a particular estate where they also work and children go to school, should be given higher priority to properties that become available in that area instead of moving new people in and causing over-subscribed schools”.</p>	<p>Applicants may choose to only express an interest (bid) if the homes which are in their chosen location/s. However, some applicants have urgent housing needs and have no preference of location.</p> <p>The Housing Allocation Scheme is framed to give greater priority to those with more urgent housing needs. In some village locations, a portion of homes which are let are allocated with greater priority given to those with a connection to the village.</p> <p>This is because many of the affordable homes built in villages are built to help meet the affordable housing needs of those with connections to those specific villages.</p>
<p>“Take into consideration age of the person applying for Social Housing and their health condition, their housing condition and their payments.”</p>	<p>All of these factors are taken into account when assessments are made to determine if an applicant qualifies to join the housing register and what level of priority is applied.</p>
<p><b>Comment theme: Supply of affordable housing</b></p>	
<p>“More adverts for 4 or more beds property for larger family”.</p>	<p>4-bedroom homes are in short supply with only 13 being let through the housing register during 2023/24. However, this Housing Allocation Scheme will only affect who will receive greatest priority for an allocation of the homes available and will not change the supply of homes.</p>

<p>“More 1 bedroomed houses and bungalows being built for older people. Over 60's single people who do not want to live in a tiny flat with younger people who deal drugs etc, speaking from experience”.</p> <p>+ 1 Similar response</p>	<p>Many of the bungalows allocated through the housing register are allocated to those who are over 50, 55 or 60. However whilst the Housing Allocation Scheme will determine who will receive greatest priority for an allocation of the homes available it will not change the supply of homes.</p>
<p>“There are very few one-bedroom places available and almost all of them have a no pets policy so a single person with pets might never get a home”.</p>	<p>Policies and decisions regarding requests for pets are for the landlord of the homes to consider and implement. These decisions will have regard to the suitability of the property for pets including, for example, whether or not there is outside space/gardens.</p>
<p>“We need to work out how to build a lot more social housing to keep up with the demand”.</p>	<p>What is developed within the district and on what land is a matter for the Cherwell District Council Local Plan. It is therefore not within scope of the Allocations Scheme.</p>
<p><b>Comment theme: Domestic abuse</b></p>	
<p>“DV changes about time instead of having to move themselves and children deal with the perpetrator”</p>	<p>Support is noted.</p>
<p>“The recognition of the complex nature of DV cases, whilst non-urgent, needing to have a provisioned route that offers more choice and control”.</p>	<p>Support is noted.</p>
<p>“How would victims of domestic abuse be monitored to make sure they did not allow their abuser to move in with them? It is quite well evidenced that victims of domestic abuse end up back with their abuser”.</p>	<p>A move to another area of Cherwell must be agreed with CDC in accordance with a safety plan to acceptably reduce the level of risk. This may mean moving to an area that is away from the perpetrator. Once a move is completed due to domestic abuse, the risk will need to be managed by the applicant in partnership with the police and support workers.</p>
<p>“By awarding band 2 priority to applicants affected by Domestic Abuse who do not wish to make a homeless application and awarding them priority to temporarily stay in their current home with appropriate safeguarding in place will help benefit some applicants/families. When a victim of domestic abuse is balancing whether to keep bidding on CBL</p>	<p>The general support for the proposals is noted.</p> <p>If applicants feel that their risk increases such that they are unsafe or unable to remain in their home they will continue to have the option available of presenting as homeless and being temporarily accommodated in a safer place away from their home, such as a</p>

<p>in Band 2 or to present as homeless and move into TA or a refuge some may feel compelled to approach as homeless if they will be housed more quickly as a statutory homeless household in Band 1.”</p>	<p>women’s refuge. In these cases increased priority will apply.</p>
<p>“Consideration may be given, if not already, to allow exceptions flexibility within the Allocations Scheme so that if an applicant for example is affected by Domestic Abuse due to financial control by a family member that they are not excluded on financial grounds without this being take into consideration or an applicant has rent arrears due to similar reasons and they are a barrier to being made an offer”.</p>	<p>CDC agree that such discretions regarding special circumstances should be in place. Each case will be assessed on its own merits with discretion applied as appropriate.</p>
<p>“To not place People more than 10 miles from there town. re don't house people in Bicester is there supporting network is in Banbury just because they are in desperate need”.</p>	<p>Applicants are able to choose which properties and which locations they would like to express an interest in (by placing bids on available properties). The main exception to this choice is homeless households. Homeless households will generally only receive one offer of suitable housing and “automatic-bidding” will apply to their applications.</p> <p>Offers will be made in accordance with Homelessness legislation and if the offer is considered unsuitable the applicant may appeal the suitability of the offer.</p> <p>However, given the good transport links within the district an offer of housing anywhere within the district in order to resolve homelessness is often deemed suitable unless special circumstances apply to the specific case.</p>
<p><b>Comment theme: Under-occupiers and downsizing</b></p>	
<p>“Under-occupiers should be forced to downsize to free up larger houses.”</p>	<p>It would generally be unlawful for a social landlord to evict a tenant who did not wish to move to a different home due to their security of tenure, unless another tenancy arrangement existed with their landlord that allowed reviews.</p> <p>Where under-occupiers wish to seek rehousing, the Allocations</p>

	Scheme enables this through the banding scheme and prioritisation of under occupancy as a criteria.
“Encouraging tenants to downsize should only be voluntary and not forced or mandatory. Often these tenants have built a solid support system around them, spent time and love in a property and shouldn’t be made to move to an area which isolates or is inferior to their current home”.	Under-occupiers of social housing will not be forced to downsize. The proposals are to further incentivise under-occupiers to move rather than force them to do so.
“Incentivising downsizing of social rented homes is a great consideration.”	Support is noted.
“People without accommodation could live in homes of the elderly or infirm as carers. This would provide social integration and also reduce hospital bed blocking etc.”	Occupiers of social housing can let out a room to a lodger with the permission of their landlord if they have a spare bedroom. This would ultimately be the tenant’s decision and this is not within scope of the Housing Allocation Scheme.
“Where an applicant is a successor case needing to move from a 3 or 4 bed house to a smaller home, allowing a degree of under occupation to help facilitate the move may also be beneficial too (if not already included in the scope of the change).”	This is within the proposed revisions.
“Increasing the number of larger family homes becoming available by helping households downsize to downsize will benefit many households – particularly larger families in need including homeless and overcrowded families”.	Support is noted.
“Registered Providers often have Lettings Policies they apply nationally and can sometime be a barrier to downsizers if a tenant will be under occupying a smaller home e.g. a single or couple moving to a 2-bed home. Buy in from the RP to this approach at an early stage locally is helpful and can avoid some potential problems at nominations/offering stages.”	Comment noted.
“Working age tenants on benefits affected by the benefit under occupation charge who will still have a 24% charge applied after they move may need to be provided with advice/help with a DHP for the move to go smoothly – until they are in	This is noted and affordability will need to be considered on an individual basis.

work/reach pension age.”	
<b>Comment Theme: Help for applicants</b>	
“Simplify the bidding for people that English is there second language.”	This is noted and plans will be made to improve this when systems are updated/upgraded.
“Don’t add properties for bidding if the previous tenant has not left”.	<p>Sometimes this is unavoidable as social landlords are encouraged to reduce the time homes are left empty between tenants as much as possible. It is relatively rare for an advertised home to be withdrawn because the previous tenant withdrew their notice.</p> <p>The agreement with social landlords is for homes to be advertised within 4-6 weeks of the estimated tenancy start date.</p>
“More help privately renting, especially for people on low wages and/or bad credit”.	The Housing Allocation Scheme only encompasses the allocation of social housing and therefore this is not within the scope of the policy.
“Review more in-depth who is entitled to which band in a fair way and identify/investigate fraudulent applications”.	Each application is assessed in detail and documents are required to help verify each applicant’s housing circumstances along with desk-based checks. In some cases, home visits are required to help verify each applicant’s circumstances.
<b>Comment theme: Overcrowding</b>	
“The long wait for 3 or 4 bedroom properties in particular tends to mean many families are not moved until some or all of their children are 16+/adults. Many older children (2 teenage boys or 2 teenage girls) will also find it hard to share (as a younger boy and a girl where one is 10+). By treating 2 boys or 2 girls who are sharing where one or both are 16 or 17 there is potential for them to be disadvantaged and wait 2 more years before qualifying for Band 2. Some families may appeal this	<p>Currently the Housing Allocation Scheme groups the vast majority of overcrowded households into one level of priority and therefore the same waiting times apply for applicants who may be more severely overcrowded than another applicant in the same priority band.</p> <p>The proposed revisions seek to separate out those who are more urgently and less urgently overcrowded whilst complying with or being</p>



and/or seek additional priority to move on social and welfare or health and welfare grounds taking up a lot of officer time assessing different evidence provided.”	more generous than statutory guidance. In some cases additional priority may apply for medical and/or social or welfare reasons.
<b>Comment theme: Supported accommodation</b>	
“Note that individuals living in supported accommodation, i.e. such as delivered by the Oxfordshire Homelessness Alliance, will be awarded band 2. We welcome this and this is in line with the commitments that all local housing authorities in Oxfordshire has made as part of Oxfordshire’s Homelessness and Rough Sleeping Strategy 2021-26.”	Support noted.
“Would like to understand the justification behind those in supported accommodation only being able to make 1 refusal whereas others have up to three refusals. We obviously want to encourage people to look carefully at offers and work with them but often there is a clear reason why something isn’t suitable. Simply removing them from the register for a period of time only places more stress on the system and will demotivate immensely.”	CDC have reflected on this comment and reviewed the proposals as a result. The proposal is now for those who are approved for move-on from supported accommodation to be eligible for up to 3 offers of accommodation through the housing register in line with other applicant types. As such, 2 offers of accommodation can be refused if the offers are deemed by the applicant to not suit their needs.
“Auto bidding - how we can make this work best for people living in supported accommodation”.	We have reviewed the application of auto-bidding for those approved for move-on from supported accommodation, along with the above regarding the number of offers these applicants can receive. CDC agree that limiting applicants to both one offer only and auto-bidding is too restrictive on choice. Applicants will therefore receive 3 offers in line with other applicants.
“If people are needed to move between supported accommodation projects for safety reasons etc.. then they should maintain their banding and timeline.”	Housing register applications are assessed based on the housing situation of the applicant which will change if the person moves from one home to another. Where applicants housing situation becomes more, or less urgent, the priority applied to their application may change and the effective date the band applies will also then change. Those moving between supported housing projects should generally remain in the same level of priority and the same effective date should therefore apply.

<p>“Is data available to review the baseline quota's to see if these are good measures to use?</p> <p>I'm not sure how routinely these 3-month reviews happen and whether our supported accommodation teams have an opportunity to feed into them with the resident”.</p>	<p>Yes data is available. 3-month reviews are generally carried out for all Band 1 applicants.</p>
<p>“The approach to rent arrears for applicants in move on accommodation may need to be considered too if flexibility is not already in the Allocations Scheme/protocols regarding this as many of those in the most need”.</p>	<p>Applicants who have made significant efforts to reduce arrears will continue to be considered for a nomination of housing. Personal circumstances regarding arrears will continue to be taken into account on a case-by-case basis.</p>
<p><b>Comment theme: Alternative proposals/initiatives</b></p>	
<p>“Incentive to move out of social housing for those that would like to buy (not Right to Buy/Right to Ascertain). A monetary incentive would help me move, whilst also freeing up a property.”</p>	<p>Whilst this is noted, such an initiative would not form part of the Housing Allocation Scheme.</p>
<p>“An alternative approach could be to set a maximum capital limit at the point of application and then review the applicants circumstances at the point they shortlist for an offer (if they do) and advise they will not be considered for an offer if their combined capital/income is considered sufficient to meet their needs. This would be a similar approach to the rent arrears approach applied in the Allocations Scheme and reduce assessment times/requests for lots of financial evidence at the point of application. If an applicant is awarded priority for time on the Housing Register but only qualifies after a change in their income – e.g. they lose their job (and they already meet another reasonable preference group e.g. they have been overcrowded for 2 years they will have lost this time on the register)”.</p>	<p>Applicants are assessed at point of application and also reviewed at point of nomination for housing which ensure that if circumstances have changed and income/savings have increased, applicants may not qualify for an offer of housing despite qualifying to join at point of application.</p> <p>We assess and verify qualification at point of application in order to both manage expectations, ensure consistency of assessment in accordance with the Housing Allocation Scheme and ensure that all those with active applications are indeed qualifying applications.</p>
<p>“An incentive to move out of social housing for those that would like to buy (not Right to Buy/Right to Ascertain). A monetary incentive would help me move, whilst also freeing up a property.”</p>	<p>Whilst this is noted, such an initiative is not within scope of the Housing Allocations Scheme.</p>

<b>Comment theme: Other</b>	
<p>“The Allocation schemes should leave room for the exercise of discretion on the part of the local authority to make offers or award additional priority outside the scheme's rules in exceptional circumstances. Please see case of Leicester CC v Shearer [2013] EWCA Civ 1467; R (on the applications of KS &amp; Ors) v Haringey LBC [2018] EWHC 587 (Admin)”</p>	<p>Discretion forms part of the Housing Allocation Scheme. See Section 14.3 and Appendix 5.</p>
<p>“Changes represent a really logical approach to recognising the nuance of need across applicants to the housing register. With the increased number of band 2 allocations, in response to the increase in duties accepted in addressing the current housing and homelessness crisis, it makes sense to differentiate those in a higher level of need to escalate their priority”.</p>	<p>Support noted.</p>
<p>“Due to the changing nature of this landscape, we welcome the flexibility proposed within this scheme which makes it open to regular review. This will ensure there will be continued commitment by CDC and alignment with CDC policies to the countywide strategy in relation to preventing and tackling rough sleeping and single homelessness, and ensuring there are no barriers for people moving on from supported a/c”.</p>	<p>Support noted.</p>

**Comments from the Overview and Scrutiny Committee 10 September 2024**

Summary of Comment	Officer Response
Do housing applicants with rent arrears have offers withdrawn and could this be negotiated to prevent them being overlooked for housing.	<p>Applicants work with clients on a case-by-case basis.</p> <p>As part of the application process, the Council routinely requests a copy of a landlord reference.</p> <p>The applicants rent record arrears would be analysed at the time that the bid is placed, and potential nomination is made. Applicants should have cleared or should clear housing related debt that is recorded, in full, before a nomination is made. Alternately, there should be evidence to show that a concerted effort has been made to address the rent arrears through an arrangement negotiated with their landlord.</p>
How many are currently on the waiting list	Around 2050 households
What is the current available stock	The Council lets around 550 properties a year
How many providers do we work with and do they all work within the same criteria	<p>Around 30 providers operating within the district, Sanctuary are the largest. The Allocations Scheme forms the criteria used to assess applications. All providers operating agree our Nominations Agreement, that informs our engagement with them.</p> <p>Some properties have different criteria in terms of age and medical need suitability and these criteria are outlined within the advert.</p>
How does the Policy relate to supply of homes?	The policy relates to allocation of homes, not supply. Supply of homes relates to the Local Plan.
Is Domestic Abuse a significant problem in Cherwell and what actions are being taken to address?	Our records show that 3% of our applicants to the waiting list in the year to date have stated Domestic Abuse as their main reason for applying.

	<p>The Council jointly commissions domestic abuse services with other districts and City Council through the ODAS contract.</p> <p>The Council is also seeking Domestic Abuse Housing Alliance (DAHA) accreditation to help recognise positive practice and improve services to residents.</p>
<p>Is it expected that the waiting list will increase with the proposed change in eligibility from £60,000 to £80,000 for larger homes?</p>	<p>This criterion has not been reviewed in some time and therefore a review as income and prices change is considered prudent.</p> <p>Our calculations show that it would be appropriate to allow those with income and savings below £80,000 to join the housing register.</p>

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<b>This report is public</b>	
<b>Traffic Regulation Order in Pioneer Square</b>	
<b>Committee</b>	Executive
<b>Date of Committee</b>	6 January 2025
<b>Portfolio Holder presenting the report</b>	Portfolio Holder for Neighbourhood Services, Councillor Ian Middleton
<b>Date Portfolio Holder agreed report</b>	10 December 2024
<b>Report of</b>	Assistant Director Property, Mona Walsh

## Purpose of report

To promote an off-street Traffic Regulation Order on land the Council owns and has responsibility for outside the entrances to Franklin House including the Travelodge Hotel in order to mitigate the risks to the public at large and to the Council itself caused by unsafe parking and traffic movements in the area.

## 1. Recommendations

The Executive resolves:

- 1.1 To approve the promotion of an off-street Traffic Regulation Order on land the Council owns and has responsibility for outside the entrances to Franklin House including the Travelodge Hotel in order to mitigate the risks to the public at large and to the Council itself caused by unsafe parking and traffic movements in the area.
- 1.2 To authorise the Assistant Director – Property to start formal consultation on the proposed off-street Traffic Regulation Order, and, following due consideration of any representations received at the consultation stage and in consultation with the Monitoring Officer and relevant portfolio holder, to make any decisions and exercise all powers necessary in respect of whether or not to make and/or seal the proposed Order.

## 2. Executive Summary

- 2.1 An area of land, shown shaded green in the plan at Appendix 1, owned by the Council and for which it has responsibility, in front of Bicester Library, Perch and the Travelodge at Franklin House Bicester is subject to unsafe and irregular parking which makes the area unsafe for pedestrians. In addition vehicles entering and leaving Pioneer Square loading and service areas are frequently obstructed preventing access as required.

2.2 The circumstances described in 2.1 require the Council to take action. It is proposed that an off-street Traffic Regulation Order is promoted. This will reduce the safety risks, ensure access to Pioneer Square loading and service areas is available and reduce the Council's exposure to liability in the event an accident should occur.

## Implications & Impact Assessments

Implications	Commentary			
<b>Finance</b>	<p>It will be necessary to advertise the proposed Traffic Regulation Order following Executive approval to promote the Order. If successfully promoted following consideration of any objections received, appropriate signage and road/surface lines to ensure the Traffic Regulation Order is enforceable. A budget of up to £7,000 will be required for the costs of advertising costs and installing the signs and lines. This sum can be met from existing Parking budgets.</p> <p>Rachel Ainsworth, Finance Business Partner 21 November 2024</p>			
<b>Legal</b>	<p>Under Sections 32 and 35 of the Road Traffic Regulation Act 1984, the Council has power to create off-street parking places and make restrictions as to the use of those areas, in particular with regards to the vehicles or class of vehicles which may be entitled to use them. The proposed Order will utilise those powers for the regulation of the site and its use by motor vehicles.</p> <p>Adrian Thompson, Principal Solicitor – Property. 22 November 2024</p>			
<b>Risk Management</b>	<p>There are no risks arising directly from this report. Any arising risks will be managed by the relevant service operational risk register and escalated to the corporate leadership risk register as and when necessary. The proposal mitigates the safety risks to the public at large and to the Council itself caused by unsafe parking and traffic movements in the area.</p> <p>Celia Prado-Teeling, Performance Team Leader, 22 November 2024</p>			
<b>Impact Assessments</b>	Positive	Neutral	Negative	Commentary
<b>Equality Impact</b>		x		<p>There are no equality implications arising directly from this report.</p> <p>Celia Prado-Teeling, Performance Team Leader, 22 November 2024</p>
<b>A</b> Are there any aspects of the proposed decision, including how it is delivered or accessed, that could		x		



impact on inequality?				
<b>B</b> Will the proposed decision have an impact upon the lives of people with protected characteristics, including employees and service users?		x		
<b>Climate &amp; Environmental Impact</b>				Not applicable
<b>ICT &amp; Digital Impact</b>				Not applicable
<b>Data Impact</b>				Not applicable
<b>Procurement &amp; subsidy</b>				Not applicable
<b>Council Priorities</b>	An enterprising economy with strong and vibrant local centres			
<b>Human Resources</b>	Not applicable			
<b>Property</b>	The promotion of a TRO as described in this report will lead to a safer environment in the locality of Pioneer Square and enable the Council enforce parking. Mona Walsh Assistant Director Property 5 Nov 2024			
<b>Consultation &amp; Engagement</b>	Legal consulted mid-June to discuss fully the implications of introducing a TRO.			

## Supporting Information

### 3. Background

- 3.1 The area proposed for the promotion of an off-street Traffic Regulation Order is shaded green on the plan at Appendix 1. It is part of the Pioneer Square development in Bicester, comprising Sainsburys supermarket, other retail and restaurant outlets and Franklin House. Franklin House includes Bicester Library, the Perch office suite, a Travelodge hotel and offices.
- 3.2 The area in question is owned and controlled by the Council and is not an adopted highway. Its original and present purpose is to enable very short-term drop-off and pick-up waiting between Manorsfield Road and the hydraulic bollard outside The Perch and to afford servicing access to the Vue Cinema, some nearby retail and restaurant units. It also includes two taxi waiting spaces and a disabled parking space.

- 3.3 The area has been habitually abused. The taxi and disabled spaces are constantly used for long stay parking by those avoiding nearby parking charges. Additionally, the parking routinely obstructs authorised servicing vehicles. Vue cinema and other retail units at Pioneer Square have had deliveries turned away when unable to access the goods yard within this area. The Council regularly receives complaints about the congestion and the impact caused, visits have been made to see the evidence.
- 3.4 The area is considered unsafe for pedestrians as a result of inappropriate and unregulated parking which poses significant risks. Many children and families walk through this area daily on their way to and from the Bicester schools. If an accident should occur The Council may find itself liable as a result of not managing the area effectively. The continual abuse of the area is routinely observed by Council staff including Community Safety officers, Health and Safety Advisor, Property and Parking teams. The need to regulate the area has the strong support of all concerned.

#### **4. Details**

- 4.1 Regulation can be achieved through an Off-Street Car Parking Order made under Sections 32 and 35 of the Road Traffic Regulation Act 1984. Traffic cannot be excluded altogether because of the servicing needs. The proposed Order would prohibit parking in the designated area other than in one marked bay allocated for disabled parking and taxi driver pick-up/drop-offs shown on the plan at Appendix 1 .
- 4.2 The Order would provide for “no waiting at any time except for loading and unloading.” This exemption would apply up to the rising bollard for the loading and unloading of persons as well as goods.
- 4.3 It will be necessary to advertise the proposed Traffic Regulation Order following Executive approval to promote the Order. If successfully promoted following consideration of any objections received, appropriate signage and road/surface lines will be installed to ensure the Traffic Regulation Order is enforceable. A budget of up to £7,000 will be required for the costs of advertising costs and installing the signs and lines. This sum can be met from existing Parking budgets.
- 4.4 Enforcement of this Off-Street Traffic Regulation Order and issue of Penalty Charge Notices will be carried out by Oxfordshire County Council via the Councils Agency Agreement with the County Council for enforcement of its Off-Street Parking Orders. There will be no additional cost incurred.
- 4.5 The promotion of the Parking Order needs the support of the Highway Authority (Oxfordshire County Council) who have confirmed their support.

#### **5. Alternative Options and Reasons for Rejection**

- 5.1 The following alternative options have been identified and rejected for the reasons as set out below.

Option 1: Do nothing.

This option has been rejected. Not promoting the off-street Traffic Regulation Order means proper enforcement to manage parking will not be available and car users will continue to abuse parking. Furthermore, the Council runs the risk of possible claims from the public if an accident were to happen.

## 6 Conclusion and Reasons for Recommendations

- 6.1 Approval of the promotion of an off-street Traffic Regulation Order as described will remove obstructions caused by unregulated parking and obstructions to traffic needing to access service areas.
- 6.2 This will improve safety for pedestrians and ensure that the existing taxi drop offs and disabled parking space are accessible and available to use.
- 6.3 The costs associated with promoting and implementing the Traffic Regulation Order can be met from existing budgets. Enforcement of this Off-Street Traffic Regulation Order and issue of Penalty Charge Notices will be carried out by Oxfordshire County Council at no additional cost to the Council.

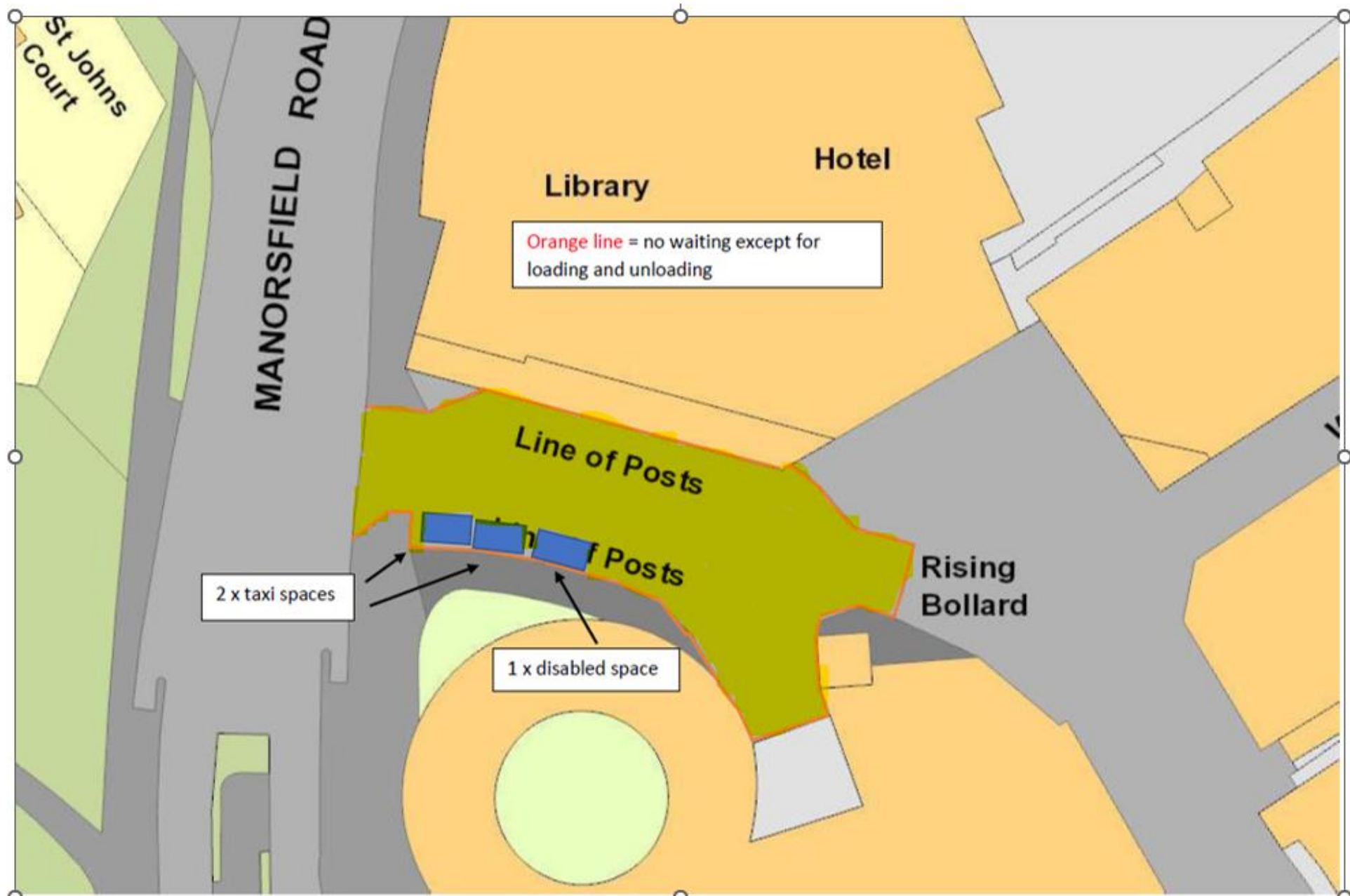
## Decision Information

<b>Key Decision</b>	Yes
<b>Subject to Call in</b>	Yes
<b>If not, why not subject to call in</b>	N/A
<b>Ward(s) Affected</b>	All wards affected

## Document Information

<b>Appendices</b>	
<b>Appendix 1</b>	Area of Proposed TRO Pioneer Square
<b>Background Papers</b>	None
<b>Reference Papers</b>	None
<b>Report Author</b>	Mona Walsh Assistant Director Property
<b>Report Author contact details</b>	DD: 01295 221602 <a href="mailto:mona.walsh@cherwell-dc.gov.uk">mona.walsh@cherwell-dc.gov.uk</a>
<b>Corporate Director Approval</b>	Stephen Hinds, Corporate Director Resources 26 Nov 2024

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<b>This report is public</b>	
<b>Finance Monitoring Report November 2024</b>	
<b>Committee</b>	Executive
<b>Date of Committee</b>	6 January 2025
<b>Portfolio Holder presenting the report</b>	Portfolio Holder for Finance, Regeneration and Property, Councillor Lesley McLean,
<b>Date Portfolio Holder agreed report</b>	16 December 2024
<b>Report of</b>	Assistant Director of Finance (Section 151 Officer), Michael Furness

## **Purpose of report**

To report to Executive the council's forecast financial position as at the end of the November 2024.

## **1. Recommendations**

The Executive resolves:

- 1.1 To consider and note the contents of the council's financial management report as at the end of November 2024.
- 1.2 To approve the reprofiling of capital projects beyond 2024/25 (section 4.2.3 and Appendix 1) and the subsequent update to the programme budget for this financial year 2024/25.
- 1.3 To approve to virement of £1.031m from Policy Contingency to services for the Cost of Living award for 2024/25 as agreed in November.
- 1.4 To approve the allocation of £0.500m Policy Contingency to cover the cost of appeals.

## **2. Executive Summary**

- 2.1 This report presents the forecast outturn position for the 2024/25 financial year as at November 2024.

## Implications & Impact Assessments

Implications	Commentary			
<b>Finance</b>	<p>Financial and Resource implications are detailed within sections 4.1 and 4.2 of this report. The reserves policy requires Executive to agree transfers to and from earmarked reserves and general balances during the financial year.</p> <p>Joanne Kaye, Head of Finance, 11 December 2024</p>			
<b>Legal</b>	<p>There are no legal implications arising at this stage. The Council has a fiduciary duty to council taxpayers, which means it must consider the prudent use of resources, including control of expenditure, financial prudence in the short and long term and the need to act in good faith in relation to compliance with statutory duties and exercising statutory powers. The Council has a statutory obligation to maintain a balanced budget and the monitoring process enables Executive to remain aware of issues and understand the actions being taken to maintain a balanced budget.</p> <p>The report sets out as at November 2024 finance position for the Council as part of its fiduciary duty to implement budgetary controls and monitoring.</p> <p>Shiraz Sheikh, Monitoring Officer/ AD Law &amp; Governance, 11 December 2024</p>			
<b>Risk Management</b>	<p>There are no risk implications arising directly from this report. Financial resilience risk is managed, and reported quarterly, through the Leadership Risk register.</p> <p>Celia Prado-Teeling, Performance &amp; Insight Team Leader, 11 December 2024.</p>			
<b>Impact Assessments</b>	Positive	Neutral	Negative	Commentary
<b>Equality Impact</b>		X		
<b>A</b> Are there any aspects of the proposed decision, including how it is delivered or accessed, that could impact on inequality?		X		N/A
<b>B</b> Will the proposed decision have an impact upon the lives of people with protected characteristics, including employees and service users?		X		N/A



<b>Climate &amp; Environmental Impact</b>		X		N/A
<b>ICT &amp; Digital Impact</b>		X		N/A
<b>Data Impact</b>		X		N/A
<b>Procurement &amp; subsidy</b>		X		N/A
<b>Council Priorities</b>	This report links to all council's priorities, as it summarises our progress against them during 2024/25.			
<b>Human Resources</b>	N/A			
<b>Property</b>	N/A			
<b>Consultation &amp; Engagement</b>	N/A			

## Supporting Information

### 3. Background

- 3.1 The council actively and regularly monitors its financial position to ensure it can deliver its corporate priorities and respond effectively to emerging issues.
- 3.2 This monitoring takes place monthly for finance, so the council can identify potential issues at the earliest opportunity and put measures in place to mitigate them.
- 3.3 These updates are consolidated on a quarterly basis where performance and Finance updates are given due to the implications and interdependencies between them, and this is the summary financial outturn forecast for the end of the financial year 2024/25.

### 4. Details

#### 4.1 Finance Update

- 4.1.1 The council's overall forecast outturn position for 2024/25 is an overspend of £0.098m. The forecast overspend is due to pressures totalling £0.408m within service budgets which are being offset by an underspend of £0.310m across Executive Matters and Policy Contingency.

There is an overspend within Environmental Services relating to gate fees of £0.200m that is currently being reviewed and we will consider what level of market risk policy contingency is available to help mitigate this.

The Corporate Leadership Team (CLT) has agreed that a Budget Oversight Group will meet with service managers each month where overspends are identified to

agree in-year mitigation plans and to further strengthen budget management and forecasting.

The projected outturn for the services is summarised below in Table 1 and further details providing explanations for variances can be found in Appendix 2.

**Table 1: Forecast Year End Position**

Service	Current Budget £m	November Forecast Outturn £m	November Variance (Under) / Over £m	% Variance to current budget %	October Variance (Under) / Over £m	Change since Previous (better) / worse £m	
Finance	3.051	3.051	0.000	0.0%	0.000	0.000	Green
Legal, Democratic, Elections & Procurement	2.307	2.439	0.132	5.7%	0.119	0.013	Red
ICT	1.510	1.510	0.000	0.0%	0.000	0.000	Green
Property	(2.432)	(2.296)	0.136	-5.6%	0.084	0.052	Red
HR & OD	0.789	0.819	0.030	3.8%	0.030	0.000	Red
Customer Focus	2.457	2.367	(0.090)	-3.7%	(0.090)	0.000	Green
<b>Resources &amp; Transformation</b>	<b>7.682</b>	<b>7.890</b>	<b>0.208</b>	<b>2.7%</b>	<b>0.143</b>	<b>0.065</b>	Red
Planning & Development	1.738	1.795	0.057	3.3%	0.114	(0.057)	Red
Growth & Economy	0.458	0.472	0.014	3.1%	0.013	0.001	Red
Environmental	5.741	5.986	0.245	4.3%	0.209	0.036	Red
Regulatory	1.116	1.100	(0.016)	-1.4%	(0.016)	0.000	Green
Wellbeing & Housing	2.156	2.056	(0.100)	-4.6%	(0.100)	0.000	Green
<b>Communities</b>	<b>11.209</b>	<b>11.409</b>	<b>0.200</b>	<b>1.8%</b>	<b>0.220</b>	<b>(0.020)</b>	Red
<b>Subtotal for Directorates</b>	<b>18.891</b>	<b>19.299</b>	<b>0.408</b>	<b>2.2%</b>	<b>0.363</b>	<b>0.045</b>	Red
Executive Matters	4.293	4.178	(0.115)	-2.7%	(0.115)	0.000	Green
Policy Contingency	3.803	3.608	(0.195)	-5.1%	0.000	(0.195)	Green
<b>Total</b>	<b>26.987</b>	<b>27.085</b>	<b>0.098</b>	<b>0.4%</b>	<b>0.248</b>	<b>(0.150)</b>	Red
<b>FUNDING</b>	<b>(26.987)</b>	<b>(26.987)</b>	<b>0.000</b>	<b>0.0%</b>	<b>0.000</b>	<b>0.000</b>	Green
<b>(Surplus)/Deficit Before proposed Transfers to reserves</b>	<b>0.000</b>	<b>0.098</b>	<b>0.098</b>		<b>0.248</b>	<b>(0.150)</b>	

**Note:** A positive variance is an overspend or a reduction in forecast income and a (negative) is an underspend or extra income received.

Green represents an underspend and red represents a overspend for the outturn position.

4.1.2 Table 2 below analyses the variances to distinguish between base budget variances and variances resulting from the non-delivery of previously approved savings. The

non-delivery of savings has a knock-on impact on the Medium-Term Financial Strategy as failure to deliver on an ongoing basis adds to future pressures.

**Table 2:** Analysis of Variance – November 2024

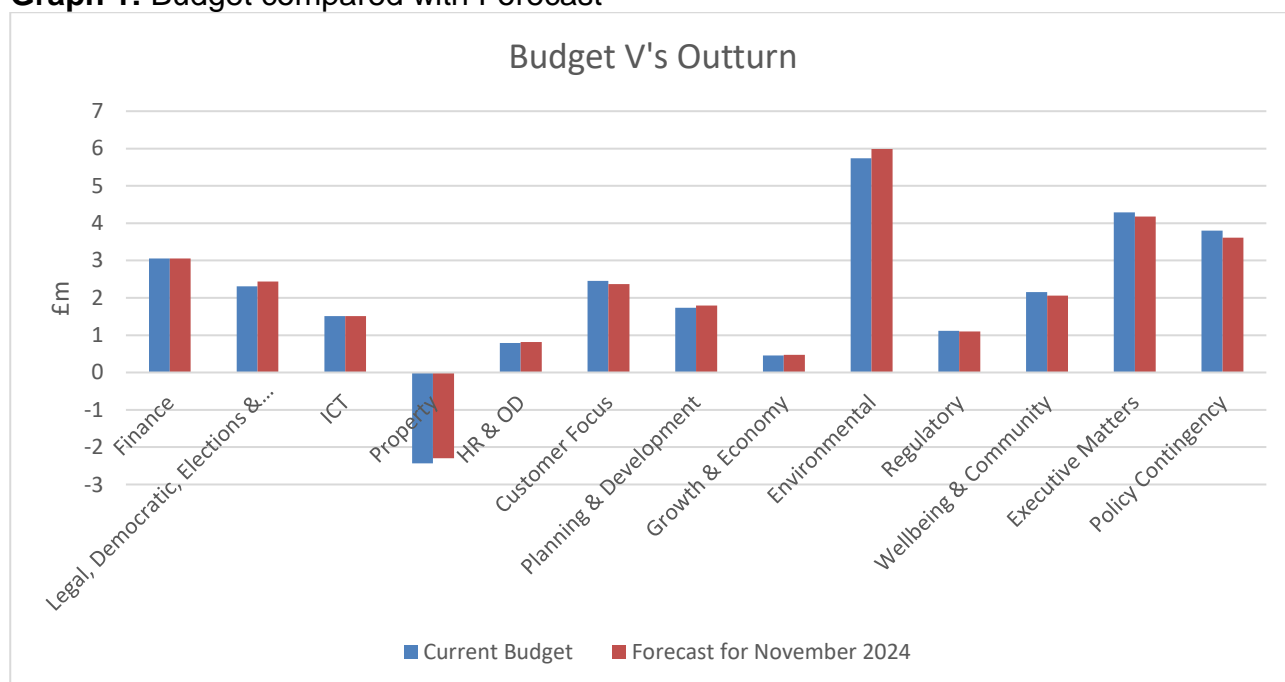
Breakdown of current month forecast	November 2024 Forecast £m	Base Budget Over/ (Under) £m	Savings Non-Delivery £m
Resources	0.208	0.158	0.050
Communities	0.200	(0.229)	0.429
<b>Subtotal Directorates</b>	<b>0.408</b>	<b>(0.071)</b>	<b>0.479</b>
Executive Matters	(0.115)	(0.115)	0.000
Policy Contingency	(0.195)	(0.195)	0.000
<b>Total</b>	<b>0.098</b>	<b>(0.381)</b>	<b>0.479</b>

<b>FUNDING</b>	<b>0.000</b>	<b>0.000</b>	<b>0.000</b>
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<b>(Surplus)/Deficit</b>	<b>0.098</b>	<b>(0.381)</b>	<b>0.479</b>
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4.1.3 The graph below shows the Budget compared with the forecast to the end of the financial year.

**Graph 1:** Budget compared with Forecast



4.1.4 Table 3 below summarises the major forecast variances for the reporting period. Further details can be found in Appendix 2.

**Table 3:** Top Major Variances:

Service	Current Budget	Variance	% Variance
Environmental	5.741	0.245	4.3%
Property	(2.432)	0.136	5.6%
Legal, Democratic, Elections & Procurement	2.307	0.132	5.7%
Policy Contingency	3.803	(0.195)	-5.1%
<b>Total</b>	<b>5.616</b>	<b>0.513</b>	

## Reserves

4.1.5 Allocations to and from reserves are made according to the Reserves Policy. Table 5 below summarises the movements which have been requested as at 30 November 2024, there are no reserve requests for this month.

**Table 5:** Reserves forecast:

Reserves	Balance 1 April 2024  £m	Original Budgeted use/ (contribution)  £m	Changes agreed since budget setting  £m	Changes proposed November 2024  £m	Balance 31 March 2025  £m
General Balance	(6.153)	0.000	0.000	0.000	(6.153)
Earmarked	(28.325)	(0.776)	(0.046)	0.000	(29.147)
Ringfenced Grant	(2.552)	0.898	0.502	0.000	(1.152)
<b>Subtotal Revenue</b>	<b>(37.030)</b>	<b>0.122</b>	<b>0.456</b>	<b>0.000</b>	<b>(36.452)</b>
Capital	(6.293)	3.250	0.000	0.000	(3.043)
<b>Total</b>	<b>(43.323)</b>	<b>3.372</b>	<b>0.456</b>	<b>0.000</b>	<b>(39.495)</b>

\*According to the Reserves Policy Executive are only required to approve uses of Capital Reserves, not contributions.

## 4.2 Capital

4.2.1 Table 6 below summarises the projected year end forecast for profiled spend in 2024/25 and Table 7 summarises the financing. There is a projected in-year underspend of (£0.411m), with £0.466m that is recommended to be reprofiled into future years. The current month variance is due to underspends on the following

projects Town Centre House Purchase & Repair (£0.356m), Castle Quay (£0.233m) and overspend on the following, Bicester East Community Centre £0.062m, Sunshine Centre £0.075m and Development of New Land Bicester Depot £0.036m. Further detail can be found in appendix 1.

Projects that are recommended to have budget reprofiled from 2024/25 are detailed in Table 9.

**Table 6:** Capital Projection

Directorate	Revised Budget £m	Forecast Spend 24/25 £m	Re-profiled beyond 2024/25 £m	Variance to Budget £m	Prior Month Variance to Budget £m
Resources & Transformation	8.574	8.331	(0.187)	(0.056)	(0.088)
Communities	8.886	8.255	(0.279)	(0.352)	(0.794)
<b>Total</b>	<b>17.460</b>	<b>16.586</b>	<b>(0.466)</b>	<b>(0.407)</b>	<b>(0.881)</b>

For further detail on individual schemes please see Appendix 1.

**Note:** A positive variance is an overspend or a reduction in forecast income and a (negative) is an underspend or extra income received.

Green represents an underspend and red represents a overspend for the outturn position.

**Table 7:** How the Capital Programme is financed

Financing	24/25 Budget £m	Future Years £m	Total
Borrowing	13.016	11.234	25.731
Capital Grants	2.146	9.010	11.156
Capital Receipts	0.425	5.896	6.321
S106 Receipts	1.872	3.563	5.435
	<b>17.459</b>	<b>29.703</b>	<b>48.643</b>

4.2.2 Table 8 below summarises the projected spend against the full capital programme (i.e. forecast spend across all years of the capital programme). Since October's report there has been a reduction in forecast underspend in the programme of (£0.474m) predominantly due to the reduction in budget relating to the Development of Activity in Play Zones being reduced by Executive at its November meeting.

**Table 8:** Total Capital Project Outturn

Directorate	Budget £m	Total Forecast 2024/25 £m	Variance to Budget £m	Prior Month Variance to Budget £m
Resources & Transformation	14.754	14.698	(0.056)	(0.088)
Communities	32.409	32.057	(0.352)	(0.794)
<b>Total</b>	<b>47.163</b>	<b>46.755</b>	<b>(0.407)</b>	<b>(0.881)</b>

4.2.3 Table 9 below details the capital schemes which it is recommended budgets are reprofiled from 2024/25 to 2025/26 or beyond. The reprofiling of capital budgets can be for several reasons and is common on multi-year projects. The reasons for the recommendations are summarised in section 4.2.4.

**Table 9:** Requested capital budget reprofiling

Code	Top In-Year Variances	Budget Total £'000	Reprofile to 24/25 £'000	% of in year Budget Variance
40224	Fairway Flats Refurbishment	0.200	0.187	93.50%
40083	Disabled Facilities Grants	1.384	0.184	13.29%
40222	Burnehyll- Bicester Country Park	0.060	0.050	83.33%
40251	Longford Park Art	0.045	0.045	100.00%
		<b>1.689</b>	<b>0.466</b>	

4.2.4 Capital schemes recommended to be reprofiled:

- Fairway Flats Refurbishment (40224)  
Planning approval has been achieved. Designers are completing the detail design and specification for the solar panels and roof works. We will then need to tender these works as they are over £0.100m. We therefore anticipate works commencing in the new year and the works to continue through to the new financial year, partly due to the need to avoid the worst of the winter / spring weather, whilst carrying out works on a residential building roof space. We have adjusted the spend profile for these works.
- Disabled Facilities Grants (40083)  
£0.184m underspend now anticipated in 2024/25, due to delays with delivery of several larger adaptations projects previously forecast for completion before year end.
- Burnehyll- Bicester Country Park (40222)  
Reprofiling of £0.050m required into 2025/26. Grants and S106 contributions have resulted in a reduction in capital spend required in 2024/25.

- Longford Park Art (40251)  
Artist will complete their commissions once the parkland has been handed over.  
This is dependent on the development reaching the required standard.

## 5. Alternative Options and Reasons for Rejection

5.1 The following alternative options have been identified and rejected for the reasons as set out below.

Option 1: This report summarises the council's forecast financial position up to the end of March 2025, therefore there are no alternative options to consider.

## 6 Conclusion and Reasons for Recommendations

6.1 The report updates Executive on the projected year-end financial position of the council for 2024/25. Regular reporting is key to good governance and demonstrates that the council is actively managing its financial resources sustainably.

### Decision Information

<b>Key Decision</b>	No
<b>Subject to Call in</b>	Yes
<b>If not, why not subject to call in</b>	N/A
<b>Ward(s) Affected</b>	All

### Document Information

<b>Appendices</b>	
<b>Appendix 1</b>	Capital November 2024
<b>Appendix 2</b>	Detailed Revenue Narrative on Forecast November 2024
<b>Appendix 3</b>	Virements November 2024
<b>Appendix 4</b>	Funding November 2024
<b>Background Papers</b>	None
<b>Reference Papers</b>	None
<b>Report Author</b>	Leanne Lock, Strategic Finance Business Partner

<b>Report Author contact details</b>	Leanne.lock@cherwell-dc.gov.uk 01295 227098
<b>Corporate Director Approval (unless Corporate Director or Statutory Officer report)</b>	Stephen Hinds, Corporate Director Resources & Transformation, 6 December 2024



Appendix 1 - CHERWELL CAPITAL EXPENDITURE

Cost Centre	DESCRIPTION	BUDGET 2024/25	YTD ACTUAL	PO COMMITMENTS	Forecast	RE-PROFILED BEYOND 2024/25	RE-PROFILED BEYOND 2025/26	Current month Variances £000	Prior month Variances £000	Forecast Narrative (Public)
40139	Banbury Health Centre - Refurbishment of roof covering and removal of redundant ventilation plant from roof	84	0	80	84			0	0	Works complete
40141	Castle Quay Waterfront	0	(616)	0	0			0	0	Retention payment to be paid
40144	Castle Quay	940	351	257	707			(233)	(233)	As part of the Castle Quay Development and the regeneration of Banbury, the Council is working closely and in partnership with a number of public and private organisations to repurpose parts of Castle Quay Shopping Centre to deliver a number of complimentary uses enabling the regeneration of Banbury. The underspend results from a cash flow and technical accounting adjustment per the requirements of the CIPFA code on Local Authority Accounting. These costs will instead be recognised as Revenue costs, spread over the life of the project
40167	Horsefair, Banbury	20	2	0	20			0	0	Works complete
40219	Community Centre - Works	94	72	1	94			0	0	Design works complete and contractor appointed. Condition report on Museum to be considered and funding sought to rectify a number of elements.
40224	Fairway Flats Refurbishment	200	3	10	13	187		0	0	Planning approval has been achieved. Designers are completing the detail design and specification for the solar panels and roof works. We will then need to tender these works as they are over £0.100m. We therefore anticipate works commencing in the new year and the works to continue through to the new financial year, partly due to the need to avoid the worst of the winter / spring weather, whilst carrying out works on a residential building roof space. We have adjusted the spend profile for these works.
40227	Banbury Museum - Decarbonisation Works	0	(20)	0	0			0	0	Retention payment to be paid
40232	Kidlington Leisure Centre - Decarbonisation Works	0	0	4	4			4	4	Small overspend for retention payment (offset elsewhere)
40239	Bicester East Community Centre	685	715	31	747			62	62	Overspend due to additional works on resolving public sewers diversion requirement of Thames Water and inaccurate information provided by them in the design stages. These works delayed works on site thus incurring further costs from the main contract works.
40241	Thorpe Place Roof Works	29	1	6	29			0	0	Carrying out drone survey of roof to identify condition ready for scoping and design.
40242	H&S Works to Banbury Shopping Arcade	122	14	3	122			0	0	Works currently in design
40254	Thorpe Lane Depot - Renewal of Electrical Incoming Main	169	0	0	169			0	0	Works are currently designed pending tender of the Electrical supply infrastructure. Works to be coordinated with the District Network Operator to install the new sub station, who are engaged. Waiting for dates from the District Network Operator.

40255	Installation of Photovoltaic at CDC Property	79	7	0	79			0	0	Preparing scope so that feasibilities can be carried out to maximise potential PV to the site. Planned delivery Q4 the financial year 2024/25.
40263	Kidlington Leisure New Electrical Main	20	0	0	20			0	0	Works are currently designed pending tender of the Electrical supply infrastructure. Works to be coordinated with the District Network Operator (DNO) to install the new sub station, who are engaged. Waiting for dates from the DNO. Planned delivery expected to be Q4 2024/25. There are 3 leases and sub leases to be amended before this can proceed.
40264	Sunshine Centre	182	226	32	257			75	75	Pressure occurred as result of previously unknown but essential works identified during the course of the works.
40279	Spiceball Sports Centre - Solar PV Car Ports	173	0	0	173			0	0	Preparing scope so that feasibilities can be carried out to maximise potential PV to the site. Planned delivery Q3/Q4 of the financial year 2024/25
40280	Kidlington Sports Centre - Solar PV Car Ports	137	0	0	137			0	0	Preparing scope so that feasibilities can be carried out to maximise potential PV to the site. Work cannot start until electrical mains installed (dependant on DNO). Planned delivery Q4 2024/25
40281	North Oxfordshire Academy - Solar Panels	18	0	0	18			0	0	Preparing scope so that feasibilities can be carried out to maximise potential PV to the site.
40282	Community Centre Solar Panels	108	0	0	108			0	0	Preparing scope so that feasibilities can be carried out to maximise potential PV to the site. Planned delivery in Q3/Q4 of 24/25. Part of EPC work, community centres will need to agree.
40283	Thorpe Lane - Solar Panels	34	0	0	34			0	0	Preparing scope so that feasibilities can be carried out to maximise potential PV to the site.
40284	Thorpe Lane - Heater Replacement (Gas to Electric)	24	0	0	24			0	0	Preparing scope so that feasibilities can be carried out to maximise potential PV to the site. Planned delivery is Q4 2024/25.
40278	Development of New Land Bicester Depot	85	89	302	121			36	4	The designers are appointed and Consultation on proposed layouts for the new depot are taking place with user groups. A Planning application is being prepared, however an ecological survey and protected species survey will be required to be submitted with this application and we have been unable to obtain these services, due to high demand for Ecologists, until October. This has resulted in a delay of 4 months to our original programme and consequent re-profiling of the capital budget as the anticipated completion is impacted by the delay to Planning approval.
40317	Cope Road, Banbury	29	1	31	29			0	0	Design work completed pending tendering. Contractor now appointed and starts in 4 weeks on site.
40316	CDC Office Relocation to Castle Quay	5,146	134	86	5,146			0	0	On target to be delivered in 24/25
40327	Thorpe Place Roofing Works	80	0	0	80			0	0	Carrying out drone survey of roof to identify condition ready for scoping and design.
<b>Property</b>		<b>8,458</b>	<b>980</b>	<b>842</b>	<b>8,215</b>	<b>187</b>	<b>0</b>	<b>(56)</b>	<b>(88)</b>	
40256	Processing Card Payments & Direct Debits	20	0	0	20			0	0	This Project will not be completed this year
<b>Finance</b>		<b>20</b>	<b>0</b>	<b>0</b>	<b>20</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	
40334	Robotic Process Automation Pilot	96	0	0	96			0	0	On target to be delivered in 24/25
<b>ICT</b>		<b>96</b>	<b>0</b>	<b>0</b>	<b>96</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	
<b>Resources &amp; Transformation</b>		<b>8,574</b>	<b>980</b>	<b>842</b>	<b>8,331</b>	<b>187</b>	<b>0</b>	<b>(56)</b>	<b>(88)</b>	

40062	East West Railways	30	0	30	30			0	0	The capital fund has been set up to enable the Council's costs to be recharged when responding to enquiries and regulatory applications, involving for example environmental and land drainage matters, made in connection with the East West Railways project. This is in partnership with England's Economic Heartland. The Digital Enhancement Project is a small element of CDC's commitment, involving the transfer of funds in four stages to reflect Network Rail's delivery of the digital infrastructure. Final invoice expected to be received by the end of Q3 once work is completed
40286	Transforming Market Square Bicester	180	(3)	0	180			0	0	Market Square study to be completed in 2024/25, An engagement event for the business sector was held in July and prompted clarification of the project's objectives. Further engagement events to gather input from both the business sector and local community groups are scheduled for November. Final drawings will be available by February 2025 for approval. Procurement of contractor and works to begin in 25/26, works aim to be completed 26/27.
40287	UK Shared Prosperity Fund (UK SPF) Year Three Investment Plan Programme	162	17	0	162			0	0	UKSPF capital grant will be fully spent in 2024/25 on the following: £90k Improvements to town centres & high streets £70k Community & neighbourhood infrastructure £2K improvements to local green spaces £50K contribution to floodlights at Whitelands Sport ground which is shown in cost centre Whiteland Farm Sports ground.
40288	UKSPF Rural Fund	408	305	65	408			(0)	(0)	UKSPF Rural Fund (REPF capital grant) will be fully spent in 2024/25: £20k - creation and improvements to local rural green spaces £67k – active travel enhancements to the local rural area £321k – capital grants for micro and small enterprises in rural areas.
<b>Growth &amp; Economy</b>		<b>780</b>	<b>319</b>	<b>96</b>	<b>780</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	
40028	Vehicle Replacement Programme	1,073	671	400	1,073			0	0	Anticipating full spend in 2024/25.
40187	On Street Recycling Bins	18	0	0	18			0	0	Anticipating full spend in 2024/25.
40216	Street Scene Furniture and Fencing project	15	0	0	15			0	0	Anticipating full spend in 2024/25.
40222	Burnehyll- Bicester Country Park	60	10	16	10	50		0	0	Reprofiling of £0.050m required in to 2025/26. Grants and S106 contributions have resulted in a reduction in capital spend required in 2024/25.
40257	Additional Commercial Waste Containers	0	0	0	0			0	0	Budget to be moved to CC 40331
40258	Kidlington Public Convenience Refurbishment	0	0	0	0			0	0	Budget reprofiled in to 2025/26.
40259	Market Equipment Replacement	15	5	0	15			0	0	Anticipating full spend in quarter 2 of 2024/25.
40291	New Commercial Waste IT System	25	18	0	25			0	0	Anticipating full spend in 2024/25.
40331	Additional Commercial Waste Containers	29	0	0	33			4	0	Anticipating full spend in 2024/25.
<b>Environmental Services</b>		<b>1,235</b>	<b>703</b>	<b>416</b>	<b>1,189</b>	<b>50</b>	<b>0</b>	<b>4</b>	<b>0</b>	
40083	Disabled Facilities Grants	1,384	713	28	1,200	184		0	0	£0.184m underspend now anticipated in 2024/25, due to delays with delivery of several larger adaptations projects previously forecast for completion before year end.
40084	Discretionary Grants Domestic Properties	150	72	0	150			0	0	Full spend anticipated
40160	Housing Services - capital	168	8	0	168			0	0	Forecasting in line with budget

40251	Longford Park Art	45	0	0	0	45		0	0	Artist will complete their commissions once the parkland has been handed over. This is dependent on the development reaching the required standard.
40262	Town Centre House Purchase and Repair	2,880	1,751	41	2,524			(356)	(356)	Some delays resulting in later completion but still due to complete in 2024/25
40294	S106 - Ambrosden Community Facility Project	20	0	0	20			0	0	Parish Council has a variety of projects they are looking to increase capacity at the village hall.
40295	S106 - Ambrosden Indoor Sport Project	65	0	0	65	0		0	0	Awaiting new project details.
40297	S106 - Ardley & Fewcott Play Area Project	15	0	0	15			0	0	Bench and play tunnel project approved, all paperwork completed and signed off, project delivery underway.
40298	S106 - Ardley & Fewcott Village Hall Project	3	0	0	3			0	0	Project details for replacement windows received. S106 spend approved.
40301	S106 - Graven Hill Outdoor Sport Project	52	0	0	52			0	0	Expected to commence works on the Graven Hill Project during 2024/25. Intention to secure services of project consultants to support on initial phases of the programme through to delivery. Project Consultants now procured, with initial scoping discussions to take place
40303	S106 - Hanwell Fields Community Centre Projects	180	0	14	180			0	0	S106 funding is allocated to Hanwell Fields Community Centre to enhance the existing facility with the intention of increasing opportunities for residents to take part in activities. This project is centred around the options for putting in a mezzanine floor in the current main hall area to give a split level facility. Currently working with Property Team around whether this is feasible and affordable with some cost estimates. Initial design proposals provided (to be discussed as part of design team meetings) <b>Outline costs provided, however review and update of designs will result in amended costs. Preferred option being explored</b>
40305	S106 - Horley Cricket Club Pavilion Project	0	0	0	0			0	0	The project is for improvements and enhancements to the Horley Cricket Club Pavilion. There have been contractors on site to price up the works, however nothing will happen until post September because of cricket season.
40308	S106 - Milton Road Community Facility and Sports Pitch Project	100	0	0	100			0	0	CDC hold the £471k of s106 for the Parish Council who are seeking additional grant funding from other sources to increase what they are aiming to deliver on
40310	S106 - Spiceball Leisure Centre Improvements	14	0	0	14			0	0	Options are being considered
40312	S106 - Whitelands Farm Sports Ground (Pedestrian crossing and various works)	132	98	0	132			0	0	Awaiting confirmation of how the pedestrian crossing is to be delivered. Project to be delivered upon in 2024/25
40313	S106 - Woodgreen Leisure Centre Improvements	47	8	8	47			0	0	Improvements planned to the Swimming Pool Changing Rooms. Expected to complete on works during February/March 2025. <b>Quotations expected by 11th December</b>
40314	S106 - Deddington Parish Council Projects	8	0	0	8			0	0	To be spent on the Windmill Community Centre car park lighting project - project spend approved and delivery underway.
40315	S106 - Longford Park Sport Pitches	10	0	0	10			0	0	Maintenance cost for the pitches and pavilion
40318	S106 - Steeple Aston Parish Council Village Hall Sports and Recreation Centre	0	(1)	0	0			0	0	Parish Council led projects towards improvements at the village hall, sports & recreation centre and playing fields.

40319	Local Authority Housing Fund R2	335	179	0	335			0	0	Grant agreements have been concluded with two registered providers of social housing, Sanctuary Housing and South Oxfordshire Housing Association (SOHA) to bring homes forward for clients within resettlement scheme. Second and final payment of £100k to Sanctuary Housing due in the next week. £56k remaining for floor coverings which Sanctuary will also deliver, some funds may remain at then of the project.
40324	Development of Activity Play Zones	162	0	0	162			0	(438)	Application process for Football Foundation Funding has been completed and working with Football Foundation and Town Council on project delivery. Grant application has been accepted by the Football Foundation. Subject to Planning Permission works likely to commence early to mid 2025. Projects identified in Princess Diana Park and Chandos Close
40325	Graven Hill Community and Infrastructure Projects	80	0	0	80			0	0	Expected to commence works on the Graven Hill Project during 2024/25. Intention to secure services of project consultants to support on initial phases of the programme through to delivery. Project Consultants now procured, with initial scoping discussions
40328	S106 – Windmill Community and Sports Centre Tennis Courts	51	0	42	51			0	0	Mini tennis court project underway and full spend anticipated in 2024/25
40329	Spiceball Leisure Centre Structural Beams	100	0	0	100			0	0	Options to be considered for moving proposed works to April 2025 to coincide with planned leisure operator works or delay to December 2025
40330	Replacement of the Sports Hall Roof at Bicester Leisure Centre	45	0	20	45			0	0	After receiving the condition survey report into the roof that gave options to extend the lifespan by 5 to 10 years it was agreed to take this option which fell within the budget allocation, rather than a new complete roof which would require a request for additional funding. Tender returns required for 30th October. Works now anticipated November/December 2024. Contract awarded for the works - completion expected Jan 25
40332	S106 - grant funded Affordable Accommodation	560	0	0	560			0	0	To provide grant funding to South Oxfordshire Housing Association (SOHA) (a registered provider of social housing), providing 40% contribution towards the cost of securing 4 homes in the Cherwell District to be converted to social housing. Initially, these homes will provide temporary accommodation for homeless households in Cherwell to whom CDC have a legal duty to temporarily accommodate. Longer term they will revert to affordable rented housing let through CDC's housing register should they no longer be required to be used as temporary accommodation. The size/type of the homes agreed in principle for SOHA to purchase are 3 x 2-bedroom houses and 1 x 3-bedroom house. Grant agreement to be put in place with SOHA Autumn 2024. Payment of grant to be made to SOHA Winter/Spring 2024/25
	<b>Wellbeing &amp; Housing</b>	<b>6,606</b>	<b>2,828</b>	<b>153</b>	<b>6,021</b>	<b>229</b>	<b>0</b>	<b>(356)</b>	<b>(794)</b>	
40245	Enable Agile Working	15	0	0	15			0	0	This funding is still intended to be used to purchase the IT hardware required to enable the teams in Regulatory Services to use the case management system whilst 'on-site' carrying out inspection work, etc. The release of the app that will support mobile working continues to be delayed but is progressing. we expect the app to be released before the end of 2024.
40333	CCTV Thames Valley Project	250	0	0	250			0	0	Upgrade the public open space CCTV network and cameras to meet the necessary threshold to be included in the OPCC Thames Valley CCTV project
	<b>Regulatory Services</b>	<b>265</b>	<b>0</b>	<b>0</b>	<b>265</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	
	<b>Communities</b>	<b>8,886</b>	<b>3,850</b>	<b>666</b>	<b>8,255</b>	<b>279</b>	<b>0</b>	<b>(352)</b>	<b>(794)</b>	

Capital	17,460	4,831	1,508	16,586	466	0	(407)	(881)	
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CHERWELL TOTAL CAPITAL PROJECT EXPENDITURE

CODE	DESCRIPTION	Total 24/25 Project Budget	Forecast	RE-PROFILED BEYOND 2024/25	24/25 Variance	Future Years Budget	Project Total Budget	Project Total forecast	Project Total Variance	Narrative
40139	Banbury Health Centre - Refurbishment of Ventilation, Heating & Cooling Systems	84	84	0	0	0	84	84	0	Works complete
40144	Castle Quay	940	707	0	(233)	1,793	2,733	2,500	(233)	As part of the Castle Quay Development and the regeneration of Banbury, the Council is working closely and in partnership with a number of public and private organisations to repurpose parts of Castle Quay Shopping Centre to deliver a number of complimentary uses enabling the regeneration of Banbury. The underspend results from a cash flow and technical accounting adjustment per the requirements of the CIPFA code on Local Authority Accounting. These costs will instead be recognised as Revenue costs, spread over the life of the project
40167	Horsefair, Banbury	20	20	0	0	0	20	20	0	Works complete
40219	Community Centre - Works	94	94	0	0	0	94	94	0	Design works complete and contractor appointed. Condition report on Museum to be considered and funding sought to rectify a number of elements.
40224	Fairway Flats Refurbishment	200	13	187	0	138	338	338	0	Planning approval has been achieved. Designers are completing the detail design and specification for the solar panels and roof works. We will then need to tender these works as they are over £0.100m. We therefore anticipate works commencing in the new year and the works to continue through to the new financial year, partly due to the need to avoid the worst of the winter / spring weather, whilst carrying out works on a residential building roof space. We have adjusted the spend profile for these works.
40227	Banbury Museum - Decarbonisation Works	0	0	0	0	0	0	0	0	Retention payment to be paid
40232	Kidlington Leisure Centre - Decarbonisation Works	0	4	0	4	0	0	4	4	Small overspend for retention payment (offset elsewhere)
40239	Bicester East Community Centre	685	747	0	62	0	685	747	62	Overspend due to additional works on resolving public sewers diversion requirement of Thames Water and inaccurate information provided by them in the design stages. These works delayed works on site thus incurring further costs from the main contract works.
40241	Thorpe Place Roof Works	29	29	0	0	0	29	29	0	Carrying out drone survey of roof to identify condition ready for scoping and design.
40242	H&S Works to Banbury Shopping Arcade	122	122	0	0	0	122	122	0	Works currently in design
40254	Thorpe Lane Depot - Renewal of Electrical Incoming Main	169	169	0	0	0	169	169	0	Works are currently designed pending tender of the Electrical supply infrastructure. Works to be coordinated with the District Network Operator to install the new sub station, who are engaged. Waiting for dates from the District Network Operator.
40255	Installation of Photovoltaic at CDC Property	79	79	0	0	0	79	79	0	Preparing scope so that feasibilities can be carried out to maximise potential PV to the site. Planned delivery Q4 the financial year 2024/25.
40263	Kidlington Leisure New Electrical Main	20	20	0	0	0	20	20	0	Works are currently designed pending tender of the Electrical supply infrastructure. Works to be coordinated with the District Network Operator (DNO) to install the new sub station, who are engaged. Waiting for dates from the DNO. Planned delivery expected to be Q4 2024/25. There are 3 leases and sub leases to be amended before this can proceed.
40264	Sunshine Centre	182	257	0	75	0	182	257	75	Pressure occurred as result of previously unknown but essential works identified during the course of the works.
40279	Spiceball Sports Centre - Solar PV Car Ports	173	173	0	0	0	173	173	0	Preparing scope so that feasibilities can be carried out to maximise potential PV to the site. Planned delivery Q3/Q4 of the financial year 2024/25

40280	Kidlington Sports Centre - Solar PV Car Ports	137	137	0	0	0	137	137	0	Preparing scope so that feasibilities can be carried out to maximise potential PV to the site. Work cannot start until electrical mains installed (dependant on DNO). Planned delivery Q4 2024/25
40281	North Oxfordshire Academy - Solar Panels	18	18	0	0	0	18	18	0	Preparing scope so that feasibilities can be carried out to maximise potential PV to the site.
40282	Community Centre Solar Panels	108	108	0	0	0	108	108	0	Preparing scope so that feasibilities can be carried out to maximise potential PV to the site. Planned delivery in Q3/Q4 of 24/25. Part of EPC work, community centres will need to agree.
40283	Thorpe Lane - Solar Panels	34	34	0	0	0	34	34	0	Preparing scope so that feasibilities can be carried out to maximise potential PV to the site.
40284	Thorpe Lane - Heater Replacement (Gas to Electric)	24	24	0	0	0	24	24	0	Preparing scope so that feasibilities can be carried out to maximise potential PV to the site. Planned delivery is Q4 2024/25.
40278	Development of New Land Bicester Depot	85	121	0	36	3,874	3,959	3,995	36	The designers are appointed and Consultation on proposed layouts for the new depot are taking place with user groups. A Planning application is being prepared, however an ecological survey and protected species survey will be required to be submitted with this application and we have been unable to obtain these services, due to high demand for Ecologists, until October. This has resulted in a delay of 4 months to our original programme and consequent re-profiling of the capital budget as the anticipated completion is impacted by the delay to Planning approval.
40316	CDC Office Relocation to Castle Quay	5,146	5,146	0	0	0	5,146	5,146	0	On target to be delivered in 24/25
40317	Cope Road, Banbury	29	29	0	0	0	29	29	0	Design work completed pending tendering. Contractor now appointed and starts in 4 weeks on site.
40327	Thorpe Place Roofing Works	80	80	0	0	0	80	80	0	Carrying out drone survey of roof to identify condition ready for scoping and design.
<b>Property</b>		<b>8,458</b>	<b>8,215</b>	<b>187</b>	<b>(56)</b>	<b>5,805</b>	<b>14,263</b>	<b>14,207</b>	<b>(56)</b>	
40256	Processing Card Payments & Direct Debits	20	20	0	0	0	20	20	0	This Project will not be completed this year
<b>Finance Total</b>		<b>20</b>	<b>20</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>20</b>	<b>20</b>	<b>0</b>	
40237	Council Website & Digital Service	0	0	0	0	122	122	122	0	Work underway to select a product to form basis of Unified CRM Platform.
40334	Robotic Process Automation Pilot	96	96	0	0	36	132	132	0	
40326	Digital Futures Programme (Business Cases Required)	0	0	0	0	217	217	217	0	New digital futures budget
<b>ICT</b>		<b>96</b>	<b>96</b>	<b>0</b>	<b>0</b>	<b>375</b>	<b>471</b>	<b>471</b>	<b>0</b>	
<b>Resources &amp; Transformation</b>		<b>8,574</b>	<b>8,331</b>	<b>187</b>	<b>(56)</b>	<b>6,180</b>	<b>14,754</b>	<b>14,698</b>	<b>(56)</b>	
40062	East West Railways	30	30	0	0	4,248	4,278	4,278	0	The capital fund has been set up to enable the Council's costs to be recharged when responding to enquiries and regulatory applications, involving for example environmental and land drainage matters, made in connection with the East West Railways project. This is in partnership with England's Economic Heartland. The Digital Enhancement Project is a small element of CDC's commitment, involving the transfer of funds in four stages to reflect Network Rail's delivery of the digital infrastructure. Final invoice expected to be received by the end of Q3 once work is completed
40286	Transforming Market Square Bicester	180	180	0	0	4,055	4,235	4,235	0	Market Square study to be completed in 2024/25, An engagement event for the business sector was held in July and prompted clarification of the project's objectives. Further engagement events to gather input from both the business sector and local community groups are scheduled for November. Final drawings will be available by February 2025 for approval. Procurement of contractor and works to begin in 25/26, works aim to be completed 26/27.
40287	UK Shared Prosperity Fund (UK SPF) Year Two Investment Plan Programme	162	162	0	0	0	162	162	0	UKSPF capital grant will be fully spent in 2024/25 on the following; £90k Improvements to town centres & high streets £70k Community & neighbourhood infrastructure £2k improvements to local green spaces £50k contribution to floodlights at Whitelands Sport ground which is shown in cost centre Whiteland Farm Sports ground.
40288	UKSPF Rural Fund	408	408	0	(0)	0	408	408	(0)	UKSPF Rural Fund (REPF capital grant) will be fully spent in 2024/25: £20k - creation and improvements to local rural green spaces £67k - active travel enhancements to the local rural area £321k - capital grants for micro and small enterprises in rural areas.



Growth & Economy		780	780	0	0	8,303	9,083	9,083	0	
40028	Vehicle Replacement Programme	1,073	1,073	0	0	5,331	6,404	6,404	0	Anticipating full spend in 2024/25.
40187	On Street Recycling Bins	18	18	0	0	0	18	18	0	Anticipating full spend in 2024/25.
40216	Street Scene Furniture and Fencing project	15	15	0	0	0	15	15	0	Anticipating full spend in 2024/25.
40218	Depot Fuel System Renewal	0	0	0	0	35	35	35	0	Budget reprofiled in to 2025/26.
40222	Burnehyll- Bicester Country Park	60	10	50	0	64	124	124	0	Reprofiling of £0.050m required in to 2025/26. Grants and S106 contributions have resulted in a reduction in capital spend required in 2024/25.
40258	Kidlington Public Convenience Refurbishment	0	0	0	0	90	90	90	0	Budget reprofiled in to 2025/26.
40259	Market Equipment Replacement	15	15	0	0	0	15	15	0	Anticipating full spend in quarter 2 of 2024/25.
40291	New Commercial Waste IT System	25	25	0	0	0	25	25	0	Anticipating full spend in 2024/25.
40320	Net Zero	0	0	0	0	625	625	625	0	
40321	Landscape Software Upgrade	0	0	0	0	25	25	25	0	Anticipating full spend in 2024/25.
40322	Street Cleansing IT System	0	0	0	0	25	25	25	0	Anticipating full spend in 2024/25.
40331	Additional Commercial Waste Containers	29	33	0	4	25	54	58	4	Anticipating full spend in 2024/25.
Environmental		1,235	1,189	50	4	6,220	7,455	7,459	4	
40019	Bicester Leisure Centre Extension	0	0	0	0	79	79	79	0	The current budget is for preparatory works to identify the business case for operation ahead of S106 monies coming in from developments. Budget requires reprofiling as scheme is outlined for build in 2027-28
40083	Disabled Facilities Grants	1,384	1,200	184	0	4,956	6,340	6,340	0	£0.184m underspend now anticipated in 2024/25, due to delays with delivery of several larger adaptations projects previously forecast for completion before year end.
40084	Discretionary Grants Domestic Properties	150	150	0	0	450	600	600	0	Full spend anticipated
40160	Housing Services - capital	168	168	0	0	0	168	168	0	Forecasting in line with budget
40251	Longford Park Art	45	0	45	0	0	45	45	0	Artist will complete their commissions once the parkland has been handed over. This is dependent on the development reaching the required standard.
40262	Town Centre House Purchase and Repair	2,880	2,524	0	(356)	0	2,880	2,524	(356)	Some delays resulting in later completion but still due to complete in 2024/25
40294	S106 - Ambrosden Community Facility Project	20	20	0	0	0	20	20	0	Parish Council has a variety of projects they are looking to increase capacity at the village hall.
40295	S106 - Ambrosden Indoor Sport Project	65	65	0	0	0	65	65	0	Awaiting new project details.
40296	S106 - Ambrosden Outdoor Sports	0	0	0	0	130	130	130	0	Site to be confirmed before project can move forward therefore reprofiled beyond 2024/25
40297	S106 - Ardley & Fewcott Play Area Project	15	15	0	0	0	15	15	0	Bench and play tunnel project approved, all paperwork completed and signed off, project delivery underway.
40298	S106 - Ardley & Fewcott Village Hall Project	3	3	0	0	0	3	3	0	Project details for replacement windows received. S106 spend approved.
40300	S106 - Bicester Leisure Centre Extension	0	0	0	0	1,154	1,154	1,154	0	Initial stages of feasibility have been completed with high level costings received to deliver the project. Further stages required including detailed business case. Reprofiled beyond 2024-25 to when S106 funding is received and fully available.
40301	S106 - Graven Hill Outdoor Sport Project	52	52	0	0	0	52	52	0	Expected to commence works on the Graven Hill Project during 2024/25. Intention to secure services of project consultants to support on initial phases of the programme through to delivery. Project Consultants now procured, with initial scoping discussions to take place
40302	S106 - Grimsbury Community Centre Projects	0	0	0	0	0	0	0	0	This S106 forms part of the Playzone Projects
40303	S106 - Hanwell Fields Community Centre Projects	180	180	0	0	0	180	180	0	S106 funding is allocated to Hanwell Fields Community Centre to enhance the existing facility with the intention of increasing opportunities for residents to take part in activities. This project is centred around the options for putting in a mezzanine floor in the current main hall area to give a split level facility. Currently working with Property Team around whether this is feasible and affordable with some cost estimates. Initial design proposals provided (to be discussed as part of design team meetings) Outline costs provided, however review and update of designs will result in amended costs. Preferred option being explored
40304	S106 - Hook Norton Sport And Social Club Project	0	0	0	0	80	80	80	0	The scale and scope of the project is yet to be confirmed and therefore reprofiled to 2025/26

40305	S106 - Horley Cricket Club Pavilion Project	0	0	0	0	110	110	110	0	The project is for improvements and enhancements to the Horley Cricket Club Pavilion. There have been contractors on site to price up the works, however nothing will happen until post September because of cricket season.
40307	S106 - Kidlington & Gosford Leisure Centre	0	0	0	0	20	20	20	0	No detailed projects as yet therefore S106 funding to be reprofiled beyond 2024-25
40308	S106 - Milton Road Community Facility and Sports Pitch Project	100	100	0	0	371	471	471	0	CDC hold the £471k of s106 for the Parish Council who are seeking additional grant funding from other sources to increase what they are aiming to deliver on
40310	S106 - Spiceball Leisure Centre Improvements	14	14	0	0	0	14	14	0	Options are being considered
40311	S106 - The Hill Improvements Project	0	0	0	0	50	50	50	0	Awaiting details of projects funded by S106 funding already received, therefore budget request to reprofile beyond 2024-25
40312	S106 - Whitelands Farm Sports Ground (Pedestrian crossing and various works)	132	132	0	0	0	132	132	0	Awaiting confirmation of how the pedestrian crossing is to be delivered. Project to be delivered upon in 2024/25
40313	S106 - Woodgreen Leisure Centre Improvements	47	47	0	0	0	47	47	0	Improvements planned to the Swimming Pool Changing Rooms. Expected to complete on works during February/March 2025. <b>Quotations expected by 11th December</b>
40314	S106 - Deddington Parish Council Projects	8	8	0	0	0	8	8	0	To be spent on the Windmill Community Centre car park lighting project - project spend approved and delivery underway.
40315	S106 - Longford Park Sport Pitches	10	10	0	0	0	10	10	0	Maintenance cost for the pitches and pavilion
40319	Local Authority Housing Fund R2	335	335	0	0	0	335	335	0	Grant agreements have been concluded with two registered providers of social housing, Sanctuary Housing and South Oxfordshire Housing Association (SOHA) to bring homes forward for clients within resettlement scheme. Second and final payment of £100k to Sanctuary Housing <b>due in the next week</b> . £56k remaining for floor coverings which Sanctuary will also deliver, some funds may remain at then of the project.
40323	NOA 3G Pitch Development	0	0	0	0	1,600	1,600	1,600	0	Due to proposed alternative location of 3G Pitch, the progression to delivery will be dependent on a number of factors. Whilst unlikely there will be any spend in 2024/25 there may be some set up costs should delivery stage be achieved before year end
40324	Development of Activity Play Zones	162	162	0	0	0	162	162	0	Application process for Football Foundation Funding has been completed and working with Football Foundation and Town Council on project delivery. Grant application has been accepted by the Football Foundation. Subject to Planning Permission works likely to commence early to mid 2025. Projects identified in Princess Diana Park and Chandos Close
40325	Graven Hill Community and Infrastructure Projects	80	80	0	0	0	80	80	0	Expected to commence works on the Graven Hill Project during 2024/25. Intention to secure services of project consultants to support on initial phases of the programme through to delivery. Project Consultants now procured, with initial scoping discussions
40328	S106 – Windmill Community and Sports Centre Tennis Courts	51	51	0	0	0	51	51	0	Mini tennis court project underway and full spend anticipated in 2024/25
40329	Spiceball Leisure Centre Structural Beams	100	100	0	0	0	100	100	0	Options to be considered for moving proposed works to April 2025 to coincide with planned leisure operator works or delay to December 2025
40330	Replacement of the Sports Hall Roof at Bicester Leisure Centre	45	45	0	0	0	45	45	0	After receiving the condition survey report into the roof that gave options to extend the lifespan by 5 to 10 years it was agreed to take this option which fell within the budget allocation, rather than a new complete roof which would require a request for additional funding. Tender returns required for 30th October. Works now anticipated November/December 2024. <b>Contract awarded for the works - completion expected Jan 25</b>
40332	S106 - grant funded Affordable Accommodation	560	560	0	0	0	560	560	0	To provide grant funding to South Oxfordshire Housing Association (SOHA) (a registered provider of social housing), providing 40% contribution towards the cost of securing 4 homes in the Cherwell District to be converted to social housing. Initially, these homes will provide temporary accommodation for homeless households in Cherwell to whom CDC have a legal duty to temporarily accommodate. Longer term they will revert to affordable rented housing let through CDC's housing register should they no longer be required to be used as temporary accommodation. The size/type of the homes agreed in principle for SOHA to purchase are 3 x 2-bedroom houses and 1 x 3-bedroom house. Grant agreement to be put in place with SOHA Autumn 2024. Payment of grant to be made to SOHA Winter/Spring 2024/25
<b>Wellbeing &amp; Housing</b>		<b>6,606</b>	<b>6,021</b>	<b>229</b>	<b>(356)</b>	<b>9,000</b>	<b>15,606</b>	<b>15,250</b>	<b>(356)</b>	
40245	Enable Agile Working	15	15	0	0	0	15	15	0	This funding is still intended to be used to purchase the IT hardware required to enable the teams in Regulatory Services to use the case management system whilst 'on-site' carrying out inspection work, etc. The release of the app that will support mobile working continues to be delayed but is progressing. we expect the app to be released before the end of 2024.

40333	CCTV Thames Valley Project	250	250	0	0	0	250	250	0	Upgrade the public open space CCTV network and cameras to meet the necessary threshold to be included in the OPCC Thames Valley CCTV project
<b>Regulatory Services</b>		<b>265</b>	<b>265</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>265</b>	<b>265</b>	<b>0</b>	
<b>Communities</b>		<b>8,886</b>	<b>8,255</b>	<b>279</b>	<b>(352)</b>	<b>23,523</b>	<b>32,409</b>	<b>32,057</b>	<b>(352)</b>	
<b>Capital Total</b>		<b>17,460</b>	<b>16,586</b>	<b>466</b>	<b>(407)</b>	<b>29,703</b>	<b>47,163</b>	<b>46,755</b>	<b>(407)</b>	

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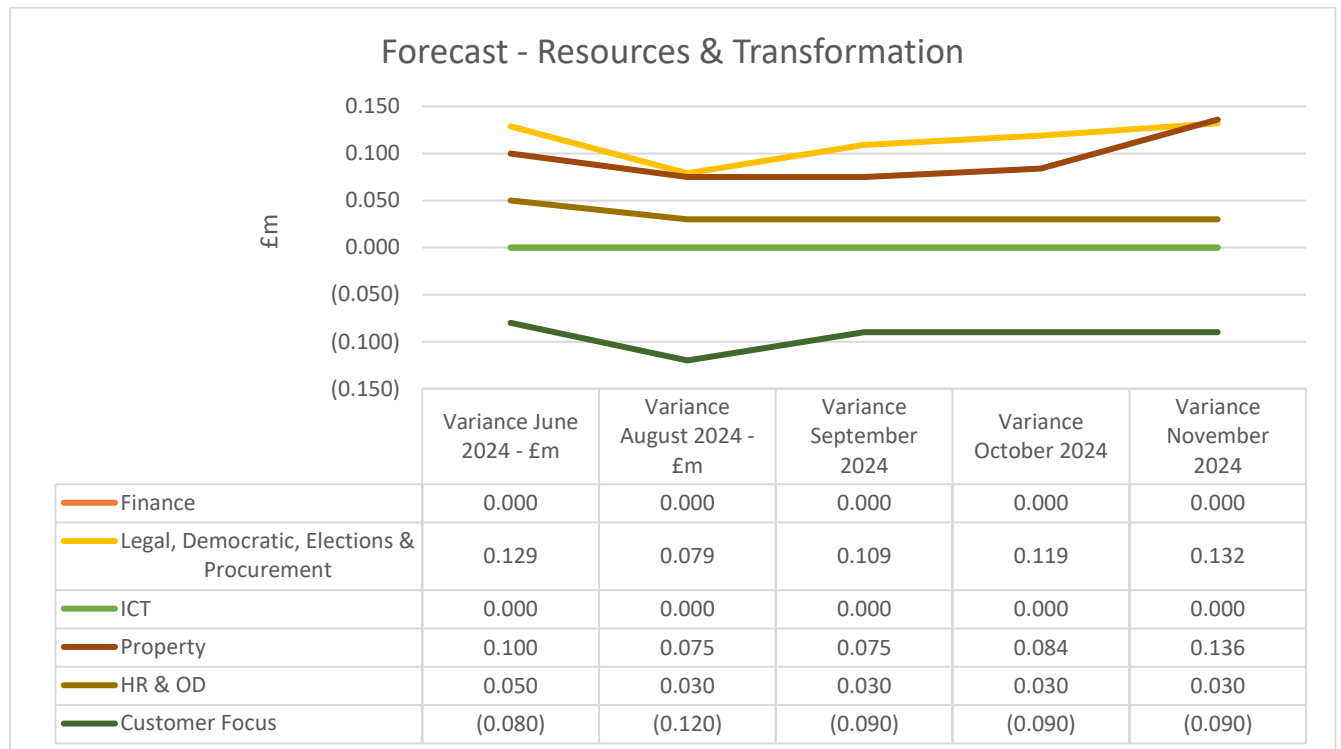
## Appendix 2 - Report Details – Additional Revenue narrative

### Resources & Transformation

#### Revenue:

Resources are forecasting £0.208m overspend against a budget of £7.682m (2.7%).

The service is keeping spend tightly under control, with constant action being taken to mitigate against increased costs. It should be noted that the increase in variance is due to repairs that were required at Banbury Museum.



#### Finance

Variation  
£0.000m

Finance is forecasting in line with budget.

Variation to October's  
Forecast  
£0.000m

---

Legal, Democratic,  
Elections &  
Procurement

Variation  
£0.132m  
Overspend

There is a continued need to provide legal advice to officers and members in relation to litigation, information governance, planning and general case load. Most of the work in these areas is funded through engaging locum lawyers and other professional staff. The service is also covering maternity leave and case load accumulated due to key staff being on leave.

The Monitoring Officer is responsible for securing appropriate staff and suitable legal advice, investigating and reporting on anything the Council does that has the potential to be an illegal action or investigating and reporting on any action that might count as maladministration.

Variation to October's  
Forecast  
£0.013m

The service is undertaking recruitment to permanent positions as well as training new member of staff as swiftly as possible. We fully recognise the needs to operate within budget however, a point of note in regard to the legal budget is that there is a high element of unpredictability to costs which arise in dealing with legal instructions in regard to unforeseen matters arising, for which no 'ongoing' forecast and provision can be made. Whilst our risk management can seek to reduce this, it is unrealistic to assume this unplanned element can be completely eliminated.

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ICT

Variation  
£0.000m overspend

IT are forecasting to be within budget with small overspends in supplies and services being offset by an underspend in salaries to be adjusted now that budgets are realigned for Digital and Innovation.

Variation to October's  
Forecast

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£0.000m

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Property

Variation  
£0.136m

The £0.136m overspend is due to the following: -  
£0.100m overspend at CQ remains unchanged and is due to void costs of holding vacant units and unscheduled necessary expenditure for car park lighting and other maintenance costs. Work to review contracts and market void units is continuing with the impact of reducing the overspend as the year progresses. There have been some positive movements achieved through the reduction of utility expenditure forecasts.

(£0.008m) underspend in Property because of an underspend due to vacancies that were not filled until October, admin charges generating an income, improved income from rent reviews and lease renewals and reduced repair and maintenance costs. This underspend has been largely offset by an overspend in repair and maintenance across the service

£0.044m overspend in car parks (due to various small overspends across the service, including electricity and insurance expenses)

Variation to October's  
Forecast  
£0.052m

£0.005m reduction in overspend within Car Park forecast and around £0.057m increase in repair and maintenance costs, particularly within Banbury Museum.

Customer Focus

Variation  
(£0.090m) underspend

Customer Focus is forecasting an underspend of (£0.090m) at year end. The bulk of this underspend is from holding on to vacancies.

Variation to October's  
Forecast  
(£0.000m)

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HR & OD

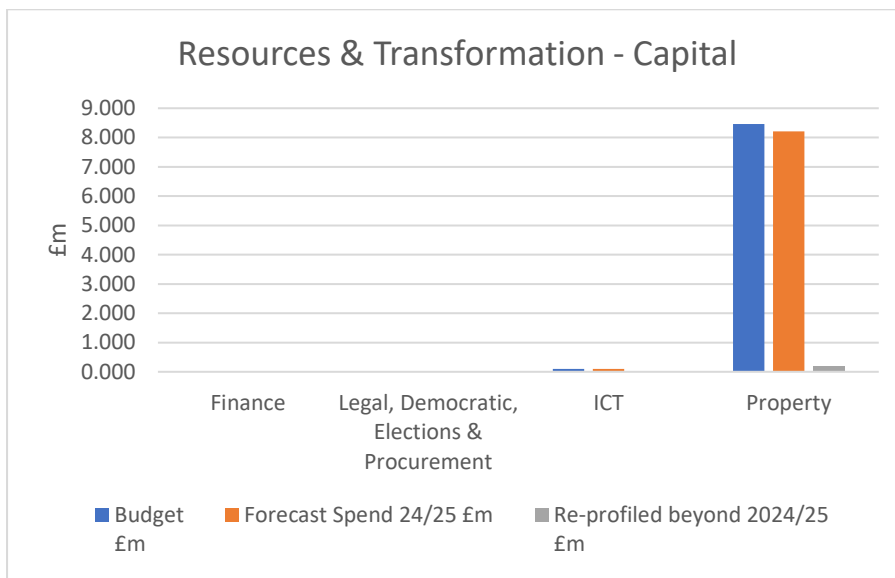
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Variations £0.030m  
Overspend

Implementation of the managed payroll system has proven more economical and offered more resilience than the in-house service, however there is an anticipated overspend of £0.050m as a result of the implementation which the service is looking to mitigate with efficiencies within the HR budget. The current forecast is £0.030m overspend.

Variation to October's  
Forecast  
(£0.000m)

**Capital:**



Service	Budget £m	Forecast Spend 24/25 £m	Re- profiled beyond 2024/25 £m	Variance to Budget £m	Prior Month Variance to Budget £m
Finance	0.020	0.020	0.000	0.000	0.000
Legal, Democratic, Elections & Procurement	0.000	0.000	0.000	0.000	0.000
ICT	0.096	0.096	0.000	0.000	0.000
Property	8.458	8.215	0.187	(0.056)	(0.088)
<b>Total</b>	<b>8.574</b>	<b>8.331</b>	<b>0.187</b>	<b>(0.056)</b>	<b>(0.088)</b>

For detailed explanation and variances please see appendix 1.

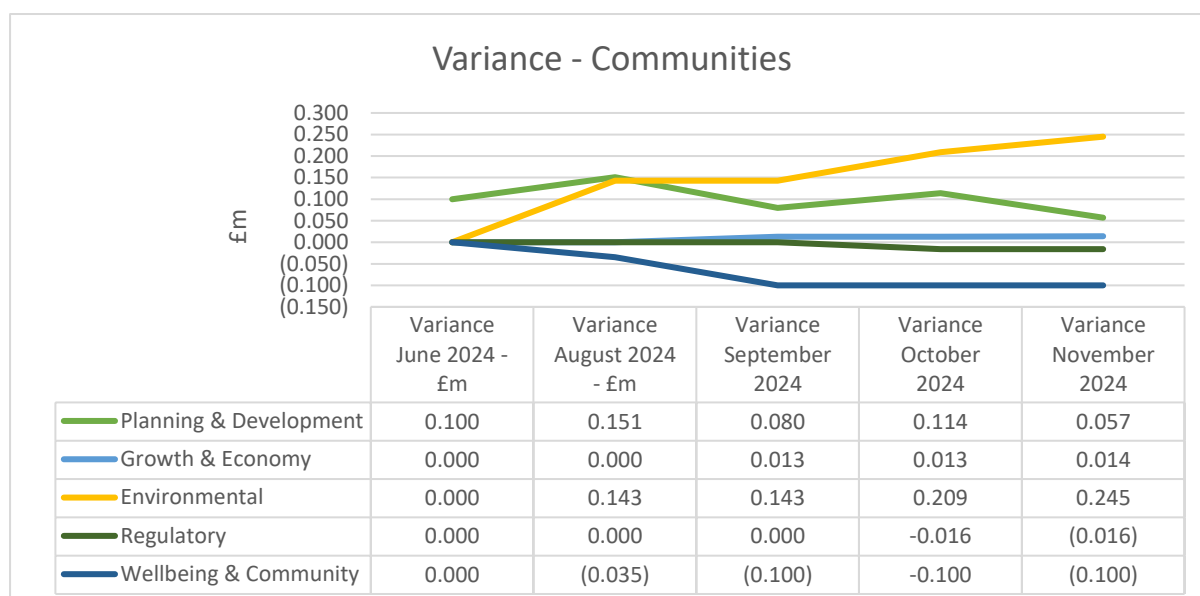


## Communities

### Revenue:

Communities are forecasting a £0.200m overspend against a budget of £11.209m, (1.8%).

With a number of pressures emerging in the forecast to year end, the directorate leadership team has carried out a review of pressures and mitigations to contain across the Communities directorate in so far as possible. This has substantially reduced the forecast pressures to year end and will be closely monitored month by month to track progress and for any further changes.



### **Planning & Development**

Variation  
£0.057m overspend

Planning and Development is forecasting an overspend of £0.057m.

Development management has a forecast variance from budget of £0.034m. This includes a lower forecast for planning application fees for the year but higher expected income from Planning Performance Agreements (PPAs)

Planning Policy, Conservation & Design is now forecasting an underspend of (£0.026m) as expected external costs have fallen.

	<p>Building Control is forecasting an overspend of £0.046m due mainly to lower income expectations and necessary agency costs.</p>
<p>Variation to October's Forecast (£0.057m)</p>	<p>The main changes since last month are the reduction in external costs for Planning Policy, a further drop in income expectations for Building Control, some additional appeal costs and additional Development Management agency costs. However, the forecast for PPA income has risen. Overall, the change is (£0.057m).</p> <p>There is active monitoring of costs relative to income to continue to put downward pressure on the forecast overspend.</p>
<hr/> <p>Growth &amp; Economy</p>	
<p>Variation £0.014m</p>	<p>Growth and Economy are predicting a £0.0014m overspend. Delivery continues in relation to the Shared Prosperity Funding commitments, alongside the Bicester Garden Town programme and work in Banbury. Additional temporary resource has been secured for the development of a programme for Kidlington and to interim provide project management capacity.</p>
<p>Variation to October's Forecast £0.001m</p>	
<hr/> <p>Environmental</p>	
<p>Variation £0.245m overspend</p>	<p>The forecasted pressure of £0.245m within Environmental Services is primarily due to staffing pressures and agency costs within Waste and Recycling, this is being closely monitored and managed.</p> <p>This pressure also now captures the request to call upon a transfer from the market risk reserve to cover the Gate Fees overspend of £0.200m and the requirement to use the £0.085m fuel reserve from policy contingency.</p> <p>The service is looking at all options to mitigate the overspend</p>
<p>Variation to October's Forecast £0.036m</p>	<p>The on-month movement of £0.036m from October's reporting is primarily due to an increase in anticipated garden waste income and a reduction in Arboriculture work predicted to take place before March 2025.</p> <p>The service is looking at all options to mitigate the overspend including additional non-recruitment to vacant posts within the service along with a review of fuel costs compared to budget.</p>

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This pressure also now captures an overspend to cover gate fees of £0.200m. We will consider what level of market risk policy contingency is available to help mitigate this pressure.

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#### Regulatory

Variation  
(£0.016m)  
Underspend

Regulatory Services and Community Safety are forecasting a (£0.016m) underspend – this is due to savings in staffing costs as some posts remain unfilled following the department restructure.

Variation to October's  
Forecast  
£0.000

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#### Wellbeing & Housing

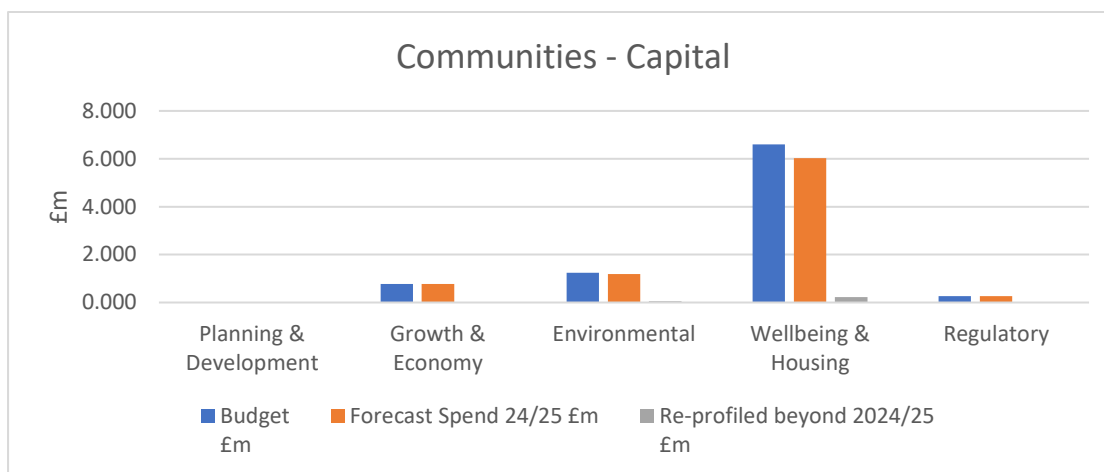
Variation  
(£0.100m)  
underspend

The services continue to actively manage pressures arising from operating front line services and flexing programme delivery, however pressures on finances are increasing on a range of activities but to date we have managed to contain them.

Variation to October's  
Forecast  
(£0.000m)

Pressures have been defrayed through operational efficiency and effective use of grants. Continued effort to redress these balances are being taken by rescheduling some activity and reducing developmental expenditure in core budgets.

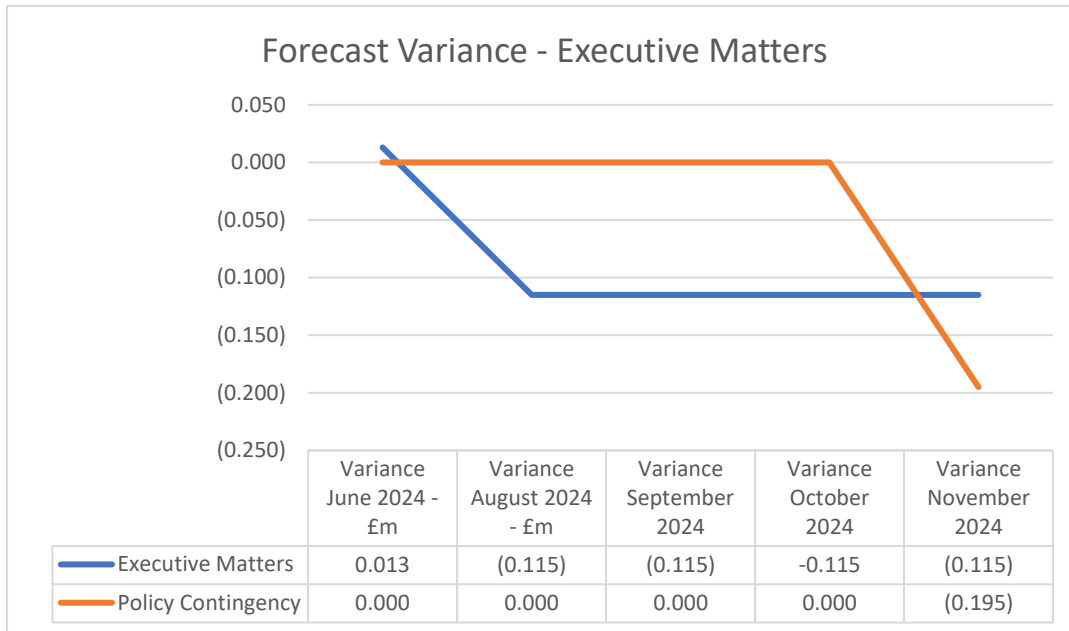
## Capital:



Service	Budget £m	Forecast Spend 24/25 £m	Re- profiled beyond 2024/25 £m	Variance to Budget £m	Prior Month Variance to Budget £m
Planning & Development	0.000	0.000	0.000	0.000	0.000
Growth & Economy	0.780	0.780	0.000	0.000	0.000
Environmental	1.235	1.189	0.050	0.004	0.000
Wellbeing & Housing	6.606	6.021	0.229	(0.356)	(0.794)
Regulatory	0.265	0.265	0.000	0.000	0.000
<b>Total</b>	<b>8.886</b>	<b>8.255</b>	<b>0.279</b>	<b>(0.352)</b>	<b>(0.794)</b>

For detailed explanation and variances please see appendix 1.

## **Executive Matters**



## **Revenue:**

Executive Matters is reporting a (£0.115m) underspend against the budget of £4.293m (-2.7%).

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### Executive Matters

Variation (£0.115m) underspend      Executive Matters are forecasting an over recovery of net interest of (£0.115m).

Variation to October's  
Forecast  
(£0.000m)

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## **Policy Contingency**

Policy Contingency is forecasting an underspend of (£0.195m) against a budget of £3.803m, (-5.1%)

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### Policy Contingency

Variation  
(£0.195m) Underspend

Policy Contingency are currently forecasting an underspend of (£0.195). This relates to the ability to release contingency now that the pay award has been agreed for 2024/25.

Variation to October's  
Forecast  
(£0.195m)

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## Appendix 3 - Virement Summary

### Virement Movement

This table shows the movement in Net Budget from October 2024 to November 2024.

<b>Virements - Movement in Net Budget</b>	<b>£m</b>
Directorate Net Budget - October 2024	18.872
Directorate Net Budget - November 2024	18.891
<b>Movement</b>	<b>0.019</b>

<b>Breakdown of Movements</b>	<b>£m</b>
Virement from Policy Contingency for Veritau one off membership	0.019
<b>Total</b>	<b>0.019</b>

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## Appendix 4 - Funding for 2024/25

Specific Funding received since budget was set:

Dept.	Grant Name	Funding
		£
DLUHC	UK Shared Prosperity Fund	(£0.658)
DLUHC	Homelessness Prevention Grant	(£0.763)
DLUHC	Electoral Integrity Programme New Burdens Funding	(£0.050)
DLUHC	Rough Sleeping Initiative	(£0.271)
DLUHC	Domestic Abuse Grant	(£0.037)
DLUHC	Redmond Review Implementation	(£0.024)
DLUHC	Tenant Satisfaction Measures New Burdens	(£0.005)
DLUHC	Local Authority Housing Fund Round 3	(£0.005)
Home Office	Syrian Resettlement Scheme	(£0.128)
Home Office	Afghan Relocations and Assistance Policy	(£1.685)
Home Office	Young Women and Girls Funding	(£0.010)
DSIT	Innovate UK	(£0.005)
		<b>(£3.636)</b>

Grants included as part of Budget setting:

Grant Name	£m
Homeless Prevention Grant	(0.517)
Afghan Resettlement Scheme	(0.244)
Syrian Refugee Initiative	(0.183)
Ukrainian Refugees Resettling in the UK	(0.417)
Asylum Seeker Dispersal Grant	(0.029)
<b>Chief Executive Total</b>	<b>(1.391)</b>
UK Shared Prosperity Fund	(0.829)
<b>Communities Total</b>	<b>(0.829)</b>
NNDR Cost of Collection Allowance	(0.231)
Rent Allowances	(25.004)
<b>Resources Total</b>	<b>(25.235)</b>
	<b>(27.455)</b>
Funding Guarantee Grant	(2.839)
Services Grant	(0.154)
<b>Corporate Total</b>	<b>(2.993)</b>

	<b>(30.448)</b>
Business Rates Retained Scheme	(9.647)
New Homes Bonus	(1.375)
Revenue Support Grant	(0.328)
<b>Funding Total</b>	<b>(11.350)</b>
<b>Government Grants Grand Total</b>	<b>(41.798)</b>

<b>This report is public</b>	
<b>Council Tax Base 2025/2026</b>	
<b>Committee</b>	Executive
<b>Date of Committee</b>	6 January 2025
<b>Portfolio Holder presenting the report</b>	Portfolio Holder for Finance, Property and Regeneration, Councillor Lesley McLean
<b>Date Portfolio Holder agreed report</b>	11 December 2024
<b>Report of</b>	Assistant Director of Finance (S151 Officer), Michael Furness

## Purpose of report

To provide Council tax Base for 2025/26

## 1. Recommendations

The Executive resolves to:

- 1.1 Approve the report of the Assistant Director of Finance for the calculation of the Council's Tax Base for 2025/26
- 1.2 Agree that, in accordance with the Local Authorities (Calculation of Council Tax Base) (England) Regulations 2012, the amount calculated by Cherwell District Council as its Council Tax Base for the year 2025/26 shall be **59,853.6**
- 1.3 Agree for the parishes which form part of its area shown in Appendix 1, the amount calculated as the Council Tax Base for the year 2025/26 in respect of special items shall be as indicated in the column titled Tax Base 2025/26.
- 1.3 Agree for the Flood Defence Areas which form part of its area, the amount calculated as the Council Tax Base for the year 2025/26 for the purposes of levies on Oxfordshire County Council by River Authorities, shall be:

Thames Flood Defence Area	57,459.5
Anglian (Great Ouse) Flood Defence Area	1,941.6
Severn Region Flood Defence Area	452.5
<b>TOTAL</b>	<b>59,853.6</b>

## 2. Executive Summary

- 2.1 The Council must legally set a tax base for the following year by 31 January. This will allow the Council to notify its preceptors of the taxbase in order for them (and the Council) to set their budgets for 2025/26.

### Implications & Impact Assessments

Implications	Commentary			
<b>Finance</b>	<p>There are no direct financial implications within this report. However, when the Council determines its Council Tax Requirement when setting the budget, the Council Tax Base is used for calculating the amount of Council Tax set by Cherwell District Council. The tax base of 59,853.6 will be reflected in the budget papers taken to Executive and Council in February 2025.</p> <p>Lynsey Parkinson, Strategic Finance Business Partner 11 December 2024</p>			
<b>Legal</b>	<p>For each financial year and each category of dwellings in its area, the council must set an amount of council tax (section 30, Local Government Finance Act 1992). Section 31B of the Local Government Finance Act 1992 and the Local Authorities (Calculation of Council Tax Base) (England) Regulations 2012 demand that the council calculates a tax base by 31 January 2025. This will be used for Council Tax setting purposes in February 2025.</p> <p>Shain Ismail, Interim Head of Legal Services, 11 December 2024</p>			
<b>Risk Management</b>	<p>If the Council does not set a tax base in accordance with statutory deadlines, then it will not be able to set its Council Tax for the 2025/26 financial year. This is managed as an operational risk and escalated to the leadership risk register as and when necessary.</p> <p>Celia Prado-Teeling, Performance Team Leader, 11 December 2024</p>			
<b>Impact Assessments</b>	Positive	Neutral	Negative	Commentary
<b>Equality Impact</b>		X		<p>All proposals are developed in line with the commitments set in our Equalities and Inclusion Framework. Any equalities and inclusion implications will be reflected with mitigating actions where possible in the correspondent Equalities Impact Assessment.</p> <p>Celia Prado-Teeling, Performance Team Leader 11 December 2024</p>
<b>A</b> Are there any aspects of the proposed decision, including how it is		X		

delivered or accessed, that could impact on inequality?				
<b>B</b> Will the proposed decision have an impact upon the lives of people with protected characteristics, including employees and service users?		X		
<b>Climate &amp; Environmental Impact</b>				N/A
<b>ICT &amp; Digital Impact</b>				N/A
<b>Data Impact</b>				N/A
<b>Procurement &amp; subsidy</b>				N/A
<b>Council Priorities</b>	All			
<b>Human Resources</b>	N/A			
<b>Property</b>	N/A			
<b>Consultation &amp; Engagement</b>	N/A			

## Supporting Information

### 3. Background

3.1 For the purposes of Section 31B of the Local Government Finance Act 1992 and the Local Authorities (Calculation of Council Tax Base) (England) Regulations 2012,

(a) the whole of its area and

(b) for any parts of its area for the purposes of:

(i) Apportioning precepts and levies and

(ii) Calculating the tax base for each area subject to a special item

3.2 In respect of the 1 (a) 'the whole of its area':

3.2.1 The tax base has to be notified by Cherwell District Council to major precepting bodies (i.e., Oxfordshire County Council and the Police and Crime Commissioner for Thames Valley) and levy authorities (i.e., Thames Flood Defence Area, Anglian

(Great Ouse) Flood Defence Area and Severn Region Flood Defence Area) by 31 January 2025 to enable their precepts to be calculated as a tax per band D equivalent properties.

3.3 In respect of 1 (b) 'parts of its area'

3.3.1 Major precepting and levying authorities have to notify Cherwell District Council (the billing authority) by 31 December 2024 of the area(s) subject to a special item (expense) and for which an apportionment of the tax base is required. No such notification has been received.

3.3.2 Parishes who levy a precept are automatically treated as a special item and there has to be a tax base calculated for each of the parishes in the area. They are not required to calculate a precept as a tax per band D equivalent property but can request the tax base figure to be supplied to them within ten days of making a request. Each parish and town council are notified of the figure for their area.

### **Calculation of the tax base**

3.4 The starting point of the calculation, as shown in Appendix 3, is the total number of council tax dwellings and their council tax band.

3.5 The council then allows for the following information and estimates for each band:

(a) Dwellings which are exempt, so no council tax is payable (e.g., those where all occupiers are students)

(b) Dwellings which attract a 25 per cent reduction (e.g., those with a single adult occupier)

(c) Dwellings which attract a 50 per cent reduction (e.g., those properties where all adult residents are disregarded or 'don't count' for council tax purposes)

(d) Dwellings which are treated as paying a lower band because they have been adapted for a disabled person. The regulations specify how to adjust the tax base in respect of band A dwellings.

(e) Dwellings which attract a reduction through the Council Tax Reduction Scheme.

(f) Dwellings which are exempt from council tax

3.6 Each band is then converted into "band D equivalents" by applying the factor required by legislation. A band H, for example, is multiplied by two. All of these are added together to give a total number of band D equivalents.

3.7 A further adjustment is made to allow for non-collection. The council is required to decide what its collection rate is likely to be and applies this to its council tax base. For 2024/25 this was 98% and it is proposed it should be 98% in 2025/26.

3.8 A final adjustment is made for Class O exempt properties (Armed forces' accommodation) as the Ministry of Defence makes a payment roughly equal to the council tax that it would have had to pay for each property if they were not exempt.

## 4. Alternative Options and Reasons for Rejection

- 4.1 There are no alternative options. The Council has to set a tax base in order to set its council tax for 2025/26.

## 5 Conclusion and Reasons for Recommendations

- 5.1 The Council must legally set a tax base for the following year by 31 January. This will allow the Council to notify its preceptors of the taxbase in order for them (and the Council) to set their budgets for 2025/26.

### Decision Information

<b>Key Decision</b>	No
<b>Subject to Call in</b>	Yes
<b>If not, why not subject to call in</b>	N/A
<b>Ward(s) Affected</b>	All

### Document Information

<b>Appendices</b>	
<b>Appendix 1</b>	Council Tax Base by Parish Area 2025/26
<b>Appendix 2</b>	Council Tax Base by Flood defence area 2025/26
<b>Appendix 3</b>	Council Tax Valuation Bands 2025/26
<b>Appendix 4</b>	Equality Impact Assessment 2025/26
<b>Background Papers</b>	N/A
<b>Reference Papers</b>	N/A
<b>Report Author</b>	Sven Hoffmann, Service Accountant
<b>Report Author contact details</b>	Sven.hoffmann@cherwell-dc.gov.uk 01295 221853
<b>Corporate Director Approval (unless Corporate Director or Statutory Officer report)</b>	Stephen Hinds, Corporate Director – Resources 10 December 2024

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Appendix 1 – Council Tax Base 2025-26  
 Number of Band D equivalent dwellings per Parish area

Parish	Number of Band D Equivalent Dwellings	Armed Forces Exempt Dwellings	Tax Base for 2025-26
Adderbury	1,371.0	0.0	1,371.0
Ambrosden	648.7	214.6	863.3
Ardley	266.6	0.0	266.6
Arccott	316.3	1.8	318.1
Banbury	17,393.5	0.8	17,394.3
Barford	273.0	0.0	273.0
Begbroke	369.8	0.0	369.8
Bicester	13,439.4	0.0	13,439.4
Blackthorn	150.9	0.0	150.9
Bletchington	455.1	0.0	455.1
Bloxham	1,590.2	0.0	1,590.2
Bodicote	1,031.1	0.0	1,031.1
Bourton	353.7	0.0	353.7
Broughton	124.6	0.0	124.6
Bucknell	109.8	0.0	109.8
Caversfield	565.8	26.7	592.5
Charlton on Otmoor	200.6	0.0	200.6
Chesterton	464.3	0.0	464.3
Claydon	146.9	0.0	146.9
Cottisford	73.2	0.0	73.2
Cropledy	307.5	0.0	307.5
Deddington	1,075.8	0.0	1,075.8
Drayton	88.3	0.0	88.3
Duns Tew	243.7	0.0	243.7
Epwell	137.3	0.0	137.3
Fencot and Murcott	129.2	0.0	129.2
Finmere	220.3	0.0	220.3
Fringford	267.0	0.0	267.0
Fritwell	299.8	0.0	299.8
Godington	21.0	0.0	21.0
Gosford and Water Eaton	552.6	0.0	552.6
Hampton Gay and Poyle	81.9	0.0	81.9
Hanwell	120.0	0.0	120.0
Hardwick with Tusmore	39.9	0.0	39.9
Hethe	118.3	0.0	118.3
Hook Norton	1,079.8	0.0	1,079.8
Horley	161.3	0.0	161.3
Hornon	169.8	0.0	169.8
Horton Cum Studley	253.2	0.0	253.2

Parish	Number of Band D Equivalent Properties	Armed Forces Exempt Dwellings	Tax Base for 2025-26
Islip	321.9	0.0	321.9
Kidlington	5,101.8	0.0	5,101.8
Kirtlington	459.4	0.0	459.4
Launton	620.1	0.0	620.1
Lower Heyford	221.6	0.0	221.6
Merton	147.3	0.0	147.3
Middle Aston	67.5	0.0	67.5
Middleton Stoney	153.1	0.0	153.1
Milcombe	282.3	0.0	282.3
Milton	88.6	0.0	88.6
Mixbury	119.1	0.0	119.1
Mollington	240.2	0.0	240.2
Newton Purcell	44.2	0.0	44.2
Noke	83.4	0.0	83.4
North Aston	98.9	0.0	98.9
North Newington	159.8	0.0	159.8
Oddington	63.2	0.0	63.2
Piddington	182.5	0.0	182.5
Prescote	5.6	0.0	5.6
Shenington	234.9	0.0	234.9
Shipton on Cherwell	156.7	0.0	156.7
Shutford	212.4	0.0	212.4
Sibford Ferris	198.5	0.0	198.5
Sibford Gower	254.0	0.0	254.0
Somerton	144.0	0.0	144.0
Souldern	210.0	0.0	210.0
South Newington	151.6	0.0	151.6
Steeple Aston	440.7	0.0	440.7
Stoke Lyne	109.3	0.0	109.3
Stratton Audley	219.2	0.0	219.2
Swalcliffe	112.0	0.0	112.0
Tadmarton	262.1	0.0	262.1
Upper Heyford	175.8	0.0	175.8
Wardington	246.7	0.0	246.7
Wendlebury	195.3	0.0	195.3
Weston on the Green	278.0	0.0	278.0
Wigginton	119.0	0.0	119.0
Wroxton	285.6	0.0	285.6
Yarnton	1,210.4	0.0	1,210.4
Heyford Park	1,221.9	0.0	1,221.9
<b>Total</b>	<b>59,609.7</b>	<b>243.9</b>	<b>59,853.6</b>

## Appendix 2 – Council Tax Base by Flood Defence Area 2025-26

Parish	Tax Base 2025-26		
	Thames	Anglian ( Great Ouse)	Severn
Adderbury	1,371.0		
Ambrosden	863.3		
Ardley		266.6	
Arncott	318.1		
Banbury	17,394.3		
Barford	273.0		
Begbroke	369.8		
Bicester	13,439.4		
Blackthorn	150.9		
Bletchington	455.1		
Bloxham	1,590.2		
Bodicote	1,031.1		
Bourton	353.7		
Broughton	124.6		
Bucknell	109.8		
Caversfield	592.5		
Charlton on Otmoor	200.6		
Chesterton	464.3		
Claydon	146.9		
Cottisford		73.2	
Cropredy	307.5		
Deddington	1,075.8		
Drayton	88.3		
Duns Tew	243.7		
Epwell	137.3		
Fencot and Murcott	129.2		
Finmere		220.3	
Fringford		267.0	
Fritwell		299.8	
Godington		21.0	
Gosford and Water Eaton	552.6		
Hampton Gay and Poyle	81.9		
Hanwell	120.0		
Hardwick with Tusmore		39.9	
Hethe		118.3	
Hook Norton	1,079.8		
Horley	161.3		
Hornton	169.8		
Horton Cum Studley	253.2		

Parish	Tax Base 2025-26		
	Thames	Anglian ( Great Ouse)	Severn
Islip	321.9		
Kidlington	5,101.8		
Kirtlington	459.4		
Launton	620.1		
Lower Heyford	221.6		
Merton	147.3		
Middle Aston	67.5		
Middleton Stoney	153.1		
Milcombe	282.3		
Milton	88.6		
Mixbury		119.1	
Mollington	240.2		
Newton Purcell		44.2	
Noke	83.4		
North Aston	98.9		
North Newington	159.8		
Oddington	63.2		
Piddington	182.5		
Prescote	5.6		
Shenington	234.9		
Shipton on Cherwell	156.7		
Shutford	212.4		
Sibford Ferris			198.5
Sibford Gower			254.0
Somerton		144.0	
Souldern	210.0		
South Newington	151.6		
Steeple Aston	440.7		
Stoke Lyne		109.3	
Stratton Audley		219.2	
Swalcliffe	112.0		
Tadmarton	262.1		
Upper Heyford	175.8		
Wardington	246.7		
Wendlebury	195.3		
Weston on the Green	278.0		
Wigginton	119.0		
Wroxton	285.6		
Yarnton	1,210.4		
Heyford Park	1,221.9		
<b>Total</b>	<b>57,459.5</b>	<b>1,941.6</b>	<b>452.5</b>

## Appendix 3 – Council Tax Valuation Bands 2025-26

## ALL PARISHES

All figures at 01 December 2024	Band A with disabled reduction	A	B	C	D	E	F	G	H	2025-26 Tax Base
1. Total dwellings on the valuation List	0	6,222	16,671	19,728	12,668	9,241	4,478	2,881	267	<b>72,156</b>
2. Number of exempt dwellings	0	222	481	365	375	100	44	23	4	<b>1,614</b>
3. Number of demolished dwellings	0	5	0	0	0	0	0	1	0	<b>6</b>
4. Number of chargeable dwellings (Lines 1 - 2 - 3)	0	5,995	16,190	19,363	12,293	9,141	4,434	2,857	263	<b>70,536</b>
5. Number of chargeable dwellings in line 4 subject to disabled reduction	0	9	39	93	66	52	25	12	11	<b>307</b>
6. Number of dwellings effectively subject to council tax for this band by virtue of disabled relief	9	39	93	66	52	25	12	11	0	<b>307</b>
7. Number of chargeable dwellings adjusted in accordance with lines 5 and 6 (Lines 4-5+6)	9	6,025	16,244	19,336	12,279	9,114	4,421	2,856	252	<b>70,536</b>
8. Number of dwellings adjusted In Line 7 entitled to a 25% (SPD)	6	3,345	6,221	5,996	3,044	1,622	679	365	21	<b>21,299</b>
9. Number of dwellings in Line 7 entitled to a 25% discount due to all but one resident being disregarded	0	27	139	169	84	91	37	7	1	<b>555</b>
10. Number of dwellings in Line 7 entitled to a 50% discount due to all residents being disregarded	0	17	39	19	7	10	6	17	12	<b>127</b>
11. Number of dwellings in Line 7 classed as second homes	0	135	138	135	106	78	39	59	12	<b>702</b>
12. Number of dwellings in Line 7 classed as empty and receiving a 0% discount	0	65	113	72	48	42	15	10	4	<b>369</b>
13. Number of dwellings in Line 7 classed as empty and receiving a discount	0	83	177	139	76	42	22	12	2	<b>553</b>
14. Number of dwellings in Line 7 classed as empty and being charged the Empty Homes Premium	0	28	31	35	24	10	6	12	3	<b>149</b>

15. Total number of dwellings in Line 7 classed as empty (Lines 12 + 13 + 14)	0	176	321	246	148	94	43	34	9	<b>1,071</b>
16. Number of dwellings that are classed as empty and have been for more than 6 months (from properties in Line 15)	0	91	145	113	74	56	24	22	7	<b>532</b>
16a. Number of dwellings included in Line 16 which are still empty because of flooding that occurred between 1 December 2015 and 31 March 2016	0	0	0	0	0	0	0	0	0	<b>0</b>
17. Number of dwellings that are classed as empty and have been for more than 6 months (formerly Class A exempt excluding any dwellings in Line 16a)	0	0	0	0	0	1	0	0	0	<b>1</b>
18. Number of dwellings classed as empty for more than 6 months excluding those empty due to flooding (Line 16 - line 16a - line 17)	0	91	145	113	74	55	24	22	7	<b>531</b>
19. Number of dwellings in line 7 where there is liability to pay 100% council tax before Family Annexe discount	3	2,526	9,641	12,986	9,049	7,342	3,673	2,447	215	<b>47,882</b>
20. Number of dwellings in line 7 that are assumed to be subject to a discount or a premium before Family Annexe discount	6	3,499	6,603	6,350	3,230	1,772	748	409	37	<b>22,654</b>
21. Reduction in taxbase as a result of the Family Annexe discount (b/fwd. from Family Annexe tab)	0	29	5	2	2	1	0	0	0	<b>37</b>
22. Number of dwellings equivalents after applying discounts and premiums to calculate taxbase	8	5,166	14,648	17,812	11,513	8,688	4,245	2,770	246	<b>65,095</b>
23. Ratio to Band D	5/9	6/9	7/9	8/9	9/9	11/9	13/9	15/9	18/9	
<b>24. Total number of band D equivalents (to 1 decimal place) (line 22 x line 23)</b>	<b>4.2</b>	<b>3,444.3</b>	<b>11,393.1</b>	<b>15,833.1</b>	<b>11,513.7</b>	<b>10,618.8</b>	<b>6,131.1</b>	<b>4,617.2</b>	<b>492.6</b>	<b>64,048.1</b>
Allowance for new properties										<b>314.2</b>
Allowance for Council Tax Reduction Scheme										<b>-3,546.0</b>
<b>Allowance for non-collection (2%)</b>										<b>-1,211.6</b>
Number of band D equivalents of contributions in lieu of M.O.D.										<b>248.9</b>
<b>Taxbase for 2025-26</b>										<b>59,853.6</b>

Appendix 4

**Cherwell District Council  
Equality Impact Assessment**

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## Section 1: Summary details

<b>Directorate and Service Area</b>	Resources - Finance
<b>What is being assessed</b> (e.g. name of policy, procedure, project, service or proposed service change).	This assessment sets out the overall impact that the council tax base proposals have on a range of equality and diversity characteristics, including the nine protected characteristics defined under the Equality Act 2010, and sets out any mitigations that have been put in place against possible negative impacts.
<b>Is this a new or existing function or policy?</b>	This impact assessment provides an overview of the 2025/26 council tax base proposals and so comments on changes to existing programmes.
<b>Summary of assessment</b> Briefly summarise the policy or proposed service change. Summarise possible impacts. Does the proposal bias, discriminate or unfairly disadvantage individuals or groups within the community?  (following completion of the assessment).	The Council must legally set a tax base for the following year by 31 January. This will allow the Council to notify its preceptors of the taxbase in order for them (and the Council) to set their budgets for 2025/26.  <b>An ECIA has been completed for the Council's overall budget and business planning proposals and authorised in December 2024.</b>
<b>Completed By</b>	Lynsey Parkinson, Strategic Finance Business Partner – Budget Setting
<b>Authorised By</b>	
<b>Date of Assessment</b>	

## Section 2: Detail of proposal

<p><b>Context / Background</b></p> <p>Briefly summarise the background to the policy or proposed service change, including reasons for any changes from previous versions.</p>	<p>For each financial year and each category of dwellings in its area, the council must set an amount of council tax (section 30, Local Government Finance Act 1992). Section 31B of the Local Government Finance Act 1992 and the Local Authorities (Calculation of Council Tax Base) (England) Regulations 2012 demand that the council calculates a tax base by 31 January 2025. This will be used for Council Tax setting purposes in February 2025.</p>
<p><b>Proposals</b></p> <p>Explain the detail of the proposals, including why this has been decided as the best course of action.</p>	<p>That the Executive agrees that, in accordance with the Local Authorities (Calculation of Council Tax Base) (England) Regulations 2012, the amount calculated by Cherwell District Council as its Council Tax Base for the year 2025/26 shall be 59,853.6.</p> <p>There are no alternative options. The Council has to set a tax base in order to set its council tax for 2025/26.</p>
<p><b>Evidence / Intelligence</b></p> <p>List and explain any data, consultation outcomes, research findings, feedback</p>	<p>All implications have been reviewed by the responsible officer.</p>

<p>from service users and stakeholders etc, that supports your proposals and can help to inform the judgements you make about potential impact on different individuals, communities or groups and our ability to deliver our climate commitments.</p>	
<p><b>Alternatives considered / rejected</b></p> <p>Summarise any other approaches that have been considered in developing the policy or proposed service change, and the reasons why these were not adopted. This could include reasons why doing nothing is not an option.</p>	<p>There are no alternative options. The Council has to set a tax base in order to set its council tax for 2025/26.</p>

### Section 3: Impact Assessment - Protected Characteristics

Protected Characteristic	No Impact	Positive	Negative	Description of Impact	Any actions or mitigation to reduce negative impacts	Action owner* (*Job Title, Organisation)	Timescale and monitoring arrangements
Age	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A		
Disability	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A		
Gender Reassignment	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A		
Marriage & Civil Partnership	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A		
Pregnancy & Maternity	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A		
Race	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A		
Sex	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A		
Sexual Orientation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A		
Religion or Belief	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A		

### Section 3: Impact Assessment - Additional Community Impacts

Additional community impacts	No Impact	Positive	Negative	Description of impact	Any actions or mitigation to reduce negative impacts	Action owner (*Job Title, Organisation)	Timescale and monitoring arrangements
Rural communities	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A		
Armed Forces	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A		
Carers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A		
Areas of deprivation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A		

### Section 3: Impact Assessment - Additional Wider Impacts

<b>Additional Wider Impacts</b>	<b>No Impact</b>	<b>Positive</b>	<b>Negative</b>	<b>Description of Impact</b>	<b>Any actions or mitigation to reduce negative impacts</b>	<b>Action owner* (*Job Title, Organisation)</b>	<b>Timescale and monitoring arrangements</b>
<b>Other Council Services</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A		
<b>Providers</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A		
<b>Social Value <sup>1</sup></b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A		

<sup>1</sup> If the Public Services (Social Value) Act 2012 applies to this proposal, please summarise here how you have considered how the contract might improve the economic, social, and environmental well-being of the relevant area

## Section 4: Review

Where bias, negative impact or disadvantage is identified, the proposal and/or implementation can be adapted or changed; meaning there is a need for regular review. This review may also be needed to reflect additional data and evidence for a fuller assessment (proportionate to the decision in question). Please state the agreed review timescale for the identified impacts of the policy implementation or service change.

<b>Review Date</b>	11 December 2024
<b>Person Responsible for Review</b>	
<b>Authorised By</b>	

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