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Cherwell

DISTRICT COUNCIL
NORTH OXFORDSHIRE

Committee: Executive

Date: Monday 6 February 2023

Time: 6.30 pm

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

Membership

Councillor Barry Wood (Chairman)

Councillor Phil Chapman
Councillor Nicholas Mawer
Councillor Adam Nell
Councillor Eddie Reeves

Councillor Ian Corkin (Vice-Chairman)

Councillor Colin Clarke
Councillor Richard Mould
Councillor Lynn Pratt
Councillor Dan Sames

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 9 - 20)

To confirm as correct records the Minutes of the meetings held on 9 January 2022 and 19 January 2022.

5. Chairman's Announcements

To receive communications from the Chairman.

6. Urgent Business

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

7. Budget Setting for 2023/24 and the Medium-Term Financial Strategy up to 2027/28 (Pages 21 - 244)

Report of Assistant Director of Finance (S151 Officer)

Purpose of report

This report is the culmination of the Budget and Business Planning process for 2023/24 to 2027/28 and sets out the Executive's proposed Business Plan and related revenue budget for 2023/24, medium term financial strategy to 2027/28, capital programme to 2027/28 and all supporting policies, strategies, and information to recommend to full Council.

The Council adopts a forward looking and anticipatory approach to its financial management, which was acknowledged by the recent Peer Review in November 2022. The Council plans for, and continues to succeed in, encouraging and facilitating economic growth across the district. This success flows through to the Council's finances, reflected in the level of income received from business rates and the New Homes Bonus grant.

The Council has proactively monitored both the economic situation and Government announcements over the past 12 months and devised and implemented a budget and business planning strategy that has delivered within the constraints identified, consulting on a proposed balanced budget in November 2022. The Council was able to identify the risk of interest rate rises at an early stage, locking in low interest rates for all of its planned borrowing requirements, meaning only new borrowing requirements will need to be taken at higher rates.

The proposed net budget for the Council is £28.2m, which is an increase of £4.6m from 2022/23. A Band D Council Tax of £148.50 is proposed for the year which is an increase of £5 compared to 2022/23. The Capital Programme for the period 2023/24 – 2027/28 is proposed to be £35.9m. The Council plans to fund £2.0m of budget pressures and will deliver £1.0m of savings proposals as part of the 2023/24 budget.

Recommendations

The Executive is recommended to:

- 1.1 Delegate authority to the Section 151 Officer (S151), following consultation with the Leader of the Council and Lead Member for Finance, to complete the legal Council Tax calculations once all the information required has been received and submit a separate report to Council.
- 1.2 Delegate authority to the S151, following consultation with the Leader of the Council and Lead Member for Finance, to make appropriate changes to the Executive's proposed budget to Council.

The Executive is recommended to recommend to Council as follows:

- 1.3 Approve the proposed Fees and Charges schedule for 2023/24 (Appendix 7) and statutory notices be placed where required.
- 1.4 Consider and note the Equality Impact Assessment of the Budget (Appendix 8)
- 1.5 Approve a pension fund prepayment for the years 2023/24 – 2025/26 of £5.7m.
- 1.6 In relation to the Business Plan (Section 3.1) to approve:
 - 1.6.1 The Business Plan and Annual Delivery Plan set out in Appendices 1 and 2 respectively.
- 1.7 In relation to the Revenue Budget (Section 3.2) and Medium-Term Financial Strategy (MTFS) (Section 3.5) to approve:
 - 1.7.1 The net revenue budget for the financial year commencing on 1 April 2023, as set out in Table 3.2.1, and further analysed in the Budget Book provided at Appendix 12
 - 1.7.2 The MTFS and Revenue Budget 2023/24 (Sections 3.5 and 3.2 respectively), including the Savings Proposals, and Pressures included at Appendices 4 and 5 respectively.
- 1.8 In relation to Council Tax to approve:
 - 1.8.1 An increase in the Basic Amount of Council Tax for Cherwell District Council for the financial year beginning on 1 April 2023 of £5, resulting in a Band D charge of £148.50 per annum.
 - 1.8.2 For long term empty properties, an additional Council Tax premium will be charged of 100 percent for properties empty for two years or more, 200 percent for properties empty 5 years or more and 300 percent for properties empty 10 years or more.
 - 1.8.3 Removal of the 25 percent discount currently available for 12 months to properties that are uninhabitable or undergoing structural repairs.
- 1.9 In relation to the Capital Programme and related strategies (Section 3.3) to approve:
 - 1.9.1 The Capital Bids and Capital Programme at Appendix 17 and 18 respectively.
 - 1.9.2 The Capital and Investment Strategy 2023/24 (Appendix 19) and revised 2022/23 (Appendix 20) including the Minimum Revenue Provision (MRP) Policy.
 - 1.9.3 The Treasury Management Strategy, including the Prudential Indicators, and Affordable Borrowing Limit for 2023/24 (Appendix 21).

1.10 In relation to reserves to approve:

1.10.1 A minimum level of General Balances of £6m as supported by Appendix 15.

1.10.2 The Reserves Policy (Appendix 14).

1.10.3 The medium-term reserves plan described in Appendix 16.

1.11 In relation to the Pay Policy Statement approve:

1.11.1 The Pay Policy Statement, as required by the Localism Act 2010, detailed in Appendix 9.

8. Financial Management, Performance and Risk Monthly Update (Pages 245 - 302)

Report of Assistant Director of Finance and Assistant Director – Customer Focus

Purpose of report

To update Executive on the council's performance, risk and financial positions for the period up to the end of December 2022.

Recommendations

The meeting is recommended:

- 1.1 To note the Performance, Risk and Finance Monitoring Report for December 2022.
- 1.2 To approve the return of £0.025m to the Country Parks Reserve as it is no longer required this financial year.
- 1.3 To approve the return of £0.023m of unspent Queens Jubilee Grant fund back to reserves.

9. Annual Monitoring Report 2022 (Pages 303 - 310)

** Due to the size of the documents, to assist with access and downloading, the appendices to the report are published as supplements to the main agenda **

Report of Assistant Director – Planning and Development

Purpose of report

To seek approval of the Annual Monitoring Report (AMR) 2022

To seek approval of accompanying updates to the Local Plan's Infrastructure Delivery Plan and the Brownfield Land Register.

Recommendations

The meeting is recommended:

- 1.1 To approve for publication the 2022 Annual Monitoring Report (AMR) presented at Appendix 1.
- 1.2 To approve for publication the 2021/22 Infrastructure Delivery Plan (IDP) update presented at Appendix 2.
- 1.3 To approve for publication the 2021/22 Brownfield Land Register (BLR) presented at Appendix 3.
- 1.4 To authorise the Assistant Director - Planning and Development in consultation with the Lead Member for Planning to make any necessary minor and presentational changes to the Annual Monitoring Report, Infrastructure Delivery Plan update, Brownfield Land Register if required prior to publication.

10. 'Regulation 10A' Planning Policy Review and Housing Land Supply Statement
(Pages 311 - 424)

Report of Assistant Director – Planning and Development

Purpose of report

To seek approval of an updated review of planning policies under Regulation 10A of the Town and Country Planning (Local Planning) (England) Regulations 2012 and a Housing Land Supply Statement for publication.

Recommendations

The meeting is recommended:

- 1.1 To approve the review of planning policies under Regulation 10A of the Town and Country Planning (Local Planning) (England) Regulations 2012 (Appendix 1)
- 1.2 To approve the Housing Land Supply Statement for publication (Appendix 2) noting the implications and conclusions of the report to the Executive.
- 1.3 To authorise the Assistant Director - Planning and Development in consultation with the Portfolio Holder for Planning to make any necessary minor and presentational changes to the Regulation 10A Review and the Housing Land Supply Statement if required prior to publication in consultation with the Portfolio Holder for Planning.

11. Tenants Charter (Pages 425 - 430)

Report of Assistant Director Wellbeing and Housing

Purpose of report

To endorse the approach of a Tenants Charter for the tenants within the Council's housing stock portfolio and receive a draft proposed Charter for approval at a future meeting of the Executive.

To receive a further report to update Executive on the engagement of Registered Social Landlords and Private Landlords.

Recommendations

The meeting is recommended:

- 1.1 To approve the drafting of a Tenants Charter. The Tenants Charter will set out a new service standard that all tenants can expect to receive from the Council whilst they are living within properties the Council manages. This Charter will be developed in consultation with our tenants.
- 1.2 To note that as part of the drafting and future adoption of the Charter, the Council and its Officers engage with Registered Social Landlords and Private Landlords to seek improvements in the services that they are providing to their residents in Cherwell.

12. A Grant scheme for Parishes for the Coronation of King Charles III (Pages 431 - 436)

Report of Assistant Director Wellbeing and Housing

Purpose of report

To consider a grant scheme and other arrangements to encourage community celebrations of His Majesty King Charles III's coronation, ensuring communities in Cherwell have sufficient time to get plans in place to celebrate; especially for road closures and large-scale town or village-wide events.

Recommendations

The meeting is recommended:

- 1.1 To agree the grant scheme and promotional measures as outlined in the report.
- 1.2 To work with colleagues from neighbouring authorities and the Lord Lieutenants office to coordinate and join up support for communities planning celebrations.
- 1.3 To promote the available local and national funding streams through a co-ordinated communications plan and dedicated webpage.

13. Revisions to the Council's Taxi and Private Hire Licensing Policy (Pages 437 - 570)

Report of Assistant Director of Regulatory Services and Community Safety

Purpose of report

In October 2022 the Executive agreed to commence consultation on proposed changes to the Council's Taxi and Private Hire Licensing Policy ('the policy'). This public consultation commenced on 1 December 2022 and closes on 31 January 2023.

Changes to the policy require approval by Full Council. The 28 February 2023 Full Council meeting will consider proposed changes to the policy. This report provides a summary of the background to the proposed changes to the policy, the consultation process being followed, a summary of consultation responses to date and the proposed revisions to the policy resulting from those responses.

The Council has a statutory duty to ensure the proper administration of taxi licensing legislation in the district. Taxi services are an important part of the local economy and therefore fulfilling this statutory duty contributes to the Council's priority to ensure the district has an enterprising economy with strong and vibrant local centres. The primary purpose of the licensing regime is to promote public safety and therefore the Council's work to licence taxi drivers, vehicles and operators also supports the commitment to work with partners to reduce crime and antisocial behaviour. Further, the proposed revisions to the licensing policy include measures to reduce the carbon emissions of the taxi fleet in support of the council's commitment to protect the environment and to help achieve net zero targets.

Recommendations

The meeting is recommended to:

- 1.1 Consider the proposed changes to the Council's Taxi and Private Hire Licensing Policy and the comments received during the consultation process and determine the final policy revisions to be presented to Full Council on 28 February 2023.

14. The Oxford to Cambridge Partnership

** Please note this report will follow as it is currently being reviewed and finalised ""

Report of Chief Executive

Information about this Agenda

Apologies for Absence

Apologies for absence should be notified to 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.

Evacuation Procedure

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Queries Regarding this Agenda

Please contact Natasha Clark, Democratic and Elections democracy@cherwell-dc.gov.uk, 01295 221534

Yvonne Rees
Chief Executive

Published on Friday 27 January 2023

Cherwell District Council

Executive

Minutes of a meeting of the Executive held at Bodicote House, Bodicote, Banbury, Oxon OX15 4AA, on 9 January 2023 at 6.30 pm

Present:

Councillor Barry Wood (Chairman), Leader of the Council and Portfolio Holder for Policy and Strategy
Councillor Ian Corkin (Vice-Chairman), Deputy Leader and Portfolio Holder for Regeneration and Economy
Councillor Phil Chapman, Portfolio Holder for Healthy Communities
Councillor Colin Clarke, Portfolio Holder for Planning
Councillor Nicholas Mawer, Portfolio Holder for Housing
Councillor Richard Mould, Portfolio Holder for Corporate Services
Councillor Adam Nell, Portfolio Holder for Finance
Councillor Lynn Pratt, Portfolio Holder for Property
Councillor Eddie Reeves, Portfolio Holder for Safer Communities
Councillor Dan Sames, Portfolio Holder for Cleaner and Greener Communities

Also Present:

Councillor Sandy Dallimore, Chairman Overview and Scrutiny Committee

Officers:

Yvonne Rees, Chief Executive
Ian Boll, Corporate Director Communities
Michael Furness, Assistant Director Finance & S151 Officer
Shiraz Sheikh, Assistant Director Law, Governance & Democratic Services/Monitoring Officer
Natasha Clark, Governance and Elections Manager

Officers Attending Virtually:

Robert Jolley, Assistant Director Growth & Economy
Shona Ware, Assistant Director Customer Focus
Celia Prado-Teeling, Performance Team Leader

70 **Declarations of Interest**

There were no declarations of interest.

71 **Petitions and Requests to Address the Meeting**

There were no petitions or requests to address the meeting.

72 **Minutes**

The minutes of the meeting held on 5 December 2022 were agreed as a correct record and signed by the Chairman.

73 **Chairman's Announcements**

There were no Chairman's announcements.

74 **Urgent Business**

There were no items of urgent business.

75 **Monthly Performance, Risk and Finance Monitoring Report November 2022**

The Assistant Director of Finance and Assistant Director – Customer Focus submitted a report to update the Executive on the council's performance, risk and financial positions for the period up to the end of November 2022.

On behalf of Executive, the Chairman thanked council officers for ensuring that targets were met and performance levels remained high. The Chairman requested that performance highlights from the monthly monitoring reports over the last year be circulated to all Members.

Resolved

- (1) That the Performance, Risk and Finance Monitoring Report for November 2022 be noted.

Reasons

This report provides an update on progress made during November 2022, to deliver the council's priorities through reporting on its performance, risk and financial positions

Alternative options

This report summarises the council's performance, risk and financial positions up to the end of November, therefore there are no alternative options to consider. However, Members may wish to request further information from officers or for inclusion.

76 **Council Tax Base 2023-2024**

The Assistant Director of Finance (S151 Officer) submitted a report to provide the Council Tax Base for 2023-2024.

Resolved

- (1) That the report of the Assistant Director of Finance for the calculation of the Council's Tax Base for 2023-2024 (annex to the Minutes as set out in the Minute Book) be approved.
- (2) That it be agreed 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 2023-2024 shall be 58,184.3.
- (3) That it be agreed for the parishes which form part of its area shown in the annex to the Minutes (as set out in the Minute Book), the amount calculated as the Council Tax Base for the year 2023-2024 in respect of special items shall be as indicated in the column titled Tax Base 2023-2024.
- (4) That it be agreed for the Flood Defence Areas which form part of its area, the amount calculated as the Council Tax Base for the year 2023-2024 for the purposes of levies on Oxfordshire County Council by River Authorities, shall be:

Thames Flood Defence Area	55,826.0
Anglian (Great Ouse) Flood Defence Area	1,910.5
Severn Region Flood Defence Area	447.8
TOTAL	58,184.3

Reasons

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 tax base in order for them (and the Council) to set their budgets for 2023/24.

Alternative options

There are no alternative options. The Council has to set a tax base in order to set its council tax for 2023-2024.

77

Consultation & Engagement for Banbury Vision 2050

The Assistant Director – Growth and Economy submitted a report to establish a workstream to set a sustainable vision for Banbury town centre and its environs through to 2050.

Recognising that post pandemic, the retail sector had significantly changed and for town centres there needed to be a changed dynamic so establishing what change was required, was an essential first step in developing a new

vision. To do this it was proposed to undertake a comprehensive consultation and engagement exercise with residents, businesses, and visitors in the fourth quarter of 2022-23 which would then inform the programme going forward in 2023-24 and onwards.

The purpose of this would be to establish what was performing well, what was performing not so well, and what stakeholders would like to see more of in their town centre with particular regard to filling the void left by retail in the current and anticipated medium term future for the town.

It was expected that the initial engagement exercise would set a bar for stakeholder expectations which would then lead to the commissioning of a series of evidence bases, modelling and development appraisals to understand and inform the ability to deliver the emerging vision. An increased emphasis on more sustainability, stronger cultural offers, increased “meanwhile” uses were expected through engagement, as would stronger employment options, opening of spaces, improved connectivity, and alternative use of retail space.

In introducing the report, the Deputy Leader and Portfolio Holder for Regeneration and Economy advised that Banbury Town Council representatives would be involved in the Board and the officer working group with representatives from Cherwell District Council and Oxfordshire County Council.

Resolved

- (1) That the outline programme governance arrangements for the Banbury Vision 2050 Programme Board and Terms of Reference be approved.
- (2) That the initiation of consultation and engagement on Banbury Vision 2050 be approved.
- (3) That proceeding with the appointment of consultants for community consultation and engagement be approved.

Reasons

This report is the first of a series which will update Executive on Banbury Vision 2050 progress to March 2024, and beyond.

The reason for recommendation 1 is that to progress the regeneration on Banbury, robust governance arrangements are required to make sure that the necessary connections and synergies are made to drive effective delivery. Recommendation 2 kicks starts the conversation and process of ensuring the ‘buy-in’ of the community into this future. Recommendation 3 gives the authority to proceed on recommendation 2.

Alternative options

Option 1: Do nothing – this is not an option. Doing nothing runs the risk of not delivering on strategic priorities and Banbury not being regenerated and left behind with impaired prosperity.

78

Oxfordshire Inclusive Economy Partnership's Charter

The Assistant Director - Growth and Economy submitted a report to introduce the Oxfordshire Inclusive Economy Partnership (OIEP), to engage the Council in its activities and to highlight the forthcoming launch of the OIEP's Charter on 24 January 2023.

Resolved

- (1) That the work of the Oxfordshire Inclusive Economy Partnership (OIEP) be broadly welcomed.
- (2) That it be agreed to actively engage with the OIEP by delegating authority to the Corporate Director – Communities, in conjunction with the Portfolio Holder for Regeneration and Economy, to contribute to the OIEP Steering Group and Working Groups on behalf of the Council.
- (3) That the Corporate Director – Communities, in consultation with the Portfolio Holder for Regeneration and Economy, be authorised to make appropriate pledges and to sign the OIEP's Charter to reflect the commitments contained within the Council's Delivery Plan (2022-2024).

Reasons

The Oxfordshire Inclusive Economy Partnership (OIEP) has developed a Charter as a statement of shared commitment to creating a more inclusive local economy, reflecting the broad ambitions of partners from throughout the county to engage everybody in the creation of stronger, more sustainable communities.

Pledges towards the aims of the Charter are being sought. It is recommended that, once the Charter and proposed pledges are clear, Cherwell District Council's commitment reflects and promotes the policies, activities and commitments it has within its Business Plan and Delivery Plan (2022-2024). This will allow partners to understand this Council's approach and to develop co-operative activity to address matters of shared interest.

The Charter is due to be launched in January 2023 and it is recommended that the Corporate Director – Communities be authorised, in consultation with the Portfolio Holder for Regeneration and Economy, to make appropriate pledges and to sign the OIEP's Charter to reflect the commitments contained within the Council's Delivery Plan (2022-2024).

Alternative options

Option 1: Not to engage with the work of the Oxfordshire Inclusive Economy Partnership and not to sign the Charter or pledge towards its delivery. This was rejected because it would miss an opportunity to reinforce its current work by working in partnership to extend the resources in Cherwell to tackle the significant issues being faced by residents who are not included within the local economy.

Option 2: To engage with the work of the Oxfordshire Inclusive Economy Partnership but neither sign the Charter nor pledge towards its delivery. This was rejected because it would suggest that the Council is not committed to the creation of an inclusive economy.

79

Banbury Business Improvement District (BID) Renewal Ballot

The Assistant Director – Growth and Economy submitted a report to provide an update on the process for Banbury Business Improvement District (the BID)'s renewal ballot, to consider the council's voting position and to seek the necessary officer delegations for the ballot process (including delegation of authority to a senior officer to cast votes in the ballot).

In introducing the report the Deputy Leader and Portfolio Holder for Regeneration and Economy advised that he had held informal discussions with Executive members who agreed that all of the Council's eligible votes be used to vote in favour of the BID. The Deputy Leader and Portfolio Holder for Regeneration and Economy proposed amended recommendations 1.4 and 1.5 to reflect that the Council's eligible votes be used to vote in favour of the BID and that authority be delegated to the Corporate Director Communities to vote accordingly. Councillor Clarke duly seconded.

The Deputy Leader and Portfolio Holder for Regeneration and Economy advised that the Chairman of the Overview & Scrutiny Committee had agreed to waive call in for this item to allow for immediate implementation of the Executive's decisions as it was time critical for the BID renewal ballot process that that the Council formally advise the BID as to whether or not their Business Plan was compliant with the Regulations as soon as possible after the Executive meeting.

Resolved

- (1) That the steps required in the process leading to Banbury BID's renewal ballot be noted.
- (2) That authority be delegated to the Assistant Director – Growth and Economy; the Assistant Director – Finance, and the Council's Monitoring Officer to review the draft Business Plan submitted by the BID in order to enable the Plan to be approved as compliant with the relevant BID legislation within the required timescale; or reject it, in which case, it would not be possible to proceed with the renewal ballot.

- (3) That authority be delegated to the Assistant Director of Finance, as the Council's s.151 officer, to determine the Levy Collection Fee per annum for the next five year term and negotiate as required with the BID.
- (4) That authority be delegated to the Assistant Director - Growth and Economy, in conjunction with the Assistant Director of Finance and the Council's Monitoring Officer, to enter into and amend any agreements, legal or contractual, between the Council and the BID, including the Operating Agreement; Data Sharing Agreement; and Baseline Statement.
- (5) That it be agreed that all of the Council's Eligible Votes be used to vote in favour of the Banbury Bid at the forthcoming ballot.
- (6) That authority be delegated to the Corporate Director - Communities to cast the votes on behalf of the Council in the renewal ballot.

Reasons

The meeting is asked to note the steps required in preparation for the renewal ballot and to approve the recommendations in order to have the necessary delegations of authority in place to enable the renewal ballot's progression in alignment with the BID Regulations 2004.

Alternative options

Option 1: Not to approve the recommended delegations of authority.
Reason for rejection: This is rejected because not approving the recommended delegations of authority would mean that the Council would be unable to fulfil its role as Ballot Holder; Billing Authority and Regulator in alignment with the BID Regulations 2004 in undertaking the actions required for the renewal ballot and thereafter.

The meeting ended at 7.12 pm

Chairman:

Date:

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Cherwell District Council

Extraordinary Executive

Minutes of an Extraordinary meeting of the Executive held at Bodicote House, Bodicote, Banbury, Oxon OX15 4AA, on 19 January 2023 at 6.30 pm

Present:

Councillor Barry Wood (Chairman), Leader of the Council and Portfolio Holder for Policy and Strategy
Councillor Ian Corkin (Vice-Chairman), Deputy Leader and Portfolio Holder for Regeneration and Economy
Councillor Phil Chapman, Portfolio Holder for Healthy Communities
Councillor Colin Clarke, Portfolio Holder for Planning
Councillor Nicholas Mawer, Portfolio Holder for Housing
Councillor Richard Mould, Portfolio Holder for Corporate Services
Councillor Adam Nell, Portfolio Holder for Finance
Councillor Lynn Pratt, Portfolio Holder for Property
Councillor Dan Sames, Portfolio Holder for Cleaner and Greener Communities

Apologies for absence:

Councillor Eddie Reeves, Portfolio Holder for Safer Communities

Also Present:

Councillor Sandy Dallimore. Chairman Overview and Scrutiny Committee

Officers:

Ian Boll, Corporate Director Communities
Shiraz Sheikh, Assistant Director Law, Governance & Democratic Services/Monitoring Officer
Maria Dopazo, Acting Planning Policy, Conservation & Design Manager
Christina Cherry, Principal Planning Policy Officer
Natasha Clark, Governance and Elections Manager

Officers Attending Virtually:

Michael Furness, Assistant Director Finance & S151 Officer
Shona Ware, Assistant Director Customer Focus

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Declarations of Interest

There were no declarations of interest.

81 **Petitions and Requests to Address the Meeting**

There were no petitions or requests to address the meeting.

The Chairman welcomed Councillor Dallimore, Chairman of Overview & Scrutiny Committee, to the meeting. Councillor Dallimore would be reporting the Committee's feedback on item 7, Draft Local Plan 2040 (Regulation 18) Consultation.

82 **Minutes**

The Chairman advised that the minutes of the previous meeting, held on 9 January 2023, would be submitted to the next scheduled Executive meeting, 6 February 2023.

83 **Chairman's Announcements**

There were no Chairman's announcements.

84 **Urgent Business**

There were no items of urgent business.

85 **Draft Local Plan 2040 (Regulation 18) Consultation**

The Assistant Director - Planning and Development submitted a report to present the draft Cherwell Local Plan 2040 for consideration and approval for public consultation.

In introducing the report the Portfolio Holder for Planning gave an overview of the Local Plan review process explaining that at the Regulation 18 consultation stage, Councils were able to amend and update the draft plan, in part based on any consultation responses received. However, the Council could not make any significant changes to the plan once the Publication (Regulation 19) stage had been reached. At the Publication stage, any responses are forwarded to an Independent Planning Inspector (or Inspectors) who presides over an Examination into whether the plan is Sound and so capable of adoption.

The Portfolio Holder thanked the Planning Policy team for their hard work on the draft Local Plan and associated documents.

The Portfolio Holder for Planning thanked the Overview and Scrutiny Committee for their detailed review of the draft Local Plan at their 11 January 2023 meeting, which he and the Leader had attended. The comments from the Overview and Scrutiny Committee had been published as a supplement to the Executive agenda.

In considering the report and the comments of the Overview and Scrutiny Committee, Executive members highlighted that there was a lot of information and Members were very reliant on the maps, which did not presently differentiate between green buffers and proposed development area and would be helpful for village coalescence. Additionally there had been changes to the housing numbers published as an addendum to the report which required further consideration.

In light of the comments of the Overview and Scrutiny Committee and Executive members, the Portfolio Holder for Planning proposed that consideration of the Draft Local Plan 2040 (Regulation 18) be deferred until a later date (to be determined) which would allow officers time to consider those matters. The proposal was duly seconded by the Deputy Leader and Portfolio Holder for Regeneration and Economy.

Councillor Dallimore, Chairman of the Overview and Scrutiny Committee, addressed Executive and thanked the Portfolio Holder for Planning and Leader for attending the Committee's meeting. Councillor Dallimore commented that the deferral was welcome in light of the Committee's comments. Councillor Dallimore highlighted the comment from the Committee in relation to Member engagement and requested all Members be afforded further opportunities to engage in the process.

The Chairman and Executive members echoed the comments of the Portfolio Holder for Planning and thanked the Planning Policy team for their hard work to date and acknowledged the additional work as a result of deferral but the work was extremely important for the future of the district.

On being put to the vote the motion, duly seconded, to defer consideration of the Draft Local Plan 2040 (Regulation 18) until a later date (to be determined) in light of the comments of the Overview and Scrutiny Committee and Executive to allow officers to consider these comments, was unanimously approved.

Resolved

- (1) That consideration of the Draft Local Plan 2040 (Regulation 18) Consultation be deferred until a later date (to be determined) in light of the comments of the Overview and Scrutiny Committee and Executive to allow officers to consider these comments.

Reasons

Deferral of the item will allow time for consideration of the comments raised by the Overview and Scrutiny Committee and Executive

Alternative options

Option 1: To approve the draft Local Plan for consultation. This was rejected as it would not enable consideration of the comments of the Overview and Scrutiny Committee and Executive.

The meeting ended at 6.44 pm

Chairman:

Date:

Cherwell District Council

Executive

6 February 2023

Budget Setting for 2023/24 and the Medium-Term Financial Strategy up to 2027/28

Report of Assistant Director of Finance (S151 Officer)

This report is public

Purpose of report

This report is the culmination of the Budget and Business Planning process for 2023/24 to 2027/28 and sets out the Executive's proposed Business Plan and related revenue budget for 2023/24, medium term financial strategy to 2027/28, capital programme to 2027/28 and all supporting policies, strategies, and information to recommend to full Council.

The Council adopts a forward looking and anticipatory approach to its financial management, which was acknowledged by the recent Peer Review in November 2022. The Council plans for, and continues to succeed in, encouraging and facilitating economic growth across the district. This success flows through to the Council's finances, reflected in the level of income received from business rates and the New Homes Bonus grant.

The Council has proactively monitored both the economic situation and Government announcements over the past 12 months and devised and implemented a budget and business planning strategy that has delivered within the constraints identified, consulting on a proposed balanced budget in November 2022. The Council was able to identify the risk of interest rate rises at an early stage, locking in low interest rates for all of its planned borrowing requirements, meaning only new borrowing requirements will need to be taken at higher rates.

The proposed net budget for the Council is £28.2m, which is an increase of £4.6m from 2022/23. A Band D Council Tax of £148.50 is proposed for the year which is an increase of £5 compared to 2022/23. The Capital Programme for the period 2023/24 – 2027/28 is proposed to be £35.9m. The Council plans to fund £2.0m of budget pressures and will deliver £1.0m of savings proposals as part of the 2023/24 budget.

1.0 Recommendations

The Executive is recommended to:

- 1.1 Delegate authority to the Section 151 Officer (S151), following consultation with the Leader of the Council and Lead Member for Finance, to complete the legal Council Tax calculations once all the information required has been received and submit a separate report to Council.

- 1.2 Delegate authority to the S151, following consultation with the Leader of the Council and Lead Member for Finance, to make appropriate changes to the Executive's proposed budget to Council.

The Executive is recommended to recommend to Council as follows:

- 1.3 Approve the proposed Fees and Charges schedule for 2023/24 (Appendix 7) and statutory notices be placed where required.
- 1.4 Consider and note the Equality Impact Assessment of the Budget (Appendix 8)
- 1.5 Approve a pension fund prepayment for the years 2023/24 – 2025/26 of £5.7m.
- 1.6 In relation to the Business Plan (Section 3.1) to approve:
 - 1.6.1 The Business Plan and Annual Delivery Plan set out in Appendices 1 and 2 respectively.
- 1.7 In relation to the Revenue Budget (Section 3.2) and Medium-Term Financial Strategy (MTFS) (Section 3.5) to approve:
 - 1.7.1 The net revenue budget for the financial year commencing on 1 April 2023, as set out in Table 3.2.1, and further analysed in the Budget Book provided at Appendix 12
 - 1.7.2 The MTFS and Revenue Budget 2023/24 (Sections 3.5 and 3.2 respectively), including the Savings Proposals, and Pressures included at Appendices 4 and 5 respectively.
- 1.8 In relation to Council Tax to approve:
 - 1.8.1 An increase in the Basic Amount of Council Tax for Cherwell District Council for the financial year beginning on 1 April 2023 of £5, resulting in a Band D charge of £148.50 per annum.
 - 1.8.2 For long term empty properties, an additional Council Tax premium will be charged of 100 percent for properties empty for two years or more, 200 percent for properties empty 5 years or more and 300 percent for properties empty 10 years or more.
 - 1.8.3 Removal of the 25 percent discount currently available for 12 months to properties that are uninhabitable or undergoing structural repairs.
- 1.9 In relation to the Capital Programme and related strategies (Section 3.3) to approve:
 - 1.9.1 The Capital Bids and Capital Programme at Appendix 17 and 18 respectively.
 - 1.9.2 The Capital and Investment Strategy 2023/24 (Appendix 19) and revised 2022/23 (Appendix 20) including the Minimum Revenue Provision (MRP) Policy.

- 1.9.3 The Treasury Management Strategy, including the Prudential Indicators, and Affordable Borrowing Limit for 2023/24 (Appendix 21).
- 1.10 In relation to reserves to approve:
 - 1.10.1 A minimum level of General Balances of £6m as supported by Appendix 15.
 - 1.10.2 The Reserves Policy (Appendix 14).
 - 1.10.3 The medium-term reserves plan described in Appendix 16.
- 1.11 In relation to the Pay Policy Statement approve:
 - 1.11.1 The Pay Policy Statement, as required by the Localism Act 2010, detailed in Appendix 9.

2.0 Introduction

- 2.1 The Budget and Business Planning report to Council on 27 February 2023 will be set out in four sections:
 - 1. Business Plan
 - 2. S151 Officer's Statutory Report
 - 3. Revenue Budget Strategy
 - 4. Capital & Investment Strategy
- 2.2 This report sets out Executive's proposed Business Plan, Annual Delivery Plan, Revenue Budget Strategy and the Capital & Investment Strategy. Alongside this, the report also sets out the Review of Fees and Charges for 2023/24.
- 2.3 The Executive's Business Plan, Annual Delivery Plan and revenue and capital budget proposals take into consideration the latest information on the council's financial position outlined in this report and comments from the Budget Planning Committee meeting on 6 December 2022. Comments from the Budget Planning Committee are included as Appendix 10 to this report. In finalising the proposals, the Executive has also taken into consideration feedback from the public consultation on the Business Plan priorities, revenue budget proposals and council tax increase.
- 2.4 The Government's "Local Government Finance Policy Statement 2023/24 to 2024/25" confirmed that the significant changes to the way they fund local authorities over the medium term has been delayed. A consultation on how the New Homes Bonus scheme will operate will take place in time for a new scheme to be in place for 2024/25. In addition, the Government is looking to introduce a new recycled waste funding stream from the Employer Producer Responsibility, though it is unclear how funding will be split in two-tier areas or whether initial set-up costs will be funded. The business rates reset and fair funding review are now expected to take place in 2025/26. All the information and intelligence received indicates that this will present CDC with a substantial financial challenge over the medium term, which the Council needs to prepare for as it sets the budget for 2023/24. The Policy Statement can be found here:

<https://www.gov.uk/government/publications/local-government-finance-policy-statement-2023-24-to-2024-25/local-government-finance-policy-statement-2023-24-to-2024-25>

2.5 On Monday 19 December 2022, the government published a provisional one-year settlement for Local Government which can be found here:

<https://www.gov.uk/government/collections/provisional-local-government-finance-settlement-england-2023-to-2024>

2.6 The impact for CDC of this one-year settlement can be summarised as follows:

- With a focus of the settlement on stability, it is essentially a “roll-forward” of funding
- Confirmation that Council Tax can be raised by 3 percent or £5, whichever is greater (for CDC this is £5)
- That a one-year only New Homes Bonus award for 2022/23 has been allocated to CDC
- An additional Funding Guarantee grant of £2.845m to ensure that the Council’s core spending power increased by a minimum of 3 percent.

2.7 The settlement was broadly as expected following announcements in the Autumn Statement announced on 25 November 2022, and subsequently from the Policy Statement, with additional one-off funding announced for 2023/24. CDC had built its financial models on the indicative information provided at that point.

2.8 In order to support the Council with its task of approving the budget for 2023/24 this report explains and explores the impacts of the various building blocks that make up the final budget of the Council including:

- estimated impact of the financial outturn for the Council for 2022/23
- cost of the services that the Council provides
- commercial activity and income
- financing the Council (borrowing and investments)
- inflationary and other price change impacts
- budget proposals (savings and pressures)
- capital investment proposals
- reserves and the use of reserves to support the budget
- an assessment of the financial resilience of the Council
- national funding assumptions for future years and the medium-term funding gap

2.9 This report will set out the Business Plan and Annual Delivery Plan for 2023/24 and show how each of the above elements support the development of the delivery of the plan by setting a budget for 2023/24, the longer term MTFs, and will then summarise the next steps that will allow the Council to consider, approve and set balanced budgets over the MTFs period.

3.0 Report Details

3.1 Business Plan

- 3.1.1 Each year the Council reviews and updates its Business Plan, setting out the priorities and high-level objectives for the year ahead, as found in Appendix 1. This year we have also developed our Annual Delivery Plan (Appendix 2), proposed to support the achievement of the vision, aims and ambitions of our Council as contained in our Business Plan.
- 3.1.2 The Annual Delivery Plan sets out the clear priorities and objectives for the year, it establishes a clear direction for our Council on an annual basis in support of the vision, aims and ambitions of our Council as contained in the Council's Business Plan. As this is our Council's initial Annual Delivery Plan and is being introduced during 2022/23 it is therefore intended to cover the period 2022/23 and 2023/24.
- 3.1.3 The Business Plan informs the development of the annual budget and the operational Service Plans for the delivery of all Council services. The Service Plans will set out the activities that each service will undertake to deliver against the priorities set out in the Business Plan. Ultimately, these activities will be reflected in the individual objectives of employees providing a clear 'golden thread' through the organisation for the delivery of the Council's priorities.
- 3.1.4 The Business Plan comprises four strategic priorities as outlined below:
- **Housing that meets your needs;**
 - **Supporting on environmental sustainability;**
 - **An enterprising economy with strong and vibrant local centres;**
 - **Healthy, resilient and engaged communities.**
- 3.1.5 Housing that meets your needs re-emphasises this Council's commitment to making sure its residents all have the opportunity to access housing that is suitable for them, whether this is through supporting the delivery of affordable and green housing, ensuring minimum standards in the private rented sector, working with partners to prevent homelessness, supporting the most vulnerable residents or through delivery of the Local Plan.
- 3.1.6 Supporting on environmental sustainability builds on the Council's commitment to be carbon neutral by 2030, in addition to focusing on the priorities of its residents including supporting waste reduction, reuse and recycling across the district. Promoting the Green economy and working with partners to improve air quality are also the Council's priorities. Climate action is a key focus for the Council, transforming the organisation to deliver its carbon neutral commitments.
- 3.1.7 A strong and enterprising economy has long been a priority of the Council, with a strong track record of supporting businesses and investing in its town centres which is a key priority for its residents. An enterprising economy with strong and vibrant local centres, reinforces this commitment for Cherwell to be a district where business can grow, attract investment and visitors to the town centres across the district.
- 3.1.8 The wellbeing of its residents and communities has always been a priority for this Council. The healthy, resilient and engaged communities priority retains its focus on ensuring residents and communities are as active and healthy as possible.

Supporting community and cultural development and working towards our continued commitment to equalities, diversity and inclusion. This Council will continue to work with partners to address the causes of health inequality and deprivation across the district.

3.1.9 The Council will continue to work with partners, across all sectors, to help our local businesses' and residents' recovery from the pandemic and to face the current cost of living crisis, consistent with our believe that working together we are in a stronger position to meet the health, economic and social challenges of the future.

3.1.10 The four priorities in our business plan are supported by ten key strategic priorities established in our Annual Delivery Plan:

- **Cost of Living Crisis Strategy:** To respond to the rising cost of living challenges within our local communities, ensuring we co-ordinate our services and our partnerships to provide the most effective support to our communities.
- **Climate Emergency Strategy:** The Council declared a climate emergency in 2019, putting in place an action plan to reduce the Council's direct impact on the environment. The Council has recently agreed to take forward a new strategy which will be developed with support from Members across the Council and through the contribution of the Overview & Scrutiny Committee.
- **Wellbeing & Healthy Communities Strategy:** To support the well-being of our communities through a single strategy for physical, mental, social and cultural support and inclusion for all.
- **Vibrant Economy Strategy:** To ensure we have a clear strategy for the economic prosperity of Bicester, Banbury, Kidlington and our rural villages and communities including specific opportunities to regenerate and improve our Town Centres.
- **Local Plan:** To ensure we have the right target for new homes and economic growth, in the right place, and protect our villages, communities and the environment through our Local Plan.
- **Homelessness Strategy:** To support our residents into permanent accommodation that meets their needs and supports their forward journey in society.
- **Investment in our Communities:** To ensure we attract additional external investment to support our local communities in Cherwell.
- **Local Strategic Partnership:** To recognise the importance of working in partnership for our local communities. We will seek to strengthen our Local Strategic Partnership in Cherwell to help achieve improved outcomes for all our communities through improved co-ordination of our priorities with our LSP partners.
- **Medium Term Financial Strategy:** To ensure the Medium-Term Financial Strategy (MTFS) is balanced over the medium term and we provide value for money with our limited resources focussed on the Council's key priorities.
- **Team Cherwell:** To ensure the support and development of our organisation, through our staff, to support the aims and ambitions of our Council.

3.1.11 The service specific plans, detailing operational performance measures and outcomes are captured as part of the 2023-24 performance management framework and will link to the Council's Leadership Risk Register. The Council will report on progress against the Business Plan to Executive on a monthly basis through the Performance, Risk and Finance report. Leadership risks will also be linked to the corporate priorities. Also, the council will report quarterly on the

progress made against the ten key strategic priorities established in the Annual Service Delivery plan.

3.2 Revenue Budget Strategy

Forecast Financial Outturn 2022/23

- 3.2.1 The Budget Planning Committee and the Executive regularly review the forecast outturn as part of the Performance, Risk and Finance report. 2022/23 has been a challenging year in continuing to deal with the ongoing impact of behaviour changes following the COVID-19 pandemic and the emergence of the Cost-of-Living Crisis whilst continuing to deliver Council services.
- 3.2.2 The forecast outturn position as at 31 December 2022 is an overspend of £0.1m. The Council anticipates that it will be able to manage this before the year end and so should not impact on the Council's reserves position. There are a number of savings proposals from 2022/23 which have not been fully delivered. Where this has been identified and there is an anticipated impact in future years, this has been taken into account within the budget proposals for 2023/24.
- 3.2.3 Managers have considered their current operational and financial performance when considering their future year budget requirements and where necessary included growth pressures or proposed budget reductions as part of the budget setting process. These are described later in this report. The budget requirements and the changes requested by managers have been scrutinised by senior managers over a number of individual sessions allowing for challenge and consideration across the range of Council budgets. This helps to ensure the proposals align with the Council's objectives.

Net Cost of Services for 2023/24

- 3.2.4 Having reviewed the impact of prior years' financial information, the next step in setting a budget is to consider the "Net Cost of Services" which includes the costs and income streams directly attributable to service delivery and commercial activities. Table 3.2.1 summarises the draft budget for 2023/24 by directorate.

Table 3.2.1: Net Cost of Services

Directorate	Net budget 2023/24 £m
Communities	8.693
Resources	5.097
Chief Executive	5.460
Service Sub-total	19.250
Corporate Costs	3.695
Policy Contingency	5.229
Net Cost of Services	28.174

- 3.2.5 The largest proportion of the expenditure budget, excluding benefits payments, is spent on staffing (47 percent).
- 3.2.6 Service income streams that are assumed within the net cost of services include fees and charges (e.g. planning fee income, income from car parks, licences etc.), service specific grants and rental income from all council-owned properties. For information on categories of Income and Expenditure, please see Appendix 6 for a summary by type of expenditure and Appendix 12 for more detail at a Directorate level.
- 3.2.7 A thorough review of service levels and budgets has taken place and savings identified at Appendix 4 that will allow the Council to operate within the level of resources that it anticipates will be available to it in 2023/24. Full monitoring of the savings programme will take place throughout 2023/24.

Budget Proposals (Pressures, and Savings)

Directorate Budget Pressures

- 3.2.8 The Council has identified new budget pressures of £2.2m for 2023/24 and a further £0.3m of savings non-delivery. Budget Pressures funded on a one-off basis in 2022/23 have fallen by (£0.5m) resulting in an overall increase in budget pressures of £2.0m. The full schedule of existing and new pressures can be seen at Appendix 5. Table 3.2.2 summarises the Pressures which have been included within the Net Cost of Services.

Table 3.2.2: Pressures

Directorate	2023/24 £m	2024/25 £m	2025/26 £m	2026/27 £m	2027/28 £m	Ongoing Impact £m
Communities	0.989	0.046	0.001	0.171	0.001	1.208
Resources	0.487	(0.031)	0.000	0.000	0.000	0.456
Chief Executive	0.725	(0.251)	0.000	0.000	0.000	0.474
Total New Pressures	2.201	(0.236)	0.001	0.171	0.001	2.138
Prior Year Pressures	(0.492)	0.014	0.012	0.000	0.000	(0.466)
Savings Non-delivery	0.300	0.000	0.000	0.000	0.000	0.300
New Pressures	2.201	(0.236)	0.001	0.171	0.001	2.138
Total Pressures	2.009	(0.222)	0.013	0.171	0.001	1.972

Savings Proposals

- 3.2.9 In total, savings of £1.0m are proposed for 2023/24, of which £0.5m were previously planned and £0.5m are new savings proposals. In December 2022, the Council consulted on £0.5m new savings proposals. After receiving consultation responses and considering the level of resources available to it following the Local Government Finance Settlement, the Council has amended its savings proposals. The full schedule of savings can be seen at Appendix 4.
- 3.2.10 The council invited people to give their views on its budget saving proposals for 2023/24 between 23 November 2022 and 23 December 2022. This opportunity

was widely promoted through a multifaceted communications campaign. The campaign resulted in over 400 people visiting the council’s website for more information on the proposals and to access the online form for providing feedback.

3.2.11 Thirty-nine people took the time to give us their views, which indicates the strength of feeling towards the proposals. The Council is grateful to everyone that took the time to learn more about its budget proposals and particularly those that provided their views on them. After reviewing the savings proposals and considering consultation responses the following changes are proposed:

- Align Affordable and Share Ownership rent increases with the national limit of 7 percent (consulted on 5 percent for Affordable Rents and 13 percent for Shared Ownership with caps of £30 or £40 per month)
- Align increase in HMO license fees to 7 percent also (original proposal was 5 percent)
- Phase the reduction of grant to Experience Oxfordshire

Table 3.2.3: Change in New Savings Proposals in £ millions

Change in New Savings	2023/24 £m	2024/25 £m	2025/26 £m	2026/27 £m	2027/28 £m	Total
New savings in Consultation	(0.500)	(0.128)	(0.105)	(0.025)	(0.000)	(0.758)
Revised after consultation:						
SAFFH231 – Rent Increase for Affordable Rent and Shared Ownership properties	(0.008)					(0.008)
SHOSD231 - Increase in HMO Licenses	(0.001)					(0.001)
SECON233 – Cutting grants to Banbury Museum TIC and Experience Oxfordshire	0.011	(0.006)	(0.005)			0.000
Final new Savings Proposals	(0.498)	(0.134)	(0.110)	(0.025)	(0.000)	(0.767)

3.2.12 Table 3.2.4 provides a breakdown of how the total savings of £1.0m for 2023/24 are allocated across the Directorates.

Table 3.2.4: Savings Proposals

Directorate	2023/24 £m	2024/25 £m	2025/26 £m	2026/27 £m	2027/28 £m	Ongoing Impact £m
Communities	(0.131)	(0.016)	(0.010)	0.000	0.000	(0.157)
Resources	(0.088)	(0.040)	(0.080)	0.000	0.000	(0.208)
Chief Executive	(0.279)	(0.078)	(0.020)	(0.025)	0.000	(0.402)
Exec Matters	0.000	0.000	0.000	0.000	0.000	0.000
Total New Savings Proposals	(0.498)	(0.134)	(0.110)	(0.025)	0.000	(0.767)
Prior Year Savings	(0.506)	(0.163)	(0.108)	(0.189)	(0.104)	(1.070)
New Savings	(0.498)	(0.134)	(0.110)	(0.025)	0.000	(0.767)
Total Savings Proposals	(1.004)	(0.297)	(0.218)	(0.214)	(0.104)	(1.837)

3.2.13 All of the pressures and savings proposals are included in the proposed budget for 2023/24 which would allow a balanced and legal budget to be set.

Corporate Updates

Inflation

3.2.14 The Council has provided for inflation on pay, contracts, and fees and charges within the budget. It assumes that there will be 5 percent pay awards in the three years to 2025/26. In the remaining two years of the MTFS period pay awards are assumed to increase at 2.5 percent annually. Contract inflation had been provided for at 6 percent in 2023/24 in the February 2022 MTFS. This provision has been increased by £3m for 2023/24 to reflect inflationary pressures on utilities, and other contracts with ongoing provision in future years at 2 percent. Fees and charges have been reviewed and increased for 2023/24 to reflect cost recovery and are then assumed to increase by 2 percent annually. A schedule of proposed fees and charges is set out at Appendix 7.

Castle Quay

3.2.15 The Castle Quay project was undertaken as part of a wider Banbury regeneration project and forecasts significant levels of income generation across the MTFS period. The latest MTFS forecast takes into consideration:

- The current outturn forecasts for 2022/23
- The post pandemic economic climate

3.2.16 As a result, the 2023/24 budget has:

- Removed £1.9m of previously assumed income growth from the MTFS
- Reduced the Castle Quay income budget by £1.4m compared to the 2022/23 budget.

3.2.17 It should be noted that the Castle Quay development was undertaken as a long-term regeneration project, which the Executive agreed at its meeting on 4 December 2017, and it is the Council's intention to bring Castle Quay forward as part of a new vision for the town centre.

Executive Matters

3.2.18 Executive Matters includes non-service costs including borrowing costs, interest receivable, contributions to and from reserves and a Policy Contingency budget. The Executive Matters budget also includes non-ringfenced general grants.

3.2.19 The impact of recovery from COVID-19 has continued to have a significant impact on the finances and services of the Council in 2022/23. The Cost-of-Living Crisis has also taken a toll. As it is unclear what the impacts of the economy will be in 2023/24 the Council has continued with a Policy Contingency in 2023/24 of £1.1m linked to commercial risk. This contingency is to protect the Council in case it suffers losses of income or increases to contract costs compared to the normal budget position.

3.2.20 In addition, the Council has set aside an inflation contingency and a general contingency. Table 3.2.5 shows the provisions that have been made in the Policy Contingency budget:

Table 3.2.5: Contingencies

Policy Contingency	2023/24 £m
Inflation Contingency	3.755
Commercial Risk	1.100
General Contingency	0.374
Total	5.229

3.2.21 Table 3.2.6 below shows the movement from the approved 2022/23 budget to the draft budget for 2023/24.

Table 3.2.6: Budget Movement from 2022/23 to 2023/24

Directorate	2022/23 Budget £m	Pressures £m	Savings Proposals £m	Capital Impact £m	Corporate Changes £m	Use of Reserves £m	Grants £m	Inflation £m	2023/24 Budget £m
Chief Executive	4.950	0.844	(0.475)	0.000	0.464	(0.361)	0.000	0.038	5.460
Communities	8.521	0.802	(0.544)	0.035	0.263	(0.739)	0.000	0.355	8.693
Resources	2.846	0.415	0.015	0.000	1.761	(0.100)	0.000	0.160	5.097
Exec Matters	4.191	(0.052)	0.000	0.253	1.527	(0.467)	(1.757)	0.000	3.695
Policy Contingency	2.984	0.000	0.000	0.000	(0.706)	0.000	0.000	2.951	5.229
2022/23 Budget	23.492	2.009	(1.004)	0.288	3.309	(1.667)	(1.757)	3.504	28.174

3.2.22 Corporate Changes reflect policy changes which have already been approved by the Executive, such as increasing the fees for Garden Waste and renewing the Debt and Money Advice Contract which will result in savings in 2023/24. As decisions have already been taken these did not need to be consulted on.

3.2.23 In February 2022 the decision was taken to end the formal strategic partnership between Cherwell District Council and Oxfordshire County Council. The process of decoupling the two authorities has been carried out at pace throughout 2022/23 with all decisions taken by 31 August 2022. Operating with joint management structures and joint teams had resulted in the sharing of costs between both authorities.

3.2.24 In order that residents were not impacted by this decision and to ensure critical services were maintained Cherwell has acted quickly to introduce new dedicated arrangements which provide the strategic leadership, focus and direction to support the district through the ongoing challenges all organisations are currently facing.

3.2.25 CDC has had to recruit into posts that were previously carried out jointly, but this has enabled a more focused approach to our service delivery and thus future activity, for example climate change. Cherwell DC has now approved an Annual Delivery Plan that sets out the key strategic priorities for our residents and communities following our separation from the partnership. The loss of savings from the joint working relationship are estimated to be £0.880m in 2023/24.

Council Financing

3.2.26 In addition to the fees and charges income streams and grant funding recorded in the Net Cost of Services, the Council funds the balance of its activities from the following sources:

Business Rates Retention

3.2.27 Under the business rates retention scheme, 50 percent of the business rates collected is retained locally and shared between CDC (40 percent) as the billing authority, and Oxfordshire County Council (10 percent) as the major precepting authority, the remaining 50 percent goes to central government.

3.2.28 The Council, as the billing authority, is required before the beginning of a financial year, to forecast the amount of business rates collectable during the year. The NNDR1 form provides a tool to enable authorities to do this and it must be submitted to the Secretary of State and major precepting authorities by 31 January each year.

3.2.29 The Council sets its business rates income budget based on the NNDR1 form and the following:

- The Government deducts a tariff on business rates collected as a way to redistribute business rates collected based on need.
- A levy is also deducted by the Government for on growth in business rates above the baseline set in 2013/14 determined by the Government.
- CDC has entered a pooling arrangement with the other councils in Oxfordshire to ensure that this growth is retained within the county. CDC is able to retain an element of this “pooling benefit”.
- CDC must also take account of the estimated surplus/deficit on its business rates income in 2022/23. This compares the level of business rates collectable in 2022/23 compared to the estimate it made when setting the budget for 2022/23.
- Section 31 Grants are paid to compensate CDC for government changes to the business rates policy which has resulted in CDC generating lower business rates income than it otherwise would have done.

3.2.30 The resources retained by the Council from business rates are summarised in Table 3.2.7.

Table 3.2.7: Resources retained from business rates related income

Business Rates Breakdown	2023/24 £m	2024/25 £m	2025/26 £m	2026/27 £m	2027/28 £m
Business Rates	(42.095)	(2.652)	(1.107)	(5.803)	(1.231)
Business Rates Deductions	38.464	2.620	6.992	1.034	0.968
Business Rates Pooling Gain	(1.800)	0.000	1.800	0.000	0.000
Business Rates Collection Fund (Surplus) / Deficit	(3.052)	3.052	0.000	0.000	0.000
S31 grants	(8.644)	(0.525)	2.577	4.562	(0.034)
Grand Total	(17.127)	2.495	10.262	(0.207)	(0.297)

Movements from 2024/25 onwards are annual incremental changes from the previous year

3.2.31 Any variance between the actual business rates income billed and accounted for compared to the NNDR1 estimate at the beginning of the year is managed through the Collection Fund.

3.2.32 It is estimated that there will be a Collection Fund surplus on business rates of £3.1m which has been taken account in setting the business rates income budget and summarised in Table 3.2.8 below.

Table 3.2.8: Business Rates (Surplus)/Deficit Calculation

Business Rates Deficit	2023/24 £m
2021/22 surplus	(1.925)
2022/23 deficit relating to business rates reliefs	(3.984)
Use of S31 Reserve	2.886
1/3 2020/21 deficit ¹	(0.029)
Business Rates Surplus	(3.052)

Other Grants

Grants supporting the Net Cost of Services:

3.2.33 New Homes Bonus: The Council expects to receive £1.6m in 2023/24 comprising a payment for 2022/23, but all legacy payments from the scheme are complete. It is not known how the Government intends to replace this regime; a consultation took place in 2021/22 but no response to the consultation has been announced. With confirmation of the Business Rates reset delayed until 2025/26, this payment is expected to drop out in 2025/26.

3.2.34 Revenue Support Grant: Due to the roll forward of funding, the Council expects to receive £0.1m in 2023/24 which has increased in line with inflation compared to last year. RSG is then also expected to be zero beginning in 2025/26.

Grant Funding within the Net Cost of Services:

3.2.35 The Government announced that Lower Tier Services Grant would not continue for 2023/24 but would be replaced by a Funding Guarantee Grant to ensure that the Council did not suffer a reduction in the allocations of funding received from Government. There will also be a new one-off Services Grant for 2023/24. The Council will receive £2.8m and £0.1m from these grants respectively.

3.2.36 The Council also receives ringfenced grants for specific purposes. These are allocated directly to the Directorates to be spent in line with the grant conditions. A breakdown of all government grant income assumed within the budget is at Appendix 13.

Council Tax

3.2.37 The council tax requirement of CDC for 2023/24 is £8.6m and the tax base has been set at 58,184.3. A £5 increase to the rate of Council Tax has been assumed: from £143.50 to £148.50. This is the maximum increase the Council can propose, without the need to hold a referendum.

¹ The 2020/21 estimated deficit was spread equally across 2021/22, 2022/23 and 2023/24 to mitigate the impacts of COVID-19

3.2.38 The Council has considered the amount of council tax that it anticipates it will collect in 2022/23 compared to the estimate it made when setting the 2022/23 budget. The Council expects there to be a surplus to be taken into account of (£0.650m).

Table 3.2.9: Breakdown of Council Tax Income

	£m
Council Tax (Surplus)/Deficit	(0.650)
Council Tax Requirement	(8.640)
Council Tax Income	(9.290)

3.2.39 The budget for 2023/24 therefore is balanced by these sources of funding as demonstrated in Table 3.2.10.

Table 3.2.10: Financing of Net Cost of Services 2023/24

Full Budget	£m
Net Cost of Services	28.174
Financed by:	
Revenue Support Grant	(0.132)
Council Tax	(9.290)
Business Rates	(17.127)
New Homes Bonus	(1.625)
Balance	0.000

3.3 Capital and Investment Strategy

3.3.1 The Capital and Investment Strategy is included at Appendix 19 and reflects the requirements of the Prudential Code including for the S151 to report explicitly on the deliverability, affordability and risks associated with the Strategy.

3.3.2 The Capital and Investment Strategy aims to set a clear framework for capital decision making alongside the Council's Business Plan, vision, and priorities. The Capital Strategy is closely aligned with the Council's service plans, asset review and regeneration plans. It also includes the Council's Minimum Revenue Provision (MRP) Policy.

3.3.3 In November 2021 the government began consultation on proposed changes to MRP guidance to strengthen the Prudential Framework. The changes proposed would have required the Council to charge MRP on the capital service loans (i.e. non-treasury loans) it has extended to third parties (including its subsidiaries). To date, the Council has not charged MRP on these loans because it has not been deemed imprudent not to. With the expectation that the new requirements were to come into force in the 2022/23 financial year, the Council changed its MRP policy accordingly.

3.3.4 This Council, and many others, responded to the consultation with concern about the unintended consequences on revenue budgets of the proposed changes. Government responded by issuing a survey requesting views on further proposed amendments that would provide some flexibilities with respect to capital loans which closed in July 2022.

3.3.5 The timetable for implementation of the revised MRP guidance is now expected to be from April 2024. However, until the final guidance is published, the MRP Policy will not commit the Council to charging MRP on the granting of service loans. It is proposed that the MRP policy for 2022/23, which was agreed in February 2022, also be amended to reflect the delay in implementation with the revised wording at paragraph 4 of Appendix 20.

Capital Programme

3.3.6 The capital programme sets out a plan for investment between 2023/24 and 2027/28. It forms an integral part of the Council's core activity and is an important part of the MTFs.

3.3.7 Capital expenditure can be funded from Revenue, Capital Receipts, Capital Grants, Internal or External Borrowing. External Borrowing is used to manage the cashflow requirements of the Council and, whilst it is used to finance the capital programme, it is not linked to individual projects. Details of the Council's expected borrowing for 2023/24 are included in the Treasury Management suite of strategies which are scrutinised by the Accounts, Audit and Risk Committee (AARC) and included in Appendix 21. These were reviewed in draft form and were recommended to the Executive at the AARC meeting on 25 January 2023.

3.3.8 Table 3.3.1 below details the new capital investments proposed for 2023/24 (detailed proposals can be found in Appendix 17). Where these result in a revenue cost or savings, these have been adjusted for in the Net Cost of Services. A list of all proposals in the full capital programme (£15.5m in 2023/24) is set out in Appendix 18. The financial implications of these are incorporated into the MTFs.

Table 3.3.1 – Capital Bids 2023/24 through to 2027/28

Directorates	2023/24 £m	2024/25 £m	2025/26 £m	2026/27 £m	2027/28 £m	Total Project Cost £m	External Funding £m	Balance to be funded by borrowing £m
Communities	4.061	5.032	0.025	0.000	0.000	9.118	(5.806)	3.312
Resources	0.855	0.000	0.000	0.000	0.000	0.855	0.000	0.855
Chief Executive	2.912	1.434	1.239	1.239	1.239	8.063	(7.868)	0.195
Grand Total	7.828	6.466	1.264	1.239	1.239	18.036	(13.674)	4.362

3.3.9 Since 2015/16, the Council has incurred significant capital expenditure that has been temporarily financed by internal borrowing (cash received in advance of expenditure) and external borrowing (debt). Borrowing is seen as a temporary source of finance. The extent to which the Council has needed to borrow is reflected in the Capital Financing Requirement (CFR) which is a direct measure of the amount of capital outlaid but not financed by grants, capital receipts or revenue resources.

3.3.10 To get an indication of the Council's overall capital health, it is useful to examine the ratio of the CFR to the Council's total capital asset value in Table 3.3.2.

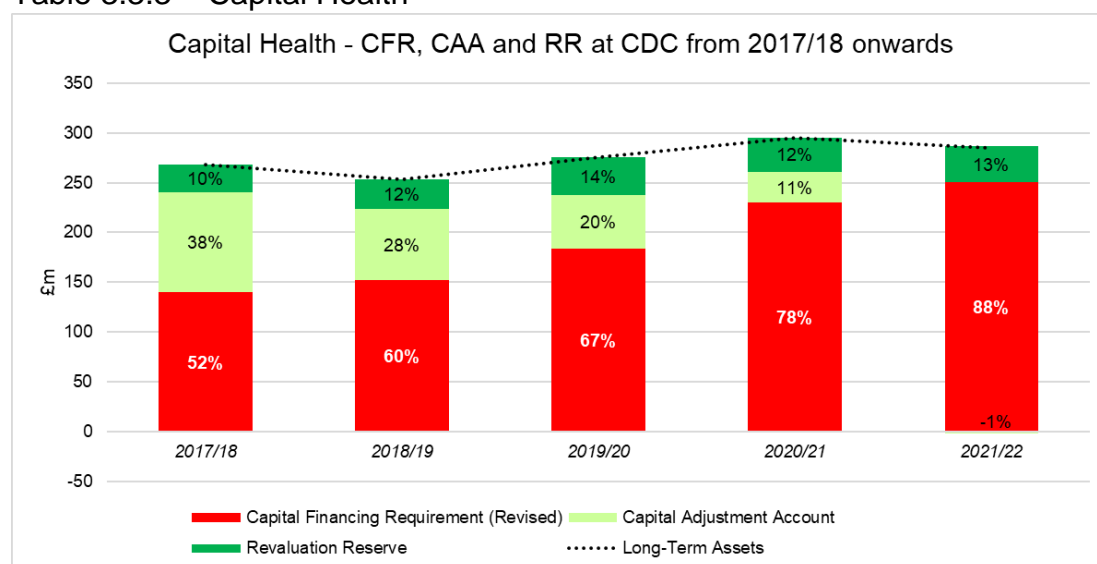
Table 3.3.2 – Capital Health Overall in £ millions

Capital Health	2017/18	2018/19	2019/20	2020/21	2021/22
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Capital Financing Requirement	139.73	151.85	183.21	229.92	250.24
Capital Adjustment Account	101.01	71.99	54.35	31.08	(2.28)
Revaluation Reserve	27.11	29.76	37.6	34.46	36.53
Capital Assets	267.85	253.6	275.16	295.46	284.49

3.3.11 As of 31 March 2022, the Council's CFR amounted to 88 percent of the value of its total capital worth. Table 3.3.3 shows how this has changed since the Council began borrowing to fund its capital programme.

Table 3.3.3 – Capital Health



3.3.12 The Council primarily holds its capital assets to deliver service objectives, such as economic regeneration and local housing, alongside generating income to support the revenue budget. With national trends in operational and investment property showing a decline in book value, it is important to continue to monitor this ratio to consider appropriate next steps if the Council's need to borrow (CFR) exceeds the total value of its capital assets.

3.3.13 Actions the Council is taking to reduce the CFR include the setting aside of prudent levels of revenue resources (MRP) to repay existing borrowing and using capital grants and receipts to finance new projects wherever possible, keeping future borrowing requirements to a minimum.

3.3.14 Where borrowing of capital has been deemed necessary to deliver against service objectives or, for example to comply with health and safety regulations, financing costs (revenue expenditure) are incurred by the Council. These can be medium to long-term in nature, depending on the useful lives of the assets purchased (or invested in). Projects financed by borrowing typically incur a Minimum Revenue Provision (MRP) charge to the revenue account which is made in line with the Council's MRP policy and with due regard to government guidance. The Council also incurs interest on the borrowing it has taken.

3.3.15 While these costs are significant, the Council generates income within its services to support them. Budgeted interest and MRP represents 34 percent of the £28.2m net council Funding. When the Council's total budgeted income, i.e., income generated from service activities and income from local taxation (excluding benefits payments) of £60.8m is compared to budgeted Interest Payable and MRP on

borrowing for capital purposes of £9.4m, the result is 15 percent. This demonstrates that the funding of interest payable and MRP is not entirely from council tax.

3.4 Reserves

3.4.1 Reserves are held to ensure the Council can manage and mitigate current and future risk and spending plans. The Council has carried out a review of its reserves requirements as part of the Budget and Business Planning Process and continues to follow its reserves policy attached at Appendix 14. This has enabled the Council to hold larger, more strategic reserves, rather than smaller earmarked reserves and allows the Council to use its reserves in a more flexible manner. The Council will regularly review its level of reserves to ensure they remain adequate and appropriate and will continue to be monitored throughout 2023/24.

3.4.2 Table 3.4.1 below shows a summary of the forecast reserves position for 2023/24 to 2027/28. The final outturn position for 2022/23 will be reported to the Executive in June 2023 and the Accounts, Audit and Risk Committee in May 2023, as part of the Council's Statement of Accounts. Appendix 16 provides a breakdown of the proposed use of reserves for 2023/24 and an estimate of how reserves are currently expected to be used to 2027/28.

Table 3.4.1 – Forecast Use of Reserves

Reserve Category	Forecast Balance 1 April 2023 £m	2023/24 £m	2024/25 £m	2025/26 £m	2026/27 £m	2027/28 £m	Expected Balance 1 April 2028 £m
General Balances	(6.450)	0.000	0.000	0.000	0.000	0.000	(6.450)
Earmarked Reserves	(23.449)	(2.381)	(0.191)	(0.684)	(1.161)	0.227	(27.638)
Revenue Grants	(1.530)	0.711	0.007	0.007	0.007	0.007	(0.792)
Capital Reserves	(5.131)	4.250	0.000	0.000	0.000	0.000	(0.881)
Sub-TOTAL RESERVES	(36.560)	2.581	(0.184)	(0.677)	(1.154)	0.234	(35.761)
Revenue Grants relating to cashflow timing	(0.263)	0.000	0.000	0.000	0.000	0.000	(0.263)
TOTAL RESERVES	(36.823)	2.581	(0.184)	(0.677)	(1.154)	0.234	(36.024)

3.4.3 A risk assessment has been carried out on the level of general balances that CDC holds which is detailed in Appendix 15. This sets out that CDC should hold general balances of at least £6m.

3.4.4 It is the duty of the Section 151 Officer to ensure that the Council retains reserves at a level which provides the Council with financial resilience both in setting the budget for 2023/24 but also looking into the medium term and the MTFs. Reserves can be

used for one-off expenditure but should not be used to finance ongoing Council activities.

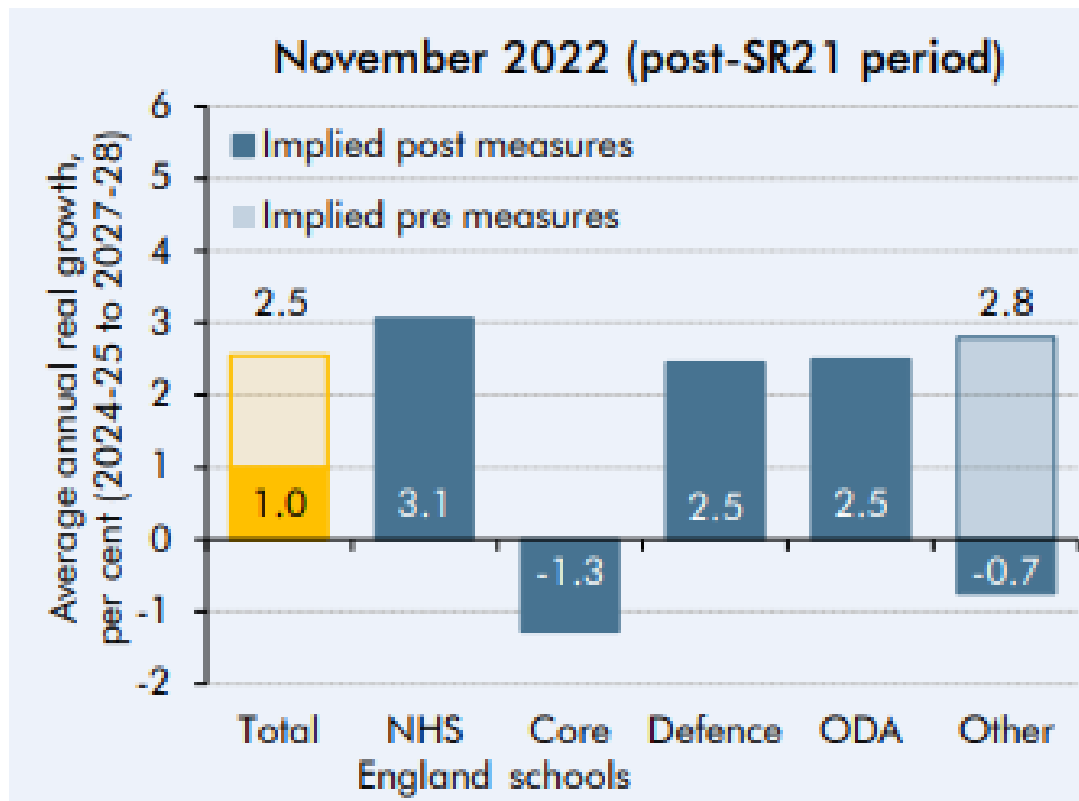
- 3.4.5 The Council has taken advantage of making advance payments to the Oxfordshire Pension Fund over the last three years concluding in 2022/23 and the Pension Fund's Actuary, Hymans Robertson, has provided the Council with the opportunity to continue this arrangement for a further three-year period of advance payments for 2023/24, 2024/25 and 2025/26, reducing the overall cost of the pension fund contributions to the Council.
- 3.4.6 A lump sum payment of £5.78m would allow the Council to retain its Employer's Contribution rate at 15.9 percent, rather than it increasing by 12.5 percent to 28.4 percent, which is the required contribution rate indicated by the most recent fund projections. The actuary's forecasts, based on the current pensionable payroll, could result in £0.410m savings across the three-year period. The MTFs already contains a provision of £1.675m in anticipation of future lump sum payments; the reserves forecast in Table 3.4.1 and Appendix 16 includes the use of £0.252m to top the current provision to 1/3 per annum of the proposed lump sum.
- 3.4.7 This is an attractive reduction in the overall cost and gives the Council some cost certainty over the three-year period. The actual savings achieved will depend on the performance of the Fund over the period and the degree to which the Council's pensionable pay differs to the assumptions made by the actuaries.

3.5 Medium Term Financial Strategy

Funding Reforms

- 3.5.1 The Council expects that local government funding reforms will be implemented in 2025/26 as announced in the Local Government Finance Policy Statement on 12 December 2022. Additionally, the Autumn Statement announced on 17 November 2022, explained that the Government would operate within the Spending Review control totals for 2023/24 and 2025/26.
- 3.5.2 As part of funding reforms, a reset of the Business Rates baseline is expected. This would impact CDC significantly as the Council has been consistently collecting above the baseline and retaining 50 percent of that growth under the current retention scheme. The Council is assuming a reset is introduced in 2025/26, which will significantly reduce the level of resource available to the Council.
- 3.5.3 Government funding of local authorities is based on an assessment of need. The Government is expected to simplify the way need is determined and to make the formula more objective and transparent. However, until a consultation on proposed new arrangements is published by the Government there is no way to accurately forecast the impact. Therefore, the Council has assumed the impact of its implementation is neutral within the MTFs and has been considered as part of the risk assessment of reserves.
- 3.5.4 In addition to funding reforms, the Office for Budget Responsibility's analysis of the Autumn Statement has highlighted that whilst plans for total Government spending are expected to increase in the next spending review period, that it is likely that funding for sectors such as local government will reduce as demonstrated by the chart below.

Chart 3.5.1 – Analysis of Autumn Statement



Source: Office for Budget Responsibility, Economic and fiscal outlook, November 2022

MTFS Funding Gap

3.5.5 The MTFS, as presented in Table 3.5.1 below, represents the scenario without the benefit of any national transition funding to compensate for the loss of funding following implementation of funding reforms. Planning on this basis is both prudent and sensible and ensures that the Council can respond to any changes coming forward and remain financially sustainable.

3.5.6 It is important to note that 2023/24 reflects a balanced budget but it should be acknowledged that there are both planned contributions to and uses of one-off funds from some earmarked reserves. The net use of reserves in 2023/24 is shown above in Table 3.4.1 (£2.6m including use of capital reserves; there is a net contribution of £1.7m to revenue reserves). A full schedule of the use of reserves can be found in Appendix 16. For 2024/25 an ongoing funding gap has been identified, which increases in 2025/26, and the Council has established a strategy that will shape how it looks to review opportunities to reduce this gap and balance the budget in 2024/25 and future years.

3.5.7 Table 3.5.1 below sets out the Council's future funding estimates. There remains much uncertainty regarding this position over the medium term with the expected funding reforms. However, estimates are based on the most recent information available from the Government which forecasts the effects of these changes to be in the region of a 41 percent reduction in net funding. This is a result of:

- the phasing out of New Homes Bonus in relation to growth in 2022/23 payable in 2023/24; the Government has said it will consult on a replacement NHB

scheme for 2024/25 but it is unclear what the financial benefit will be for the Council at this stage.

- the business rates baseline reset in 2025/26 and growth at 1 percent thereafter (the Council has grown business rates significantly in recent years and this baseline reset results in the Council losing the benefit of this growth)
- the cessation of Revenue Support Grant, Council Tax increases of £5 per annum with on average 2.43 percent annual growth of the Council tax base from 2024/25.
- No assumptions have been made that the Council will receive any transitional finance support. As set out above, the Government has announced that a reset is likely to be phased. However, there has been no indication of what profile this could take or the period over which the transition will be applied.

3.5.8 The MTFS indicates that, with all of the assumptions around national funding changes, Cherwell will have a gap between its net budget requirement and its funding as shown in Table 3.5.1 below. This is further analysed by gross and net budget by directorate in Appendix 11.

3.5.9 Table 3.5.1 below also does not attempt to forecast the outcome of any future spending reviews for local government as these will be based on political priorities at the time. CDC, along with our peers across all tiers of local government, will need to provide evidence and arguments about the totality of funding for CDC services. CDC has always taken an active role in these reviews and will continue to do so both on an individual Council basis but also through our professional bodies and professional peer groups including the District Council Network (DCN), the Local Government Association (LGA) and SDCT (Society of District Council Treasurers).

Table 3.5.1: MTFS 2023/24 – 2027/28 (year on year change)

MTFS Movements	2023/24 £m	2024/25 £m	2025/26 £m	2026/27 £m	2027/28 £m
Base budget brought forward	23.492	0.000	0.000	0.000	0.000
Service Pressures	2.009	(0.222)	0.013	0.171	0.001
Service Savings Proposals	(1.004)	(0.297)	(0.218)	(0.214)	(0.104)
Capital Impact	0.288	(0.056)	0.024	0.022	0.106
Corporate changes	3.309	0.909	(2.940)	0.612	0.001
Inflation	3.504	1.213	1.214	0.529	0.562
Change in use of reserves	(1.667)	0.462	0.454	0.472	0.000
Additional government grants	(1.757)	0.000	2.993	0.000	0.000
Net Budget Requirement	28.174	2.009	1.540	1.592	0.566
Revenue Support Grant	(0.132)	0.000	0.132	0.000	0.000
Council Tax	(9.290)	0.170	(0.481)	(0.419)	(0.422)
Business Rates	(17.127)	2.495	10.262	(0.207)	(0.297)
New Homes Bonus	(1.625)	0.000	1.625	0.000	0.000
Total Income	(28.174)	2.665	11.538	(0.626)	(0.719)
Funding Gap / (Surplus)	0.000	4.674	13.078	0.966	(0.153)

How the MTFS gap is planned to be addressed

3.5.10 In addition to continuing to lobby policy makers, highlighting where the Council has been delivering growth and driving benefits to others, the Council has developed a strategy to meet the challenges highlighted in the MTFS if no additional funding is made available to the Council. Whilst the Council will develop plans for scenarios that include a full business rates reset, it will continue to lobby the Government for a phased implementation. Implementation of savings plans developed will not take place until it is clear that the savings must be achieved. Approaches the Council will adopt to identify savings will include:

Prioritisation

3.5.11 Services will be broken down into specific work units which have been mapped to the strategic priority they most apply to (support services will be identified separately as support). Therefore, we can map how much the Council spends of its revenue budget on each priority. Similarly in setting the 2023/24 budget, all capital schemes are being mapped to the priority that they link most closely to. The budget and Business Plan will then be developed in conjunction to maximise the ability to deliver the priorities of each Council within the level of resources available to it.

Strategic Cross-cutting themes

3.5.12 Overlaid on the priority-based budgeting is the Council's approach to the Strategic Cross-Cutting Themes (Transformation Programme). Strategic Cross-Cutting Themes allow the Council to review its approaches thematically across its services rather than always considering service delivery on a silo basis. This view of the expenditure of the Council helps identify organisational transformational opportunities which might not present themselves so readily via a service-based budget approach. This analysis helps to shape the thinking for the future design of our Council, one that is affordable within the future funding envelope as set out in the MTFS.

3.5.13 Where Strategic Cross-Cutting Themes are able to identify transformational approaches to delivery, this will generate efficiency savings to the Council that will allow it to invest in a larger proportion of its priority services. The identification of these opportunities shapes the Transformation Programme for the organisation.

Savings Targets

3.5.14 In order to ensure that all services contribute to the reduced funding of the Council, all services will be required to make a contribution of a set percentage of their budget which they have control over. So, for example where there are budgets which hold corporate costs in a service area, a savings target should not be applied to this.

Financial Resilience Assessment

3.5.15 CIPFA's Financial Resilience Index is designed to support and improve discussions surrounding local authority financial resilience. It shows a council's performance against a range of measures associated with financial risk, including the level of earmarked reserves and general balances. The Index is a comparative tool to be used to support good financial management and generate a common understanding of the financial position within authorities.

- 3.5.16 The index considers both the value of general balances and earmarked reserves compared to councils' net revenue budget. While earmarked reserves are held for specific purposes, they can be called upon to meet unexpected costs or provide short term funding to enable long term recovery plans to be put in place.
- 3.5.17 The publication of the Financial Resilience Index based on 2021/22 outturn data was published in January 2023. This will be considered as part of the Chief Financial Officer's Section 25 statement for Council on the adequacy of the proposed financial reserves and the robustness of the estimates for the purposes of the council tax calculations.

3.6 Climate Action

- 3.6.1 In 2019, CDC declared a climate emergency and committed to prioritising climate action in decision making. More recently, a climate action framework was approved that commits the council to:
- Being carbon neutral in its operations by 2030
 - Enabling a zero-carbon Cherwell by 2030.
- 3.6.2 In developing budget proposals, services were asked to assess how their plans affected the Council's ability to reduce its emissions from buildings, fleet, staff travel, purchased products and services (including construction) and to enable emission reductions at a district-wide level.
- 3.6.3 All of the proposals put forward were deemed by services to not impact the Council's ability to meet our climate action.
- 3.6.4 The proposal to increase parking charges could reduce district-wide carbon emissions by encouraging drivers to walk, cycle or use public transport. Additional solar panels are proposed for council buildings to reduce our energy consumption.

4.0 Conclusion and Reasons for Recommendations

- 4.1 This report provides information around the various building blocks that make up the proposed budget for 2023/24 and beyond, allowing members to consider and scrutinise the elements of the budget and provide advice and guidance to Council to help further shape both budget setting for 2023/24 and the MTFS up to 2027/28.

5.0 Consultation

- 5.1 The Council sought the views of residents and businesses during the period of 23 November 2022 until 23 December 2022.
- 5.2 The Budget Planning Committee considered the revenue budget pressures, savings proposals and capital bids in a report on 6 December 2022. The Committee's comments have been taken into account in arriving at these proposals and are summarised in Appendix 10. Budget Planning Committee also considered and recommended the 2023/24 planned reserves levels and Capital and Investment Strategy at its meeting on 17 January 2023.

- 5.3 The Accounts, Audit and Risk Committee considered and recommended to full Council the Capital and Investment and Treasury Management Strategies and the associated Appendices on 25 January 2023.

6.0 Alternative Options and Reasons for Rejection

- 6.1 It is a legal requirement to set a balanced budget and the recommendations as outlined set out a way to achieve this. The following alternative option has been identified and rejected for the reasons set out below.

Option 1: To reject the current proposals and make alternative recommendations. Members will not be aware of the medium-term financial forecast or implications of alternatives if they choose to take this option.

7.0 Implications

Financial and Resource Implications

- 7.1 The financial implications are set out in this report. The Council has a statutory duty to set a balanced budget and could be subject to intervention of the Secretary of State if it failed to do so.

Comments checked by:

Michael Furness, Assistant Director of Finance, 01295 221845

Michael.Furness@cherwell-dc.gov.uk

Legal Implications

- 7.2 The Council is legally required to set a balanced budget each year together with a requirement to produce a Revenue Budget under the various Local Government Finance Acts. The legal framework for which is set out in the main body of this report. Officers consider the recommendations will achieve this if approved by full Council.
- 7.3 The savings proposals have been consulted upon as appropriate, and further consultations may be required prior to implementing certain proposals.
- 7.4 The Public Sector Equality Duty S149 (1) requires a Local Authority in exercise of its functions to have due regard to the need to:
- (a) Eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under this Act.
 - (b) Advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it.
 - (c) Foster good relations between persons who share a relevant protected characteristic and persons who do not share it.
- 7.5 Decision makers must keep the above requirements in mind when making decisions.

Comments checked by:

Shiraz Sheikh, Assistant Director Law & Governance, 01295 221651
Shiraz.sheikh@cherwell-dc.gov.uk,

Risk Implications

- 7.6 The risk of Executive recommending the budget proposals contained in this report are that Council will not approve the proposed budget. This is mitigated by the Executive having consulted with Budget Planning Committee and the Accounts Audit and Risk Committee on the specific budget proposals, policies and strategies.

Comments checked by:

Shona Ware, Assistant Director Customer Focus, 01295 221652
Shona.ware@cherwell-dc.gov.uk

Equality and Inclusion Implications

- 7.7 The Equality Act 2010 imposes a duty on local authorities that, when making decisions of a strategic nature, decision makers must exercise “due regard to the need to eliminate unlawful discrimination... advance equality of opportunity... and foster good relations”.
- 7.6 In line with the council’s Equalities framework; Including Everyone services have carried out Equalities Impact Assessments (EIAs) to ensure budget savings proposals will not discriminate or disadvantage the any of the district’s diverse communities. The EIAs did not identify any Equalities, Diversity, and Inclusion implications. The overarching EIA, taking into account the overall impact of the budget proposals, is published as Appendix 8.

Comments checked by:

Shona Ware, Assistant Director Customer Focus, 01295 221652
Shona.ware@cherwell-dc.gov.uk

Sustainability Implications

- 7.8 Sustainability implications are included in Section 3.6 of this report.

Comments checked by:

Jo Miskin, Climate Action Manager, 07900 227103
Jo.Miskin@cherwell-dc.gov.uk

8.0 Decision Information

Key Decision

Financial Threshold Met: Yes

Community Impact Threshold Met: Yes

Wards Affected

All

Links to Corporate Plan and Policy Framework

All

Lead Councillor

Cllr Adam Nell, Executive Member for Finance

Document Information

Appendix number and title

- Appendix 1 – Business Plan
- Appendix 2 – Annual Delivery Plan
- Appendix 3 – Not used
- Appendix 4 – Savings Proposals
- Appendix 5 – Revenue Pressures
- Appendix 6 – Budget Summary
- Appendix 7 – Fees and Charges Schedule
- Appendix 8 – Equality Impact Assessment
- Appendix 9 – Pay Policy Statement
- Appendix 10 – Budget Planning Committee Responses to Budget Proposals
- Appendix 11 – Gross Service Budget, Income, Net Budget and Future Years MTFs Changes by Directorate
- Appendix 12 – Budget Book
- Appendix 13 – Government Grants
- Appendix 14 – Reserves Policy
- Appendix 15 – Reserves Assessment
- Appendix 16 – Forecast Use of Reserves
- Appendix 17 – Capital Bids
- Appendix 18 – Capital Programme
- Appendix 19 – Capital and Investment Strategy
- Appendix 20 – Revised 2022/23 Minimum Revenue Provision Policy
- Appendix 21 – Treasury Management Strategy

Background papers

None

Report Author and contact details

Joanne Kaye, Strategic Finance Business Partner, 01295 221545,
joanne.kaye@cherwell-dc.gov.uk

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Our Business plan priorities

Housing that meets your needs

- Support the delivery of affordable and green housing.
- Ensure minimum standards in rented housing.
- Work with partners supporting new ways to prevent homelessness.
- Support our most vulnerable residents.
- Deliver the Local Plan.



Supporting environmental sustainability

- Work towards our commitment to be carbon neutral by 2030.
- Promote the green economy.
- Support waste reduction, reuse and recycling.
- Work with partners to improve air quality.



An enterprising economy with strong and vibrant local centres

- Support business retention and growth.
- Work with partners to support skills development and innovation.
- Work with others to support growth.
- Work with partners to promote the district as a visitor destination and attract investment in our town centres.
- Work with businesses to ensure compliance and promote best practice.



Healthy, resilient and engaged communities

- Support and encourage active lifestyles and health and wellbeing.
- Support development of leisure services and facilities meeting the needs of residents.
- Support community and cultural development.
- Work towards our commitment to equalities, diversity and inclusion.
- Work with partners to address the causes of health inequality and deprivation.
- Work with partners to reduce crime and antisocial behaviour.



Delivery themes

Customers

Deliver high quality, accessible and convenient services that are right first time.



Healthy places

Work collaboratively to create sustainable, thriving communities that support good lifestyle choices connecting us to each other and the natural environment.



Partnerships

Work with partners across all sectors to deliver and improve services for our residents and communities.



Continuous improvement

Make the best use of our resources and focus on improvement, innovation and staff development to maintain and enhance services.



Climate action

Support residents and local businesses to reduce their carbon emissions. Continue to transform our own estate to deliver our carbon neutral commitments.



Including everyone

Our equalities, diversity and inclusion framework outlines how we plan to create an inclusive community and workplace in Cherwell, through fair and equitable services.

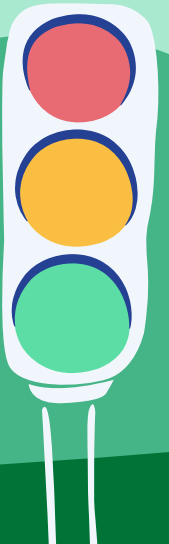
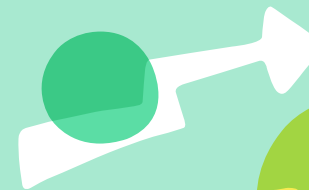


Performance management framework

Cherwell District Council's performance management framework sets out the key actions, projects and programmes of work that contribute to the delivery of the 2023 business plan and the priorities of the council. The supporting measures and key performance indicators are reported on a monthly basis to highlight progress, identify areas of good performance and actions that have been taken to address underperformance or delay.

To measure performance a 'traffic light' system is used. Where performance is on or ahead of target, it is rated green. Where performance is slightly behind the target it is rated amber. A red rating indicates performance is off target.

The monthly performance cycle also includes the management and reporting of leadership risk and financial information. This provides an overview of the council's progress against its strategic priorities and delivery themes as set out earlier in this business plan.



Our Annual Delivery Plan which sets out the clear priorities and objectives for the year, it establishes a clear direction for our Council on an annual basis in support of the vision, aims and ambitions of our Council as contained in the Council's Business Plan. As this is our Council's initial Annual Delivery Plan, introduced during 2022/23, it is therefore intended to cover the period 2022/23 and 2023/24. The Annual Delivery Plan contains ten key Strategic Priorities which are identified in table below.

Response to the Cost of Living Crisis	To respond to the rising cost of living challenges within our local communities, ensuring we co-ordinate our services and our partnerships to provide the most effective support to our communities.
Response to the Climate Emergency	The Council declared a climate emergency in 2019 this Council and many others recognised the importance of tackling the impending global ecological disaster by unanimously passing a climate emergency motion and has in place an action plan to reduce the Council's direct impact on the environment. The Council has recently agreed to take forward a new strategy which will be developed with support from Members across the Council and through the contribution of the Overview & Scrutiny Committee.
Promote individual Well Being & Healthy Communities	To support the well-being of our communities and develop a single strategy for physical, mental, social and cultural support promoting inclusion for all.
Support and facilitate a Vibrant Local Economy	To ensure we have a clear strategy for the economic prosperity of Bicester, Banbury, Kidlington and our rural villages and communities including specific opportunities to regenerate and improve our Town Centres.
Right homes, Right places - Local Plan	To ensure we have the right target for new homes and economic growth, in the right place, and protect our villages, communities and the environment through our Local Plan.
Work to prevent Homelessness	To support our residents into permanent accommodation that meets their needs and supports their forward journey in society.
Deliver in Partnership	To recognise the importance of working in partnership for our local communities. We will seek to strengthen our Local Strategic Partnership in Cherwell to help achieve improved outcomes for all our communities through improved co-ordination of our priorities with our LSP partners.
Deliver for and with our communities	Deliver effective and efficient services to meet the needs of our local communities now and into the future.
Medium Term Financial sustainability	To ensure the MTFs is balanced over the medium term and we provide value for money with our limited resources focused on the Council's key priorities and maximise external investment into Cherwell.
Team Cherwell	To ensure the support and development of our organisation, through our staff, to support the aims and ambitions of our Council.

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Annual Delivery Plan

2022/24

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November 2022



Cherwell

DISTRICT COUNCIL
NORTH OXFORDSHIRE

Business Plan Aims

- Housing that meets your needs
- Supporting environmental sustainability
- An enterprising economy with strong and vibrant local centres
- Healthy, resilient and engaged communities

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Housing that meets your needs

- Support the delivery of affordable and green housing.
- Ensure minimum standards in rented housing.
- Work with partners supporting new ways to prevent homelessness.
- Support our most vulnerable residents.
- Deliver the Local Plan.

An enterprising economy with strong and vibrant local centres

- Support business retention and growth.
- Work with partners to support skills development and innovation.
- Work with other to support growth.
- Work with partners to promote the district as a visitor destination and attract investment in our town centres.
- Work with businesses to ensure compliance and promote best practice.

Supporting environmental sustainability

- Work towards our commitment to be carbon neutral by 2030.
- Promote the green economy.
- Support waste reduction, reuse and recycling.
- Work with partners to improve air quality.

Healthy, resilient and engaged communities

- Support and encourage active lifestyles and health and wellbeing.
- Support development of leisure services and facilities meeting the needs of residents.
- Support community and cultural development.
- Work towards our commitment to equalities, diversity and inclusion.
- Work with partners to address the causes of health inequality and deprivation.
- Work with partners to reduce crime and antisocial behaviour.



Annual Delivery Plan Priorities

- Housing that meets your needs
- Supporting environmental sustainability
- An enterprising economy with strong and vibrant local centres
- Healthy, resilient and engaged communities



Top 10 x Key Strategic Priorities

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Business Plan Aims

- Housing that meets your needs
- Supporting environmental sustainability
- An enterprising economy with strong and vibrant local centres
- Healthy, resilient and engaged communities

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Housing that meets your needs

Supporting Our Strategic Priorities

- Support the delivery of affordable and green housing
 - Ensure minimum standards in rented housing
 - Work with partners supporting new ways to prevent homelessness
 - Support our most vulnerable residents
 - Deliver the Local Plan
- **Local Plan:** Progress a new Plan with policies to guide housing development to meet needs and address national and local priorities including those addressing climate change.
 - **Wholly Owned Companies:** GHVDC / Crown House delivery.
 - **Affordable Housing:** Deliver affordable housing to meet needs and assist access to the housing market.
 - **Infrastructure:** Work with Oxfordshire County Council to deliver key infrastructure, including to support strategic development and the delivery of the Bicester Garden Town, to deliver improvements to Kidlington Roundabout and access to Banbury Railway station, and to support non-car based modes of transport. Banbury Road junction improvement scheme, engaging with Homes England on North West Bicester, Pioneer Roundabout and Ploughley Road junction in Bicester.
 - **Unlock CDC owned sites:** for potential affordable and green housing.
 - **Empty Property Policy:** Identify owners of disused sites (i.e.garages) to ascertain viability of transforming into packets of affordable housing.
 - **Council Tax Policy:** 2nd Homes.
 - **Housing Grants Programme:** enabling residents to be independent longer.
 - **Regulatory Services and Inspections:** Ensuring compliance and standards.
 - **Oxfordshire Housing and Growth Deal Programme:** Delivering the workstreams to the agreed programme.
 - **'One Council':** approach of identification to homelessness.
 - **Housing First:** implementing a new approach in partnership with the Oxfordshire Homelessness Alliance.
 - **Digital Assistance:** and automation in homes to support vulnerable adults.
 - **Permanent Address Scheme:** develop to help residents for permanent address (Manchester Approach).
 - **Supporting the Refugee and Asylum Schemes:** to ensure all residents move towards independent living and settle well.
 - **Business Engagement :** Continuing to build good relations with the business community.

Business Plan Aims

- Housing that meets your needs
- Supporting environmental sustainability
- An enterprising economy with strong and vibrant local centres
- Healthy, resilient and engaged communities



Supporting environmental sustainability

- Work towards our commitment to be carbon neutral by 2030
- Promote the green economy
- Support waste reduction, reuse and recycling
- Work with partners to improve air quality

Supporting Our Strategic Priorities

- **Local Plan:** Progress a new Plan with policies to guide sustainable development including for responding to climate change and minimising carbon emissions.
- **Green Investments:** with cash borrowed will be looking to invest until it is all needed.
- **Tree Surgery:** look at investment to provide supply capacity to major development sites and planting initiatives.
- **Country Parks:** Management Strategy.
- **Food Waste Collections:** introduction and approach to green waste.
- **Garden Town Programme and LCWIP delivery** – modal shift support (sustainable travel).
- **Plant a tree nursery:** to supply trees to our country parks and major development sites.
- **Solar Park on land:** in our control to meet our energy needs and provide income stream – which could be a supplementary cost of living crisis.
- **Engagement:** High Tech, High Performing Businesses.
- **Taxi License Policy:** reducing the environmental impact of the licenced taxi fleet.
- **Procurement Strategy:** focus on sustainability with business who work with Cherwell.
- **Waste Strategy:** work with partners to develop an effective strategy for the County.
- **Green Credentials:** placing emphasis on green credentials of our partners.
- **Town Centres:** long term development and delivery of our visions for more sustainable town centres.
- **Parking and Access Strategy:** to provide sufficient and suitable parking to sustain economic, social and environmental well being of our town centres.
- **Air Quality Management:** monitoring air quality and work with partners to improve air quality in designated air quality management areas.

An enterprising economy with strong and vibrant local centres

Business Plan Aims

- Housing that meets your needs
- Supporting environmental sustainability
- An enterprising economy with strong and vibrant local centres
- Healthy, resilient and engaged communities

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Supporting Our Strategic Priorities

- Support business retention and growth
- Work with partners to support skills development and innovation
- Work with others to support growth
- Work with partners to promote the district as a visitor destination and attract investment in our town centres
- Work with businesses to ensure compliance and promote best practice
- **Establish visions** for Banbury, Bicester, Kidlington and Rural.
- **Local Plan:** Progress a new Plan with policies to guide development to improve the environment and vitality of our town centres.
- **Public Realm:** design out/solutions in based on healthy place shaping principles and using public art to best effect to develop distinctiveness and civic pride.
- **Castle Quay and Castle Quay Waterfront**
- **Develop a new Investment Strategy:** for Cherwell, Bicester, Banbury, Kidlington and Rural communities.
- **UK Shared Prosperity Fund:** receipt of funding anticipated Autumn 2022 and Year One programme to be delivered by end March 2023.
- **Oxfordshire Housing and Growth Deal:** Delivering the workstreams to the agreed programme.
- **Business Engagement:** continuing to build good relations with the local business community.
- **Cherwell Business Adaptation Fund:** funding from ARG to OxLEP to administer a grant scheme for local business to adapt post-pandemic.
- **Skills:** act as a broker between employers and education establishments to identify skills shortages that are blockers to growth and how this can be remedied.
- **Supportive of high performing business relocation:** and growth within the area.
- **Bicester Garden Town:** supporting the delivery of the garden town programme.
- **Regulatory Services:** provide regulatory business advice and support and deliver risk-based inspection programmes to increase assurance.
- **Develop a Single Business Approach:** across the service areas with our businesses.
- **Support Investment:** through efficient planning and economic development services.
- **Community Safety:** a visible presence in our town centres to provide reassurance and deter anti-social behaviour.
- **Inclusive economy:** developing additional resources to support people into better work.



Business Plan Aims

- Housing that meets your needs
- Supporting environmental sustainability
- An enterprising economy with strong and vibrant local centres
- Healthy, resilient and engaged communities



Healthy, resilient and engaged communities

- Support and encourage active lifestyles and health and wellbeing
- Support development of leisure services and facilities meeting the needs of residents
- Support community and cultural development
- Work towards our commitment to equalities, diversity and inclusion
- Work with partners to address the causes of health inequality and deprivation
- Work with partners to reduce crime and antisocial behaviour

Supporting Our Strategic Priorities

- **LSP Food Strategy:** Helping to Tackle the Cost of Living Crisis and Food Insecurity.
- **Digital communities:** having resources accessible anywhere/anytime.
- **Encouraging Active Travel:** Changing residents habits through infrastructure and influencing.
- **Move Together:** helping individuals with long term health conditions out of Covid.
- **Movement on Movement:** working with partners to increase activity and physical independence.
- **Brighter Futures Programme:** partners working to improve life chances in areas of deprivation in Banbury.
- **Inter Faith:** working with faith groups to improve understanding and resident engagement in active, healthy lifestyles.
- **Healthy Place Shaping :** New models of Care, Community Activation Built environment.
- **Cultural Development:** Facilitating and enabling development and attracting external funding to support a vibrant and rich cultural life for residents.
- **Activity for All:** identifying gaps in sporting facilities and active lifestyles locally – developing opportunities for local residents and encouraging visitors to the district.
- **Playing Pitch and Built Facilities Strategy:** develop models to deliver new facilities through securing contributions from developers based on a needs analysis.
- **You Move Programme:** Activity programme aimed at families with free school meal eligibility.
- **Facility Development:** An additional learner pool at Bicester.
- **Age Friendly Family:** extend the principles of age friendly communities across Cherwell.
- **Bicester:** An additional visibility learner pool at Bicester.
- **Work with Community groups:** to take ownership (potential CATs) of unloved and unallocated land to bring communities together/civic pride.
- **Relocation of The Mill:** Facilitating the relocation of The Mill to new premises ensuring the continued provision in the district.
- **Banbury Library:** Working with our partners at the County Council to continue having library provision in Banbury
- **Preventative Debt:** measures use data to proactively work with residents to deliver preventative debt.
- **Community Safety Partnership:** work with partners to deliver actions to enhance community safety.
- **Regulatory Services:** acting on problems which negatively impact local communities.
- **Zero tolerance on Domestic Abuse:** working with partners to prevent domestic abuse and support victims.

Chief Executive Annual Delivery Plan

2022/24

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November 2022



Cherwell

DISTRICT COUNCIL
NORTH OXFORDSHIRE

Chief Executive Directorate

- HR & OD
- Well Being & Housing
- Customer Focus

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Chief Executive Directorate - Strategic

Priority	Portfolio	Activity	Delivery timeframe
Housing that meets your needs	Wellbeing & Housing	<ul style="list-style-type: none"> • To deliver the new CDC homelessness strategy linked to the countywide strategy; increasing prevention, reducing rough sleeping by half and minimise the length of stay in temporary accommodation. • To improve the supply of and access to housing at affordable and social rents. • To relicence HMO accommodation. • To hold Registered Providers to account for voids, maintenance and overall quality of provision in the social rented accommodation sector locally. • To continue to provide Home improvements and adaptations for disabled residents. • To ensure the joint commissioning of homelessness services meet our residents needs and provides good value for money. • To work across the Oxfordshire system and within the South East Migration Partnership to ensure refugees and asylum seekers settle well. • To continue to manage our own properties well. 	<ul style="list-style-type: none"> • QTR2 2022/23 • ON GOING • QTR3 2022/23 • ON GOING • ON GOING • ON GOING • ON GOING



Chief Executive Directorate

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Chief Executive Directorate - Strategic

Priority	Portfolio	Activity	Delivery timeframe
Leading on environmental sustainability	Wellbeing & Housing	<ul style="list-style-type: none">• To continue to modify facilities to reduce carbon impact and seek ways of embracing new technology and external funding to improve our facilities.• To continue to invest in renewable energy for swimming pools and active spaces to reduce utility costs.• To work with Property services to consider renewable energy investment in community buildings owned by Cherwell DC.	<ul style="list-style-type: none">• QTR4 2022/23• ON GOING• ON GOING



Chief Executive Directorate

Chief Executive Directorate - Strategic

Priority	Portfolio	Activity	Delivery timeframe
An enterprising economy with strong and vibrant local centres	HR & OD	<ul style="list-style-type: none"> To support the organisation in the decoupling from the strategic partnership with Oxfordshire County Council. 	<ul style="list-style-type: none"> QTR2 2022/23
	Well Being & Housing	<ul style="list-style-type: none"> To support the development of the arts and cultural services and their role in regeneration. To promote an inclusive economy. To deliver the projects funded through the UK Shared Prosperity Fund. 	<ul style="list-style-type: none"> ON GOING ON GOING ON GOING

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Chief Executive Directorate

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Chief Executive Directorate - Strategic

Priority	Portfolio	Activity	Delivery timeframe
Healthy, resilient and engaged communities	Wellbeing & Housing	<ul style="list-style-type: none"> • To deliver targeted Physical Activity provision examples being FAST and HAF to decrease inequality and physical inactivity levels with a focus on those most in need and most deprived wards. • To deliver a Wellbeing Strategy that outlines how the wellbeing team will deliver services linking physical activity, healthy behaviours, wellbeing, cultural and community development. • To seek to improve the quality and offering to residents relating to the Leisure Facilities through robust and regular monitoring of the service provided aligned with the need to undertake needs assessments of built facilities. • To consider options around management of Joint Use Facilities/Sports grounds in Bicester and Kidlington. • To support the voluntary sector to be robust and sustainable and achieve corporate priorities. • To work to strengthen our most vulnerable communities., tackling food insecurity • To assist parish councils to plan for and support the wellbeing of their communities. • To organise the Cherwell Local Strategic Partnership to facilitate cross-sectoral working. • To develop the role of the Brighter Futures in Banbury Partnership to have greater impact on the lives of residents. 	<ul style="list-style-type: none"> • QTR1 2022/23 • QTR4 2022/23 • ON GOING • QTR2 2022/23 • ON GOING • ON GOING • ON GOING • ON GOING • ON GOING
	Customer Focus	<ul style="list-style-type: none"> • To tell our story as a council and as a place – helping to improve our reputation nationally, regionally and sector wide. • To implement a new consultation and engagement strategy to engage with residents and other stakeholders in a more active and inclusive way and put residents at the heart of decision-making. • To implement a Communications Strategy that works both ways, engaging with our customer to understand their needs, working proactively to provide information about the services we provide and the latest developments. • To deliver on the vision of ‘Our Customer Service is your experience...Your satisfaction is our success’. Enhancing our digital customer offer, to increase self-service and assisted service opportunities. 	<ul style="list-style-type: none"> • ON GOING • QTR4 2022/23 • QTR4 2022/23 • ON GOING



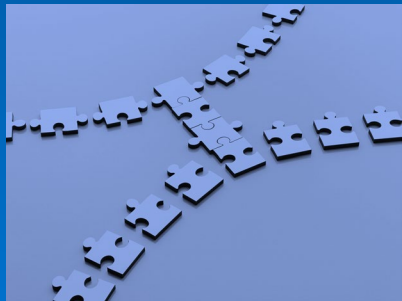
Chief Executive Directorate

Chief Executive Directorate - Corporate

Priority	Portfolio	Activity	Delivery timeframe
Housing that meets your needs	Wellbeing & Housing	<ul style="list-style-type: none"> To ensure the housing allocations process is efficient and meets the needs of the most vulnerable applicants. To work in partnership with other statutory agencies to reduce homelessness. To maintain a needs assessed policy for strategic housing delivery. 	<ul style="list-style-type: none"> ON GOING ON GOING ON GOING

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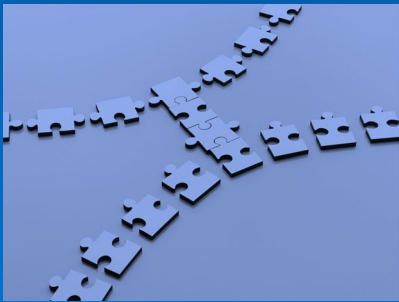
Chief Executive Directorate

Chief Executive Directorate - Corporate

Priority	Portfolio	Activity	Delivery timeframe
Leading on environmental sustainability	Wellbeing & Housing	<ul style="list-style-type: none">To manage built Leisure facilities in a sustainable manner, reducing their carbon footprint	<ul style="list-style-type: none">QTR4 2022/23
	Customer Focus	<ul style="list-style-type: none">To incorporate the climate action framework to our Comms and Marketing strategy, to promote awareness and support education initiatives.	<ul style="list-style-type: none">QTR4 2022/23

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Chief Executive Directorate

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- Well Being & Housing
- Customer Focus

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Chief Executive Directorate - Corporate

Priority	Portfolio	Activity	Delivery timeframe
An enterprising economy with strong and vibrant local centres	HR & OD	<ul style="list-style-type: none"> • To work with the organisation to design and embed agile working practices and issue new contracts to all employees. • To review of policies to ensure continued legal compliance, clarity on related processes and efficiency in their operation. • To develop a suite of workforce reports that are readily available to managers to make better evidence-based and informed decisions. • To review of agency worker usage and contractors; analysing current usage that informs a best value approach which offers savings across the organisation. • To develop a Performance Management strategy that ensures every employee is clear on their contribution to the strategic priorities, measures progress and encourages meaningful conversation that motivates and develops our workforce, whilst also ensuring accountability of actions. 	<ul style="list-style-type: none"> • ON GOING • ON GOING • QTR2 2022/23 • QTR4 2022/23 • QTR4 2022/23
	Wellbeing & Housing	<ul style="list-style-type: none"> • To drive partnerships to secure employment for refugees 	<ul style="list-style-type: none"> • QTR2 2022/23
	Customer Focus	<ul style="list-style-type: none"> • To provide Marketing and comms support to all council's commercial initiatives . • To provide data analysis such as benchmarking to support the delivery of commercial initiatives, funding grants bids and industry awards applications. 	<ul style="list-style-type: none"> • ON GOING • ON GOING



Chief Executive Directorate

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Chief Executive Directorate - Corporate

Priority	Portfolio	Activity	Delivery timeframe
Healthy, resilient and engaged communities	HR & OD	<ul style="list-style-type: none"> • To review our Learning and Development offer and devise and implement a new strategy. • To continue to undertake regular health and safety audits across internal departments. 	<ul style="list-style-type: none"> • QTR3 2022/23 • ON GOING
	Well Being & Housing	<ul style="list-style-type: none"> • To continue to review services to ensure the structure and focus of services are fit for purpose to meet the objective of Healthy resilient and engaged communities. • To fulfil the council’s statutory duty to assess, register and administer Assets of Community Value. • To lead on fulfilling the council’s commitments under the Armed Forces Covenant. • To secure developer contributions (s.106) for community Infrastructure. • To deliver developer funded community infrastructure projects to benefit new communities. 	<ul style="list-style-type: none"> • ON GOING • ON GOING • ON GOING • ON GOING
	Customer Focus	<ul style="list-style-type: none"> • To perform against our own individual Food Strategy Action Plan measures. • To ensure compliance with new Armed Forces Covenant. • To co-ordinate quarterly Civilian Military Partnership (CMP) and support CMP Steering Group. • To host National Graduate Development Programme. • To co-ordinate Corporate awards and Stonewall Workplace Equality Index submissions. • To expand from broadcast communications to conversations and two-way engagement – using digital platforms and more varied types of content (such as video, animation and long-form editorial) to broaden our reach and engagement. • To implement a new consultation and engagement strategy to engage with residents and other stakeholders in a more active and inclusive way and put residents at the heart of decision-making. • To co-ordinate locality meetings and provide policy support to members and ELT. • To enhance key strategic relationships with our local partners . • To work in partnership on cross-organisation priorities to address inequalities. • To improve the First Contact Resolution to customers across all access channels. • To improve satisfaction with customer service centre. 	<ul style="list-style-type: none"> • ON GOING • ON GOING • ON GOING • ON GOING • ON GOING • ON GOING • QTR4 2022/23 • QTR4 2022/23 • ONGOING • ON GOING • ON GOING • ON GOING • ON GOING



Chief Executive Directorate

Chief Executive Directorate - Local

Priority	Portfolio	Activity	Delivery timeframe
Housing that meets your needs	HR & OD	<ul style="list-style-type: none">To support the workforce to transform and continuously improve.	<ul style="list-style-type: none">ON GOING
	Wellbeing & Housing	<ul style="list-style-type: none">To prioritise and maintain delivery of statutory housing services within the revised budget.	<ul style="list-style-type: none">ON GOING

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- Well Being & Housing
- Customer Focus

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Chief Executive Directorate

Chief Executive Directorate - Local

Priority	Portfolio	Activity	Delivery timeframe
An enterprising economy with strong and vibrant local centres	HR & OD	<ul style="list-style-type: none">To successfully embed the iTrent system following strategic review that results in efficiencies within the team, streamlined processes and improved customer experience.	<ul style="list-style-type: none">QTR4 2022/23

- HR & OD
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Communities

Annual Delivery Plan

2022/24

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Cherwell

DISTRICT COUNCIL
NORTH OXFORDSHIRE

Communities Directorate

- Planning & Development
- Growth & Economy
- Environmental Services
- Regulatory & Community Safety

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Communities Directorate - Strategic

Priority	Portfolio	Activity	Delivery timeframe
Housing that meets your needs	Planning & Development	<ul style="list-style-type: none"> • To contribute to the delivery or acceleration of development associated with the Oxfordshire Housing & Growth Deal. • To deliver the Cherwell Local Plan Review within the identified budget by developing a robust and demonstrably 'sound' Local Plan that can be adopted as efficiently, effectively and cost effectively as possible. • To implement the Development Management Improvement Plan. • To build strategic developer relationships to enable strategic site delivery. • To reduce our costs and increase resilience by entering into an effective Building Control collaboration with a Partner Authority. 	<ul style="list-style-type: none"> • QTR4 2022/23 • QTR3 2022/23 • QTR4 2022/23 • QTR2 2022/23 • QTR1 2022/23
	Growth & Economy	<ul style="list-style-type: none"> • To continue to develop accelerated housing delivery with funding from Homes England (Garden Communities and Growth Deal). 	<ul style="list-style-type: none"> • ON GOING



Communities Directorate

Communities Directorate - Strategic

Priority	Portfolio	Activity	Delivery timeframe
Leading on environmental sustainability	Planning & Development	<ul style="list-style-type: none"> To progress policies that will lift the environmental credentials of all new development for the Local Plan. To promote, through negotiation and sharing of good practice examples, the Council's aspiration to see applicants consider the opportunities open to them to maximise the sustainability benefits their proposal could deliver. 	<ul style="list-style-type: none"> QTR4 2022/23 ON GOING
	Environmental Services	<ul style="list-style-type: none"> To develop plans for the decarbonisation of the fleet to achieve net zero by 2030. To help move the Street Cleansing fleet towards net zero. To aim to achieve a recycling rate around 60%. To secure a new site for Bicester depot. To develop a new Carbon Management Programme for 2022/25. 	<ul style="list-style-type: none"> QTR2 2022/23 QTR2 2022/23 QTR4 2022/23 QTR3 2022/23 QTR3 2022/23
	Regulatory & Community Safety	<ul style="list-style-type: none"> To work with partners to monitor air quality in the district and deliver actions which improve air quality. 	<ul style="list-style-type: none"> ON GOING

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Communities Directorate

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- Growth & Economy
- Environmental Services
- Regulatory & Community Safety

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Communities Directorate - Strategic

Priority	Portfolio	Activity	Delivery timeframe
An enterprising economy with strong and vibrant local centres	Planning & Development	<ul style="list-style-type: none"> To deliver the Cherwell Local Plan Review as efficiently, effectively and cost effectively as possible. 	<ul style="list-style-type: none"> ON GOING
	Growth & Economy	<ul style="list-style-type: none"> To contribute to the Oxfordshire Housing and Growth Deal Productivity workstream through RPS projects delivering against the Growth Deal Productivity work stream ambitions set out in the Oxfordshire Local Industrial Strategy and harmonising with growth plans across the Oxford-Cambridge Arc. To engage with businesses to provide effective services. To deliver a refocussed and refreshed Garden Town programme for Bicester. To engage with developers and communities. To lead the CDC input into the EEH connectivity studies. To co-ordinate the CDC response to the emerging A34 project proposals. To progress the options for the East West Rail London Road level crossing and fibre connectivity with OCC colleagues and the East West Rail Company. 	<ul style="list-style-type: none"> ON GOING ON GOING ON GOING ON GOING ON GOING ON GOING ON GOING ON GOING
	Environmental Services	<ul style="list-style-type: none"> To deliver the car parking action plan during 2022-23 & develop a revised plan for 2023-25 – scrutiny review, Banbury BID, Bicester Vision, technology & safety, pay on exit payment, safe, lighting renewal, town centres, Bolton Road, Park and Charge, charging facilities. To satisfy our external customers including West Northamptonshire, by providing a high quality good value service. 	<ul style="list-style-type: none"> QTR4 2022/23 ON GOING



Communities Directorate

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- Growth & Economy
- Environmental Services
- Regulatory & Community Safety

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Communities Directorate - Strategic

Priority	Portfolio	Activity	Delivery timeframe
Healthy, resilient and engaged communities	Planning & Development	<ul style="list-style-type: none"> To ensure that the infrastructure required to support new development is secured through Section 106 legal agreements or via Community Infrastructure Levy (CIL) funding upon implementation. 	<ul style="list-style-type: none"> ON GOING
	Environmental Services	<ul style="list-style-type: none"> To progress Banbury Country Park renewing planning, reviewing the masterplan, instigating regular project meetings, installing infrastructure. To progress Burnehyll Community Woodland with regular project meetings. To re-commence neighbourhood blitz events after suspension due to Covid – with communities, awareness raising, village ‘wombles’ programme, Keep Britain Tidy, 50-60 villages ‘Spring Clean’. 	<ul style="list-style-type: none"> QTR4 2022/32 QTR3 2022/23 QTR4 2022/23
	Regulatory & Community Safety	<ul style="list-style-type: none"> To support the Oxfordshire review of public space CCTV to ensure Cherwell’s interests are reflected. To deliver actions to improve community safety and tackle anti-social behaviour to support healthy, resilient and engaged communities. To ensure the commissioning of the new domestic abuse support contract achieves good outcomes for Cherwell. To implement improvements in our approach to tackling child exploitation following the Jacob Child Safeguarding Practice Review. 	<ul style="list-style-type: none"> ON GOING ON GOING QTR3 2022/23 ON GOING



Communities Directorate

Communities Directorate - Corporate

Priority	Portfolio	Activity	Delivery timeframe
Housing that meets your needs	Planning & Development	<ul style="list-style-type: none"> To reinvigorate our development management service to be proportionate and increasingly cost neutral. To enforce against unauthorised development and proportionately monitor development to ensure compliance with consents and provision of S106 contributions. To enhance customer focus and efficiency as part of wider departmental review of workload management and prioritisation. 	<ul style="list-style-type: none"> Q4 2022/23 ON GOING Q4 2022/23
	Growth & Economy	<ul style="list-style-type: none"> Leading contribution to the Oxfordshire Housing and Growth Deal Engaging with Developers to understand and unlock sites through infrastructure acceleration Developing new town centre vision and masterplans to ensure vibrant and successful places 	<ul style="list-style-type: none"> ON GOING ON GOING Q4 2022/23

- Planning & Development
- Growth & Economy
- Environmental Services
- Regulatory & Community Safety

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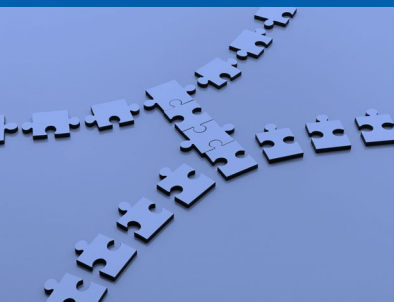
Communities Directorate

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Communities Directorate - Corporate

Priority	Portfolio	Activity	Delivery timeframe
Leading on environmental sustainability	Planning & Development	<ul style="list-style-type: none"> • To build resilience and responsiveness into our Land Drainage/Flood Risk Management service by working in close collaboration with OCC under our Agency agreement and where appropriate with the Flood Risk Management teams of neighbouring Authorities. • To undertake monitoring of policy implementation, development and the maintenance of the historic environment, including preparation of the Annual Monitoring Report, housing land supply data and administering the self-and custom build register. 	<ul style="list-style-type: none"> • ON GOING • QTR4 2022/23
	Environmental Services	<ul style="list-style-type: none"> • To ensure planning consultations are completed on time. • To adopt green open space when needed – Longford Park, Parish & Town Councils, adoption plan. • To maximise the number of properties taking up the chargeable garden waste. 	<ul style="list-style-type: none"> • ON GOING • ON GOING • ON GOING
	Regulatory & Community Safety	<ul style="list-style-type: none"> • Take action to tackle and reduce environmental crime. 	<ul style="list-style-type: none"> • ON GOING



Communities Directorate

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- Regulatory & Community Safety

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Communities Directorate - Corporate

Priority	Portfolio	Activity	Delivery timeframe
An enterprising economy with strong and vibrant local centres	Planning & Development	<ul style="list-style-type: none"> • To commence preparation of a Community Infrastructure Levy (CIL) in readiness for adoption following adoption of the Local Plan Review. 	<ul style="list-style-type: none"> • QTR4 2022/23
	Growth & Economy	<ul style="list-style-type: none"> • To resolve the issues affecting the delivery of proposals at North West Bicester and Graven Hill. • To collaborate with OCC officers on strategic transport issues, projects and proposals. 	<ul style="list-style-type: none"> • QTR3 2022/23 • ON GOING
	Environmental Services	<ul style="list-style-type: none"> • To continue to gradually expand Banbury markets & develop income streams – Bicester and Kidlington Market. • To refurbish public convenience facilities in Kidlington to ensure high quality facilities exist in Kidlington – 5 x public conveniences, capital programme, changing placing support facilities – Banbury, Castle Quay, Bicester, Bus Station Redevelopment. 	<ul style="list-style-type: none"> • ON GOING • Q4 2022/23
	Regulatory & Community Safety	<ul style="list-style-type: none"> • To inspect high risk food businesses. 	<ul style="list-style-type: none"> • ON GOING



Communities Directorate

Communities Directorate - Corporate

Priority	Portfolio	Activity	Delivery timeframe
Healthy, resilient and engaged communities	Environmental Services	<ul style="list-style-type: none"> To continue to develop facilities such as Burnehyll Community Woodland encouraging nearby residents to fully utilise good outdoor facilities. 	<ul style="list-style-type: none"> ON GOING
	Regulatory & Community Safety	<ul style="list-style-type: none"> To enhance Community Resilience - activity undertaken to promote community resilience and respond to emergency incidents. To ensure the council's emergency planning and business continuity arrangements remain robust. 	<ul style="list-style-type: none"> ON GOING ON GOING

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Communities Directorate

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Communities Directorate - Local

Priority	Portfolio	Activity	Delivery timeframe
Housing that meets your needs	Planning & Development	<ul style="list-style-type: none"> • To implement continuous improvement in the timeliness of the determination of planning applications and in the quality of decision making by minimising the number of development granted on appeal. • To maintain our share of the Building Regulations market (we are in direct competition with private sector Regulators) – 70% of market, partnership opportunity. • To resume the review and updating of the Conservation Area Appraisals to ensure there is an effective rolling programme for these to be kept up-to-date and ensure they are fit-for-purpose, thus contributing to the protection of Cherwell’s historic environment – no design element, no urban designers, design codes, design review panel access. • To provide policy support to other Council teams/ departments and external organisations, including DM consultations and commitments under the Duty-to-Cooperate. 	<ul style="list-style-type: none"> • ON GOING • ON GOING • QTR4 2022/23 • ON GOING



Communities Directorate

Communities Directorate - Local

Priority	Portfolio	Activity	Delivery timeframe
Leading on environmental sustainability	Planning & Development	<ul style="list-style-type: none"> To respond to reports of dangerous/unsafe structures as soon as practically possible and engage with our blue-light Partners to mitigate all risks to the public at large. 	<ul style="list-style-type: none"> ON GOING
	Environmental Services	<ul style="list-style-type: none"> To maintain the vehicle fleet to minimise costs and environmental impact. 	<ul style="list-style-type: none"> ON GOING
	Regulatory & Community Safety	<ul style="list-style-type: none"> To review the taxi licensing policy for Cherwell to ensure new government guidance is implemented and policy includes transitional arrangements for the taxi fleet to reduce emissions. To monitor compliance with environmental permits. 	<ul style="list-style-type: none"> QTR2 2022/23 ON GOING

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Communities Directorate - Local

Priority	Portfolio	Activity	Delivery timeframe
An enterprising economy with strong and vibrant local centres	Planning & Development	<ul style="list-style-type: none"> • To maintain Building Control Quality Assurance Accreditation. • To ensure customer service improvement benefits the Council’s relationships with both local communities and the promoters of development. 	<ul style="list-style-type: none"> • ON GOING • ON GOING
	Environmental Services	<ul style="list-style-type: none"> • To ensure the MOT station continues to deliver a good income stream. • To expand commercial waste service to offset overall costs of collection – 4 years, £400k, 25-30% - £150k contribution, £100k per annum. • To increase existing income streams and develop new income streams (such as the new graffiti removal vehicle due summer 2022) – litter picking, green open spaces, other public sector bodies, NHS, Park & Ride Bicester, Civil Repairs, Public Sector opportunities – locally, Town Councils. 	<ul style="list-style-type: none"> • ON GOING • ON GOING • ON GOING
	Regulatory & Community Safety	<ul style="list-style-type: none"> • To provide regulatory business advice and support to local businesses. • To provide licensing support and services to local businesses. 	<ul style="list-style-type: none"> • ON GOING • ON GOING



Communities Directorate

Communities Directorate - Local

Priority	Portfolio	Activity	Delivery timeframe
Healthy, resilient and engaged communities	Planning & Development	<ul style="list-style-type: none"> To continue to support the preparation of Neighbourhood Development Plans. To provide training and support for Town and Parish Council's to ensure that they can effectively represent their communities when there are local planning applications under consideration. 	<ul style="list-style-type: none"> ON GOING ON GOING
	Environmental Services	<ul style="list-style-type: none"> To deliver the vehicle capital programme on time & on budget. To ensure our technicians are well trained to deal with developing & evolving technology. To maintain levels of customer satisfaction – annual customer satisfaction survey. To develop our staff to ensure we have enough skilled staff to deliver services. To maintain levels of customer satisfaction – customer satisfaction survey, annual result, inspections, low level of complaints. 	<ul style="list-style-type: none"> QTR4 2022/23 ON GOING ON GOING ON GOING
	Regulatory & Community Safety	<ul style="list-style-type: none"> To ensure the delivery of, and learning from, Domestic Homicide Reviews for Cherwell. To deliver community safety programmes utilising grant funding from the Safer Streets Fund and Young Women and Girls Fund. 	<ul style="list-style-type: none"> ON GOING ON GOING

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Annual Delivery Plan

2022/24

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November 2022



Cherwell

DISTRICT COUNCIL
NORTH OXFORDSHIRE

Resources Directorate

Resources Directorate - Strategic

Priority	Portfolio	Activity	Delivery timeframe
Housing that meets your needs	Legal & Democratic	<ul style="list-style-type: none">To embed a strong governance function, which enables and supports strong service delivery, well run projects, and a well governed Council.	<ul style="list-style-type: none">QTR3 2022/23
	ICT	<ul style="list-style-type: none">To develop and deliver assisted living technologies.	<ul style="list-style-type: none">QTR3 2023/24

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Resources Directorate

Resources Directorate - Strategic

Priority	Portfolio	Activity	Delivery timeframe
Leading on environmental sustainability	Legal & Democratic	<ul style="list-style-type: none"> To recruit solicitors and a Team leader into Legal Services with expertise in planning, commercial development and environmental legal skills. To embed specialist lawyers into project teams. To support the Planning Service in responding to EIR requests through the Information Governance function. 	<ul style="list-style-type: none"> QTR3 2022/23 QTR3 2022/23 QTR3 2022/23
	ICT	<ul style="list-style-type: none"> To develop and delivery a Digital Strategy for the Council that will help underpin all sustainability work. 	<ul style="list-style-type: none"> QTR4 2022/23
	Corporate Property	<ul style="list-style-type: none"> To deliver the Decarbonisation programme on CDC operational estate. To plan to rationalise the CDC operational estate and new ways of working. To review of Investment properties and develop plan to work with tenants to increase EPC performance. To acquire a New depot to facilitate the decarbonisation of the rest of the waste fleet in future years. To continue the Capital projects delivery and decarbonisation programme. 	<ul style="list-style-type: none"> QTR4 2022/23 QTR4 2022/23 QTR4 2022/23 QTR4 2022/23 ON GOING

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Resources Directorate

Resources Directorate - Strategic

Priority	Portfolio	Activity	Delivery timeframe
An enterprising economy with strong and vibrant local centres	Finance	<ul style="list-style-type: none"> To deliver a budget process (revenue and capital) in line with the Council's Business Plan. To initiate prompt recovery action for council tax, business rates and sundry debts to maximise revenue collection for the Council. 	<ul style="list-style-type: none"> QTR1 2022/23 ON GOING
	Legal & Democratic	<ul style="list-style-type: none"> To establish strong governance oversight on council projects such as Castle Quay, Waterfront, Canalside, Town Centre House and the Council's wholly owned companies. To provide legal support on partnership based projects. To facilitate good decision making by early planning of key decisions and other decision making routes by timetabling and forward planning. 	<ul style="list-style-type: none"> QTR3 2022/23 ON GOING ON GOING
	ICT	<ul style="list-style-type: none"> To maintain high levels of security standards. 	<ul style="list-style-type: none"> ON GOING
	Corporate Property	<ul style="list-style-type: none"> To deliver more scheme improvements to Castle Quay Shopping Centre. To complete the Waterfront development in Banbury to increase leisure offering in the town. To continue work on Banbury Canalside development. To see through the end of construction and last openings of Castle Quay Phase 2 / Waterfront. To seek to enhance the OPE involvement of CDC and seek to enhance relationships with other public sector bodies within the wider Oxfordshire area. To start Portfolio review of all property assets and consider best use. Identify surplus assets for disposal to gain capital sums to aid with MTFS gap. 	<ul style="list-style-type: none"> ON GOING QTR3 2022/23 ON GOING QTR1 2022/23 ON GOING QTR4 2022/23

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Resources Directorate

Resources Directorate - Strategic

Priority	Portfolio	Activity	Delivery timeframe
Healthy, resilient and engaged communities	Finance	<ul style="list-style-type: none"> To continue to promote online services to deliver budget savings and consider initiating a customer portal take up campaign to promote digital inclusion. 	<ul style="list-style-type: none"> QTR4 2023/24
	Legal & Democratic	<ul style="list-style-type: none"> To support corporate initiatives by ensuring legal input into community consultation, data sharing and good governance oversight. 	<ul style="list-style-type: none"> ON GOING
	ICT	<ul style="list-style-type: none"> To support the councils carbon neutral pledge, new ways of working and recovery from Covid, through the effective use of digital technology. 	<ul style="list-style-type: none"> ON GOING
	Corporate Property	<ul style="list-style-type: none"> To work with community organisations to ensure community halls and facilities are fit for purposes. To increase inspections of community assets and structures, parks pavilions play areas to ensure safe and in good condition. To develop Community Asset transfer scheme. 	<ul style="list-style-type: none"> ON GOING QTR3 2022/23 QTR4 2022/23

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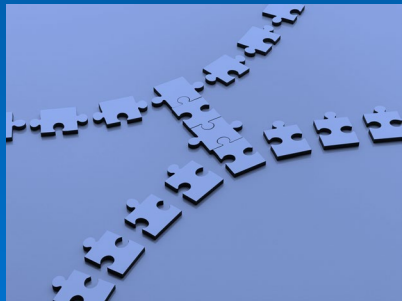
Resources Directorate

Resources Directorate - Corporate

Priority	Portfolio	Activity	Delivery timeframe
Housing that meets your needs	Finance	<ul style="list-style-type: none"> To review and identify policies, practices and procedures inherited from CSN that require revision. This will include an improvement strategy to identify and correct erroneous housing benefits claims for corrective action resulting in a reduction in Housing Benefit Subsidy errors. To ensure the annual uprating exercise for both housing benefits and the council tax reduction scheme is delivered efficiently to enable prompt payment to all customers. 	<ul style="list-style-type: none"> QTR4 2023/24 QTR4 2023/24
	Legal & Democratic	<ul style="list-style-type: none"> To provide specialist housing legal expertise on homelessness, housing options and needs. To support enhanced housing performance reporting so that there is a transparent and open accountability on how the Council is meeting its statutory obligations and closing the gap on housing needs targets. 	<ul style="list-style-type: none"> QTR4 2022/23 QTR4 2022/23
	ICT	<ul style="list-style-type: none"> To use data to assist defining housing needs. 	<ul style="list-style-type: none"> QTR3 2023/24

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Resources Directorate - Corporate

Priority	Portfolio	Activity	Delivery timeframe
Leading on environmental sustainability	Legal & Democratic	<ul style="list-style-type: none">• To ensure access to specialist external legal providers on corporate projects requiring legal advice in environmental issues.• To provide specialist planning advice to support the Local Plan delivery and review.• To provide governance support on the separation of functions for the Council as Local Planning Authority and development partner on corporate projects.	<ul style="list-style-type: none">• QTR 3 2022/23
	ICT	<ul style="list-style-type: none">• To explore opportunities with partners such as Google, Microsoft and AWS on technologies to assist with environmental sustainability. EG Google Project Sunroof, which maps properties roofs for solar panel suitability.	<ul style="list-style-type: none">• QTR1 2023/24



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Resources Directorate - Corporate

Priority	Portfolio	Activity	Delivery timeframe
An enterprising economy with strong and vibrant local centres	Finance	<ul style="list-style-type: none"> • To ensure the new financial system is utilised amongst both Finance and Service Staff following its implementation on 1 April 2021. • To assist services in identifying and developing sustainable budget proposals in line with the Council's priorities and Medium Term Resource Forecast. • To improved budget monitoring to ensure that reasons for changes in the forecast (revenue and capital) are clear. In particular enhance Capital monitoring to give updates on the in-year position and the total cost of the scheme. • To integrate the Finance and Revenues and Benefits team to facilitate greater joined up working around business rates and council tax forecasting and monitoring. • To ensure the annual billing exercise for both council tax and business rates is delivered efficiently to enable cash collection in-line with instalment profiles. • To ensure sundry debtor accounts for 2022/23 are produced promptly to maximise revenue collection. 	<ul style="list-style-type: none"> • QTR4 2022/23 • QTR2 2023/24 • QTR2 2022/23 • QTR4 2022/23 • QTR4 2022/23 • QTR4 2022/23
	Legal & Democratic	<ul style="list-style-type: none"> • To provide sound decision making advice on corporate projects. • To take the lead on governance oversight of complex projects and programmes. 	<ul style="list-style-type: none"> • QTR1 2023/24 • QTR2 2022/23
	ICT	<ul style="list-style-type: none"> • To investigate automation of services to reduce demand on council staff. • To unlock data to provide advice to local businesses on opportunities and threats. • To explore grant funding opportunities and, wherever possible, spend these funds with local businesses. 	<ul style="list-style-type: none"> • QTR1 2023/24 • QTR2 2023/24 • ON GOING
	Corporate Property	<ul style="list-style-type: none"> • To work through de-coupling process, re- establish CDC Team and the property Function and ensure safe and everything is safe and legal from a property perspective. • To establish the full CDC property records and cross reference with the CDC Statutory Asset list. • To identify strategic projects in CDC which require property input already in progress and start assisting to drive these forward at pace, especially those that have been stuck for some time (eg Highfield Depot). • To start establishing a more pro-active approach to our property portfolio and strive to deliver both increased revenue and capital value (main focus Castle Quay as revenue stream at a higher risk level). • To increase the profile of the Property Team within CDC and enhance links with other service such as Economic Development. • To start work on policies required (Asset Management Plans, Property Action Plans, Rental Grant Subsidies, Community Asset Transfer etc). • To establish a corporate landlord model throughout CDC to ensure all property related functions and projects, involving a property, have access to, and the benefits of, the experts in the property team. 	<ul style="list-style-type: none"> • QTR3 2022/23 • QTR4 2022/23 • ON GOING • ON GOING • ON GOING • QTR4 2022/23 • QTR3 2022/23

Resources Directorate

Resources Directorate - Corporate

Priority	Portfolio	Activity	Delivery timeframe
Healthy, resilient and engaged communities	Legal & Democratic	<ul style="list-style-type: none"> To provide specialist legal support on community engagement, community consultation, and equality impact assessments. 	<ul style="list-style-type: none"> QTR2 2022/23
	ICT	<ul style="list-style-type: none"> To develop a single view of customer to assist with automated proactive service offering. To use data to map areas of engagement, track initiative success and forecast future initiative success. 	<ul style="list-style-type: none"> QTR1 2023/24 QTR3 2023/24

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Resources Directorate - Local

Priority	Portfolio	Activity	Delivery timeframe
Housing that meets your needs	Legal & Democratic	<ul style="list-style-type: none">To provide specialist housing legal advice, or procure specialist external advice at competitive rates by utilising legal frameworks and instructing external lawyers as an 'intelligent client'.	<ul style="list-style-type: none">ON GOING
	ICT	<ul style="list-style-type: none">To support all service in the delivery of their plans.	<ul style="list-style-type: none">ON GOING

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Resources Directorate - Local

Priority	Portfolio	Activity	Delivery timeframe
Leading on environmental sustainability	Legal & Democratic	<ul style="list-style-type: none"> To provide specialist environmental legal advice, or procure specialist external advice at competitive rates by utilising legal frameworks and instructing external lawyers as an 'intelligent client'. 	<ul style="list-style-type: none"> ON GOING
	ICT	<ul style="list-style-type: none"> To support all services in the delivery of their plans. To continue cloud-first approach. To identify and use carbon-neutral hardware suppliers. 	<ul style="list-style-type: none"> ON GOING ON GOING ON GOING

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Resources Directorate - Local

Priority	Portfolio	Activity	Delivery timeframe
An enterprising economy with strong and vibrant local centres	Finance	<ul style="list-style-type: none"> To successfully complete the year end closedown process and completion of the statement of accounts and accompanying audit. To ensure compliance with CIPFA's FM Code. 	<ul style="list-style-type: none"> QTR4 2022/23 QTR3 2022/23
	Legal & Democratic	<ul style="list-style-type: none"> To provide specialist commercial, property and contracts legal advice, or procure specialist external advice at competitive rates by utilising legal frameworks and instructing external lawyers as an 'intelligent client' 	<ul style="list-style-type: none"> ON GOING
	ICT	<ul style="list-style-type: none"> To provide digital innovation advice to all services. To create and deliver joint digital programmes. 	<ul style="list-style-type: none"> ON GOING ON GOING
	Corporate Property	<ul style="list-style-type: none"> To establish the property service processes and ways of working to enhance governance and the transparency of decision within the service. To ensure the property team is operating in a commercial way and consider introducing charges or policies for work completed for non-statutory functions (e.g. a resident asks to buy some Council owned land). To prepare work for annual valuations and ensure they are available for the end of year. To continue to establish the commercialisation of the property team. Consider if there are services which we undertake which we could sell commercially to create additional revenue streams for the council. 	<ul style="list-style-type: none"> QTR4 2022/23 QTR4 2022/23 QTR4 2022/23 QTR4 2022/23

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Priority	Portfolio	Activity	Delivery timeframe
Healthy, resilient and engaged communities	Legal & Democratic	<ul style="list-style-type: none"> To provide specialist legal advice, or procure specialist external advice at competitive rates by utilising legal frameworks and instructing external lawyers as an 'intelligent client'. 	<ul style="list-style-type: none"> ON GOING
	ICT	<ul style="list-style-type: none"> To provide safe and secure, enabled solutions to prevent innovation roadblocks due to technology/policy constraints. To develop users centric, self-service IT Portal. 	<ul style="list-style-type: none"> QTR1 2023/24 QTR3 2023/24

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Appendix 3 not used for Executive report

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Appendix 4 - Savings Proposals 2023/24

Figures are shown as an incremental, year on year change to the budget

Chief Executive									
Reference	Existing or New	Title	Description	2023/24 (£m)	2024/25 (£m)	2025/26 (£m)	2026/27 (£m)	2027/28 (£m)	Total MTFs (£m)
SAFFH221	Existing	Affordable and Social housing partnership work	Prioritise the building of affordable and social housing through greater partnership work with registered providers and developers, shifting the emphasis away from direct delivery by the Council	(0.185)	-	-	-	-	(0.185)
SDEBT221	Existing	Debt and Money advice contract	Review the debt and money advice contract to assess future options and cost reductions	(0.011)	-	-	-	-	(0.011)
SMUSE221	Existing	Reduction in Banbury Museum grant	Reduce the grant funding to the Banbury Museum Trust	-	(0.012)	(0.025)	(0.050)	-	(0.087)
SHUMR231	New	Reduction in consultancy fees	We no longer require consultancy support for the roll-out of our HR system so we can release the budget set aside for this in 2023/24	(0.020)	-	-	-	-	(0.020)
SHUMR232	New	Reduction in external legal support	We have reduced the need to access external legal advice for complex HR/staffing matters and are therefore proposing to reduce this budget in 2023/24.	(0.011)	-	-	-	-	(0.011)
SHUMR233	New	Back office efficiencies in HR	By reviewing our back-office HR processes we could make a saving in 2023/24.	(0.025)	(0.050)	-	-	-	(0.075)
SAFFH231	New	Rent increase for Affordable Rent and Shared Ownership properties	<p>The Council's rent policy for Affordable Rent and Shared Ownership says we will follow Government guidance on rent increases. This is currently CPI plus 1% for Affordable Rent, and RPI plus 0.5% for Shared Ownership, which would mean an increase of around 13% next year. However, because of high inflation, the Government is consulting on a new rent cap of 7% or less for 2023/24, which would apply to our affordable rent tenants only. The Government has concluded its consultation and set the cap at 7% for affordable rented properties in 2023/24; the Council intends to increase its rent for affordable rent tenants at 7% in line with the cap.</p> <p>The rent cap does not apply to Shared Ownership properties, which would mean around 13% increase for all properties. However the Council is proposing to cap the increase at 7% in line with affordable rent increases.</p>	(0.114)	-	-	-	-	(0.114)
SAFFH232	New	Bringing rent collection in house	By collecting the rent from council properties ourselves, instead of through a housing association we could achieve a saving in 2023/24	(0.015)	(0.015)	-	-	-	(0.030)
SHOSD231	New	Increase in HMO Licenses	By introducing a 7% increase in the license fee for landlords providing houses in multiple occupation we can generate additional income	(0.016)	-	-	-	-	(0.016)
SCDEV231	New	Increase grant income and or external funding	By applying for external grants and funding we hope to raise additional income in 2023/24 to support service delivery	(0.045)	-	-	-	-	(0.045)
SCPAR231	New	Review of funding arrangements to partnership programmes	We could make a small saving in 2023/24 by focusing the financial support we give to partnership programmes to those that are supporting our overarching strategic priorities such as tackling the cost-of-living crisis and climate change.	(0.008)	-	-	-	-	(0.008)
SMUSE231	New	Gradual reduction in support to Banbury Museum	We are proposing a gradual reduction in the funding we give to Banbury Museum over a three-year period. This is as a result of a change to their business model which will enable the museum to generate additional income. If we go ahead with this proposal, we will keep the situation under constant review, so if it becomes untenable for the museum we will work with them to consider what options are available.	-	(0.013)	(0.020)	(0.025)	-	(0.058)
SSDEV231	New	Adopting a full cost recovery model for our Holiday activities programme	Through delivering a holiday activity programme that generates enough income to cover its costs we can achieve a saving in 2023/24	(0.015)	-	-	-	-	(0.015)
SBTRA231	New	Joint transformation service	This money was earmarked for a joint transformation service with OCC, which we no longer need now that we will be delivering our own inhouse service.	(0.010)	-	-	-	-	(0.010)
			Total	(0.475)	(0.090)	(0.045)	(0.075)	-	(0.685)

Appendix 4 - Savings Proposals 2023/24

Figures are shown as an incremental, year on year change to the budget

Communities							2023/24	2024/25	2025/26	2026/27	2027/28	Total MTFS
Reference	Existing or New	Title	Description	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)			
SAV2145	Existing	Food Waste Collection Service	Continued impact of introduction of the food waste collection service giving residents the opportunity to recycle their food waste on a weekly basis. This will reduce the amount of residual waste and increase CDC's recycling rate. Residents will still be able to subscribe to our current well used garden waste collection service, which will incur a charge.	(0.210)	(0.077)	-	-	-	(0.287)			
SAV025 & SCARP222	Existing	Car park fees	Increase annual car parking charge of no more than 10p per hour	(0.200)	(0.145)	(0.100)	(0.100)	(0.100)	(0.645)			
SBCON221	Existing	Building Control Fees	Increase building control fees	(0.001)	(0.001)	(0.001)	(0.001)	(0.001)	(0.005)			
SDMAN225	Existing	Planning pre-application fees	Increase planning pre-application charges	(0.002)	(0.001)	(0.002)	(0.001)	(0.002)	(0.008)			
SDMAN231	New	Planning Service Efficiencies	Approved investment in the planning team will result in ongoing efficiencies through realisation of the recommendations made to streamline activity, implement new IT solutions to case tracking and invest in house capacity of the team.	(0.075)	-	-	-	-	(0.075)			
SPROT231	New	Reduction in cost of noise nuisance service	The Council utilises a noise recording app to assess noise nuisance complaints. The use of this app has reduced the need for officers to attend locations out of hours to carry out these assessments. Therefore, costs of the noise nuisance service have reduced slightly.	(0.002)	-	-	-	-	(0.002)			
SLICE231	New	Licensing function and charges review	The Council will undertake a review of its licensing activities in recognition of the reduction in licence fees received by the council in recent years. This review will assess the capacity required by the council to fulfil its licensing functions in future years and the appropriate cost of the licences it issues to ensure the licensing costs are recovered by fees.	(0.040)	-	-	-	-	(0.040)			
SBICR231	New	Gradual reduction in grant to Bicester Vision	We currently contribute £15k towards the work on Bicester Vision, which is the only contribution we make to organisations leading similar projects across the district. By tapering this contribution off over three years as a saving we can ensure we are treating these organisations equally and provide resilience for Bicester Vision to adapt its funding streams.	-	(0.010)	(0.005)	-	-	(0.015)			
SECON233	New	Cutting grants to: Banbury Museum TIC and Experience Oxfordshire	Ceasing grants to Banbury Museum and Experience Oxfordshire would save the Council 25K per annum.	(0.014)	(0.006)	(0.005)	-	-	(0.025)			
Total				(0.544)	(0.240)	(0.113)	(0.102)	(0.103)	(1.102)			

Appendix 4 - Savings Proposals 2023/24

Figures are shown as an incremental, year on year change to the budget

Resources							2023/24	2024/25	2025/26	2026/27	2027/28	Total MTFS
Reference	Existing or New	Title	Description	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)		
SFREV221	Existing	Revenues and Benefits insourcing	Reduce the cost of the revenues and benefits service now the service has been brought back inhouse	(0.013)	-	-	-	-	-	(0.013)		
SAV2133b	Existing	Bodicote House Utilities	Fallout of temporary reduction in utilities spend due to reduced occupancy at Bodicote House	0.030	-	-	-	-	-	0.030		
SAV2133d	Existing	LED lighting projects	Ongoing impact of not proceeding with planned LED lighting project at Bodicote House. This was replaced with LED lighting projects across other properties.	0.120	-	-	-	-	-	0.120		
SELEC221	Existing	Parish Election Charges	Review of recharges to Parishes for CDC running Parish Elections	(0.002)	(0.001)	-	(0.002)	(0.001)	-	(0.006)		
SFCOS231	New	Ensure services funded through external grants reflect the costs of support services required	Through adopting a new approach to allocating any grants we receive towards services we can deliver savings on existing and future grants by ensuring they take into account all the costs of providing the services	(0.040)	(0.040)	(0.080)	-	-	-	(0.160)		
SINVP221	Existing	Commercial Rents	Increase rental income from commercial council properties through contractual lease reviews	(0.032)	0.074	0.020	(0.035)	-	-	0.027		
SITBS231	New	Consolidation of telephony services	By consolidating our landline and mobile telephony services we could achieve a saving in 2023/24	(0.008)	-	-	-	-	-	(0.008)		
SITBS232	New	Procurement exercise for Council internet connectivity to secure best value	Through carrying out a competitive procurement exercise for a new intranet connectivity supplier we are predicting a small saving in 2023/24	(0.002)	-	-	-	-	-	(0.002)		
SITBS233	New	Increase charges for external IT customers	Proposal to increase the support charges to our external customers in-line with CPI as outlined in the Council contractual arrangements	(0.004)	-	-	-	-	-	(0.004)		
SITBS234	New	Electronic Document Storage	By migrating Council documents to a more cost effective storage solution we could achieve a saving in 2023/24	(0.009)	-	-	-	-	-	(0.009)		
SLEGL231	New	Increase in income from legal agreements	We have adjusted the budget to reflect recent trends in income from providing legal support.	(0.025)	-	-	-	-	-	(0.025)		
Total				0.015	0.033	(0.060)	(0.037)	(0.001)	-	(0.090)		
Total Existing Savings				(0.506)	(0.163)	(0.108)	(0.195)	(0.104)	-	(1.076)		
Total New Savings				(0.498)	(0.134)	(0.110)	(0.025)	-	-	(0.767)		
Total Savings				(1.004)	(0.297)	(0.218)	(0.214)	(0.104)	-	(1.843)		

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Appendix 5 -Revenue Pressures 2023/24

Figures are shown as an incremental, year on year change to the budget

Chief Executive									
Reference	Existing, Savings Non-Delivery, or New	Title	Description	2023/24 (£m)	2024/25 (£m)	2025/26 (£m)	2026/27 (£m)	2027/28 (£m)	Total MTF5 (£m)
GRW026	Existing	FAST Programme	Fallout of time limited funding for the FAST Programme - Wellbeing Service	(0.027)	-	-	-	-	(0.027)
PCOMM221	Existing	Community engagement business system	Renewal of contract for community engagement business system	0.016	(0.001)	-	-	-	0.015
PPERF221	Existing	Performance Management System	Funding for the council's performance management business system	-	0.010	-	-	-	0.010
SAFFH221	Savings Non-Delivery	Affordable and Social housing partnership work	Prioritise the building of affordable and social housing through greater partnership work with registered providers and developers, shifting the emphasis away from direct delivery by the Council	0.130	-	-	-	-	0.130
PCUST231	New	Telephony costs	The cost of our telephony licences has increased	0.005	-	-	-	-	0.005
PLAND231	New	Land Charges LLC1 income	The national project to migrate Land Charges services to HM Land Registry will result in a loss of income for the Council	0.065	-	-	-	-	0.065
PPERF231	New	Licenses for Performance Management System	We have had to purchase more licenses for our performance management system, following the decoupling from Oxfordshire County Council	0.009	-	-	-	-	0.009
PAFFH231	New	Repairs and Maintenance	High inflation costs mean we need a further £75k for essential repairs and maintenance	0.060	0.015	-	-	-	0.075
PAFFH232	New	Town Centre House pressures	Loss of income due to the building being vacant whilst roof is repaired	0.266	(0.266)	-	-	-	-
PLEIS233	New	Utility Costs	We are predicting higher costs due to utility prices increasing	0.320	-	-	-	-	0.320
			Total	0.844	(0.242)	-	-	-	0.602

Appendix 5 -Revenue Pressures 2023/24

Figures are shown as an incremental, year on year change to the budget

Communities									
Reference	Existing, Savings Non-Delivery, or New	Title	Description	2023/24 (£m)	2024/25 (£m)	2025/26 (£m)	2026/27 (£m)	2027/28 (£m)	Total MTF5 (£m)
GRW002	Existing	Growth Deal	Fallout of time limited contribution to Growth Deal	(0.277)	-	-	-	-	(0.277)
GRW013	Existing	Waste Collection Round	Increase in Waste Collection crew required due to district growth.	0.170	-	-	-	-	0.170
PSCEN221	Existing	Women's Cycling Tour	Fallout of time limited contribution towards AJ Bell Women's Cycling Tour in 2022/23	(0.030)	-	-	-	-	(0.030)
PDMAN223	Existing	Investment in development management	Fallout of time limited investment in development management to support service delivery due to increased demand	(0.050)	-	-	-	-	(0.050)
PCARP231	New	Adjusting the Car Parks income budget from 2023/24	Car Parking income dropped significantly during the covid pandemic and has not returned to pre pandemic levels due to changes in work patterns, reduced retail offers in town centres and the current cost of living crisis. It is not anticipated that car parking income will return to previous levels and therefore the income target must be adjusted.	0.800	0.045	-	-	-	0.845
PPCON231	New	Increased costs for cleaning and maintenance contract for public conveniences	The cleaning and maintenance of our public conveniences is contracted out and expected to rise in line with inflation and resourcing pressures for the new contract in 23/24 and onwards	0.010	-	-	-	-	0.010
PWAST231	New	Additional crew and vehicle for growth of the district	Housing growth in the district is rising rapidly, which means a new waste crew is required approximately every 3 years. As this is entirely dependent on the level of housing growth we cannot predict exactly when this need will arise. We anticipate needing an additional crew in 2026/27 and we have identified an additional vehicle through the vehicle replacement programme.	-	-	-	0.170	-	0.170
PWAST233	New	Food Waste Transfer station fees	Operationally to move the food waste collected in Banbury to the processing plant in Cassington we use a transfer station. We are hoping to share the transfer costs with OCC but in the meantime are incurring the full £80,000 transfer costs.	0.080	-	-	-	-	0.080
PWAST234	New	Dry Recycling, Glass and Residual Costs	Increase in recycling costs	0.050	-	-	-	-	0.050
PEMPL231	New	Inflationary costs in relation to the Council's Emergency Planning responsibilities	Cherwell District Council is supported by Oxfordshire County Council to prepare for and respond to emergency incidents that may arise in the district. Cherwell District Council pays for this support through a service level agreement with the County Council which includes provision for the rise in staffing costs	0.001	0.001	0.001	0.001	0.001	0.005
PLICE231	New	Reduction in licensing income	Levels of income for the Council's licensing function have not returned to pre-pandemic levels. We expect this trend to continue, which leaves a shortfall in the Council's licensing budget	0.040	-	-	-	-	0.040
PCSAF231	New	Reduced contributions for public space CCTV	The Council provides public space CCTV in Cherwell. A small proportion of the cost of this CCTV network is met from partner contributions. Partners have reduced their contributions to this cost and therefore the council is now required to meet a greater proportion if the monitoring is to continue at the same level of service.	0.008	-	-	-	-	0.008
Total				0.802	0.046	0.001	0.171	0.001	1.021

Appendix 5 -Revenue Pressures 2023/24
Figures are shown as an incremental, year on year change to the budget

Resources									
Reference	Existing, Savings Non-Delivery, or New	Title	Description	2023/24 (£m)	2024/25 (£m)	2025/26 (£m)	2026/27 (£m)	2027/28 (£m)	Total MTFS (£m)
SAV2193	Existing	Commercial Rent	Forecast change in rental incomes for Council owned properties	(0.090)	0.205	0.012	-	-	0.127
PFREV221	Existing	Housing Benefit Subsidy costs	Additional Housing Benefit Subsidy costs to the Council	0.004	(0.200)	-	-	-	(0.196)
PPCAP222	Existing	Dover Avenue Garage Demolition	Fallout of one-off cost of demolition of Dover Avenue garage complex	(0.108)	-	-	-	-	(0.108)
PPCAP223	Existing	Garage Sites and Other Retained Land Development Potential	Fallout of one-off costs of feasibility study to investigate council owned land for progression to planning consent in principle	(0.048)	-	-	-	-	(0.048)
SAV2133a	Savings Non-Delivery	Joint OCC/CDC Service	Full year effect of establishing a joint CDC/Oxfordshire County Council Property Service by sharing resources and functions.	0.073	-	-	-	-	0.073
SINVP222	Savings Non-Delivery	Franklin House letting	Reduce business rate cost to the council for Franklin House (former customer services office) through letting the property	0.012	-	-	-	-	0.012
SPREV221	Savings Non-Delivery	Bodicote House utilities	Reduce utility costs at the council's main office, Bodicote House	0.032	-	-	-	-	0.032
SPREV222	Savings Non-Delivery	Maintenance and repairs services	End the maintenance and repairs services contract and procure these services from Oxfordshire County Council when needed	0.053	-	-	-	-	0.053
PITBS231	New	Increased Data Centre Costs	We are predicting the costs from running the cloud data centre environment to be greater than currently budgeted	0.050	-	-	-	-	0.050
PITBS232	New	Spatial Mapping and Local Land Property Gazetteer (LLPG) Address system support & maintenance	Additional support & maintenance costs for Spatial mapping and LLPG address systems, which are not currently included in the base budget	0.019	-	-	-	-	0.019
PITBS234	New	Reduction in income	Cost recovery from Oxfordshire County Council for sharing of IT services ceased following decoupling	0.033	-	-	-	-	0.033
PFCOS231	New	Electronic Bank Transfer/Card Processing costs.	Additional costs from an increase in electronic transactions by card and bank transfers	0.070	-	-	-	-	0.070
PFCOS232	New	Insurance premium increase	We are expecting an increase of 15%-20% when we renew our insurance contracts	0.063	-	-	-	-	0.063
PFREV231	New	Additional mandatory Department for Work and Pension reporting requirements	Additional work is required from a new DWP project including Housing Benefit Full Case Reviews (FCRs), Housing Benefit Matching Service (HBMS) referrals and Self-employed Earnings Reviews (SERs)	0.031	-	-	-	-	0.031
PFREV232	New	Computer software and licencing	Additional costs of computer licences and a new cloud based product	0.040	-	-	-	-	0.040
PDEMO233	New	New Legal Team structure	Cost of establishing our own legal team following the decoupling with Oxfordshire County Council	0.149	(0.031)	-	-	-	0.118
PINVP232	New	Reduced income	Removing unachievable income target	0.012	-	-	-	-	0.012
PPREV231	New	Bodicote House Utilities	Increase in energy and utility pricing	0.020	-	-	-	-	0.020
			Total	0.415	(0.026)	0.012	-	-	0.401

Corporate									
Reference	Existing, Savings Non-Delivery, or New	Title	Description	2023/24 (£m)	2024/25 (£m)	2025/26 (£m)	2026/27 (£m)	2027/28 (£m)	Total MTFS (£m)
UNAV2105	Existing	Housing and Growth Deal	Fallout of time limited funding for Housing and Growth Deal contribution	(0.052)	-	-	-	-	(0.052)
			Total	(0.052)	-	-	-	-	(0.052)
			Total Existing Pressures	(0.492)	0.014	0.012	-	-	(0.466)
			Total Savings Non-Delivery	0.300	-	-	-	-	0.300
			Total New Pressures	2.201	(0.236)	0.001	0.171	0.001	2.138
			Total Pressures	2.009	(0.222)	0.013	0.171	0.001	1.972

Appendix 6 - Budget Summary

Directorate	Expenditure										Income									Net Expenditure
	Employee Costs	Premises Related Expenditure	Transport Related Expenditure	Supplies and Services	Third Party Payments	Transfer Payments	Capital Charges	Capital Financing	Contribution to Reserves	Total Expenditure	Customer and Client Receipts	Fees and Charges	Rental Income	Government Grant Income	Other Grants and Reimbursements	Interest Income	Recharges to Other Accounts	Use of Reserves	Income total	
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
Chief Executive	6.434	1.203	0.022	2.417	0.418	-	-	-	-	10.494	(0.046)	(0.960)	(1.392)	(0.992)	(1.481)	-	-	(0.163)	(5.035)	5.460
Communities	13.119	1.920	1.829	1.350	2.161	-	-	-	-	20.378	(0.618)	(7.173)	(0.129)	(0.189)	(2.014)	-	(0.736)	(0.827)	(11.685)	8.693
Resources	6.795	2.587	0.129	1.700	1.324	25.200	-	-	0.025	37.760	(0.117)	(0.592)	(6.248)	(25.335)	(0.371)	-	-	-	(32.662)	5.097
Services Sub-total	26.347	5.710	1.980	5.467	3.903	25.200	-	-	0.025	68.632	(0.781)	(8.725)	(7.768)	(26.516)	(3.867)	-	(0.736)	(0.990)	(49.382)	19.250
Corporate Costs	1.953	-	-	-	0.328	-	5.625	4.162	-	12.067	-	-	-	(2.993)	-	(5.127)	-	(0.252)	(8.372)	3.695
Policy Contingency	-	-	-	-	5.229	-	-	-	-	5.229	-	-	-	-	-	-	-	-	-	5.229
Net Cost of Services	28.300	5.710	1.980	5.467	9.460	25.200	5.625	4.162	0.025	85.928	(0.781)	(8.725)	(7.768)	(29.509)	(3.867)	(5.127)	(0.736)	(1.242)	(57.755)	28.174

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Lawyer Hourly Rates / Fees				
Fees and Charges	Proposed Fee 23-24 (Excl. VAT) National 1	Actual Increase	% Increase	Statutory/ Discretionary?
Solicitors and legal executives with over 8 years qualified experience	£261.00	£0.00	0.0%	Discretionary
Solicitors and legal executives with over 4 years qualified experience	£218.00	£0.00	0.0%	Discretionary
Other solicitors or legal executives and fee earners of equivalent experience	£178.00	£0.00	0.0%	Discretionary
Trainee solicitors, paralegals and other fee earners	£126.00	£0.00	0.0%	Discretionary

Planning					
Fees and Charges	Fee 22-23 (Excl. VAT)	Proposed Fee 23-24 (Excl. VAT)	Actual Increase	% Increase	Statutory/ Discretionary?
Planning Application fees					
1. Erection of dwellings					
(1) Where the application is for outline planning permission and:					
(a) Site does not exceed 2.5 hectares (£462 per 0.1 Ha) (No VAT)	£462.00	£462.00	£0.00	0.0%	Statutory
(b) Site exceed 2.5 hectares (£11,432; and an additional £138 for each 0.1 hectare in excess of 2.5 hectares, subject to a maximum in total of £150,000) (No VAT)	£11,432.00	£11,432.00	£0.00	0.0%	Statutory
1A) Where the application is for permission in principle (£402 for each 0.1 hectare of the site area) (No VAT)	£402.00	£402.00	£0.00	0.0%	Statutory
(2) In other cases:					
(a) Where the number of dwellinghouses to be created by the development is 50 or fewer (£462 for each dwellinghouse) (No VAT)	£462.00	£462.00	£0.00	0.0%	Statutory
(b) Where the number of dwellinghouses to be where the number of dwellinghouses to be created by the development exceeds 50 (£22,859; and an additional £138 for each dwellinghouse in excess of 50 dwellinghouses, subject to a maximum in total of £300,000) (No VAT)	£22,859.00	£22,859.00	£0.00	0.0%	Statutory
2. The erection of buildings					
(1) Where the application is for outline planning permission and:					
(a) The site area does not exceed 2.5 hectares (£462 for each 0.1 hectare of the site area) (No VAT)	£462.00	£462.00	£0.00	0.0%	Statutory
(b) The site area exceeds 2.5 hectares (£11,432; and an additional £138 for each 0.1 hectare in excess of 2.5 hectares, subject to a maximum in total of £150,000) (No VAT)	£11,432.00	£11,432.00	£0.00	0.0%	Statutory
1A) Where the application is for permission in principle (£402 for each 0.1 hectare of the site area) (No VAT)	£402.00	£402.00	£0.00	0.0%	Statutory
(2) In other cases:					
(a) Where no floor space is to be created by the development (No VAT)	£234.00	£234.00	£0.00	0.0%	Statutory
(b) Where the area of gross floor space to be created by the development does not exceed 40 square metres (No VAT)	£234.00	£234.00	£0.00	0.0%	Statutory
(c) where the area of the gross floor space to be created by the development exceeds 40 square metres, but does not exceed 75 square metres (No VAT)	£462.00	£462.00	£0.00	0.0%	Statutory
(d) where the area of the gross floor space to be created by the development exceeds 75 square metres, but does not exceed 3750 square metres (for each 75 square metres of that area) (No VAT)	£462.00	£462.00	£0.00	0.0%	Statutory
(e) where the area of gross floor space to be created by the development exceeds 3750 square metres. Additional £138 for each 75 square metres in excess of 3750 square metres, subject to a maximum in total of £300,000	£22,859.00	£22,859.00	£0.00	0.0%	Statutory

Planning					
Fees and Charges	Fee 22-23 (Excl. VAT)	Proposed Fee 23-24 (Excl. VAT)	Actual Increase	% Increase	Statutory/ Discretionary?
3. The erection, on land used for the purposes of agriculture, of buildings to be used for agricultural purposes.					
(1) where the application is for outline planning permission and:					
(a) the site area does not exceed 2.5 hectares. Per each 0.1 hectare of the site area	£462.00	£462.00	£0.00	0.0%	Statutory
(b) the site area exceeds 2.5 hectares. Additional £138 for each additional hectare additional 0.1 hectare in excess of 2.5 hectares, subject to a maximum in total of £150,000	£11,432.00	£11,432.00	£0.00	0.0%	Statutory
(1A) Where the application is for permission in principle. Per each 0.1 hectare of the site area.	£402.00	£402.00	£0.00	0.0%	Statutory
(2) In other cases:					
(a) where the area of gross floor space to be created by the development does not exceed 465 square metres	£96.00	£96.00	£0.00	0.0%	Statutory
(b) where the area of gross floor space to be created by the development exceeds 465 square metres but does not exceed 540 square metres	£462.00	£462.00	£0.00	0.0%	Statutory
(c) where the area of the gross floor space to be created by the development exceeds 540 square metres but does not exceed 4215 square metres. Additional £462 for each 75 square metres in excess of 540 square metres	£462.00	£462.00	£0.00	0.0%	Statutory
(d) where the area of gross floor space to be created by the development exceeds 4215 square metres. Additional £138 for each 75 square metres in excess of 4215 square metres, subject to a maximum in total of £300,000.	£22,859.00	£22,859.00	£0.00	0.0%	Statutory
4. The erection of glasshouses on land used for the purposes of agriculture.					
(1) Where the area of gross floor space to be created by the development does not exceed 465 square metres	£96.00	£96.00	£0.00	0.0%	Statutory
(2) where the area of gross floor space to be created by the development exceeds 465 square metres	£2,580.00	£2,580.00	£0.00	0.0%	Statutory
5. The erection, alteration or replacement of plant or machinery.					
(1) Where the site area does not exceed 5 hectares. Per each 0.1 hectare of the site area	£462.00	£462.00	£0.00	0.0%	Statutory
(2) where the site area exceeds 5 hectares. Additional £138 for each 0.1 hectare in excess of 5 hectares, subject to a maximum in total of £300,000.	£22,859.00	£22,859.00	£0.00	0.0%	Statutory
6. The enlargement, improvement or other alteration of existing dwellinghouses.					
(1) Where the application relates to one dwellinghouse.	£206.00	£206.00	£0.00	0.0%	Statutory
(2) where the application relates to two or more dwellinghouses	£407.00	£407.00	£0.00	0.0%	Statutory
7. The carrying out of operations (including the erection of a building) within the curtilage of an existing dwellinghouse, for purposes ancillary to the enjoyment of the dwellinghouse as such, or the erection or construction of gates, fences, walls or other means of enclosure along a boundary of the curtilage of an existing dwellinghouse.					
	£206.00	£206.00	£0.00	0.0%	Statutory
8. The construction of car parks, service roads and other means of access on land used for the purposes of a single undertaking, where the development is required for a purpose incidental to the existing use of the land.					
	£234.00	£234.00	£0.00	0.0%	Statutory
9. The carrying out of any operations connected with exploratory drilling for oil or natural gas.					
(1) Where the site area does not exceed 7.5 hectares, £385 £423 £508 for each 0.1 hectare of the site area;	£508.00	£508.00	£0.00	0.0%	Statutory
(2) where the site area exceeds 7.5 hectares. Additional £151 for each 0.1 hectare in excess of 7.5 hectares, subject to a maximum in total of £300,000	£38,070.00	£38,070.00	£0.00	0.0%	Statutory
9A. The carrying out of any operations for the winning and working of oil or natural gas.					
Where the site area:					
(a) does not exceed 15 hectares. Per each 0.1 hectare of the site area	£257.00	£257.00	£0.00	0.0%	Statutory
(b) exceeds 15 hectares. Additional £151 for each 0.1 hectare in excess of 15 hectares, subject to a maximum in total of £78,000.	£38,520.00	£38,520.00	£0.00	0.0%	Statutory

Planning					
Fees and Charges	Fee 22-23 (Excl. VAT)	Proposed Fee 23-24 (Excl. VAT)	Actual Increase	% Increase	Statutory/ Discretionary?
10. The carrying out of any operations not coming within any of the above categories.					
(1) In the case of operations for the winning and working of minerals:					
(a) where the site area does not exceed 15 hectares. Per each 0.1 hectare of the site area	£234.00	£234.00	£0.00	0.0%	Statutory
(b) where the site area exceeds 15 hectares. Additional £138 for each 0.1 hectare in excess of 15 hectares, subject to a maximum in total of £78,000	£34,934.00	£34,934.00	£0.00	0.0%	Statutory
(2) in any other case. Per each 0.1 hectare of the site area, subject to a maximum in total of £2,028	£234.00	£234.00	£0.00	0.0%	Statutory
11. The change of use of a building to use as one or more separate dwellinghouses.					
(1) Where the change of use is from a previous use as a single dwellinghouse to use as two or more single dwellinghouses:					
(a) where the change of use is to use as 50 or fewer dwellinghouses, for each additional dwellinghouse	£462.00	£462.00	£0.00	0.0%	Statutory
(b) where the change of use is to use as more than 50 dwellinghouses. Additional £138 for each dwellinghouse in excess of 50 dwellinghouses, subject to a maximum in total of £300,000	£22,859.00	£22,859.00	£0.00	0.0%	Statutory
(2) in all other cases:					
(a) where the change of use is to use as 50 or fewer dwellinghouses, for each dwellinghouse	£462.00	£462.00	£0.00	0.0%	Statutory
(b) where the change of use is to use as more than 50 dwellinghouses. Additional £138 for each dwellinghouse in excess of 50 dwellinghouses, subject to a maximum in total of £300,000	£22,859.00	£22,859.00	£0.00	0.0%	Statutory
12. The use of land for:					
(a) the disposal of refuse or waste materials;					
(b) the deposit of material remaining after minerals have been extracted from land; or					
(c) the storage of minerals in the open.					
(1) Where the site area does not exceed 15 hectares, for each 0.1 hectare of the site area	£234.00	£234.00	£0.00	0.0%	Statutory
(2) where the site area exceeds 15 hectares, an additional £138 for each 0.1 hectare in excess of 15 hectares, subject to a maximum in total of £78,000	£34,934.00	£34,934.00	£0.00	0.0%	Statutory
13. The making of a material change in the use of a building or land	£462.00	£462.00	£0.00	0.0%	Statutory
Fees for Advertisements					
1. Advertisements displayed externally on business premises, the forecourt of business premises or other land within the curtilage of business premises, wholly with reference to all or any of the following matters: (a) the nature of the business or other activity carried on on the premises; (b) the goods sold or the services provided on the premises; or (c) the name and qualifications of the person carrying on such business or activity or supplying such goods or services.	£132.00	£132.00	£0.00	0.0%	Statutory
2. Advertisements for the purpose of directing members of the public to, or otherwise drawing attention to the existence of, business premises which are in the same locality as the site on which the advertisement is to be displayed but which are not visible from that site.	£132.00	£132.00	£0.00	0.0%	Statutory
3. All other advertisements.	£462.00	£462.00	£0.00	0.0%	Statutory
Lawful Development Certificate					
Application for a certificate to establish the lawfulness of an existing land-use, or of development already carried out. Same as Planning Application fee for that use or operation.					Statutory
Application for a certificate to establish that it was lawful not to comply with a particular condition or other limitation imposed on a planning permission.	£234.00	£234.00	£0.00	0.0%	Statutory
Application for a certificate to state that a proposed use would be lawful. Half as Planning Application fee for that use or operation.					Statutory

Planning					
Fees and Charges	Fee 22-23 (Excl. VAT)	Proposed Fee 23-24 (Excl. VAT)	Actual Increase	% Increase	Statutory/ Discretionary?
Prior Approval					
Construction of new dwellinghouses:					
(a) Not more than 50 dwellinghouses. Per dwelling	£334.00	£334.00	£0.00	0.0%	Statutory
(b) More than 50 dwellinghouses, additional £100 for each dwellinghouse to maximum fee of £300,000	£16,525.00	£16,525.00	£0.00	0.0%	Statutory
Enlargement of a dwellinghouse by construction of additional storeys	£96.00	£96.00	£0.00	0.0%	Statutory
Agricultural and Forestry buildings & operations	£96.00	£96.00	£0.00	0.0%	Statutory
Demolition of buildings	£96.00	£96.00	£0.00	0.0%	Statutory
Communications	£462.00	£462.00	£0.00	0.0%	Statutory
Change of Use of a building and any land. £206 if it includes building operations in connection with the change of use	£96.00	£96.00	£0.00	0.0%	Statutory
Erection, extension, or alteration of a university building	£96.00	£96.00	£0.00	0.0%	Statutory
Reserved Matters					
Application for approval of reserved matters following outline approval. Sum equal to approval of all the reserved matters, subject to minimum.	£462.00	£462.00	£0.00	0.0%	Statutory
Approval/Variation/Discharge of Condition					
Application for removal or variation of a condition following grant of planning permission	£234.00	£234.00	£0.00	0.0%	Statutory
Request to discharge one or more planning conditions (Householder)	£34.00	£34.00	£0.00	0.0%	Statutory
Request to discharge one or more planning conditions (Non Householder)	£116.00	£116.00	£0.00	0.0%	Statutory
Application for a non-material amendment following a grant of planning permission					
(a) Applications in respect of householder developments	£34.00	£34.00	£0.00	0.0%	Statutory
(b) Applications in respect of other developments	£234.00	£234.00	£0.00	0.0%	Statutory

Planning					
Fees and Charges	Fee 22-23 (Excl. VAT)	Proposed Fee 23-24 (Excl. VAT)	Actual Increase	% Increase	Statutory/ Discretionary?
Pre-Application Charges					
The Council has reviewed its pre-application offer to ensure that we continue to offer a suitable avenue for prospective applicants to obtain feedback on their proposals before making a formal application, at a fee that reflects the impact it has on our resources. The variation of the fee structure outlined below will ensure that proportionate fees will be charged so that this service is appropriately funded.					
Category A (Householder)					
Written Advice only (Desktop Assessment)	£150.00	£153.00	£3.00	2.0%	Discretionary
Category B (1-9 Dwellings)					
Meeting and Written Advice - 1 Dwelling	£382.50	£382.50	£0.00	0.0%	Discretionary
Meeting and Written Advice - Per each additional dwelling	£75.00	£75.00	£0.00	0.0%	Discretionary
Site Visit (Set charge for 1 officer for 2 hours inc travel)	£200.00	£200.00	£0.00	0.0%	Discretionary
Follow-up Written Clarification	£150.00	£150.00	£0.00	0.0%	Discretionary
Category C (10-99 dwellings)					
Meeting and Written Advice - 10 dwellings	£1,000.00	£1,000.00	£0.00	0.0%	Discretionary
Meeting and Written Advice - Per additional dwelling	£30.00	£30.00	£0.00	0.0%	Discretionary
Meeting and Written Advice - Maximum	£4,500.00	£4,500.00	£0.00	0.0%	Discretionary
Site Visit (Set charge for 1 officer for 2 hours inc travel)	£200.00	£200.00	£0.00	0.0%	Discretionary
Follow-up Written Clarification	£150.00	£150.00	£0.00	0.0%	Discretionary
Category D (250+ Dwellings)					
Minimum Charge	£5,000.00	£5,000.00	£0.00	0.0%	Discretionary
Officer hourly rate after first 30 hours (collective input of all officers) - Planning Officer	£85.00	£85.00	£0.00	0.0%	Discretionary
Officer hourly rate after first 30 hours (collective input of all officers) - Senior Planning Officer	£100.00	£100.00	£0.00	0.0%	Discretionary
Officer hourly rate after first 30 hours (collective input of all officers) - Principal Planning Officer	£120.00	£120.00	£0.00	0.0%	Discretionary
Officer hourly rate after first 30 hours (collective input of all officers) - Team Leader	£135.00	£135.00	£0.00	0.0%	Discretionary
Officer hourly rate after first 30 hours (collective input of all officers) - Senior Manager	£150.00	£150.00	£0.00	0.0%	Discretionary
Category E (Hotels, HMOs, Communal housing of elderly & disabled)					
Meeting and Written Advice - Per 100 sqm of building/0.1 hectare of site area (whichever fee is the higher)	£120.00	£120.00	£0.00	0.0%	Discretionary
Meeting and Written Advice Per 100 sqm of building/0.1 hectare of site area (whichever fee is the higher) - Minimum	£360.00	£360.00	£0.00	0.0%	Discretionary
Meeting and Written Advice Per 100 sqm of building/0.1 hectare of site area (whichever fee is the higher) - Maximum	£4,500.00	£4,500.00	£0.00	0.0%	Discretionary
Site Visit (Set charge for 1 officer for 2 hours inc travel), excludes written response	£200.00	£200.00	£0.00	0.0%	Discretionary
Follow-up Written Clarification	£150.00	£150.00	£0.00	0.0%	Discretionary

Planning					
Fees and Charges	Fee 22-23 (Excl. VAT)	Proposed Fee 23-24 (Excl. VAT)	Actual Increase	% Increase	Statutory/ Discretionary?
Category F (Listed building and Conservation Area advice)					
Bespoke charge agreed in advance based on agreed assumptions on hourly rate for officer(s)					
Officer hourly rate - Conservation Officer	£65.00	£65.00	£0.00	0.0%	Discretionary
Officer hourly rate - Senior Conservation Officer	£85.00	£85.00	£0.00	0.0%	Discretionary
Officer hourly rate - Manager	£125.00	£125.00	£0.00	0.0%	Discretionary
Site Visit (Set charge in addition to hourly rate)	£80.00	£80.00	£0.00	0.0%	Discretionary
Category G - Shopfronts					
Written Advice only (Desktop Assessment)	£150.00	£150.00	£0.00	0.0%	Discretionary
Category H - Advertisements					
Written Advice only (Desktop Assessment)	£150.00	£150.00	£0.00	0.0%	Discretionary
Category I (Telecommunications)					
Written Advice only (Desktop Assessment)	£150.00	£150.00	£0.00	0.0%	Discretionary
Category J (Agricultural, forestry & glasshouse devt – less than 465 sqm)					
Written Advice only (Desktop Assessment)	£150.00	£150.00	£0.00	0.0%	Discretionary
Site Visit (Set charge for 1 officer for 2 hours inc travel), excludes written response	£200.00	£200.00	£0.00	0.0%	Discretionary
Category K (Agricultural, forestry & glasshouse devt – more than 465 sqm)					
Meeting and Written Advice - Up to 540 sqm	£200.00	£200.00	£0.00	0.0%	Discretionary
Meeting and Written Advice - Per each additional 75 sqm (or part thereof)	£120.00	£120.00	£0.00	0.0%	
Site Visit (Set charge for 1 officer for 2 hours inc travel), excludes written response	£200.00	£200.00	£0.00	0.0%	Discretionary
Follow-up Written Clarification	£150.00	£150.00	£0.00	0.0%	Discretionary
Category L (Change of use of land to equestrian)					
Written Advice only (Desktop Assessment)	£150.00	£150.00	£0.00	0.0%	Discretionary
Site Visit (Set charge for 1 officer for 2 hours inc travel), excludes written response	£200.00	£200.00	£0.00	0.0%	Discretionary
Meeting - Bespoke charge based on agreed assumptions on hourly rate for officer(s)	£0.00	£0.00	£0.00	0.0%	Discretionary
Officer hourly rate - Planning Officer	£85.00	£85.00	£0.00	0.0%	Discretionary
Officer hourly rate - Senior Planning Officer	£100.00	£100.00	£0.00	0.0%	Discretionary
Officer hourly rate - Principal Planning Officer	£120.00	£120.00	£0.00	0.0%	Discretionary
Officer hourly rate - Team Leader	£135.00	£135.00	£0.00	0.0%	Discretionary
Officer hourly rate - Senior Manager	£150.00	£150.00	£0.00	0.0%	Discretionary
Category M (Anemometer masts or single wind turbines of less than 100 m in height)					
Meeting and Written Advice	£600.00	£600.00	£0.00	0.0%	Discretionary
Site Visit (Set charge for 1 officer for 2 hours inc travel), excludes written response	£200.00	£200.00	£0.00	0.0%	Discretionary
Follow-up Written Clarification	£150.00	£150.00	£0.00	0.0%	Discretionary

Planning					
Fees and Charges	Fee 22-23 (Excl. VAT)	Proposed Fee 23-24 (Excl. VAT)	Actual Increase	% Increase	Statutory/ Discretionary?
Category N (Wind and solar farm developments)					
Minimum charge	£4,000.00	£4,000.00	£0.00	0.0%	Discretionary
Officer hourly rate after first 30 hours (collective input of all officers) - Planning Officer	£85.00	£85.00	£0.00	0.0%	Discretionary
Officer hourly rate after first 30 hours (collective input of all officers) - Senior Planning Officer	£100.00	£100.00	£0.00	0.0%	Discretionary
Officer hourly rate after first 30 hours (collective input of all officers) - Principal Planning Officer	£120.00	£120.00	£0.00	0.0%	Discretionary
Officer hourly rate after first 30 hours (collective input of all officers) - Team Leader	£135.00	£135.00	£0.00	0.0%	Discretionary
Officer hourly rate after first 30 hours (collective input of all officers) - Senior Manager	£150.00	£150.00	£0.00	0.0%	Discretionary
Category O (Other developments inc change of use: floorspace less than 200 sqm and the site area is less than 0.1 hectares)					
Meeting and Written Advice	£200.00	£200.00	£0.00	0.0%	Discretionary
Site Visit (Set charge for 1 officer for 2 hours inc travel), excluding written response	£200.00	£200.00	£0.00	0.0%	Discretionary
Follow-up Written Clarification	£150.00	£150.00	£0.00	0.0%	Discretionary
Category P (Other developments inc change of use: floorspace less than 1000 sqm and the site area is less than 0.5 hectares)					
Meeting and Written Advice	£350.00	£350.00	£0.00	0.0%	Discretionary
Site Visit (Set charge for 1 officer for 2 hours inc travel), excluding written response	£200.00	£200.00	£0.00	0.0%	Discretionary
Follow-up Written Clarification	£150.00	£150.00	£0.00	0.0%	Discretionary
Category Q (Other developments inc change of use: floorspace less than 5000 sqm and the site area is less than 1 hectare)					
Meeting and Written Advice	£1,500.00	£1,500.00	£0.00	0.0%	Discretionary
Site Visit (Set charge for 1 officer for 2 hours inc travel), excluding written response	£200.00	£200.00	£0.00	0.0%	Discretionary
Follow-up Written Clarification	£150.00	£150.00	£0.00	0.0%	Discretionary
Category R (Other developments inc change of use: floorspace less than 10000 sqm and the site area is less than 2 hectares)					
Meeting and Written Advice	£2,750.00	£2,750.00	£0.00	0.0%	Discretionary
Site Visit (Set charge for 1 officer for 2 hours inc travel), excluding written response	£200.00	£200.00	£0.00	0.0%	Discretionary
Follow-up Written Clarification	£150.00	£150.00	£0.00	0.0%	Discretionary
Category S (Other developments inc change of use: floorspace more than 10000 sqm and the site area is more than 2 hectares)					
Meeting and Written Advice	£4,000.00	£4,000.00	£0.00	0.0%	Discretionary
Officer hourly rate after first 30 hours (collective input of all officers) - Planning Officer	£85.00	£85.00	£0.00	0.0%	Discretionary
Officer hourly rate after first 30 hours (collective input of all officers) - Senior Planning Officer	£100.00	£100.00	£0.00	0.0%	Discretionary
Officer hourly rate after first 30 hours (collective input of all officers) - Principal Planning Officer	£120.00	£120.00	£0.00	0.0%	Discretionary
Officer hourly rate after first 30 hours (collective input of all officers) - Team Leader	£135.00	£135.00	£0.00	0.0%	Discretionary
Officer hourly rate after first 30 hours (collective input of all officers) - Senior Manager	£150.00	£150.00	£0.00	0.0%	Discretionary
Category T (Written requests for information)					
Bespoke charge based on levels of officer input with minimum of £300 (ex VAT)	£300.00	£300.00	£0.00	0.0%	Discretionary
Officer hourly rate - Officer	£65.00	£65.00	£0.00	0.0%	Discretionary
Officer hourly rate - Senior Officer	£85.00	£85.00	£0.00	0.0%	Discretionary
Officer hourly rate - Principal Officer	£100.00	£100.00	£0.00	0.0%	Discretionary
Category U (Parish/Town Council developments and other exemptions)					
Fee	£0.00	£0.00	£0.00	0.0%	Discretionary

Appendix 7 - Fees and Charges Schedule

Planning					
Fees and Charges	Fee 22-23 (Excl. VAT)	Proposed Fee 23-24 (Excl. VAT)	Actual Increase	% Increase	Statutory/ Discretionary?
Planning Performance Agreements					
Setting up PPA (Administration charge)	£500.00	£500.00	£0.00	0.0%	Discretionary
Meetings (assumptions on hourly rate of officer preparation, attendance and follow-up) plus set, per meeting, administration charge of (£72 inc VAT)	£60.00	£60.00	£0.00	0.0%	Discretionary
Officer hourly rate - Planning Officer	£85.00	£85.00	£0.00	0.0%	Discretionary
Officer hourly rate - Senior Planning Officer	£100.00	£100.00	£0.00	0.0%	Discretionary
Officer hourly rate - Principal Planning Officer	£120.00	£120.00	£0.00	0.0%	Discretionary
Officer hourly rate - Team Leader	£135.00	£135.00	£0.00	0.0%	Discretionary
Officer hourly rate - Senior Manager	£150.00	£150.00	£0.00	0.0%	Discretionary
Officer hourly rate - Assistant Director	£190.00	£190.00	£0.00	0.0%	Discretionary
Development Monitoring					
Registration charge for S106 agreements (per agreement)	£500.00	£500.00	£0.00	0.0%	Discretionary
S73 Variations, linking agreements and modifications - Bespoke charge	£0.00	£0.00	£0.00	0.0%	Discretionary
Less than 10 dwellings and/or 1,000sqm of floorspace) - Bespoke charge based on number of obligations and triggers with minimum of £500 (exc VAT)	£500.00	£500.00	£0.00	0.0%	Discretionary
10 - 100 dwellings and/or 1,000 - 10,000sqm of floorspace) - Bespoke charge based on number of obligations and triggers with minimum of £1,000 (exc VAT)	£1,000.00	£1,000.00	£0.00	0.0%	Discretionary
100 - 250 dwellings units and/or 10,000 - 75,000sqm of floorspace - Bespoke charge based on number of obligations and triggers with minimum of £5,000 (exc VAT)	£5,000.00	£5,000.00	£0.00	0.0%	Discretionary
251+ dwellings units and/or 75,001sqm+ of floorspace - Bespoke charge based on number of obligations and triggers with minimum of £10,000 (exc VAT)	£10,000.00	£10,000.00	£0.00	0.0%	Discretionary
Desktop records check and guidance on compliance issued via email (per request)	£200.00	£200.00	£0.00	0.0%	Discretionary
Fee for remedial inspections for on-site provisions (Monitoring officer only)	£200.00	£200.00	£0.00	0.0%	Discretionary
High Hedges					
Application fee for High hedges complaint	£396.00	£396.00	£0.00	0.0%	Discretionary
Planning Enforcement					
Confirmation of closure of enforcement case where it was found not expedient to take action (available for a 12-month period following closure of the case)	£85.00	£85.00	£0.00	0.0%	Discretionary
Confirmation that an Enforcement Notice had been complied with	£200.00	£200.00	£0.00	0.0%	Discretionary
Request to withdraw enforcement notice	£200.00	£200.00	£0.00	0.0%	Discretionary
Supplementary Fees					
Administration charges for invalid submissions not made valid.					
Householder, Minor and Other applications with no planning officer input	£40.00	£40.00	£0.00	0.0%	Discretionary
Major Applications and applications where officer input required	£90.00	£90.00	£0.00	0.0%	Discretionary

Building control					
Fees and Charges	Fee 22-23 (Excl. VAT)	Proposed Fee 23-24 (Excl. VAT)	Actual Increase	% Increase	Statutory/ Discretionary?
New Dwellings					
1 Dwelling	£775.00	£800.00	£25.00	3.2%	Discretionary
2 Dwellings	£1,050.00	£1,075.00	£25.00	2.4%	Discretionary
3 Dwellings	£1,300.00	£1,350.00	£50.00	3.8%	Discretionary
4 Dwellings	£1,450.00	£1,500.00	£50.00	3.4%	Discretionary
5 Dwellings	£1,650.00	£1,700.00	£50.00	3.0%	Discretionary
Other New Builds					
New Garage <40m2	£315.00	£325.00	£10.00	3.2%	Discretionary
New Garage 40m2 - 60m2	£395.00	£405.00	£10.00	2.5%	Discretionary
Extensions					
Extn<10m2	£360.00	£375.00	£15.00	4.2%	Discretionary
Extn 10m2-40m2	£570.00	£585.00	£15.00	2.6%	Discretionary
Extn 40m2-80m2	£675.00	£695.00	£20.00	3.0%	Discretionary
Conversions					
Garage Conversion	£310.00	£320.00	£10.00	3.2%	Discretionary
Loft conversion <80m2	£525.00	£540.00	£15.00	2.9%	Discretionary
Loft Conversion 80m2-100m2	£570.00	£585.00	£15.00	2.6%	Discretionary
Miscellaneous Works					
Underpinning	£360.00	£370.00	£10.00	2.8%	Discretionary
Up to 6 doors/windows	£135.00	£140.00	£5.00	3.7%	Discretionary
Each additional door/window	£20.00	£25.00	£5.00	25.0%	Discretionary
Heating Appliance	£200.00	£210.00	£10.00	5.0%	Discretionary
Electrical Appliance	£525.00	£540.00	£15.00	2.9%	Discretionary
Thermal upgrade	£200.00	£210.00	£10.00	5.0%	Discretionary
Up tp 6 Solar Panels	£525.00	£540.00	£15.00	2.9%	Discretionary
Based on Construction Value					
0-£10K	£310.00	£320.00	£10.00	3.2%	Discretionary
£10K-£40K	£500.00	£515.00	£15.00	3.0%	Discretionary
£40K-£100K	£750.00	£770.00	£20.00	2.7%	Discretionary
Building notice supplement	10%	10%	£0.00	0.0%	Discretionary
Supplementary Fees					
Additional Visits	£65.00	£70.00	£5.00	7.7%	Discretionary
Copies of Certificates	£40.00	£45.00	£5.00	12.5%	Discretionary
Reopening applications after less than 3 years	£50.00	£50.00	£0.00	0.0%	Discretionary
Reopening applications after more than 3 years	£100.00	£100.00	£0.00	0.0%	Discretionary

Housing Standards					
Fees and Charges	Fee 22-23 (Excl. VAT)	Proposed Fee 23-24 (Excl. VAT)	Actual Increase	% Increase	Statutory/ Discretionary?
HMO Licence category A - Higher rate new application (where the HMO has been unlicensed for 6 weeks or more)	£1,071.00	£1,146.00	£75.00	7.0%	Discretionary
HMO Licence category B - Standard new application (where the HMO was acquired or became licensable within 6 weeks, or change of existing licence holder)	£663.00	£710.00	£47.00	7.1%	Discretionary
HMO Licence category C - Higher rate renewal (where we have concerns about the HMO management or conditions)	£663.00	£710.00	£47.00	7.1%	Discretionary
HMO Licence category D - Standard rate renewal (valid application made and paid on time with no compliance issues)	£459.00	£491.00	£32.00	7.0%	Discretionary
Landlord advice visits (per visit)	£153.00	£160.00	£7.00	4.6%	Discretionary
Desktop review of plans etc.	£102.00	£110.00	£8.00	7.8%	Discretionary
Empty Homes VAT-exemption letter	£41.00	£44.00	£3.00	7.3%	Discretionary
Housing Act 2004 - serving an Improvement Notice	£459.00	£480.00	£21.00	4.6%	Discretionary
Housing Act 2004 - making a Prohibition Order	£459.00	£480.00	£21.00	4.6%	Discretionary
Housing Act 2004 - taking emergency remedial action	£459.00	£480.00	£21.00	4.6%	Discretionary
Housing Act 2004 - Making an emergency prohibition order	£459.00	£480.00	£21.00	4.6%	Discretionary
Housing Act 2004 - Reviewing suspended improvement notice or prohibition order	£230.00	£240.00	£10.00	4.3%	Discretionary

Appendix 7 - Fees and Charges Schedule

Land Drainage					
Fees and Charges	Fee 22-23 (Excl. VAT)	Proposed Fee 23-24 (Excl. VAT)	Actual Increase	% Increase	Statutory/ Discretionary?
Consent Application fee	£50.00	£50.00	£0.00	0.0%	Statutory

Street Naming and Numbering					
Fees and Charges	Fee 22-23 (Excl. VAT)	Proposed Fee 23-24 (Excl. VAT)	Actual Increase	% Increase	Statutory/ Discretionary?
Assigning official address's to properties	£35.00	£40.00	£5.00	14.3%	Discretionary

Environmental Services					
Fees and Charges	Fee 22-23 (excl. VAT)	Proposed Fee 23-24 (excl. VAT)	Actual Increase	% Increase	Statutory/ Discretionary?
Special Collections					
Special Collections - Clearout (Garden waste or waste package)	£65.00	£69.50	£4.50	6.9%	Discretionary
Special Collections - Clearout (Garden waste or waste package)	£99.00	£120.00	£21.00	21.2%	Discretionary
Special Collections - Any (3 Items Collected)	£26.99	£29.99	£3.00	11.1%	Discretionary
New: Special Collection - 1 item	£9.99	£10.99	£0.00	10.0%	Discretionary
New: Special Collection - 1 large item	£14.99	£16.99	£0.00	13.3%	Discretionary
Special Collections - Any (3 Items Collected) During Blitz Weeks	£15.00	£20.00	£5.00	33.3%	Discretionary
Bins and Waste Sacks					
Blue & Brown Wheeled Bins	£30.00	£35.00	£5.00	16.7%	Discretionary
240L Additional Green Bin - Annual Charge	£105.00	£120.00	£15.00	14.3%	Discretionary
Bundles of 25 Trade Waste Sacks	£62.50	£62.50	£0.00	0.0%	Both Statutory and Discretionary elements
Bundles of 25 Trade Recycling Sacks	£45.00	£45.00	£0.00	0.0%	Both Statutory and Discretionary elements
COMMERCIAL REFUSE COLLECTION - PER LIFT					
240 litre bin	£7.50	£7.75	£0.25	3.3%	Both Statutory and Discretionary elements
360 litre bin	£9.75	£10.00	£0.25	2.6%	Both Statutory and Discretionary elements
660 litre bin	£13.75	£14.25	£0.50	3.6%	Both Statutory and Discretionary elements
1100 litre bin	£18.50	£19.00	£0.50	2.7%	Both Statutory and Discretionary elements
COMMERCIAL RECYCLING COLLECTION - PER LIFT					
240 litre bin	£5.00	£5.00	£0.00	0.0%	Both Statutory and Discretionary elements
360 litre bin	£6.50	£6.50	£0.00	0.0%	Both Statutory and Discretionary elements
660 litre bin	£9.00	£9.00	£0.00	0.0%	Both Statutory and Discretionary elements
1100 litre bin	£12.00	£12.00	£0.00	0.0%	Both Statutory and Discretionary elements
COMMERCIAL GLASS RECYCLING COLLECTION - PER LIFT					
240 litre bin	£5.25	£5.25	£0.00	0.0%	Both Statutory and Discretionary elements
360 litre bin	£6.75	£6.75	£0.00	0.0%	Both Statutory and Discretionary elements
COMMERCIAL FOOD RECYCLING - PER LIFT					
120 litre bin	£4.00	£4.50	£0.50	12.5%	Both Statutory and Discretionary elements

* Discount of 10% for >5 bins, 20% for >10 bins

Environmental Services					
Fees and Charges	Fee 22-23 (excl. VAT)	Proposed Fee 23-24 (excl. VAT)	Actual Increase	% Increase	Statutory/ Discretionary?
Schedule II Collections - Schools					
240L Wheeled Bin Package	£154.00	£170.00	£16.00	10.4%	Both Statutory and Discretionary elements
360L Wheeled Bin Package	£210.00	£235.00	£25.00	11.9%	Both Statutory and Discretionary elements
660L Wheeled Bin Package	£325.00	£360.00	£35.00	10.8%	Both Statutory and Discretionary elements
1100L Wheeled Bin Package	£445.00	£490.00	£45.00	10.1%	Both Statutory and Discretionary elements
Trade Glass Collection (1 bell)					
Trade Glass Collection (1 bell)	£80.00	£125.00	£45.00	56.3%	Discretionary
Garden Waste Charges - 240L Brown Wheeled Bin					
Sign up before 1st March 2022 (Until 28th February 2023)	£36.00	£39.00	£3.00	8.3%	Both Statutory and Discretionary elements
Sign up after 1st March 2022 (Until 28th February 2023)	£40.00	£43.00	£3.00	7.5%	Both Statutory and Discretionary elements
Additonal licences (1st March - 28th February 2023)	£30.00	£33.00	£3.00	10.0%	Both Statutory and Discretionary elements
Bundles of 25 Biodegradable Garden Waste Sacks	£45.00	£47.50	£2.50	5.6%	Discretionary
Roll of 52 Compostable Liners	£4.00	£4.50	£0.50	12.5%	Discretionary
Dog bin emptying charge					
For parishes with more than 20 bins	£1.60	£1.70	£0.10	6.2%	Discretionary
For parishes with more than 5 bins	£1.70	£1.80	£0.10	5.9%	Discretionary
For parishes with less than 5 bins	£1.85	£1.95	£0.10	5.4%	Discretionary
MOT's					
Class IV for Trade, Staff and Account Customers	£45.00	£45.00	£0.00	0.0%	Discretionary
Class IV for General Public	£50.00	£50.00	£0.00	0.0%	Discretionary
Class V for Trade, Staff and Account Customers	£50.00	£50.00	£0.00	0.0%	Discretionary
Class V for General Public	£55.00	£55.00	£0.00	0.0%	Discretionary
Class VII for Trade, Staff and Account Customers	£50.00	£50.00	£0.00	0.0%	Discretionary
Class VII for General Public	£55.00	£55.00	£0.00	0.0%	Discretionary
Other					
Hourly Rate - Workshop (External)	£60.00	£62.50	£2.50	4.2%	Discretionary
Use of Washdown facility at Thorpe Lane Depot	£55.00	£57.50	£2.50	4.5%	Discretionary
Use of Public Conveniences - Bicester	£0.20	£0.20	£0.00	0.0%	Discretionary
Use of Public Conveniences - Banbury and Kidlington	£0.20	£0.20	£0.00	0.0%	Discretionary
Pitch Fees 'Casual'	£31.00	£32.00	£1.00	3.2%	Discretionary
Pitch Fees 'Regular'	£25.50	£26.35	£0.85	3.3%	Discretionary
Pitch Fees 'Charity/Community'	£15.00	£15.50	£0.50	3.3%	Discretionary
Highway Closures	£90.00	£93.00	£3.00	3.3%	Discretionary

Car Parking					
Fees and Charges	Fee 22-23 (excl. VAT)	Proposed Fee 23-24 (excl. VAT)*	Actual Increase	% Increase	Statutory/ Discretionary?
Banbury Short Stay (Charges apply 8am-7pm. Free Parking after 7pm)					
Market Place Monday To Saturday					
0 -30 minutes	£1.10	£1.20	£0.10	9.1%	Discretionary
0 - 1 hour	£1.60	£2.00	£0.40	25.0%	Discretionary
1 - 2 hours	N/A	£4.00	N/A	N/A	Discretionary
Market Place Sunday and Bank Holidays					
0 - 1 hour	£1.10	£1.20	£0.10	9.1%	Discretionary
Over 1 hour flat rate	£1.60	£1.70	£0.10	6.2%	Discretionary
Horsefair West Monday To Saturday					
0 - 1 hour	£1.10	£1.20	£0.10	9.1%	Discretionary
1 - 2 hours	£2.20	£2.40	£0.20	9.1%	Discretionary
2 - 3 hours	£3.00	£3.30	£0.30	10.0%	Discretionary
Over 3 hours	N/A	£7.50	N/A	N/A	Discretionary
Horsefair West Sunday and Bank Holidays					
0 - 1 hour	£1.10	£1.20	£0.10	9.1%	Discretionary
Over 1 hour flat rate	£1.60	£1.70	£0.10	6.2%	Discretionary
Calthorpe Street West (part) Monday To Saturday					
0 - 1 hour	£1.10	£1.20	£0.10	9.1%	Discretionary
1 - 2 Hours	£2.20	£2.40	£0.20	9.1%	Discretionary
2 - 3 Hours	£3.00	£3.30	£0.30	10.0%	Discretionary
Over 3 hours	N/A	£7.50	N/A	N/A	Discretionary
Calthorpe Street West (part) Sunday and Bank Holidays					
0 - 1 hour	£1.10	£1.20	£0.10	9.1%	Discretionary
Over 1 hour flat rate	£1.60	£1.70	£0.10	6.2%	Discretionary
Calthorpe Street East Monday To Saturday					
0 - 1 hour	£1.10	£1.20	£0.10	9.2%	Discretionary
1 - 2 Hours	£2.20	£2.40	£0.20	9.1%	Discretionary
2 - 3 Hours	£3.00	£3.30	£0.30	10.0%	Discretionary
Over 3 hours	N/A	£7.50	N/A	N/A	Discretionary
Calthorpe Street East Sunday and Bank Holidays					
0 - 1 hour	£1.10	£1.20	£0.10	9.1%	Discretionary
Over 1 hour flat rate	£1.60	£1.70	£0.10	6.2%	Discretionary
South Bar East (part) up to Calthorpe Street Monday To Saturday					
0 - 1 hour	£1.10	£1.20	£0.10	9.1%	Discretionary
1 - 2 Hours	£2.20	£2.40	£0.20	9.1%	Discretionary
2 - 3 Hours	£3.00	£3.30	£0.30	10.0%	Discretionary
Over 3 hours	N/A	£7.50	N/A	N/A	Discretionary
South Bar East (part) up to Calthorpe Street Sunday and Bank Holidays					
0 - 1 hour	£1.10	£1.20	£0.10	9.1%	Discretionary
Over 1 hour flat rate	£1.60	£1.70	£0.10	6.2%	Discretionary
North Bar East Monday To Saturday					
0 - 1 hour	£1.10	£1.20	£0.10	9.1%	Discretionary
1 - 2 Hours	£2.20	£2.40	£0.20	9.1%	Discretionary
2 - 3 Hours	£3.00	£3.30	£0.30	10.0%	Discretionary
Over 3 hours	N/A	£7.50	N/A	N/A	Discretionary
North Bar East Sunday and Bank Holidays					
0 - 1 hour	£1.10	£1.20	£0.10	9.1%	Discretionary
Over 1 hour flat rate	£1.60	£1.70	£0.10	6.2%	Discretionary
The Mill Monday To Saturday					
0 - 1 hour	£1.10	£1.20	£0.10	9.1%	Discretionary
1 - 2 Hours	£2.20	£2.40	£0.20	9.1%	Discretionary
2 - 3 Hours	£3.00	£3.30	£0.30	10.0%	Discretionary
Over 3 hours	N/A	£7.50	N/A	N/A	Discretionary

Car Parking					
Fees and Charges	Fee 22-23 (excl. VAT)	Proposed Fee 23-24 (excl. VAT)*	Actual Increase	% Increase	Statutory/ Discretionary?
The Mill Sunday and Bank Holidays					
0 - 1 hour	£1.10	£1.20	£0.10	9.1%	Discretionary
Over 1 hour flat rate	£1.60	£1.70	£0.10	6.2%	Discretionary
Chamberlaine Court Monday To Saturday					
0 - 1 hour	£1.10	£1.20	£0.10	9.1%	Discretionary
1 - 2 Hours	£2.20	£2.40	£0.20	9.1%	Discretionary
2 - 3 Hours	£3.00	£3.30	£0.30	10.0%	Discretionary
Over 3 hours	N/A	£7.50	N/A	N/A	Discretionary
Chamberlaine Court Sunday and Bank Holidays					
0 - 1 hour	£1.10	£1.20	£0.10	9.1%	Discretionary
Over 1 hour flat rate	£1.60	£1.70	£0.10	6.2%	Discretionary
Bridge Street (Blue Badge Holders Only)					
Monday To Saturday	£0.00	£0.00	£0.00	0.0%	Discretionary
Sunday and Bank Holidays	£0.00	£0.00	£0.00	0.0%	Discretionary
Free of charge up to maximum stay permitted					
Banbury Long Stay (charges apply 8am-7pm. Free Parking after 7pm)					
Riverside Monday To Saturday					
0 - 1 hour	£1.10	£1.20	£0.10	9.1%	Discretionary
1 - 2 Hours	£2.20	£2.40	£0.20	9.1%	Discretionary
2 - 3 Hours	£3.00	£3.30	£0.30	10.0%	Discretionary
3 - 4 Hours	£3.80	£4.20	£0.40	10.5%	Discretionary
4 - 5 Hours	N/A	£4.50	N/A	N/A	Discretionary
Day rate up to 7pm	£5.00	£5.50	£0.50	10.0%	Discretionary
Riverside Sunday and Bank Holidays					
0 - 1 hour	£1.10	£1.20	£0.10	9.1%	Discretionary
Over 1 hour flat rate	£1.60	£1.70	£0.10	6.2%	Discretionary
South Bar East and West Monday To Saturday					
0 - 1 hour	£1.10	£1.20	£0.10	9.1%	Discretionary
1 - 2 Hours	£2.20	£2.40	£0.20	9.1%	Discretionary
2 - 3 Hours	£3.00	£3.30	£0.30	10.0%	Discretionary
3 - 4 Hours	£3.80	£4.20	£0.40	10.5%	Discretionary
4 - 5 Hours	N/A	£4.50	N/A	N/A	Discretionary
Day rate up to 7pm	£5.00	£5.50	£0.50	10.0%	Discretionary
South Bar East and West Sunday and Bank Holidays					
0 - 1 hour	£1.10	£1.20	£0.10	9.1%	Discretionary
Over 1 hour flat rate	£1.60	£1.70	£0.10	6.2%	Discretionary
North Bar West Monday To Saturday					
0 - 1 hour	£1.10	£1.20	£0.10	9.1%	Discretionary
1 - 2 Hours	£2.20	£2.40	£0.20	9.1%	Discretionary
2 - 3 Hours	£3.00	£3.30	£0.30	10.0%	Discretionary
3 - 4 Hours	£3.80	£4.20	£0.40	10.5%	Discretionary
4 - 5 Hours	N/A	£4.50	N/A	N/A	Discretionary
Day rate up to 7pm	£5.00	£5.50	£0.50	10.0%	Discretionary
North Bar West Sunday and Bank Holidays					
0 - 1 hour	£1.10	£1.20	£0.10	9.1%	Discretionary
Over 1 hour flat rate	£1.60	£1.70	£0.10	6.2%	Discretionary
Calthorpe Street West Monday To Saturday					
0 - 1 hour	£1.10	£1.20	£0.10	9.1%	Discretionary
1 - 2 Hours	£2.20	£2.40	£0.20	9.1%	Discretionary
2 - 3 Hours	£3.00	£3.30	£0.30	10.0%	Discretionary
3 - 4 Hours	£3.80	£4.20	£0.40	10.5%	Discretionary
4 - 5 Hours	N/A	£4.50	N/A	N/A	Discretionary
Day rate up to 7pm	£5.00	£5.50	£0.50	10.0%	Discretionary

Car Parking					
Fees and Charges	Fee 22-23 (excl. VAT)	Proposed Fee 23-24 (excl. VAT)*	Actual Increase	% Increase	Statutory/ Discretionary?
Calthorpe Street West Sunday and Bank Holidays					
0 - 1 hour	£1.10	£1.20	£0.10	9.1%	Discretionary
Over 1 hour flat rate	£1.60	£1.70	£0.10	6.2%	Discretionary
Windsor Street Monday To Saturday					
0 - 1 hour	£1.10	£1.20	£0.10	9.1%	Discretionary
1 - 2 Hours	£2.20	£2.40	£0.20	9.1%	Discretionary
2 - 3 Hours	£3.00	£3.30	£0.30	10.0%	Discretionary
3 - 4 Hours	£3.80	£4.20	£0.40	10.5%	Discretionary
4 - 5 Hours	N/A	£4.50	N/A	N/A	Discretionary
Day rate up to 7pm	£5.00	£5.50	£0.50	10.0%	Discretionary
Windsor Street Sunday and Bank Holidays					
0 - 1 hour	£1.10	£1.20	£0.10	9.1%	Discretionary
Over 1 hour flat rate	£1.60	£1.70	£0.10	6.2%	Discretionary
Bolton Road Monday To Saturday					
0 - 1 hour	£1.10	£1.20	£0.10	9.1%	Discretionary
1 - 2 Hours	£2.20	£2.40	£0.20	9.1%	Discretionary
2 - 3 Hours	£3.00	£3.30	£0.30	10.0%	Discretionary
3 - 4 Hours	£3.80	£4.20	£0.40	10.5%	Discretionary
4 - 5 Hours	N/A	£4.50	N/A	N/A	Discretionary
Day rate up to 7pm	£5.00	£5.50	£0.50	10.0%	Discretionary
Bolton Road Sunday and Bank Holidays					
0 - 1 hour	£1.10	£1.20	£0.10	9.1%	Discretionary
Over 1 hour flat rate	£1.60	£1.70	£0.10	6.2%	Discretionary
Compton Road Monday To Saturday					
0 - 1 hour	£1.10	£1.20	£0.10	9.1%	Discretionary
1 - 2 Hours	£2.20	£2.40	£0.20	9.1%	Discretionary
2 - 3 Hours	£3.00	£3.30	£0.30	10.0%	Discretionary
3 - 4 Hours	£3.80	£4.20	£0.40	10.5%	Discretionary
4 - 5 Hours	N/A	£4.50	N/A	N/A	Discretionary
Day rate up to 7pm	£5.00	£5.50	£0.50	10.0%	Discretionary
Compton Road Sunday and Bank Holidays					
0 - 1 hour	£1.10	£1.20	£0.10	9.1%	Discretionary
Over 1 hour flat rate	£1.60	£1.70	£0.10	6.2%	Discretionary
Compton Road lay over (Coaches only) - no charge	£0.00	£0.00	£0.00	0.0%	Discretionary
<u>Drop Off - Pick Up Points</u>					
Bridge Street (all week)					
0 - 15 minutes	£0.40	£0.40	£0.00	0.0%	Discretionary
Horsefair East - Coaches Drop Off/Pick Up - no charge	£0.00	£0.00	£0.00	0.0%	Discretionary
<u>Banbury season ticket prices</u>					
5 Day Permit Valid Monday - Friday					
Annual	£770.00	£850.00	£80.00	10.4%	Discretionary
Quarterly	£210.00	£231.00	£21.00	10.0%	Discretionary
Monthly	£80.00	£88.00	£8.00	10.0%	Discretionary
7 Day Permit Valid Monday - Sunday					
Annual	£1,000.00	£1,100.00	£100.00	10.0%	Discretionary
Quarterly	£270.00	£297.00	£27.00	10.0%	Discretionary
Monthly	£100.00	£110.00	£10.00	10.0%	Discretionary

Car Parking					
Fees and Charges	Fee 22-23 (excl. VAT)	Proposed Fee 23-24 (excl. VAT)*	Actual Increase	% Increase	Statutory/ Discretionary?
Bicester Short Stay (Charges apply 8am-7pm. Free Parking after 7pm)					
Market Square Monday To Saturday					
0 - 30 Minutes	£1.10	£1.20	£0.10	9.1%	Discretionary
0 - 1 Hour	£1.60	£2.00	£0.40	25.0%	Discretionary
Market Square Sunday and Bank Holidays					
0 - 1 Hour	£1.10	£1.20	£0.10	9.1%	Discretionary
Over 1 hour flat rate	£1.60	£1.70	£0.10	6.2%	Discretionary
Claremont Monday To Saturday					
0 - 1 hour	£1.10	£1.20	£0.10	9.1%	Discretionary
1 - 2 Hours	£2.20	£2.40	£0.20	9.1%	Discretionary
2 - 3 Hours	£3.00	£3.30	£0.30	10.0%	Discretionary
Over 3 hours	N/A	£7.50	N/A	N/A	Discretionary
Claremont Sunday and Bank Holidays					
0 - 1 hour	£1.10	£1.20	£0.10	9.1%	Discretionary
Over 1 hour flat rate	£1.60	£1.70	£0.10	6.2%	Discretionary
Chapel Brook Monday To Saturday					
0 - 1 hour	£1.10	£1.20	£0.10	9.1%	Discretionary
1 - 2 Hours	£2.20	£2.40	£0.20	9.1%	Discretionary
2 - 3 Hours	£3.00	£3.30	£0.30	10.0%	Discretionary
Over 3 hours	N/A	£7.50	N/A	N/A	Discretionary
Chapel Brook Sunday and Bank Holidays					
0 - 1 hour	£1.10	£1.20	£0.10	9.1%	Discretionary
Over 1 hour flat rate	£1.60	£1.70	£0.10	6.2%	Discretionary
Victoria Road Monday To Saturday					
0 - 1 hour	£1.10	£1.20	£0.10	9.1%	Discretionary
1 - 2 Hours	£2.20	£2.40	£0.20	9.1%	Discretionary
2 - 3 Hours	£3.00	£3.30	£0.30	10.0%	Discretionary
Over 3 hours	N/A	£7.50	N/A	N/A	Discretionary
Victoria Road Sunday and Bank Holidays					
0 - 1 hour	£1.10	£1.20	£0.10	9.1%	Discretionary
Over 1 hour flat rate	£1.60	£1.70	£0.10	6.2%	Discretionary
Bicester Long Stay					
Cattle Market Monday To Saturday					
0 - 1 hour	£1.10	£1.20	£0.10	9.1%	Discretionary
1 - 2 Hours	£2.20	£2.40	£0.20	9.1%	Discretionary
2 - 3 Hours	£3.00	£3.30	£0.30	10.0%	Discretionary
3 - 4 Hours	£3.80	£4.20	£0.40	10.5%	Discretionary
4 - 5 Hours	N/A	£4.50	N/A	N/A	Discretionary
Day rate up to 7pm	£5.00	£5.50	£0.50	10.0%	Discretionary
Cattle Market Sunday and Bank Holidays					
0 - 1 hour	£1.10	£1.20	£0.10	9.1%	Discretionary
Over 1 hour flat rate	£1.60	£1.70	£0.10	6.2%	Discretionary
Curtis Place (all week) - no charge					
	£0.00	£0.00	£0.00	0.0%	Discretionary

Land Charges					
Fees and Charges	Fee 22-23 (excl. VAT)	Proposed Fee 23-24 (Excl. VAT)	Actual Increase	% Increase	Statutory/ Discretionary?
Full Search Fee (LLC1 & CON29R)	£185.00	£185.00	£0.00	0.0%	Both Statutory and Discretionary elements as combination of LLC1 and CON29
Additional parcel CON29	£18.00	£18.00	£0.00	0.0%	Discretionary
Additional parcel LLC1	£2.00	£2.00	£0.00	0.0%	Statutory
Additional parcel Q22	£1.13	£1.25	£0.00	10.6%	Discretionary - Fee set by OCC
LLC1 Only (Register search)	£65.00	£50.00	-£15.00	-23.1%	Statutory
CON 29R only (no LLC1)	£120.00	£135.00	£15.00	12.5%	Discretionary
CON29O (Optional enquiries Question 4-21)	£10.00	£10.00	£0.00	0.0%	Discretionary
CON29O Question 22	£36.67	£41.67	£5.00	13.6%	Discretionary - Fee set by OCC
PART 3 Own worded enquiries	£20.00	£20.00	£0.00	0.0%	Discretionary

Electoral Services - Electoral Register - Statutory Charges*					
Fees and Charges	Fee 22-23 (excl. VAT)	Proposed Fee 23-24 (Excl. VAT)	Actual Increase	% Increase	Statutory/ Discretionary?
Electoral Register Data format - per transaction	£20.00	£20.00	£0.00	0.0%	Statutory
Electoral Register Data format - per 1000 names or part thereof	£1.50	£1.50	£0.00	0.0%	Statutory
Electoral Register Print format - per transaction	£10.00	£10.00	£0.00	0.0%	Statutory
Electoral Register Print format - per 1000 names or part thereof	£5.00	£5.00	£0.00	0.0%	Statutory
Electoral Register - Marked copies of Register and Absent Lists - Data format - per transaction	£10.00	£10.00	£0.00	0.0%	Statutory
Electoral Register - Marked copies of Register and Absent Lists - Data format - per 1000 names or part thereof	£1.00	£1.00	£0.00	0.0%	Statutory
Electoral Register - Marked copies of Register and Absent Lists - Print format - per transaction	£10.00	£10.00	£0.00	0.0%	Statutory
Electoral Register - Marked copies of Register and Absent Lists - Print format - per 1000 names or part thereof	£2.00	£2.00	£0.00	0.0%	Statutory
Electoral Register - Overseas elections - Data format - per transaction	£20.00	£20.00	£0.00	0.0%	Statutory
Electoral Register - Overseas elections - Data format - per 100 names or part thereof	£1.50	£1.50	£0.00	0.0%	Statutory
Electoral Register - Overseas elections - Print format - per transaction	£10.00	£5.00	£0.00	0.0%	Statutory
Electoral Register - Overseas elections - Print format - per 100 names or part thereof	£5.00	£5.00	£0.00	0.0%	Statutory

*Prescribed fees as set out in the Representation of the People (England and Wales) Regulations 2001

Appendix 7 - Fees and Charges Schedule

Returning Officer (RO)* - Local Elections (scheduled & unscheduled)**					
Fees and Charges	Current fee	Proposed Fee 23-24 (Excl. VAT)	Actual Increase	% Increase	Statutory/ Discretionary?
For each district ward (3 seats) - 1 seat uncontested	£43.75	£48.00	£4.25	9.7%	Statutory role - personal appointment
For each district ward (3 seats) - 2 seats uncontested	£87.50	£96.00	£8.50	9.7%	Statutory role - personal appointment
For each district ward (3 seats) - 3 seats uncontested	£131.25	£144.00	£12.75	9.7%	Statutory role - personal appointment
For each district ward (3 seats) - 1 seat contested	£90.90	£100.00	£9.10	10.0%	Statutory role - personal appointment
For each district ward (3 seats) - 2 seats contested	£181.80	£200.00	£18.20	10.0%	Statutory role - personal appointment
For each district ward (3 seats) - 3 seats contested	£259.50	£300.00	£40.50	15.6%	Statutory role - personal appointment
Deputy Returning Officer*** (district elections contested and uncontested)	Variable	85% RO fee	N/A	N/A	Statutory role - personal appointment
Returning Officer Count Fee - for each district ward (3 seats) - 1 seat	£58.00	£60.00	£2.00	3.4%	Statutory role - personal appointment
Returning Officer Count Fee - for each district ward (3 seats) - 2 seats contested	£116.00	£120.00	£4.00	3.4%	Statutory role - personal appointment
Returning Officer Count Fee - for each district ward (3 seats) - 3 seats contested	£174.00	£180.00	£6.00	3.4%	Statutory role - personal appointment
Returning Officer - recount fee for each recount	£14.00	£25.00	£11.00	78.6%	Statutory role - personal appointment
Deputy Returning Officer*** count fee district elections	Variable	85% RO fee	N/A	N/A	Statutory role - personal appointment
For each Parish Council / Parish Council Ward - uncontested	£26.00	£35.00	£9.00	34.6%	Statutory role - personal appointment
For each Parish Council / Parish Council Ward - contested	£54.60	£70.00	£15.40	28.2%	Statutory role - personal appointment
Deputy Returning Officer*** (parish elections contested and uncontested)	Variable	85% RO fee	N/A	N/A	Statutory role - personal appointment
Returning Officer Count fee - For each Parish Council / Parish Council Ward - electorate under 1000	£40.20	£45.00	£4.80	11.9%	Statutory role - personal appointment
Returning Officer Count fee - For each Parish Council / Parish Council Ward - electorate 1000 - 2000	£43.30	£50.00	£6.70	15.5%	Statutory role - personal appointment
Returning Officer Count fee - For each Parish Council / Parish Council Ward - electorate 2000 - 3000	£45.30	£55.00	£9.70	21.4%	Statutory role - personal appointment
Returning Officer Count fee - For each Parish Council / Parish Council Ward - electorate greater than 3000	£50.50	£60.00	£9.50	18.8%	Statutory role - personal appointment
Returning Officer - recount fee for each recount	£14.00	£25.00	£11.00	78.6%	Statutory role - personal appointment
Deputy Returning Officer count fee*** (parish elections)	Variable	85% RO fee	N/A	N/A	Statutory role - personal appointment

*Returning Officer, fee for conducting the election and generally performing the duties required by any enactments relating to the election, other than any duties for which separate fees are provided

**Returning Officer fees for county elections and national are set by the body responsible for funding the election

***The CDC Returning Officer fee has not been reviewed in over 14 years. It will be increased in line with the staff pay award going forward.

****Appointed for the purposes of conducting and generally performing the duties assigned by the Returning Officer, other than duties for which separate fees are provided.

The Returning Officer has delegation to agree the fees their staff working on elections. The Oxfordshire County Council fee schedule for staff working on elections is adopted by all Oxfordshire districts/City, subject to local amendments for local circumstances by the respective Returning Officer

Parish Elections - Uncontested Election					
Fees and Charges	Fee 22-23 (excl. VAT)	Proposed Fee 23-24 (Excl. VAT)	Actual Increase	% Increase	Statutory/ Discretionary?
Uncontested Election recharge - scheduled-election	£100.00	£250.00	£150.00	150.0%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Uncontested Election recharge - by-election	£100.00	£250.00	£150.00	150.0%	Statutory requirement to run elections on behalf of parishes - discretionary fee level

Parish Elections - Contested Scheduled Election (combined)*						
Fees and Charges	Current fee	Proposed Fee 23-24 (Excl. VAT)	Actual Increase	% Increase	Statutory/ Discretionary?	
Adderbury	£1,488.96	£2,402.50	£913.54	61.4%	Statutory requirement to run elections on behalf of parishes - discretionary fee level	
Ambrosden	£1,061.91	£1,964.26	£902.35	85.0%	Statutory requirement to run elections on behalf of parishes - discretionary fee level	
Ardley with Fewcott	£897.45	£1,688.98	£791.53	88.2%	Statutory requirement to run elections on behalf of parishes - discretionary fee level	
Arcott	£893.31	£1,798.64	£905.33	101.3%	Statutory requirement to run elections on behalf of parishes - discretionary fee level	
Banbury Town Council - Calthorpe North Ward	Total combined fee - £18,554.99	£3,484.53	N/A	N/A	Statutory requirement to run elections on behalf of parishes - discretionary fee level	
Banbury Town Council - Calthorpe South Ward		£3,021.13	N/A	N/A	Statutory requirement to run elections on behalf of parishes - discretionary fee level	
Banbury Town Council - Easington North Ward		£1,782.59	N/A	N/A	Statutory requirement to run elections on behalf of parishes - discretionary fee level	
Banbury Town Council - Easington South Ward		£3,008.80	N/A	N/A	Statutory requirement to run elections on behalf of parishes - discretionary fee level	
Banbury Town Council - Grimsbury Ward		£3,855.96	N/A	N/A	Statutory requirement to run elections on behalf of parishes - discretionary fee level	
Banbury Town Council - Hardwick East Ward		£1,865.91	N/A	N/A	Statutory requirement to run elections on behalf of parishes - discretionary fee level	
Banbury Town Council - Hardwick West Ward		£4,208.79	N/A	N/A	Statutory requirement to run elections on behalf of parishes - discretionary fee level	
Banbury Town Council - Neithrop North Ward		£2,574.69	N/A	N/A	Statutory requirement to run elections on behalf of parishes - discretionary fee level	
Banbury Town Council - Neithrop South Ward		£2,530.21	N/A	N/A	Statutory requirement to run elections on behalf of parishes - discretionary fee level	
Banbury Town Council - Park Road Ward		£3,095.64	N/A	N/A	Statutory requirement to run elections on behalf of parishes - discretionary fee level	
Banbury Town Council - Ruscote Ward		£5,561.83	N/A	N/A	Statutory requirement to run elections on behalf of parishes - discretionary fee level	
Banbury Town Council - Town Centre Ward		£3,161.47	N/A	N/A	Statutory requirement to run elections on behalf of parishes - discretionary fee level	
Barford St John and St Michael		£892.10	£1,842.42	£950.32	106.5%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Begbroke		£864.70	£1,797.21	£932.51	107.8%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Bicester Town Council - East Ward	Total combined fee - £12,799.38	£4,532.06	N/A	N/A	Statutory requirement to run elections on behalf of parishes - discretionary fee level	
Bicester Town Council - North Ward		£3,686.93	N/A	N/A	Statutory requirement to run elections on behalf of parishes - discretionary fee level	
Bicester Town Council - South Ward		£6,137.24	N/A	N/A	Statutory requirement to run elections on behalf of parishes - discretionary fee level	
Bicester Town Council - West Ward		£4,594.28	N/A	N/A	Statutory requirement to run elections on behalf of parishes - discretionary fee level	
Blackthorn	£802.68	£1,708.62	£905.94	112.9%	Statutory requirement to run elections on behalf of parishes - discretionary fee level	
Bletchington	£901.39	£1,841.29	£939.90	104.3%	Statutory requirement to run elections on behalf of parishes - discretionary fee level	
Bloxham	£1,555.92	£2,812.49	£1,256.57	80.8%	Statutory requirement to run elections on behalf of parishes - discretionary fee level	
Bodicote	£1,149.18	£2,048.01	£898.83	78.2%	Statutory requirement to run elections on behalf of parishes - discretionary fee level	
Bourton	£911.21	£1,789.27	£878.06	96.4%	Statutory requirement to run elections on behalf of parishes - discretionary fee level	
Broughton	£800.62	£1,720.54	£919.92	114.9%	Statutory requirement to run elections on behalf of parishes - discretionary fee level	
Bucknell	£849.39	£1,746.31	£896.92	105.6%	Statutory requirement to run elections on behalf of parishes - discretionary fee level	
Caversfield	£1,596.13	£3,540.91	£1,944.78	121.8%	Statutory requirement to run elections on behalf of parishes - discretionary fee level	
Charlton-on-Otmoor	£831.39	£1,739.29	£907.90	109.2%	Statutory requirement to run elections on behalf of parishes - discretionary fee level	
Chesterton	£872.60	£1,861.45	£988.85	113.3%	Statutory requirement to run elections on behalf of parishes - discretionary fee level	

Appendix 7 - Fees and Charges Schedule

Claydon with Clattercot	£847.19	£1,761.11	£913.92	107.9%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Cropredy	£925.78	£1,789.47	£863.69	93.3%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Deddington	£1,283.02	£2,201.53	£918.51	71.6%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Drayton	£782.37	£1,741.82	£959.45	122.6%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Duns Tew	£913.65	£1,816.59	£902.94	98.8%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Epwell	£807.96	£1,715.30	£907.34	112.3%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Fencott & Murcott	£817.12	£1,759.21	£942.09	115.3%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Finmere	£849.70	£1,738.00	£888.30	104.5%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Fringford	£911.56	£1,795.75	£884.19	97.0%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Fritwell	£864.56	£1,768.91	£904.35	104.6%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Gosford & Water Eaton	£1,211.50	£2,196.47	£984.97	81.3%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Hanwell	£859.54	£1,780.85	£921.31	107.2%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Hethe	£830.79	£1,739.63	£908.84	109.4%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Heyford Park	£946.79	£1,982.19	£1,035.40	109.4%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Hook Norton	£1,180.23	£2,165.50	£985.27	83.5%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Horley	£806.40	£1,716.54	£910.14	112.9%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Hornton	£811.33	£1,720.69	£909.36	112.1%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Horton-cum-Studley	£859.28	£1,762.98	£903.70	105.2%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Islip	£852.30	£1,838.67	£986.37	115.7%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Kidlington Parish Council - Dogwood Ward	Total combined fee - £7319.02	£2,420.60	N/A	N/A	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Kidlington Parish Council - Exeter Ward		£2,097.68	N/A	N/A	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Kidlington Parish Council - Orchard Ward		£2,569.53	N/A	N/A	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Kidlington Parish Council - St Mary's Ward		£2,535.92	N/A	N/A	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Kidlington Parish Council - Roundham Ward		£2,173.30	N/A	N/A	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Kirtlington	£947.91	£1,777.67	£829.76	87.5%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Launton	£946.79	£1,898.71	£951.92	100.5%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Lower Heyford	£847.55	£1,801.31	£953.76	112.5%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Merton	£847.12	£1,741.94	£894.82	105.6%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Middleton Stoney	£792.48	£1,725.69	£933.21	117.8%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Milcombe	£887.00	£1,817.40	£930.40	104.9%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Mollington	£861.12	£1,808.79	£947.67	110.1%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
North Newington	£1,401.33	£1,883.62	£482.29	34.4%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Piddington	£841.53	£1,751.60	£910.07	108.1%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Shenington with Alkerton	£840.99	£1,732.85	£891.86	106.0%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Shipton-on-Cherwell & Thrupp	£869.89	£1,798.62	£928.73	106.8%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Shutford	£887.36	£1,748.84	£861.48	97.1%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Sibford Ferris	£724.73	£1,747.78	£1,023.05	141.2%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Sibford Gower	£735.36	£1,759.67	£1,024.31	139.3%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Somerton	£833.84	£1,759.02	£925.18	111.0%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Souldern	£854.91	£1,782.77	£927.86	108.5%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
South Newington	£797.53	£1,732.51	£934.98	117.2%	Statutory requirement to run elections on behalf of parishes - discretionary fee level

Appendix 7 - Fees and Charges Schedule

Steeple Aston	£922.70	£1,850.98	£928.28	100.6%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Stoke Lyne	£824.50	£1,733.36	£908.86	110.2%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Stratton Audley	£909.48	£1,833.84	£924.36	101.6%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Swalcliffe	£785.56	£1,690.88	£905.32	115.2%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Tadmarton	£884.70	£1,761.70	£877.00	99.1%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Upper Heyford	£886.35	£1,754.45	£868.10	97.9%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Wardington	£922.75	£1,822.81	£900.06	97.5%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Wendlebury	£822.34	£1,723.04	£900.70	109.5%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Weston-on-the-Green	£845.79	£1,761.76	£915.97	108.3%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Wigginton	£798.28	£1,723.38	£925.10	115.9%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Wroxton	£898.61	£1,757.13	£858.52	95.5%	Statutory requirement to run elections on behalf of parishes - discretionary fee level
Yarnton	£1,200.46	£2,422.30	£1,221.84	101.8%	Statutory requirement to run elections on behalf of parishes - discretionary fee level

*Parish recharges have not been reviewed or increased for over 14 years and currently the cost is heavily subsidised by the district council. The increases reflect actual costs but with a fixed maximum amount to enable parish councils to budget accordingly. Going forward, recharges will be reviewed and increased annually.

Parish Elections - By-Election without poll cards+					
Fees and Charges	Current fee	Proposed Fee 23-24 (Excl. VAT)	Actual Increase	% Increase	Statutory/ Discretionary?
Adderbury	£2,008.19	£3,008.04	£999.85	49.8%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Ambrosden	£1,384.21	£2,294.92	£910.71	65.8%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Ardley with Fewcott	£1,192.77	£1,959.10	£766.33	64.2%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Arncott	£1,177.31	£2,096.93	£919.62	78.1%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Banbury Town Council - Calthorpe North Ward	£3,814.04	£3,820.95	£6.91	0.2%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Banbury Town Council - Calthorpe South Ward	£3,814.04	£3,983.96	£169.92	4.5%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Banbury Town Council - Easington North Ward	£3,814.04	£2,126.82	-£1,687.22	-44.2%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Banbury Town Council - Easington South Ward	£3,814.04	£3,991.90	£177.86	4.7%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Banbury Town Council - Grimsbury Ward	£3,814.04	£5,261.91	£1,447.87	38.0%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Banbury Town Council - Hardwick East Ward	£3,814.04	£2,267.47	-£1,546.57	-40.5%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Banbury Town Council - Hardwick West Ward	£3,814.04	£5,915.58	£2,101.54	55.1%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Banbury Town Council - Neithrop North Ward	£3,814.04	£3,365.43	-£448.61	-11.8%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Banbury Town Council - Neithrop South Ward	£3,814.04	£3,206.96	-£607.08	-15.9%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Banbury Town Council - Park Road Ward	£3,814.04	£4,722.93	£908.89	23.8%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Banbury Town Council - Ruscote Ward	£3,814.04	£8,595.66	£4,781.62	125.4%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Banbury Town Council - Town Centre Ward	£3,814.04	£4,442.64	£628.60	16.5%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Barford St John and St Michael	£1,195.85	£2,239.98	£1,044.13	87.3%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Begbroke	£1,119.46	£2,143.06	£1,023.60	91.4%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Bicester Town Council - East Ward	£3,600.38	£6,581.62	£2,981.24	82.8%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Bicester Town Council - North Ward	£3,600.38	£5,040.46	£1,440.08	40.0%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Bicester Town Council - South Ward	£3,600.38	£8,127.97	£4,527.59	125.8%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Bicester Town Council - West Ward	£3,600.38	£6,693.05	£3,092.67	85.9%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Blackthorn	£1,046.06	£1,985.38	£939.32	89.8%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Bletchington	£1,191.90	£2,211.73	£1,019.83	85.6%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Bloxham	£2,098.21	£3,425.02	£1,326.81	63.2%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Bodicote	£1,469.85	£2,427.16	£957.31	65.1%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Bourton	£1,212.22	£2,127.19	£914.97	75.5%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Broughton	£1,059.14	£2,009.23	£950.09	89.7%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Bucknell	£1,147.65	£2,067.26	£919.61	80.1%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Caversfield	£1,130.01	£3,753.72	£2,623.71	232.2%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Charlton-on-Otmoor	£1,090.83	£2,040.22	£949.39	87.0%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Chesterton	£1,132.17	£2,258.55	£1,126.38	99.5%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Claydon with Clattercot	£1,115.57	£2,090.36	£974.79	87.4%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Cropredy	£1,237.85	£2,127.59	£889.74	71.9%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Deddington	£1,727.85	£2,710.86	£983.01	56.9%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Drayton	£1,025.45	£2,032.29	£1,006.84	98.2%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Duns Tew	£1,245.09	£2,194.82	£949.73	76.3%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Epwell	£1,073.07	£1,998.74	£925.67	86.3%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Fencott & Murcott	£1,098.01	£2,093.07	£995.06	90.6%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Finmere	£1,119.33	£2,037.65	£918.32	82.0%	Statutory requirement to run elections on behalf of parishes discretionary fee level

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Fringford	£1,228.37	£2,146.64	£918.27	74.8%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Fritwell	£1,130.50	£2,086.46	£955.96	84.6%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Gosford & Water Eaton	£1,694.40	£2,798.33	£1,103.93	65.2%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Hanwell	£1,157.73	£2,136.35	£978.62	84.5%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Hethe	£1,105.79	£2,053.90	£948.11	85.7%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Heyford Park	£1,239.85	£2,317.78	£1,077.93	86.9%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Hook Norton	£1,539.46	£2,684.39	£1,144.93	74.4%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Horley	£1,035.06	£2,001.23	£966.17	93.3%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Hornton	£1,065.05	£2,009.53	£944.48	88.7%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Horton-cum-Studley	£1,137.59	£2,087.61	£950.02	83.5%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Islip	£1,128.46	£2,232.49	£1,104.03	97.8%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Kidlington Parish Council - Dogwood Ward	£2,708.49	£3,057.25	£348.76	12.9%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Kidlington Parish Council - Exeter Ward	£2,708.49	£2,585.51	-£122.98	-4.5%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Kidlington Parish Council - Orchard Ward	£2,708.49	£3,348.61	£640.12	23.6%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Kidlington Parish Council - St Mary's Ward	£2,708.49	£3,244.38	£535.89	19.8%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Kidlington Parish Council - Roundham Ward	£2,708.49	£2,693.50	-£14.99	-0.6%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Kirtlington	£1,187.42	£2,097.48	£910.06	76.6%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Launton	£1,239.85	£2,196.31	£956.46	77.1%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Lower Heyford	£1,105.37	£2,164.27	£1,058.90	95.8%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Merton	£1,125.62	£2,052.02	£926.40	82.3%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Middleton Stoney	£1,041.43	£2,019.53	£978.10	93.9%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Milcombe	£1,181.63	£2,189.94	£1,008.31	85.3%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Mollington	£1,144.94	£2,179.23	£1,034.29	90.3%	Statutory requirement to run elections on behalf of parishes discretionary fee level
North Newington	£2,258.97	£2,335.38	£76.41	3.4%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Piddington	£1,130.30	£2,071.34	£941.04	83.3%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Shenington with Alkerton	£1,108.12	£2,027.35	£919.23	83.0%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Shipton-on-Cherwell & Thrupp	£1,176.64	£2,165.38	£988.74	84.0%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Shutford	£1,197.18	£2,059.33	£862.15	72.0%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Sibford Ferris	£1,052.19	£2,063.70	£1,011.51	96.1%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Sibford Gower	£1,062.82	£2,080.99	£1,018.17	95.8%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Somerton	£1,120.85	£2,086.19	£965.34	86.1%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Souldern	£1,132.91	£2,133.68	£1,000.77	88.3%	Statutory requirement to run elections on behalf of parishes discretionary fee level
South Newington	£1,046.30	£2,039.67	£993.37	94.9%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Steeple Aston	£1,199.64	£2,187.60	£987.96	82.4%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Stoke Lyne	£1,095.38	£2,041.37	£945.99	86.4%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Stratton Audley	£1,254.37	£2,229.33	£974.96	77.7%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Swalcliffe	£1,027.82	£1,956.41	£928.59	90.3%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Tadmarton	£1,176.08	£2,085.04	£908.96	77.3%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Upper Heyford	£1,129.92	£2,077.04	£947.12	83.8%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Wardington	£1,260.19	£2,200.77	£940.58	74.6%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Wendlebury	£1,078.65	£2,007.73	£929.08	86.1%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Weston-on-the-Green	£13,331.79	£2,085.16	-£11,246.63	-84.4%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Wigginton	£1,062.98	£2,021.41	£958.43	90.2%	Statutory requirement to run elections on behalf of parishes discretionary fee level

Appendix 7 - Fees and Charges Schedule

Wroxton	£1,008.99	£2,075.91	£1,066.92	105.7%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Yamton	£1,355.79	£2,632.64	£1,276.85	94.2%	Statutory requirement to run elections on behalf of parishes discretionary fee level

Parish Elections - By-Election with poll cards*

Fees and Charges	Current fee	Proposed Fee 23-24 (Excl. VAT)	Actual Increase	% Increase	Statutory/ Discretionary?
Adderbury	£2,779.52	£4,937.84	£2,158.32	77.7%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Ambrosden	£1,831.12	£3,696.42	£1,865.30	101.9%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Ardley with Fewcott	£1,392.53	£2,497.90	£1,105.37	79.4%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Arncott	£1,405.78	£3,020.18	£1,614.40	114.8%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Banbury Town Council - Calthorpe North Ward	£5,091.26	£5,036.55	£54.71	-1.1%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Banbury Town Council - Calthorpe South Ward	£5,091.26	£6,667.01	£1,575.75	31.0%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Banbury Town Council - Easington North Ward	£5,091.26	£2,850.97	£2,240.29	-44.0%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Banbury Town Council - Easington South Ward	£5,091.26	£7,048.95	£1,957.69	38.5%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Banbury Town Council - Grimsbury Ward	£5,091.26	£9,141.26	£4,050.00	79.5%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Banbury Town Council - Hardwick East Ward	£5,091.26	£3,259.47	£1,831.79	-36.0%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Banbury Town Council - Hardwick West Ward	£5,091.26	£10,218.43	£5,127.17	100.7%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Banbury Town Council - Neithrop North Ward	£5,091.26	£5,213.83	£122.57	2.4%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Banbury Town Council - Neithrop South Ward	£5,091.26	£5,164.26	£73.00	1.4%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Banbury Town Council - Park Road Ward	£5,091.26	£5,632.98	£541.72	10.6%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Banbury Town Council - Ruscote Ward	£5,091.26	£13,179.86	£8,088.60	158.9%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Banbury Town Council - Town Centre Ward	£5,091.26	£6,033.89	£942.63	18.5%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Barford St John and St Michael	£1,373.73	£2,989.43	£1,615.70	117.6%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Begbroke	£1,356.48	£2,993.16	£1,636.68	120.7%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Bicester Town Council - East Ward	£4,931.66	£10,709.57	£5,777.91	117.2%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Bicester Town Council - North Ward	£4,931.66	£8,530.11	£3,598.45	73.0%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Bicester Town Council - South Ward	£4,931.66	£13,423.62	£8,491.96	172.2%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Bicester Town Council - West Ward	£4,931.66	£10,949.70	£6,018.04	122.0%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Blackthorn	£1,156.25	£2,635.83	£1,479.58	128.0%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Bletchington	£1,440.54	£3,198.23	£1,757.69	122.0%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Bloxham	£3,006.96	£5,596.82	£2,589.86	86.1%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Bodicote	£2,077.43	£4,102.86	£2,025.43	97.5%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Bourton	£1,416.42	£2,973.44	£1,557.02	109.9%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Broughton	£1,162.15	£2,646.48	£1,484.33	127.7%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Bucknell	£1,238.35	£2,682.51	£1,444.16	116.6%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Caversfield	£1,480.52	£4,991.32	£3,510.80	237.1%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Charlton-on-Otmoor	£1,225.29	£2,737.42	£1,512.13	123.4%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Chesterton	£1,369.19	£3,214.25	£1,845.06	134.8%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Claydon with Clattercot	£1,225.08	£2,740.81	£1,515.73	123.7%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Cropredy	£1,369.19	£2,952.39	£1,583.20	115.6%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Deddington	£2,323.81	£4,231.71	£1,907.90	82.1%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Drayton	£1,120.94	£2,880.19	£1,759.25	156.9%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Duns Tew	£1,403.80	£2,917.87	£1,514.07	107.9%	Statutory requirement to run elections on behalf of parishes discretionary fee level

Appendix 7 - Fees and Charges Schedule

Epwell	£1,180.53	£2,628.84	£1,448.31	122.7%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Fencott & Murcott	£1,191.45	£2,711.07	£1,519.62	127.5%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Finmere	£1,264.74	£2,755.20	£1,490.46	117.8%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Fringford	£1,415.48	£2,914.79	£1,499.31	105.9%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Fritwell	£1,333.00	£2,892.56	£1,559.56	117.0%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Gosford & Water Eaton	£2,067.82	£3,880.83	£1,813.01	87.7%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Hanwell	£1,255.96	£2,764.25	£1,508.29	120.1%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Hethe	£1,206.07	£2,670.80	£1,464.73	121.4%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Heyford Park	£1,578.06	£3,860.08	£2,282.02	144.6%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Hook Norton	£2,136.11	£4,217.89	£2,081.78	97.5%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Horley	£1,146.62	£2,654.98	£1,508.36	131.5%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Hornton	£1,177.95	£2,668.78	£1,490.83	126.6%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Horton-cum-Studley	£1,288.12	£2,801.86	£1,513.74	117.5%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Islip	£1,328.17	£3,011.09	£1,682.92	126.7%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Kidlington Parish Council - Dogwood Ward	£3,519.48	£4,844.60	£1,325.12	37.7%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Kidlington Parish Council - Exeter Ward	£3,519.48	£3,842.91	£323.43	9.2%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Kidlington Parish Council - Orchard Ward	£3,519.48	£5,269.06	£1,749.58	49.7%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Kidlington Parish Council - St Mary's Ward	£3,519.48	£5,006.98	£1,487.50	42.3%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Kidlington Parish Council - Roundham Ward	£3,519.48	£4,229.75	£710.27	20.2%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Kirtlington	£1,461.70	£3,030.08	£1,568.38	107.3%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Launton	£1,578.06	£3,338.21	£1,760.15	111.5%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Lower Heyford	£1,262.74	£2,876.32	£1,613.58	127.8%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Merton	£1,252.91	£2,695.32	£1,442.41	115.1%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Middleton Stoney	£1,147.18	£2,659.53	£1,512.35	131.8%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Milcombe	£1,369.08	£2,990.54	£1,621.46	118.4%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Mollington	£1,305.05	£2,907.23	£1,602.18	122.8%	Statutory requirement to run elections on behalf of parishes discretionary fee level
North Newington	£2,369.51	£2,985.83	£616.32	26.0%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Piddington	£1,248.70	£2,734.44	£1,485.74	119.0%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Shenington with Alkerton	£1,247.03	£2,718.50	£1,471.47	118.0%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Shipton-on-Cherwell & Thrupp	£1,295.72	£2,838.38	£1,542.66	119.1%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Shutford	£1,350.79	£2,765.33	£1,414.54	104.7%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Sibford Ferris	£1,200.33	£2,730.10	£1,529.77	127.4%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Sibford Gower	£1,244.29	£2,808.99	£1,564.70	125.8%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Somerton	£1,225.23	£2,725.09	£1,499.86	122.4%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Souldern	£1,263.28	£2,809.98	£1,546.70	122.4%	Statutory requirement to run elections on behalf of parishes discretionary fee level
South Newington	£1,151.02	£2,673.07	£1,522.05	132.2%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Steeple Aston	£1,479.05	£3,089.40	£1,610.35	108.9%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Stoke Lyne	£1,184.03	£2,645.62	£1,461.59	123.4%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Stratton Audley	£1,383.71	£2,925.98	£1,542.27	111.5%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Swalcliffe	£1,108.61	£2,558.46	£1,449.85	130.8%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Tadmarton	£1,360.46	£2,842.19	£1,481.73	108.9%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Upper Heyford	£1,474.94	£2,741.79	£1,266.85	85.9%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Wardington	£1,431.92	£2,966.17	£1,534.25	107.1%	Statutory requirement to run elections on behalf of parishes discretionary fee level

Appendix 7 - Fees and Charges Schedule

Wendlebury	£1,209.70	£2,693.38	£1,483.68	122.6%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Weston-on-the-Green	£1,281.47	£2,820.86	£1,539.39	120.1%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Wigginton	£1,141.04	£2,613.56	£1,472.52	129.1%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Wroxton	£1,377.60	£2,834.16	£1,456.56	105.7%	Statutory requirement to run elections on behalf of parishes discretionary fee level
Yamton	£2,261.45	£4,498.64	£2,237.19	98.9%	Statutory requirement to run elections on behalf of parishes discretionary fee level

*Parish recharges have not been reviewed or increased for over 14 years and currently the cost is heavily subsidised by the district council. The increases reflect actual costs but with a fixed maximum amount to enable parish councils to budget accordingly. Going forward, recharges will be reviewed and increased annually.

Public Protection, Environmental Health, Licensing					
Fees and Charges	Fee 22-23 (Excl. VAT)	Proposed Fee 23-24 (Excl. VAT)	Actual Increase	% Increase	Statutory/ Discretionary?
Environmental Health, Environmental Protection and Licensing					
Gambling Act					
Premises	Various	Various			Statutory
Animal Licensing					
Animal Boarding Establishment Licence	£402.50	£418.50	£16.00	4.0%	Discretionary
Pet Shop Licence	£402.50	£418.50	£16.00	4.0%	Discretionary
Riding Establishment Licence	£402.50	£418.50	£16.00	4.0%	Discretionary
Dog Breeding Establishment Licence	£402.50	£418.50	£16.00	4.0%	Discretionary
Dangerous Wild Animals Licence	£402.50	£418.50	£16.00	4.0%	Discretionary
Zoo Licence	£610.00	£625.00	£15.00	2.5%	Discretionary
Skin Piercing, Tattooing, Acupuncture, Electrolysis etc.					
Registration Fee	£111.00	£115.00	£4.00	3.6%	Discretionary
Registration of Premises	£165.00	£170.00	£5.00	3.0%	Discretionary
Scrap Metal					
Variation of scrap metal dealers licence type Collector - Dealer	£218.00	£225.00	£7.00	3.2%	Discretionary
Variation of scrap metal dealers licence - Admin, change of name or replacement	£109.00	£113.50	£4.50	4.1%	Discretionary
Scrap metal dealers site	£499.50	£520.00	£20.50	4.1%	Discretionary
Scrap metal collectors licence	£295.00	£307.50	£12.50	4.2%	Discretionary
Street Trading consent charges					
12 month period	£1,229.00	£1,255.00	£26.00	2.1%	Discretionary
6 month period	£613.00	£625.00	£12.00	2.0%	Discretionary
3 month period	£307.00	£320.00	£13.00	4.2%	Discretionary
1 month period	£172.50	£180.00	£7.50	4.3%	Discretionary
Table and Chairs consent charges					
12 month period (per chair)	£16.20	£17.00	£0.80	4.9%	Discretionary
Pavement licences (per chair- licences cannot extend beyond 30/09/)	£15.80	£15.80	£0.00	0.0%	Statutory
Private Hire and Hackney Carriage DRIVER Fees and Charges					
Grant of Licence 1 Year	£124.50	£129.50	£5.00	4.0%	Discretionary
Grant of licence 3 Years	£203.50	£212.00	£8.50	4.2%	Discretionary
Renewal of existing licence 1 year	£103.50	£108.00	£4.50	4.3%	Discretionary
Renewal of existing licence 3 years	£179.50	£186.50	£7.00	3.9%	Discretionary
DBS (was CRB) check and DVLA check	£51.00	£70.00	£19.00	37.3%	Discretionary
Knowledge Test	£30.00	£31.50	£1.50	5.0%	Discretionary
Re take of Knowledge test	£26.00	£27.00	£1.00	3.8%	Discretionary
Cost of badge/ replacement badge	£32.00	£35.00	£3.00	9.4%	Discretionary
Cost of replacement paper licence	£15.00	£17.00	£2.00	13.3%	Discretionary
Disability and Safeguarding Awareness Training	£50.00	£50.00	£0.00	0.0%	Fee set by OCC
English Testing	£43.75	£45.50	£1.75	4.0%	Discretionary
Hackney Carriage VEHICLE Fees and Charges					
Grant of licence	£313.50	£326.00	£12.50	4.0%	Discretionary
Renewal of existing licence	£272.00	£283.00	£11.00	4.0%	Discretionary
Replacement licence plate	£22.00	£25.00	£3.00	13.6%	Discretionary
Replacement bracket	£22.00	£25.00	£3.00	13.6%	Discretionary
Change of vehicle only	£118.00	£123.00	£5.00	4.2%	Discretionary
Transfer of licensee only	£60.00	£62.50	£2.50	4.2%	Discretionary
Change of vehicle and licensee	£44.20	£185.50	£141.30	319.7%	Discretionary
Private Hire VEHICLE Fees and Charges					
Grant of new licence	£286.00	£297.50	£11.50	4.0%	Discretionary
Renewal of licence	£263.00	£273.50	£10.50	4.0%	Discretionary
Internal Plate Replacement	£11.00	£12.50	£1.50	13.6%	Discretionary
Plate or bracket replacement	£22.00	£25.00	£3.00	13.6%	Discretionary
Cost of replacement paper licence	£15.00	£17.00	£2.00	13.3%	Discretionary
Change of vehicle only	£107.50	£123.00	£15.50	14.4%	Discretionary
Transfer of licensee only	£60.00	£62.50	£2.50	4.2%	Discretionary
Change of vehicle and licensee	£133.00	£185.50	£52.50	39.5%	Discretionary
Private Hire OPERATOR Fees and Charges					
Operator's Licence (one vehicle only) - 1 year	£151.00	£157.00	£6.00	4.0%	Discretionary
Operator's Licence (one vehicle only) - 5 year	£139.50	£145.00	£5.50	3.9%	Discretionary
For each additional vehicle	£21.50	£23.00	£1.50	7.0%	Discretionary
Sex Establishment Venue					
Application	£1,675.00	£1,745.00	£70.00	4.2%	Discretionary
Renewal	£1,110.00	£1,155.00	£45.00	4.1%	Discretionary
Contaminated land enquiry					
Charge per hour or part thereof	£71.50	£74.50	£3.00	4.2%	Discretionary

Public Protection, Environmental Health, Licensing					
Fees and Charges	Fee 22-23 (Excl. VAT)	Proposed Fee 23-24 (Excl. VAT)	Actual Increase	% Increase	Statutory/ Discretionary?
Health Protection					
Food Export/Hygiene Certificates	£120.00	£126.00	£6.00	5.0%	Discretionary
Food Hygiene Rating Scheme Rescore Visit	£295.00	£310.00	£15.00	5.1%	Discretionary
Food Surrender Certificates	£130.00	£136.00	£6.00	4.6%	Discretionary
Copies of Food Premises Register (a) Single Entry	£4.50	£4.75	£0.25	5.6%	Discretionary
Copies of Food Premises Register (b) Full Register	£338.00	£355.00	£17.00	5.0%	Discretionary
Factual Statements for Civil Proceedings	£165.00	£175.00	£10.00	6.1%	Discretionary
Reports provided under the Environmental Information Regulations	£160.00	£165.00	£5.00	3.1%	Statutory
Water Sampling					
Large/Commercial use supplies (each assessment at £68/hour capped at £500)	£500.00	£500.00	£0.00	0.0%	Statutory
Risk assessment (each assessment at £68/hour capped at £500)	£500.00	£500.00	£0.00	0.0%	Statutory
Sampling (each visit)	£100.00	£100.00	£0.00	0.0%	Statutory
Investigation	£100.00	£100.00	£0.00	0.0%	Statutory
Granting an authorisation	£100.00	£100.00	£0.00	0.0%	Statutory
Analysing a sample:					
Taken under regulation 10	£25.00	£25.00	£0.00	0.0%	Statutory
Taken during Check monitoring	£100.00	£100.00	£0.00	0.0%	Statutory
Taken during Audit monitoring	£500.00	£500.00	£0.00	0.0%	Statutory
Water Sampling Fees:					
Lab Fees (Depending on criteria)	£87.50	£92.50	£5.00	5.7%	Discretionary
Pools (basic swimming pool test)	£34.50	£36.00	£1.50	4.3%	Discretionary
Sampling and admin cost recovery hourly rate	£47.00	£50.00	£3.00	6.4%	Discretionary
Courier charge	£34.50	£36.00	£1.50	4.3%	Discretionary
Health Protection - Food Safety					
Level 2 Food Safety in Catering Course					
Taught Course	£78.00	£81.50	£3.50	4.5%	Discretionary
Taught - Voluntary Groups	£44.00	£46.00	£2.00	4.5%	Discretionary
Taught - Unemployed	£44.00	£46.00	£2.00	4.5%	Discretionary
E-learning (all level 2 courses)	£26.00	£27.50	£1.50	5.8%	Discretionary
Level 2 Personal license Holder elearning and invigilated exam	£85.00	£90.00	£5.00	5.9%	Discretionary
Invigilated exam resit	£27.00	£28.50	£1.50	5.6%	Discretionary
Level 3 Food Hygiene Course Taught Course	£305.00	£320.00	£15.00	4.9%	Discretionary
Cost recovery - Commercial & Business Support					
Basic cost recovery (qualified officer)	£73.50	£77.00	£3.50	4.8%	Discretionary
Full cost recovery (qualified officer)	£81.00	£85.00	£4.00	4.9%	Discretionary
Mileage cost per mile	£0.45	£0.45	£0.00	0.0%	Discretionary
Strive for 5	£265.50	£278.00	£12.50	4.7%	Discretionary
SFBB Packs (without diary)	£16.50	£17.50	£1.00	6.1%	Discretionary
SFBB 48 week diary refills	£15.50	£16.50	£1.00	6.5%	Discretionary
SFBB Pack with 48 week diary refill	£26.00	£27.50	£1.50	5.8%	Discretionary
Mobile Home Sites Fees					
New Application					
1 to 10 pitches	£316.00	£328.50	£12.50	4.0%	Discretionary
11 to 30 pitches	£464.00	£482.50	£18.50	4.0%	Discretionary
31 to 99 pitches	£602.00	£626.00	£24.00	4.0%	Discretionary
100 or more pitches	£750.00	£780.00	£30.00	4.0%	Discretionary
Annual Fee					
1 to 10 pitches	£247.00	£257.00	£10.00	4.0%	Discretionary
11 to 30 pitches	£316.00	£328.50	£12.50	4.0%	Discretionary
31 to 99 pitches	£390.00	£405.50	£15.50	4.0%	Discretionary
100 or more pitches	£464.00	£482.50	£18.50	4.0%	Discretionary
Transfer/amendment	£174.50	£181.50	£7.00	4.0%	Discretionary
Replacement paper licence	£15.00	£17.00	£2.00	13.3%	Discretionary
Lodging rules	£60.00	£62.40	£2.40	4.0%	Discretionary

Public Protection, Environmental Health, Licensing					
Fees and Charges	Fee 22-23 (Excl. VAT)	Proposed Fee 23-24 (Excl. VAT)	Actual Increase	% Increase	Statutory/ Discretionary?
Environmental Enforcement					
Unwanted vehicle	£34.00	£35.50	£1.50	4.4%	Discretionary
Rats & Mice, Per consultation - 3 visits	£56.50	£62.50	£6.00	10.6%	Discretionary
Additional visit		£20.50			
Fleas, cockroaches ants, carpet beetles, and other household insects	£62.50	£79.00	£16.50	26.4%	Discretionary
Bedbugs	£96.50	£112.50	£16.00	16.6%	Discretionary
Wasps Nests	£56.50	£67.75	£11.25	19.9%	Discretionary
Collection of stray dogs	£142.50	£148.50	£6.00	4.2%	Both Statutory and Discretionary Elements
Kennel Costs (per day/part of)	£22.50	£22.50	£0.00	0.0%	Discretionary

NOA, Cooper School and Stratfield Brake					
Fees and Charges	Fees 2022-23 (excl. VAT)	Proposed Fee 2023-24 (excl. VAT)	Actual Increase	% Increase	Statutory/ Discretionary?
NORTH OXFORDSHIRE ACADEMY ATP BANBURY					
ATP/GRASS INNER PITCH					
Senior Match	£67.10	£68.45	£1.35	2.0%	Discretionary
Junior Match	£33.45	£34.10	£0.65	1.9%	Discretionary
Senior Training Whole Pitch	£48.50	£49.45	£0.95	2.0%	Discretionary
Senior Training Half Pitch	£30.15	£30.75	£0.60	2.0%	Discretionary
Junior Training Whole Pitch	£25.90	£26.40	£0.50	1.9%	Discretionary
Junior Training Half Pitch	£15.20	£15.50	£0.30	2.0%	Discretionary
NORTH OXFORDSHIRE ACADEMY ATP FOR KEYHOLDERS					
60 Minutes Hire					
Senior Match	£57.60	£58.75	£1.15	2.0%	Discretionary
Junior Match	£21.15	£21.60	£0.45	2.1%	Discretionary
NORTH OXFORDSHIRE ATHLETICS TRACK BANBURY					
Fixtures					
Non Cherwell Based Clubs Fixtures	£52.55	£53.60	£1.05	2.0%	Discretionary
Cherwell Clubs – Seniors Fixtures	£40.10	£40.90	£0.80	2.0%	Discretionary
Cherwell Clubs – Juniors Fixtures	£31.75	£32.40	£0.65	2.0%	Discretionary
Seniors Training	£41.75	£42.60	£0.85	2.0%	Discretionary
Juniors	£21.55	£22.00	£0.45	2.1%	Discretionary
PAVILION/CHANGING/CLUB ROOM HIRE					
Pavilion/Changing/Club Room Hire	£17.00	£17.35	£0.35	2.1%	Discretionary
NOA Holiday Hubs					
Session 8:45am to 3:00pm	£16.23	£16.55	£0.32	2.0%	Discretionary
Session 8:45am to 5:00pm	£20.60	£21.00	£0.40	1.9%	Discretionary
COOPER SCHOOL, BICESTER					
Sports Hall Hire – 55 Minutes					
Senior	£45.20	£46.10	£0.90	2.0%	Discretionary
Junior	£27.00	£27.55	£0.55	2.0%	Discretionary
Badminton Court - 55 minutes					
Senior	£10.00	£10.20	£0.20	2.0%	Discretionary
Junior	£4.90	£5.00	£0.10	2.0%	Discretionary
ATP – 60 Minutes					
Senior Whole Pitch	£52.65	£53.70	£1.05	2.0%	Discretionary
Senior Half Pitch	£34.60	£35.30	£0.70	2.0%	Discretionary
Senior Quarter Pitch	£28.95	£29.55	£0.60	2.1%	Discretionary
Junior Whole Pitch	£44.40	£45.30	£0.90	2.0%	Discretionary
Junior Half Pitch	£27.65	£28.20	£0.55	2.0%	Discretionary
Junior Quarter Pitch	£19.35	£19.75	£0.40	2.1%	Discretionary
Hockey Club – Whole Pitch					
Senior Match – 90 Minutes	£92.75	£94.60	£1.85	2.0%	Discretionary
Senior Training – 60 Minutes	£52.95	£54.00	£1.05	2.0%	Discretionary
Junior Match – 90 Minutes	£48.40	£49.35	£0.95	2.0%	Discretionary
Junior Training – 60 Minutes	£31.30	£31.90	£0.60	1.9%	Discretionary
Performance Hall					
Hire charge (per hour)	£28.05	£28.60	£0.55	2.0%	Discretionary
Hire charge with tiered seating	£56.05	£57.15	£1.10	2.0%	Discretionary
Events hire including seating/lighting/stage					
Cooper Holiday Hubs					
Session 8:45am to 3:00pm	£16.23	£16.55	£0.32	2.0%	Discretionary
Session 8:45am to 5:00pm	£20.60	£21.00	£0.40	1.9%	Discretionary
Public Liability Insurance re-charge charged at 10% of total hire fee.					
*Block bookings of 10 sessions or more are exempt from VAT					

NOA, Cooper School and Stratfield Brake					
Fees and Charges	Fees 2022-23 (excl. VAT)	Proposed Fee 2023-24 (excl. VAT)	Actual Increase	% Increase	Statutory/ Discretionary?
STRATFIELD BRAKE					
Cricket Pitch Hire (per match)	£100.70	£102.70	1.99%	£2.00	Discretionary
Cricket Pitch Hire (per match) - junior	£49.85	£50.85	2.01%	£1.00	Discretionary
Cricket Nets Hire (per hour)	£15.55	£15.85	1.93%	£0.30	Discretionary
Rugby Pitch Hire - Adult Matches (per match)	£72.70	£74.15	1.99%	£1.45	Discretionary
Rugby Pitch Hire - Adult Training (per hour)	£46.75	£47.70	2.03%	£0.95	Discretionary
Rugby Pitch Hire - Junior Matches (per match)	£39.45	£40.25	2.03%	£0.80	Discretionary
Rugby Pitch Hire - Junior Training (per hour)	£24.90	£25.40	2.01%	£0.50	Discretionary
Rugby Pitch Hire - Mini Matches (per match)	£17.65	£18.00	1.98%	£0.35	Discretionary
Rugby Pitch Hire - Mini Training (per hour)	£10.40	£10.60	1.92%	£0.20	Discretionary
GAB Adult Pitch Hire - Match	£58.15	£59.30	1.98%	£1.15	Discretionary
GAB Adult Pitch Hire - Training	£39.45	£40.25	2.03%	£0.80	Discretionary
GAB Junior Pitch Hire - Match	£32.20	£32.85	2.02%	£0.65	Discretionary
GAB Junior Pitch Hire - Training	£21.80	£22.25	2.06%	£0.45	Discretionary
GAB Mini Pitch Hire - Match	£14.55	£14.85	2.06%	£0.30	Discretionary
GAB Mini Pitch Hire - Training	£10.40	£10.60	1.92%	£0.20	Discretionary
Football Pitch Hire - Adult Matches (per match)	£72.70	£74.15	1.99%	£1.45	Discretionary
Football Pitch Hire - Adult Training (per hour)	£46.75	£47.70	2.03%	£0.95	Discretionary
Football Pitch Hire - Junior Matches (per match)	£39.45	£40.25	2.03%	£0.80	Discretionary
Football Pitch Hire - Junior Training (per hour)	£25.95	£26.45	1.93%	£0.50	Discretionary
Football Pitch Hire - Mini Matches (per match)	£17.65	£18.00	1.98%	£0.35	Discretionary
Football Pitch Hire - Mini Training (per hour)	£10.40	£10.60	1.92%	£0.20	Discretionary
KYFC Football Pitch Hire - Junior Matches (per match) 9v9 & 11v11	£31.20	£31.85	2.08%	£0.65	Discretionary
KYFC Football Pitch Hire - Junior Training(p.hr) 9v9 & 11v11	£24.95	£25.45	2.00%	£0.50	Discretionary
KYFC Football Pitch Hire - Mini Matches (per match) 5v5 & 7v7	£14.55	£14.85	2.06%	£0.30	Discretionary
KYFC Football Pitch Hire - Mini Training (p.hr) 5v5 & 7v7	£10.40	£10.60	1.92%	£0.20	Discretionary
Function Room Hire - per hour	£27.50	£28.05	2.00%	£0.55	Discretionary
Running Club Showers	£1.35	£1.40	3.70%	£0.05	Discretionary
Changing Room Hire (per hour)	£10.40	£10.60	1.92%	£0.20	Discretionary

CHERWELL					
Fees and Charges	Fees 2022-23 (excl. VAT)	Proposed 2023- 24 Fees (excl. VAT)	increase in %	increase in £	Statutory/ Discretionary?
MEMBERSHIP DIRECT DEBITS					
Expressions DD (single)					
Single DD - FIXED	£39.00	£40.00	2.56%	£1.00	Discretionary
Single DD - FLEXI	£44.00	£45.00	2.27%	£1.00	Discretionary
Expressions Family					
Family DD (2 adults + 2 children) - FIXED	£80.00	£85.00	6.25%	£5.00	Discretionary
Family DD (2 adults + 2 children) - FLEXI	£85.00	£90.00	5.88%	£5.00	Discretionary
Family with up to 5 children					
Family DD (2 adults + 5 children) - FIXED	£90.00	£94.00	4.45%	£4.00	Discretionary
Family DD (2 adults + 5 children) - FLEXI	£95.00	£99.00	4.20%	£4.00	Discretionary
One Parent (1 adult + 2 children)					
Single Parent (1 adult + 2 children) - FIXED	£50.00	£52.50	5.00%	£2.50	Discretionary
Single Parent (1 adult + 2 children) - FLEXI	£55.00	£57.50	4.55%	£2.50	Discretionary
One Parent (5 children)					
Single Parent (1 adult + 5 children) - FIXED	£60.00	£63.00	5.00%	£3.00	Discretionary
Single Parent (1 adult + 5 children) - FLEXI	£65.00	£68.00	4.60%	£3.00	Discretionary
Corporate (single)					
Corporate (single) FIXED	£37.00	£38.00	2.70%	£1.00	Discretionary
Corporate (single) FLEXI	£39.00	£40.00	2.56%	£1.00	Discretionary
Fixed Swimming	£23.50	£25.00	6.40%	£1.50	Discretionary
Swim 15	£15.50	£16.00	3.20%	£0.50	Discretionary
GP Referral - one year follow on	£27.75	£28.00	0.90%	£0.25	Discretionary
Expressions Concession	£37.00	£38.00	2.70%	£1.00	Discretionary
Junior	£22.00	£23.00	4.50%	£1.00	Discretionary
Student	£25.00	£26.00	4.00%	£1.00	Discretionary
Aqua Swim, Sauna, Steam	£35.00	£36.00	2.80%	£1.00	Discretionary
1 - month offer	£56.00	£55.00	-1.75%	-£1.00	Discretionary
Annuals	£421.20	£432.00	2.56%	£10.80	Discretionary

CHERWELL

Fees and Charges	Fees 2022-23 (excl. VAT)	Proposed 2023- 24 Fees (excl. VAT)	increase in %	increase in £	Statutory/ Discretionary?
FITNESS SUITE					
Casual Peak	£10.30	£11.00	6.80%	£0.70	Discretionary
Senior Peak	£4.25	£4.75	11.76%	£0.50	Discretionary
Casual Off-Peak	£8.55	£9.00	5.26%	£0.45	Discretionary
Senior Off-Peak	£3.85	£4.00	3.09%	£0.12	Discretionary
Induction (for PAYG)	£20.45	£23.00	12.48%	£2.55	Discretionary
Refresher Induction	£10.20	£11.50	12.48%	£1.28	Discretionary
Junior Peak	£4.25	£4.50	5.96%	£0.25	Discretionary
Junior Induction	£4.70	£5.00	5.96%	£0.28	Discretionary
Adult Link Card Peak	£5.15	£5.50	7.04%	£0.36	Discretionary
Senior Link Card Peak	£2.15	£2.35	9.32%	£0.20	Discretionary
Adult Link Card Off-Peak	£4.30	£4.50	4.67%	£0.20	Discretionary
Senior Link Card Off-Peak	£1.95	£2.00	3.09%	£0.06	Discretionary
Link Card Induction	£10.20	£11.50	12.48%	£1.28	Discretionary
GP Referral Session	£4.35	£4.75	9.15%	£0.40	Discretionary
MotorMed Session	£2.60	£3.00	14.44%	£0.38	Discretionary
Fitness Test - non members	£16.20	£18.00	11.11%	£1.80	Discretionary
Replacement Membership Card	£3.45	£3.00	-13.30%	-£0.46	Discretionary

HEALTH SUITE					
Sauna / Steam / Spa* (* = Swim at KGLC)	£8.50	£9.50	11.76%	£1.00	Discretionary
Sauna / Steam / Spa / Swim	£12.70	£14.00	10.24%	£1.30	Discretionary
Senior Health Suite	£4.35	£4.75	9.15%	£0.40	Discretionary
Link Card Sauna / Steam	£4.25	£4.75	11.85%	£0.50	Discretionary

CHERWELL					
Fees and Charges	Fees 2022-23 (excl. VAT)	Proposed 2023- 24 Fees (excl. VAT)	increase in %	increase in £	Statutory/ Discretionary?
FITNESS CLASSES					
All Classes (incl AquaFit)	£7.00	£8.00	14.29%	£1.00	Discretionary
Body conditioning (1.5 hours)	£9.00	N/A	N/A	N/A	Discretionary
Studio Cycling (Peak)	£10.35	£11.50	11.11%	£1.15	Discretionary
Studio Cycling (Off-Peak)	£8.85	£10.00	12.99%	£1.15	Discretionary
Yoga	£7.05	£8.00	13.48%	£0.95	Discretionary
Yoga (1.5 hours)	£9.05	N/A	N/A	N/A	Discretionary
Junior and Senior - specific classes	£4.25	£5.00	17.73%	£0.75	Discretionary
Senior Classes - Bicester	£3.75	£5.00	32.54%	£1.23	Discretionary
Yoga (1.5 hours)	£9.05	N/A	N/A	N/A	Discretionary
Virtual Classes	£3.45	£4.00	15.59%	£0.54	Discretionary
Core on the Ball (30 mins)	£3.75	N/A	N/A	N/A	Discretionary
Link Card Classes	£3.50	£4.00	13.87%	£0.49	Discretionary
Link Card Classes - Senior / Junior	£2.10	£2.50	19.21%	£0.40	Discretionary

CHERWELL					
Fees and Charges	Fees 2022-23 (excl. VAT)	Proposed 2023- 24 Fees (excl. VAT)	increase in %	increase in £	Statutory/ Discretionary?
SWIMMING SESSIONS					
Adult	£4.50	£5.05	12.22%	£0.55	Discretionary
Junior	£2.95	£3.30	11.86%	£0.35	Discretionary
Seniors	£2.95	£3.30	11.86%	£0.35	Discretionary
Under 3's	£0.00	£0.00	£0.00	£0.00	Discretionary
Block of 10 swims - Adult	£40.75	£45.45	11.53%	£4.70	Discretionary
Block of 10 swims - Juniors	£26.70	£29.70	11.24%	£3.00	Discretionary
Block of 10 swims - Seniors	£26.70	£29.70	11.24%	£3.00	Discretionary
Family Swim ticket	£14.40	£16.00	11.11%	£1.60	Discretionary
Adult Link Card Swim	£2.25	£2.50	10.89%	£0.25	Discretionary
Junior Link Card Swim	£1.50	£1.65	10.00%	£0.15	Discretionary
Senior Link Card Swim	£1.50	£1.65	10.00%	£0.15	Discretionary
Teachers	£3.30	£3.70	12.02%	£0.40	Discretionary
GP Referral Swim (see GP Ref section)	£4.35	£4.85	11.45%	£0.50	Discretionary
Wet & Wacky - junior	£3.50	N/A	N/A	N/A	Discretionary
Wet & Wacky - adult	£4.65	N/A	N/A	N/A	Discretionary
Wet & Wacky - senior	£3.20	N/A	N/A	N/A	Discretionary
AquaFit	£6.95	£7.80	11.43%	£0.80	Discretionary
Scouts and Brownies	£2.00	£2.20	10.33%	£0.21	Discretionary
AquaFit - senior	£4.30	£4.80	11.65%	£0.50	Discretionary
Swim Fit - Adult	£5.75	£6.45	11.85%	£0.68	Discretionary
Swim Fit - Senior	£3.70	£4.15	11.60%	£0.43	Discretionary

CHERWELL					
Fees and Charges	Fees 2022-23 (excl. VAT)	Proposed 2023- 24 Fees (excl. VAT)	increase in %	increase in £	Statutory/ Discretionary?
SWIMMING LESSONS					
Stage 1 - 7, parent & toddler 50 weeks as 3x17 weeks	£6.55	N/A	N/A	N/A	Discretionary
Stage 1 - 7, parent & toddler - Direct Debit	£26.20	£30.00	14.50%	£3.80	Discretionary
1 hour classes (rookie, survival, adults)	£9.20	N/A	N/A	N/A	Discretionary
1 hour classes (rookie, survival, adults) - Direct Debit	£36.70	£41.00	11.71%	£4.30	Discretionary
40 minute intensive lesson	£9.80	N/A	N/A	N/A	Discretionary
30 minute intensive lesson	£6.25	£7.02	12.30%	£0.77	
Ducklings 10 wk course / 30 min lesson	£6.20	N/A	N/A	N/A	Discretionary
Stage 1 - 3 (with assistants) 10 week course / 30 min lesson	£6.55	N/A	N/A	N/A	Discretionary
Stage 1 - 3 (with assistants) - Direct Debit - 30 min lesson	£26.20	£30.00	14.44%	£3.79	Discretionary
Stage 4 - 7 10 wk course / 30 min lesson	£6.20	N/A	N/A	N/A	Discretionary
Stage 4 - 7 10 wk course - Direct Debit	£26.20	£30.00	14.44%	£3.79	Discretionary
Stage 8 - 10 & Adult 10 wk course - 55mins / 1 hr	£9.40	N/A	N/A	N/A	Discretionary
Stage 8 - 10 & Adult - Direct Debit	£36.70	£41.00	11.71%	£4.30	Discretionary
CHILDREN's lessons 10 weeks course / 30 min lesson	£6.05	N/A	N/A	N/A	Discretionary
CHILDREN's lessons Direct Debit - 30 min lesson - with assistant	£26.25	£30.00	14.44%	£3.79	Discretionary
ADULT lessons 10 wk course / 60 min	£9.20	N/A	N/A	N/A	Discretionary
ADULT lessons Direct Debit - 60 min	£36.70	£41.00	11.71%	£4.30	Discretionary

CHERWELL

Fees and Charges	Fees 2022-23 (excl. VAT)	Proposed 2023- 24 Fees (excl. VAT)	increase in %	increase in £	Statutory/ Discretionary?
BIRTHDAY PARTIES					
Sports Hall Party	£118.55	£130.00	9.66%	£11.46	Discretionary
Sports Hall Party & Food for up to 23 children	£170.90	N/A	N/A	N/A	Discretionary
Sports Hall / MegaBounce Party	£118.55	£130.00	9.66%	£11.46	Discretionary
Super Striker / Football (Indoors)	£86.25	£96.00	11.31%	£9.75	Discretionary
Super Striker / Football (Outdoors)	£62.00	£69.00	11.33%	£7.02	Discretionary
Swimming Pool Party (Main Pool) - rafts and inflatables	£129.35	£145.00	12.11%	£15.66	Discretionary
Swimming Pool Party (PnT Pool) - Paddle & Play	£118.55	£130.00	9.66%	£11.46	Discretionary
Swimming Pool - wet & wacky	£150.90	£145.00	-3.91%	-£5.89	Discretionary
Swimming Pool Party - rafts and inflatables	£129.35	£145.00	12.11%	£15.66	Discretionary
Jump & Jiggle Soft Play Party	£91.60	£100.00	9.18%	£8.40	Discretionary
Sports Party (indoors or outdoors)	£91.60	£96.00	4.81%	£4.40	Discretionary
Mega Bounce & Tots Bounce Party	£134.75	£130.00	-3.52%	-£4.75	Discretionary

POOL HIRE - also see Birthday Parties					
Main Pool	£102.40	£105.00	2.54%	£2.60	Discretionary
Main Pool Gala	£136.30	£150.00	10.04%	£13.68	Discretionary
Trainer Pool	£74.40	£83.00	11.56%	£8.60	Discretionary
Trainer Pool Gala	£102.40	£83.00	-18.94%	-£19.40	Discretionary
Play & Teach Pool	£86.25	£96.00	11.31%	£9.75	Discretionary
School Hire (per lesson / teacher)	£18.85	£21.20	12.30%	£2.32	Discretionary
Swim Club - Weekday mornings per 55mins	£43.10	£48.40	12.30%	£5.30	Discretionary
Swim Club - evenings per 55mins	£68.90	£77.37	12.30%	£8.47	Discretionary

CHERWELL

Fees and Charges	Fees 2022-23 (excl. VAT)	Proposed 2023- 24 Fees (excl. VAT)	increase in %	increase in £	Statutory/ Discretionary?
SPORTS HALL HIRE (per hour)					
Badminton Court Peak	£12.50	£14.00	12.00%	£1.50	Discretionary
Badminton Court Peak - Block Booking	£13.75	£14.00	1.92%	£0.26	Discretionary
Badminton Court Off-Peak	£10.00	£11.20	12.00%	£1.20	Discretionary
Badminton Court Off Peak - Block Booking	£11.05	£11.50	3.95%	£0.44	Discretionary
Junior Peak	£6.25	£7.00	12.19%	£0.76	Discretionary
Junior Off-Peak	£4.95	£5.00	0.38%	£0.02	Discretionary
Adult vs Junior Peak	£9.35	£10.00	6.55%	£0.62	Discretionary
Adult vs Junior Off-Peak	£7.55	£8.45	11.99%	£0.91	Discretionary
Hall Hire Peak (5-a-side)	£57.40	£63.00	9.76%	£5.60	Discretionary
Hall Hire Peak (5-a-side) - Block Booking	£63.20	£64.00	1.30%	£0.82	Discretionary
Hall Hire Off-Peak (5-a-side)	£45.95	£51.60	12.30%	£5.65	Discretionary
Hall Hire Off-Peak (5-a-side) - Block Booking	£50.50	£51.60	2.20%	£1.11	Discretionary

SQUASH COURTS HIRE (per 40 mins)					
Squash Court Hire Peak	£9.25	£9.50	2.70%	£0.25	Discretionary
Squash Court Hire Peak - Block Booking	£10.15	£9.50	-2.06%	-£0.20	Discretionary
Squash Court Hire Off-Peak	£7.85	£8.75	11.46%	£0.90	Discretionary
Squash Court Hire Off Peak - Block Booking	£8.65	£9.50	9.81%	£0.85	Discretionary
Junior Peak	£4.60	£5.00	8.37%	£0.39	Discretionary
Junior Off-Peak	£3.90	£4.25	8.03%	£0.32	Discretionary
Adult vs Junior Peak	£6.95	£7.00	0.38%	£0.03	Discretionary
Adult vs Junior Off-Peak	£5.90	£6.50	9.65%	£0.57	Discretionary

CHERWELL

Fees and Charges	Fees 2022-23 (excl. VAT)	Proposed 2023- 24 Fees (excl. VAT)	increase in %	increase in £	Statutory/ Discretionary?
TABLE TENNIS HIRE (per hour)					
Adult Hire	£7.35	£8.00	8.84%	£0.65	Discretionary
Junior Hire	£3.65	£4.00	8.99%	£0.33	Discretionary
Adult vs Junior	£5.50	£6.00	8.99%	£0.49	Discretionary

ALL WEATHER PITCHES - BLC and KGLC					
Adult Football	£44.20	£48.00	8.60%	£3.80	Discretionary
Adult Football - Block Booking	£47.45	£52.00	9.59%	£4.55	Discretionary
Junior Football (up to 7.15pm)	£33.40	£36.00	7.79%	£2.60	Discretionary
Junior Football (up to 7.15pm) - Block booking	£36.75	£40.00	8.83%	£3.25	Discretionary
Junior individual PAYG	£3.10	£3.45	11.53%	£0.36	Discretionary
Senior individual PAYG	£4.80	£5.00	3.66%	£0.18	Discretionary
Whole Pitch	£84.60	£90.00	6.36%	£5.38	Discretionary
2/3rds Pitch	£61.55	£65.00	5.60%	£3.45	Discretionary
1/3rd Pitch	£38.50	£40.00	3.81%	£1.47	Discretionary
Tennis	£7.00	£7.89	12.30%	£0.86	Discretionary

EQUIPMENT HIRE					
Racquets - badminton, tennis, & table tennis bats	£2.00	£2.00	0.00%	£0.00	Discretionary
Bibs	£2.00	£2.00	0.00%	£0.00	Discretionary
Deposit (refundable)	£5.00	£5.00	0.00%	£0.00	Discretionary
Breakages (take from deposit)	£5.00	£5.00	-7.41%	-£0.40	Discretionary
Football hire	£2.00	£2.00	0.00%	£0.00	Discretionary
Football deposit	£10.00	£10.00	0.00%	£0.00	Discretionary

CHERWELL					
Fees and Charges	Fees 2022-23 (excl. VAT)	Proposed 2023- 24 Fees (excl. VAT)	increase in %	increase in £	Statutory/ Discretionary?
JUNIOR ACTIVITIES					
Sway Dance	£0.00	N/A	N/A	N/A	Discretionary
Parent & Toddler Sessions	£6.45	£7.00	6.87%	£0.45	Discretionary
Adults & Juniors (1 hour)	£9.35	£10.00	6.55%	£0.62	Discretionary
Spice Up Saturday	£5.70	£6.00	5.03%	£0.29	Discretionary
Baby Bounce	£3.25	£3.70	12.12%	£0.40	Discretionary
Baby Bounce - additional sibling	£2.65	N/A	N/A	N/A	Discretionary
Strikers / Dribblers	£5.50	£6.00	8.99%	£0.49	Discretionary
Mini Dribblers	£4.40	£4.80	8.99%	£0.40	Discretionary
Soft Play	£1.75	N/A	N/A	N/A	Discretionary
Gymnastics and Trampoline (terms 12-14 weeks)	£7.35	N/A	N/A	N/A	Discretionary
Gymnastics Direct debit (39 weeks spread over 52 weeks) - NEW FOR 2019	£23.80	£26.00	9.23%	£2.20	Discretionary
Trampoline (30 minute class)	£4.00	N/A	N/A	N/A	Discretionary
Tots Bounce	£2.75	£3.10	11.56%	£0.32	Discretionary
Tots Bounce - Family Member 50% off	£1.40	£1.55	9.49%	£0.13	Discretionary
Mega Bounce	£3.40	£3.70	8.57%	£0.29	Discretionary
Jump & Jiggle Area	£1.65	£1.85	10.27%	£0.17	Discretionary
ROOM HIRE					
Activity Hall - Peak	£50.55	£55.00	8.59%	£4.35	Discretionary
Exercise Studio	£22.55	£25.00	10.89%	£2.46	Discretionary
Activity Hall - Peak	£50.65	£55.00	8.59%	£4.35	Discretionary
Studio 1	£67.63	£70.00	3.50%	£2.37	Discretionary
Studio 2	£45.80	£50.00	9.11%	£4.18	Discretionary
Meeting Room - 1 hour	£19.40	£20.00	3.09%	£0.60	Discretionary
Meeting Room - half day	£64.75	£70.00	8.11%	£5.25	Discretionary
Meeting Room - full day	£107.80	£110.00	2.04%	£2.20	Discretionary
Body Therapy Clinic	£44.20	£44.20	0.00%	£0.00	Discretionary

CHERWELL					
Fees and Charges	Fees 2022-23 (excl. VAT)	Proposed 2023- 24 Fees (excl. VAT)	increase in %	increase in £	Statutory/ Discretionary?
OVER 70's					
Evergreens (Monday)	£3.20	£3.50	9.44%	£0.30	Discretionary
Evergreens (Tuesday)	£3.40	£3.80	11.76%	£0.40	Discretionary
Evergreens (Wednesday)	£4.05	£4.50	11.11%	£0.45	Discretionary
OTHER					
Parish Card (12 months)	N/A	£61.53	12.30%	£6.74	Discretionary
Shower	£4.55	£5.11	12.30%	£0.56	Discretionary
Spectator - Adult	£1.10	£1.24	12.30%	£0.14	Discretionary
Spectator - Junior / Senior	£1.10	£1.24	12.30%	£0.14	Discretionary
Mixed Leisure	£4.60	£5.17	12.30%	£0.57	Discretionary
Adult Badminton Course	£43.82	£51.46	12.30%	£5.64	Discretionary
No Strings	£5.00	£4.48	12.30%	£0.49	Discretionary

Appendix 7 - Fees and Charges Schedule

WOODGREEN					
Fees and Charges	Fees 2022-23 (excl. VAT)	Proposed Fees 2023-24 (excl. VAT)	increase in %	increase in £	Statutory/ Discretionary?
Bowling*					
Member Rink peak (2 hours)	£3.50	£3.85	10.20%	£0.35	Discretionary
Public Play	£3.05	£3.35	10.54%	£0.31	Discretionary
Link Play (per hour)	£1.70	£1.80	9.09%	£0.15	Discretionary
Learners (2 hours)	£3.90	£4.30	10.20%	£0.39	Discretionary
Disabled (per hour)	£1.70	£1.80	6.07%	£0.10	Discretionary
Membership Adult	£50.90	£56.00	10.34%	£5.11	Discretionary
New-to-bowls membership	£25.45	£28.00	10.34%	£2.55	Discretionary
Membership Junior	£15.45	£17.00	10.31%	£1.55	Discretionary
Junior Member peak (2 hours)	£1.90	£2.10	10.49%	£0.19	Discretionary
Junior Non Member peak (2 hours)	£3.80	£4.20	10.49%	£0.39	Discretionary
Bowls area wedding	£1,855.00	£2,000.00	8.09%	£145.64	Discretionary
Classes					
Fit 'N'Fifty block of 10	£25.55	£31.50	24.00%	£5.95	Discretionary
Fit 'N' Fifty	£3.20	£3.50	9.88%	£0.31	Discretionary
Fit 'N' Fifty LINK	£1.60	£1.75	10.20%	£0.16	Discretionary
Room Hire					
Meeting room 1 hour	£16.48	£17.50	6.36%	£1.02	Discretionary

Appendix 7 - Fees and Charges Schedule

WOODGREEN					
Fees and Charges	Fees 2022-23 (excl. VAT)	Proposed Fees 2023-24 (excl. VAT)	increase in %	increase in £	Statutory/ Discretionary?
Swimming					
Adult session	£4.40	£5.20	17.91%	£0.77	Discretionary
Adult All Day	£8.65	£10.00	16.03%	£1.35	Discretionary
Junior session	£2.90	£3.40	18.41%	£0.52	Discretionary
Junior All Day	£5.35	£6.40	20.06%	£1.04	Discretionary
Senior Citizen	£2.90	£3.40	18.41%	£0.52	Discretionary
Senior All Day	£5.35	£6.40	20.06%	£1.04	Discretionary
Early Bird/Lane swimming	£4.40	£5.20	17.91%	£0.77	Discretionary
Adult Lunchtime	£4.40	£5.20	17.91%	£0.77	Discretionary
Junior/Senior Lunchtime	£2.90	£3.40	18.41%	£0.52	Discretionary
Family Ticket (2 adults, up to 3 children)	£13.75	£15.50	13.08%	£1.75	Discretionary
Block of 10 adult	£39.60	£52.00	31.35%	£12.13	Discretionary
Block of 10 adult all day	£77.90	£100.00	29.26%	£22.12	Discretionary
Block of 10 Junior/senior	£25.95	£34.00	31.90%	£8.04	Discretionary
Block of 10 junior/senior all day	£48.20	£64.00	33.73%	£15.79	Discretionary
Pool Hire (per hour)					
Main Pool	£138.05	£150.00	8.92%	£11.95	Discretionary
Club Hire	£47.90	£60.00	26.01%	£12.10	Discretionary
Gala	£173.00	£180.00	4.12%	£6.93	Discretionary
Party hire	£173.00	£180.00	4.12%	£6.93	Discretionary

Appendix 7 - Fees and Charges Schedule

WOODGREEN					
Fees and Charges	Fees 2022-23 (excl. VAT)	Proposed Fees 2023-24 (excl. VAT)	increase in %	increase in £	Statutory/ Discretionary?
FITNESS / GYM					
Single DD - FIXED	£26.80	£27.00	3.85%	£1.00	Discretionary
Single DD - FLEXI	£31.95	£32.00	3.23%	£1.00	Discretionary
Corporate (single) FIXED	£23.70	£24.00	4.35%	£1.00	Discretionary
Corporate (single) FLEXI	£28.85	£29.00	3.57%	£1.00	Discretionary
Gym casual admission	£6.80	£7.50	10.62%	£0.70	Discretionary
Shower (winter)	£2.05	£2.20	6.98%	£0.14	Discretionary
Junior Gym Session	£3.85	£4.25	10.20%	£0.38	Discretionary
Studio 1 hire per hour	£16.45	£18.00	9.48%	£1.52	Discretionary
Studio 2 hire per hour	£16.45	£18.00	9.48%	£1.52	Discretionary
Seniors Classes	£3.20	£3.50	9.88%	£0.31	Discretionary
Group Cycling	£6.40	£7.00	9.88%	£0.61	Discretionary
Fitness Classes (incl Zumba)	£6.25	£7.00	11.73%	£0.72	Discretionary

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**Appendix 4 - Cherwell District Council
Equality Impact Assessment
Summary Savings proposals 2023/24**

November 2022

Section 1: Summary details

Directorate and Service Area	All Directorates and Service Areas
What is being assessed (e.g. name of policy, procedure, project, service or proposed service change).	This assessment sets out the overall impact that the budget and business planning 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.
Is this a new or existing function or policy?	This impact assessment provides an overview of the 2023/24 budget and business planning proposals and so comments on changes to existing programmes as well as new proposals.
Summary of assessment 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>This assessment covers the overall budget and business planning proposal for Cherwell District Council and seeks to highlight key evidence and intelligence that the Council has used to assess the impact of its budget proposals on the nine protected characteristics set out in the Equality Act 2010. The Council has also assessed the impact on those living in rural areas, those living with social deprivation, armed forces communities and carers.</p> <p>An initial review of all proposals was completed by the Performance and Insight Team to review the impact of savings and determine where mitigations would be required. Individual Equality Impact Assessments will be finalised following approval of budget proposals for any required policy change that could have a negative impact.</p> <p>The assessment has not identified any bias, unfair advantage or disadvantage to any groups or individuals. Where potential negative impacts have been identified, mitigations have been put in place to reduce impact.</p>
Completed By	Celia Prado-Teeling – Performance & Insight Team Leader
Authorised By	Shona Ware, Assistant Director – Customer Focus
Date of Assessment	November 2022

Section 2: Detail of proposal

<p>Context / Background</p> <p>Briefly summarise the background to the policy or proposed service change, including reasons for any changes from previous versions.</p>	<p>The Council's budget and business planning proposals are designed to enable us to deliver the key priorities in our Business Plan to enable communities to thrive and businesses to grow. Our strategic priorities are:</p> <ul style="list-style-type: none"> - Housing that meets your needs - Leading on environmental sustainability - An enterprising economy with strong and vibrant local centres - Healthy, resilient and engaged communities <p>This budget and business planning round has been impacted by reduction and ongoing uncertainty in major funding streams including the New Homes Bonus Grant and Business Rates. In addition, significant budget pressures have arisen due to reduction in income due to Covid-19, alongside the additional costs incurred due to the current economic environment and increased inflation. In combination, this is resulting in a challenging budgeting and business planning process as set out in the main Budget and Business Planning reports.</p>
<p>Proposals</p> <p>Explain the detail of the proposals, including why this has been decided as the best course of action.</p>	<p>This impact assessment covers all savings proposals across Wellbeing and Housing, Customer Focus, Human Resources and Organisational development, Properties, Planning and development, Growth and Economy, Environmental and Regulatory services. Details of proposals are set out in the main Budget and Business Planning proposals.</p> <p>Changes to fees and charges are addressed in the associated Fees and Charges schedule. Any increase to fees and charges may impact on those with more need to use a service, including due to an individual having one or more of the protected characteristics. Changes to fees and charges are proposed after consideration of inflation, service need, bench-marking and market opportunities. Where material service impact has been assessed from changes in charges these will be addressed through the equality impact assessment process that supports decision making on the budget and business planning report or the later specific decision-making process associated with review and any subsequent proposed change.</p>
<p>Evidence / Intelligence</p>	<p>In considering the impact of budget proposals before they are formally agreed, the Council undertakes a detailed process of democratic and community engagement. This includes:</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>	<ul style="list-style-type: none"> • Using the Oxfordshire Joint Strategic Needs Assessment (JSNA) of health and wellbeing needs, and the associated Equalities Briefing and Cherwell District Profile to consider the impact of proposals as they are drawn up and in the development of this overarching assessment. The latest countywide JSNA can be found here; and detailed data for our main population settlements (Banbury, Bicester and Kidlington) is available here. • A public consultation process, the results of which will be published alongside the Budget and Business Planning proposals. • A democratic process including agreement of proposals by Executive, analysis and comment on those proposals by Budget and Business Planning Committee, and adoption of the budget by Full Council. Each of these stages provides an opportunity to invite comment and engagement from the public and representatives of particular organisations or population groups.
<p>Alternatives considered / rejected</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>	

Section 3: Impact Assessment - Protected Characteristics

Age: In mid-2020 there were 151,800 residents in the Cherwell district, 3,829 of which were aged 85+. Cherwell's population is ageing with the 85+ population predicted to increase by 88% by 2037. There were 43,153 people aged under 25 in Cherwell in 2019 (28.5% of the total population), this is slightly lower than the figure for the rest of the county where around 30.5% of the population is aged under 25.

No specific issues relating to age have been identified as likely to arise as a result of these proposals.

Disability: As of October 2020, there were 2,875 attendance allowance claimants in Cherwell; also, 3,862 Personal Independence Payment and 2,696 Disability living allowance claimants across the district.

No specific issues relating to disability have been identified as likely to arise as a result of these proposals.

Gender Identity: There is limited information available on gender identity and data at a local level is not available. During the 2019-20 financial year, there were 445 applications for gender recognition certificates in the UK, but this will be under representative of those whose gender identity does not match the sex they were assigned at birth.

No specific issues relating to gender reassignment have been identified as likely to arise as a result of these proposals.

Pregnancy and Maternity: There were 1,791 live births in Cherwell in 2020 and is a comparatively higher fertility rate to the county average.

No specific issues relating to pregnancy and maternity have been identified as likely to arise as a result of these proposals.

Marriage and Civil Partnership: Only county-level data could be sourced for this protected characteristic. At the time of the 2011 Census there were 128,400 married households in Oxfordshire and 682 registered same-sex civil partnerships. Same sex marriage became legal in 2014. In 2017 in Oxfordshire there were 3,224 marriages of opposite sex couples and 79 same-sex marriages.

No specific issues relating to marriage and civil partnership have been identified as likely to arise as a result of these proposals.

Race including ethnic or national origin, colour or nationality: In the 2011 Census, 86.3% of Cherwell's residents were White British, 5.8% White-non-British, 4.3% were Asian/Asian British 0.46% Chinese and 0.80% Other Asian), 1.4% were Black/African/Caribbean/Black British, 1.8% Mixed and 0.4% were other ethnic groups. The majority of ethnic minority populations in Cherwell are based in Banbury.

No specific issues relating to race including ethnic or national origin, colour or nationality have been identified as likely to arise as a result of these proposals.

Religion or belief: The question on religion and belief in the 2011 Census survey was voluntary and 67.7% of residents in Cherwell responded to this question. 94.2% of those that responded said that they were Christian, the largest non-Christian group stated that they were Muslim (2.3%) and 25% of respondents said that they had no religion or belief. No specific issues relating to religion or belief have been identified as likely to arise as a result of these proposals.

Sex: In Cherwell in 2019 there were 75,832 females (50.3%) and 74,671 (49.6%) males. No specific issues relating to sex have been identified as likely to arise as a result of these proposals.

Sexual Orientation: There is limited data on sexual orientation defined as people identifying as heterosexual/straight, gay/lesbian, bisexual or another sexual attraction at a district level. It was estimated that there was a total of 12,300 people aged 16+ in Oxfordshire identifying as Lesbian, Gay or Bisexual in 2018. No specific issues relating to sexual orientation have been identified as likely to arise as a result of these proposals.

Rural Communities: According to the Output Area Classification (2011) 21% of Cherwell residents live in rural areas. This impact assessment has identified no specific impact of our budget and business planning proposals on rural communities.

Armed Forces: In April 2020 there were 9,360 regular armed forces personnel stationed in Oxfordshire and as of March 2020 there were 6,623 recipients of pensions/compensation under the Armed Forces Pension Scheme, War Pension Scheme and Armed Forces Compensation Scheme in the county. This impact assessment has identified no specific impact of our budget and business planning proposals on the Armed Forces.

Carers: According to the 2011 Census, there was a total of 13,354 people providing unpaid care in Cherwell. No specific issues relating to carers have been identified as likely to arise as a result of these proposals.

Care leavers: Care Leavers face many challenges as they move into adulthood, such as those relating to careers, education, accommodation and personal change. This impact assessment has identified no specific impact of our budget and business planning proposals on Care Leavers.

Areas of Social Deprivation: Parts of Banbury Cross and Neithrop, Banbury Ruscote, Bicester South and Ambrosden, Bicester West, Kidlington East, and Launton and Otmoor are within the most deprived areas of Cherwell. The proposal of increasing rent for Affordable Rent and Shared Ownership properties could have a negative impact on residents within areas of deprivation, there are mitigating actions in place to minimise this impact, such as increase on housing benefits and cost-of-living crisis support for Universal credit and other benefits' claimants.

Section 4 : Summary

The overall budget proposals have been developed with the objective of effectively targeting services so that we continue to meet the needs of the most vulnerable, including those living with deprivation, and fulfil our statutory duties. All proposals that will have an impact, positive or negative, on any protected characteristic or on rural communities, armed forces, carers or areas of social deprivation; as per the council's Equalities and Inclusion framework all proposals will have an individual EIA completed alongside policy development, to ensure full compliance to our commitment to equality, diversity and inclusion. The proposal to increase rent for Affordable Rent and Shared Ownership properties could have a negative impact on part of the residents within areas of deprivation; there are mitigating actions in place to minimise this impact, such as increases on benefits, cost-of-living crisis support and extra payments for benefits' claimants. Also, as always, we will be working closely across different services and voluntary sector to monitor the welfare of our most vulnerable residents to make sure sufficient support is in place.

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Cherwell

DISTRICT COUNCIL
NORTH OXFORDSHIRE

Cherwell District Council Pay Policy Statement

This policy statement will be subject to review annually and in accordance with new or proposed legislation to ensure that it remains relevant and effective. It is effective from 1st April 2023

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1. Introduction, Overview and Purpose

Under Section 112 of the Local Government Act 1972, the Council has the “power to appoint officers on such reasonable terms and conditions as the authority thinks fit”. This Pay Policy Statement (the ‘statement’) sets out the Council’s approach to pay policy in accordance with the requirements of Section 38-43 of the Localism Act 2011 and due regard to the associated Statutory Guidance including the Supplementary Statutory Guidance issued in February 2013 and guidance issued under the Local Government Transparency Code 2015.

The purpose of this statement is to provide transparency with regard to the Council’s approach to setting the pay of its employees, excluding employees working in alternative service delivery models.

Thus, this statement details the methods by which salaries for all roles are determined, and the detail and the level of remuneration of its most senior employees. This statement will be published on the Council’s public website and will be available in other formats upon request.

Procedural and approval requirements set down in the Council’s Constitution will be applied as required.

In determining the pay and remuneration of all its employees, the Council takes account of the need to ensure value for money in respect of the use of public expenditure.

The Council develops and implements reward systems and structures which meet the following requirements:

- Allow the Council to recruit and retain high calibre employees to provide high quality services
- Maintain levels of pay which are in line with the Council’s financial policies and provide value for money
- Are open, transparent and accountable
- Are fair and consistent

Once approved, this policy statement will come into effect on the 1st April 2023 superseding the 2022/23 statement and will continue to be reviewed on an annual basis.

2. Definitions

To support the transparency of the Pay Policy Statement, below are definitions for common words/phrases that are used throughout.

2.1. Remuneration

For the purposes of this statement remuneration includes three elements – basic salary, pension and all other allowances arising from employment.

2.2. Chief Officers

The definition of Chief Officers is defined as the officer designated as the Head of the Authority's Paid Service; a statutory chief officer – which under the Local Government and Housing Act 1989 means the Section 151 Officer and Monitoring Officer.

The definition of a non-statutory Chief Officer which under section 2 (7) of the 1989 Act means direct reports of the Head of Paid Service (HOPS), a person for whom the HOPS is directly responsible; a person who, as respects all or most of the duties of his/her post, is required to report directly or is directly accountable to the HOPS; and any person who, as respects all or most of the duties of his/her post, is required to report directly or is directly accountable to the local authority themselves or any committee or sub-committee of the authority.

In the case of the Council these posts are:

- Chief Executive (Head of Paid Service)

Statutory Chief Officers

- Assistant Director of Finance and Section 151 Officer
- Assistant Director of Law and Governance and Monitoring Officer

Non-Statutory Chief Officers

- Corporate Director of Communities
- Corporate Director of Resources

2.3. Lowest Paid Employees

According to the pay scales, the lowest pay that employees receive is on Grade A, Scale Point 3 which is the lowest standard pay point. The salary on this grade is currently payable to staff carrying out cleaning roles. Lowest paid employees exclude apprentices due to their trainee status and exclude staff who may have transferred into the Council under TUPE protected rates.

2.4. Pay Multiples

The pay multiples is the relationship between two different pay amounts, showing the number of times one value is contained within another value. The relationships will be shown between:

- the highest paid taxable earnings (including base salary, variable pay, bonuses, allowances and cash value of any benefits in kind) and the lowest paid taxable earnings.
- the highest paid taxable earnings (including base salary, variable pay, bonuses, allowances and the cash value of any benefits in kind) and the median earnings figure of the whole workforce.
- the average median salary of Chief Officers and the median earnings figure of the whole workforce.

3. Pay Strategy

We undertake a review of the remuneration of all staff each year, taking into consideration hourly pay rates and other significant benefits such as annual leave above the statutory requirements, employer pension contributions and training and development. We believe that taking a holistic view to remuneration ensures that our staff are rewarded fairly and encourages us all to think of total reward packages rather than a single component such as base pay.

Our lowest hourly rate £10.45 which is currently 0.3% above the April 2023 rates for UK Living Wage of £10.42. This hourly rate incorporates a pay award of 2.75% (already agreed and communicated to staff for 23/24) to be paid with effect from 1 April 2023. As normal practice however, CDC has committed to track the national pay negotiations for 23/24 and will review at the point this is awarded, so this could be subject to change.

4. Pay Design

There is a single pay scale in operation at the Council. This was developed in 2018 by external reward specialists as part of a harmonisation process and in conjunction with a review of the job evaluation schemes in use. The harmonisation process was subject to a full consultation process with the trade unions.

The Council ensures that all pay arrangements can be objectively justified through the use of Job Evaluation methods. These are:

- Greater London Provincial Council (GLPC) scheme for roles that score under 560 points when evaluated.

- Roles that score 560 points and above are subject to HAY evaluation.

Grading structures for all groups of employees are implemented in line with agreed published pay scales and agreed relevant local terms and conditions of employment where applicable.

5. Appointments

The Personnel Committee is the appointing body for appointments to the roles of Head of Paid Service, the Monitoring Officer and the s151 Officer with recommendations made to full council.

The statutory role of s151 officer is held by the Assistant Director of Finance and the Monitoring Officer held by the Assistant Director of Law and Governance. The Head of Paid Service can appoint to Assistant Director level roles, subject to ratification of Executive members but Full Council ratify appointments of statutory officers.

The Personnel Committee is the appointing body for non-statutory Chief Officers.

It still remains that the Executive consultation procedure would be utilised as required by regulations for Chief Officer posts and Assistant Director roles.

Post	Regulatory Description	Appointment under Constitution
Head of Paid Service	Head of Paid Service	Personnel Committee with recommendation to Full Council
(s151 Officer) Assistant Director of Finance	Statutory Chief Officer	Head of Paid Service for the appointment of Assistant Director role, ratified by Executive members, with Full Council appointing to s151 Officer
(Monitoring Officer) Assistant Director of Law and Governance	Statutory Chief Officer	Head of Paid Service for the appointment of Assistant Director role, ratified by Executive members, with Full Council appointing to Monitoring Officer
Corporate Director of Communities	Non-statutory Chief Officer	Personnel Committee, ratified by Executive members

Corporate Director of Resources	Non-statutory Chief Officer	Personnel Committee, ratified by Executive members
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Any pay or grading changes for Chief Officers are considered and, if agreed, approved by the Personnel Committee.

Salary packages for new posts in excess of £100,000 per annum will be subject to formal approval by the Personnel Committee.

6. Pay Structures

6.1. Pay Grades and Progression

Most jobs have a grade with at least four and a maximum of five incremental points. When an employee is appointed to a new role it is typically at the bottom of the grade, unless they have significant experience in a similar role.

Annually and usually with effect from 1st April, pay awards are implemented following local negotiation with the trade unions and are broadly in line with national recommendations.

Employees also progress to the next incremental point within their pay scale on the 1 April following their completion of a full years' service. This system recognises their increasing experience and performance progression continues until they reach the top of the grade.

6.2. High levels of performance are expected from all employees and where standards are not satisfactory, prompt managerial action will be taken to improve performance. This may include disciplinary/capability action in Pay Supplements and increments may be withheld as a result of these actions.

From time to time it may be necessary to pay special allowances or supplements to individual employees as part of their employment contract where specific circumstances require this and where it can be justified in accordance with Council policies. The Council uses the following:

- Honoraria are paid where an employee has taken on additional duties and responsibilities for a defined period, for example covering a vacancy due to maternity leave or other staff absence.

The Council will ensure that the requirement for additional allowances or supplements is objectively justified by reference to clear and transparent evidence.

Pay Supplements are subject to reviews as appropriate in accordance with agreed procedures.

7. Other Employment Related Arrangements

7.1. Local Government Pension Scheme (LGPS)

Subject to qualifying conditions, employees have a right to belong to the LGPS.

The Employee contribution rates which are defined by statute, currently range between 5.5% and 12.5% of pensionable pay depending on actual salary levels.

The Employer contribution rates are set by actuaries and reviewed on a triennial basis in order to ensure the scheme is appropriately funded. The current average rate is 15.9% based on making an upfront payment for the next three years of £5.7m.

The Council will not at any time augment the pension or membership of employees nor award or fund additional pension to employees unless required to do so by the LGPS Regulations.

7.2. Benefits Schemes

As part of the Reward Strategy to recruit and retain high calibre employees, the Council provides a wide range of benefits including the Cycle Scheme and Childcare Voucher salary sacrifice schemes and will soon introduce the Electric Vehicle scheme.

A full review of the benefits offered by the council is continuing in 2023.

7.3. Expenses

Subsistence and out of pocket expenses are based on national joint council rates. Car mileage is based on the HM Revenue & Customs approved rate, currently 45 pence per mile falling to 25 pence, for miles travelled in excess of 10,000 per annum

8. Pay Arrangements for Senior Management

The Council does not apply any bonuses or performance related pay to its Chief Officers.

Where Officers receive fees for undertaking elections duties, these will be shown separately to salary. Election fees are reviewed by the Returning Officer.

9. Pay Multiples and Medians as at 1st April 2023

Cherwell District Council is required to report on the pay multiples between its lowest and highest paid members of staff.

Table 1 shows the ratio between the lowest paid and the highest paid and the ratio between the median salary of the workforce and the highest paid.

Pay Multiples	2023/2024
Highest Paid - Chief Executive	£165,864
Lowest Paid	£20,164
Pay Multiple between the lowest paid and the highest paid	8.2:1
Median Salary	£51,811
Pay Multiple between median and highest paid	3.2:1

Table 2 shows the ratio between the median salary of the workforce and the average salary of its Chief Officers.

Pay Multiples using the average salary of Chief Officers	2023/24
Average Salary of Chief Officers	£117,082
Lowest Paid	£20,164
Pay Multiple between the lowest paid and the Average Salary of Chief Officers	5.8:1
Median Salary	£51,811
Pay Multiple between Median salary and Average salary of Chief Officers	2.2:1

10. Payments on Termination of Employment

The Cherwell District Council Redundancy Scheme applies to all employees and is one week's statutory entitlement based on actual pay for employees under the age of 41 years and one and half week's statutory entitlement based on actual pay for those aged 41 years and above where redundancy payments are due.

All employees who have received a redundancy payment in relation to the termination of their contracts of employment will be subject to the provisions of the Redundancy Modification Order and will be subject to Local Government Pension Scheme (LGPS) Regulations.

Where severance payments are appropriate such payments will be approved by the Monitoring Officer, Assistant Director, Finance (s151) and Head of Paid Service and will be the subject of a Settlement Agreement for the purpose of compromising any compensation for which the Council may otherwise be legally liable. Severance payments will be discussed with legal advisors and a 'Best Value' note obtained based on the merits of the individual case.

11. Publication of Senior Salaries Statement

In accordance with publication requirements, a table showing information on the pay of all officers earning over £50,000 per annum will be published on the Council's website. All allowances and other payments will also be shown.

Claire Cox
Assistant Director of Human Resources
January 2023



Summary of the Decisions Taken at the Meeting of Budget Planning Committee held on 6 December 2022

Agenda Item No.	Agenda Item	Decision
6	<p>Budget Proposals 2023/24 - 2027/28</p> <p>Report of Assistant Director of Finance (S151 Officer)</p> <p>Purpose of report</p> <p>This report sets out the capital bids, revenue savings proposals and budget pressures for Cherwell District Council for the period 2023/24 to 2027/28. Feedback on the savings proposals will be taken into account as part of the overall response to the budget engagement. Feedback from the Committee on the revenue pressures and capital bids will be provided to the Executive to consider in finalising its budget proposals for Council.</p> <p>Recommendations</p> <p>The meeting is recommended to:</p> <p>1.1 Agree feedback on the capital bids, revenue savings proposals and budget pressures to provide to the Executive to consider in finalising its 2023/24 budget proposal.</p>	<p>Resolved</p> <p>(1) That, having given due consideration, Executive be advised that the Budget Planning Committee have no feedback, comments or recommendations in relation to capital bids, revenue savings proposals and budget pressures for inclusion as part of the 2023/24 budget proposal.</p>
7	<p>Review of Committee Work Plan</p> <p>Verbal update by Strategic Finance Business Partner</p>	<p>Resolved</p> <p>(1) The verbal Committee Work Plan update be noted.</p>

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Gross Budget, Income, Net Budget and Future Years MTFs Changes by Directorate

Appendix 11

	Gross Expenditure	Gross Income	Total	Net Change to	Net Change to	Net Change to	Net Change to	Net Budget at end of Period
Directorate	2023/24	2023/24	2023/24	2024/25	2025/26	2026/27	2027/28	
	£m	£m	£m	£m	£m	£m	£m	£m
Chief Executive	10.494	(5.035)	5.460	(0.366)	(0.099)	(0.110)	(0.056)	4.829
Communities	20.378	(11.685)	8.693	(0.245)	(0.113)	0.068	(0.091)	8.312
Resources	37.760	(32.662)	5.097	(0.143)	(2.230)	0.103	0.124	2.951
Service Sub-Total	68.632	(49.382)	19.250	(0.754)	(2.442)	0.061	(0.023)	16.092
Corporate Costs	12.067	(8.372)	3.695	1.832	4.618	1.006	0.062	11.213
Policy Contingency	5.229	0.000	5.229	0.931	(0.636)	0.525	0.525	6.574
Cost of Services	85.928	(57.755)	28.174	2.009	1.540	1.592	0.564	33.879
Council Tax	0.000	(9.290)	(9.290)	0.170	(0.481)	(0.419)	(0.422)	(10.442)
Business Rates	39.550	(56.677)	(17.127)	2.495	10.262	(0.207)	(0.297)	(4.874)
New Homes Bonus	0.000	(1.625)	(1.625)	0.000	1.625	0.000	0.000	0.000
Revenue Support Grant	0.000	(0.132)	(0.132)	0.000	0.132	0.000	0.000	0.000
Funding Sub-total	39.550	(67.724)	(28.174)	2.665	11.538	(0.626)	(0.719)	(15.316)
Total	125.478	(125.478)	(0.000)	4.674	13.078	0.966	(0.155)	18.563

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Appendix 12 - Budget Book

Directorate	Service	Division	Gross Expenditure	Gross Income	Net Expenditure / (Income)
			£m	£m	£m
Chief Executive	Customer Focus	Contract Centre Services	1.292	(0.000)	1.292
		Land Charges	0.108	(0.238)	(0.130)
		Insight & Corporate Progs	0.444	-	0.444
		Strategy	0.344	-	0.344
		Assistant Director	0.105	-	0.105
		Communications & Media	0.312	-	0.312
		Customer Focus Total	2.606	(0.238)	2.367
	HR & OD	HR OD & Payroll	0.807	-	0.807
		HR & OD Total	0.807	-	0.807
	Wellbeing & Housing	Communities	1.233	(0.097)	1.135
		AD Wellbeing and Housing	0.096	-	0.096
		Strategic Housing	0.948	(0.768)	0.180
		Healthy Place Shaping	0.213	(0.030)	0.183
		Leisure	0.359	(0.153)	0.205
		Sport	1.471	(1.340)	0.130
		Housing Needs	1.133	(0.165)	0.968
		Affordable Rents	0.172	(0.998)	(0.826)
		Private Sector Housing	0.562	(0.349)	0.212
		Shared Ownership	0.376	(0.369)	0.007
Refugee Resettlement		0.519	(0.526)	(0.007)	
	Wellbeing & Housing Total	7.082	(4.796)	2.286	
Chief Executive Total			10.494	(5.035)	5.460
Communities	Environmental	Car Parks	1.051	(1.793)	(0.742)
		Environment and Waste	0.305	-	0.305
		Landscaping	2.076	(1.012)	1.064
		Street Cleansing	1.657	(0.387)	1.270
		Vehicle Maintenance and MOTs	1.067	(0.995)	0.072
		Waste and Recycling	6.609	(3.471)	3.138
		Environmental Total	12.764	(7.658)	5.106
	Growth & Economy	AD Econ Regen	0.112	-	0.112
		Bicester Regen Programme	0.673	(0.625)	0.048
		Economic Dev	0.575	(0.189)	0.386
		Growth and Economy Total	1.360	(0.814)	0.546
	Planning & Development	Building Control	0.515	(0.448)	0.067
		Conservation	0.161	-	0.161
		Development Control	2.652	(2.054)	0.598
		Planning Policy	1.163	(0.100)	1.063
		Planning and Development Total	4.492	(2.603)	1.890
	Regulatory	Enforcement	0.287	(0.035)	0.251
		Environment Health Licensing	1.201	(0.173)	1.028
		Licensing	0.274	(0.403)	(0.129)
	Regulatory Total	1.762	(0.611)	1.151	
Communities Total			20.378	(11.685)	8.693
Resources	Finance	Finance	2.360	(0.072)	2.287
		Fraud Team	0.068	-	0.068
		Revenue and Benefits	27.155	(26.207)	0.948
			Finance Total	29.582	(26.279)
	Legal & Democratic	Civic Ceremonies	0.003	-	0.003
		Democratic	0.674	-	0.674
		Elections	0.230	(0.006)	0.224
		Legal	1.133	(0.075)	1.058
		Legal and Democratic Total	2.040	(0.081)	1.959
	ICT	Information Technology	1.621	(0.095)	1.526
			ICT Total	1.621	(0.095)
	Property	Property	2.373	(2.601)	(0.228)
		Castle Quay Development	2.143	(3.606)	(1.463)
		Property Total	4.516	(6.207)	(1.691)
Resources Total			37.760	(32.662)	5.097
Services Sub-total			68.632	(49.382)	19.250
Corporate Costs	Corporate Costs	Corporate Costs	12.067	(8.372)	3.695
			Corporate Costs Total	12.067	(8.372)
		Corporate Costs Total	12.067	(8.372)	3.695
Policy Contingency	Policy Contingency	Policy Contingency	5.229	-	5.229
			Policy Contingency Total	5.229	-
		Policy Contingency Total	5.229	-	5.229
Net Cost of Services			85.928	(57.755)	28.174

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Appendix 13 - Government Grants Income

Directorate	Grant Name	£m
Chief Executive	Homeless Prevention Grant	(0.490)
	Afghan Resettlement Scheme	(0.058)
	Syrian Refugee Initiative	(0.144)
	Ukrainian Refugees Resettling in the UK	(0.300)
	Chief Executive Total	(0.992)
Communities	UK Shared Prosperity Fund	(0.189)
	Communities Total	(0.189)
Resources	NNDR Cost of Collection Allowance	(0.231)
	Rent Allowances	(25.103)
	Resources Total	(25.335)
Services Sub-total		(26.516)
Corporate	Funding Guarantee Grant	(2.845)
	Services Grant	(0.148)
	Corporate Total	(2.993)
Cost of Services total		(29.509)
Funding	Business Rates Retained Scheme	(8.644)
	New Homes Bonus	(1.625)
	Revenue Support Grant	(0.132)
	Funding Total	(10.401)
Government Grants Grand Total		(39.910)

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CHERWELL DISTRICT COUNCIL RESERVES POLICY

1. Background

- 1.1. The purpose of this policy is to set out how Cherwell District Council (CDC) will determine and review its overall level of reserves and how it uses them.
- 1.2. Sections 31A and 42A of the Local Government Finance Act 1992 require authorities to have regard to the level of balances and reserves needed for meeting estimated future expenditure when calculating the council tax requirement.
- 1.3. CDC has usable reserves and unusable reserves on its Balance Sheet. The unusable reserves are as a result of accounting adjustments and are not therefore available to spend. This policy will concentrate on usable reserves.

2. General Policy

- 2.1. Usable reserves can be split into the following categories:
 - General Balances
 - Earmarked Reserves
 - Revenue Grant Related Reserves
 - Capital Reserves
- 2.2. CDC maintains usable reserves primarily for the following reasons:
 - The need to put aside sums in case of unexpected or unplanned events or emergencies.
 - To smooth out the impact of payments on the revenue account
 - To cover timing differences such as grant money received in any given year where expenditure takes place in a later year
 - To provide pump prime funding for projects to deliver changes in working practices on an invest to save basis. Any approved use on this basis must include an agreed repayment plan
 - A means of building up funds to meet known or predicted liabilities
- 2.3. Reserves can only be used on a one-off basis which means that their application does not offer a permanent solution to delivering savings or reductions in the level of expenditure.

3. Usable Reserves

3.1. General Balances

- 3.1.1. These are funds that do not have restrictions as to their use. CDC can use them for any purpose within the General Fund. The purpose of general

reserves is to manage the impact of exceptional emergencies and unforeseen events. Without such reserves the potential financial impact of these unforeseen events could cause a financial deficit in the General Fund, which would be severely disruptive to the effective operation of the authority.

3.2. Earmarked Reserves

3.2.1. Earmarked Reserves enable CDC to set aside sums to meet specific future anticipated liabilities. Funds could be set aside for items such as (but not limited to):

- cyclical maintenance,
- cyclical events such as elections,
- income generated that must be spent on specific purposes,
- managing market volatility (e.g. commercial rent)
- insurance.

3.2.2. Earmarked reserves should not be held for a sustained period of time as they are held for a specific purpose¹. Where earmarked reserves are no longer required for their original purpose or are not expected to be spent over the medium term they should be reviewed and a decision made on using for alternative purposes.

3.2.3. In line with financial regulations, where a service has generated a service underspend as part of its day to day running, this should not be requested to be set aside as an earmarked reserve without a specific purpose; it should contribute to the overall benefit of CDC's financial position and the achievement of its corporate objectives.

3.2.4. The request to use earmarked reserves, create new earmarked reserves or contribute to existing earmarked reserves (where not approved as part of the budget) must be approved by the Executive. The allocation of Earmarked Reserves will be made when services can demonstrate that the funding is required for that particular purpose.

3.3. Revenue Grant Related Reserves

3.3.1. These reserves relate to the unused element of grant support for which the conditions of the grant are expected to be met. The reserves will be used to meet future years' expenditure for the service for which the grant was awarded. These reserves are managed by Directors.

3.3.2. CDC holds various Section 106 reserves which were contributed by private companies to improve the local community. The fund must be used for the specific scheme and within the agreed timescale. If funds are not used they need to be returned back to the contributors.

¹ with the exception of insurance reserves held to manage risk for which it is difficult to forecast when they will be called upon

3.3.3. Use of these reserves should be planned as part of the budget setting process. Use of these reserves during the financial year requires approval by the Section 151 Officer.

3.4. Capital Reserves:

3.4.1. These are reserves that have been set aside to finance capital schemes and cannot be used to support revenue expenditure without the consent of the Secretary of State for Local Government. These reserves comprise:

- Capital Receipts Reserve reflects the income received from the disposal of capital assets prior to being used to fund future capital expenditure or for the redemption of debt. Capital receipts cannot be used to fund revenue expenditure except where allowed by statute. CDC will allocate resources from the Capital Receipts Reserve in line with its priorities
- Capital Grants Unapplied reflects the unused element of capital grants or capital contributions awarded to CDC, for which the conditions of the grant support are expected to be met or for which there are no conditions. The reserve will be used to meet future years' capital expenditure in a way which best fits with CDC's priorities.

4. **Determining the Level of General Balances and Earmarked Reserves**

4.1. CDC must maintain sufficient general balances and earmarked reserves to cover the key financial risks and contingencies.

4.2. Section 25 of the Local Government Finance Act 2003 requires that when a local authority is agreeing its annual budget and council tax precept, the Chief Finance Officer must report on the adequacy of the proposed financial reserves

4.3. As part of the budget setting process the Section 151 Officer will consider and assess the level of general balances and earmarked reserves. Consideration will be given to the strategic, operational and financial risks facing CDC.

4.4. Major factors to be considered when evaluating the level of general balances and earmarked reserves, include but are not limited to the following:

Budget Assumptions	Issues to Consider
Inflation and interest rate volatility	The overall financial standing of CDC
Scale of budget gap over the medium term	The trend of CDC's financial management and the robustness of the MTFS – i.e. is it balanced over the medium term and delivered annually?

Savings delivery	Size, scale, complexity and pace of the savings programme and risks around slippage or non-delivery.
The availability of other funds to deal with major contingencies and the adequacy of provisions	The adequacy of CDC's arrangements to cover major unforeseen risks.
Income streams	Volatility in levels of income
Government funding	Political landscape and approach to allocating funding across local government

5. Governance and Review

- 5.1. The Council recognises the need to hold and maintain adequate reserves that meet the needs of the organisation. However, there is an opportunity cost as a result of the Council allocating resources away from other potential uses. It is therefore essential for the Section 151 Officer to regularly review the purpose and level of reserves.
- 5.2. All anticipated use of reserves should be understood and recognised as part of the budget setting process and agreed when Council approves the budget.
- 5.3. Any identified use of, or contribution to, reserves after the budget has been set should be approved by the Executive, or the Section 151 Officer in the case of grant reserves, prior to the budget being changed. Uses should be for specific purposes for which reserves have been set aside and not to address savings non-delivery or budget pressures. Contributions to reserves should be for specific costs expected to be incurred in the future.
- 5.4. The reserves position is reported quarterly as part of the revenue monitoring process. The planned usage of reserves is also included as part of the budget setting process. In addition the level and use of reserves is reported and reviewed during the closedown process.
- 5.5. The reserves policy will be reviewed annually as part of the budget setting process.

6. Use of Reserves Approval

- 6.1. Table 1 below shows the level of approval required to use or contribute to usable reserves.

Table 1 Level of approval required for requested use of or contribution to reserves

Type of Reserves	Level of Approval Required
General Reserves and Balances	Executive*
Earmarked Reserves	Executive*
Revenue and Capital Grant Related Reserves	Section 151 Officer
Capital Reserves**	Executive*

* Unless previously approved by Full Council as part of approval of the budget

** Approval required for contribution from reserves only

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Appendix 15 - General Balances Risk Assessment

Risk	Mitigation	Likelihood	Probability Weighted potential impact
Business Rates Appeals being 1% Greater than current assumptions	Provision has been made for a prudent level of appeals.	15%	0.300
Business Rates Growth Forecasts optimistic	Business rates forecast based on latest intelligence of businesses included on the ratings list.	25%	0.250
Council Tax growth forecasts optimistic	Council tax forecasts are based on planning approvals the Council has given.	25%	0.063
Council Tax Support Claimants greater than budgeted	The taxbase projections have assumed the current level of CTS claimants continues.	25%	0.043
Outcome of the Government Fair Funding Review	The outcome may not be in line with current financial planning assumptions of neutral in real terms. There is potential for both improvements and deterioration. But not expected to take place until 2025/26 at the earliest.	30%	0.000
Inflation runs at higher than rate assumed in MTFS	Budget assumes inflationary impacts.	50%	0.160
Pay Inflation runs at 1% higher than rate assumed	Budget assumes inflationary impact of pay award.	50%	0.125
1% unbudgeted rise in short-term and long-term interest rates	The Council has fixed the long-term borrowing requirements it has. Any new borrowing is for new capital projects	25%	0.063
Delivering the savings programme and identifying future savings.	The Council has scrutinised the savings proposals included within the budget, but anticipate having to identify significant savings in the medium term.	25%	1.625
Reductions in car park income linked to Covid 19	The Council is reviewing its car parking charges as part of the 2023/24 budget with a view to maximising the amount of income it can generate. A reduction in the base income assumptions has also been factored into the budget.	25%	0.100
Commercial Risk	Regular reviews take place of the Council's commercial interests and the latest estimates have been used when setting the budget.	25%	2.000
Loans, Guarantees and Bonds	Regular reviews take place with the companies that loans and guarantess are given to in order to ensure that they are on a stable financial footing.	1%	1.000
Exceeding the 5% Partial Exemption VAT limit	VAT Returns are carried out monthly to HMRC and the VAT position monitored appropriately.	25%	0.100
Total			5.829

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Appendix 16 - Forecast use of earmarked reserves

	Actual Balance 1 April 2022	Forecast Transfer FROM reserves	Forecast Transfer TO Reserves	S151 Review of Reserves	Forecast Balance 1 April 2023	2023/24	2024/25	2025/26	2026/27	2027/28	Expected Balance 1 April 2028
General Balances	(5.950)	0.000	(0.500)	0.000	(6.450)	0.000	0.000	0.000	0.000	0.000	(6.450)
Earmarked Reserves	(23.692)	4.484	(2.977)	(1.264)	(23.449)	(2.381)	(0.191)	(0.684)	(1.161)	0.227	(27.638)
Revenue Grants	(5.628)	2.883	(0.049)	1.264	(1.530)	0.711	0.007	0.007	0.007	0.007	(0.792)
Capital Reserves	(8.049)	2.918	0.000	0.000	(5.131)	4.250	0.000	0.000	0.000	0.000	(0.881)
Sub-TOTAL RESERVES	(43.318)	10.284	(3.527)	0.000	(36.560)	2.581	(0.184)	(0.677)	(1.154)	0.234	(35.761)
Revenue Grants relating to cashflow timing	(10.587)	10.324	0.000	0.000	(0.263)	0.000	0.000	0.000	0.000	0.000	(0.263)
TOTAL RESERVES	(53.905)	20.608	(3.527)	0.000	(36.823)	2.581	(0.184)	(0.677)	(1.154)	0.234	(36.024)

Appendix 16 - Forecast use of earmarked reserves

		Opening	Forecast 22/23			Closing	Forecast use over MTFS Period					Forecast Balance at end of Period
Title	Owner	Actual Closing Balance 31 March 2022	Transfer FROM Reserve 2022/23	Transfer TO Reserve 2022/23	S151 Review of Reserves	Forecast Closing Balance as at 31 March 2023	2023/24	2024/25	2025/26	2026/27	2027/28	
General Balances												
General Fund Balance	Michael Furness	(5.950)	-	(0.500)	-	(6.450)	-	-	-	-	-	(6.450)
Earmarked Reserves												
Building Control	Ian Boll	(0.024)	0.024	-	-	-	-	-	-	-	-	-
Country Park Reserve	Ian Boll	(0.100)	0.075	-	-	(0.025)	0.025	-	-	-	-	(0.000)
Elections	Yvonne Rees	(0.208)	0.138	-	-	(0.070)	-	-	-	-	-	(0.070)
Licensing	Ian Boll	(0.161)	0.040	-	-	(0.121)	0.070	-	-	-	-	(0.051)
Local Plan Charges	Ian Boll	(0.343)	0.140	-	-	(0.203)	0.100	-	-	-	-	(0.103)
Planning Control	Ian Boll	(0.259)	0.050	-	-	(0.209)	-	(0.050)	-	-	-	(0.259)
Pensions Deficit	Michael Furness	(1.729)	-	(1.675)	(0.701)	(4.105)	0.252	0.252	0.252	0.252	0.252	(2.845)
Bicester reserve	Ian Boll	(0.148)	-	-	-	(0.148)	-	-	-	-	-	(0.148)
Transformation Reserve	Yvonne Rees	(3.796)	0.335	-	1.461	(2.000)	-	-	-	-	-	(2.000)
Health & Safety - Public Food	Ian Boll	(0.060)	0.050	-	-	(0.010)	-	-	-	-	-	(0.010)
Bicester Depot	Ian Boll	(0.015)	0.015	-	-	-	-	-	-	-	-	-
Cherwell Lottery - Revenue	Yvonne Rees	(0.018)	0.018	-	-	-	-	-	-	-	-	-
Dilapidations	Stephen Hinds	(0.450)	0.175	-	-	(0.275)	(0.025)	(0.025)	(0.025)	(0.025)	(0.025)	(0.400)
Capital Reserve	Michael Furness	(3.277)	1.200	-	(0.423)	(2.500)	(0.500)	-	-	-	-	(3.000)
Projects	Michael Furness	(3.185)	0.362	(1.036)	(0.087)	(3.945)	0.045	-	-	-	-	(3.900)
Transformation Implementation Reserve	Michael Furness	(0.828)	-	(0.250)	(0.922)	(2.000)	(2.386)	-	-	-	-	(4.386)
Market Risk Reserve	Michael Furness	(4.404)	-	-	(0.592)	(4.996)	-	(0.462)	(0.916)	(1.388)	-	(7.762)
Growth Deal	Ian Boll	(0.555)	0.204	-	-	(0.351)	-	-	-	-	-	(0.351)
M&S Surrender Premium	Michael Furness	(3.500)	1.598	-	-	(1.902)	-	-	-	-	-	(1.902)

Appendix 16 - Forecast use of earmarked reserves

		Opening	Forecast 22/23			Closing	Forecast use over MTFS Period					Forecast Balance at end of Period
Title	Owner	Actual Closing Balance 31 March 2022	Transfer FROM Reserve 2022/23	Transfer TO Reserve 2022/23	S151 Review of Reserves	Forecast Closing Balance as at 31 March 2023	2023/24	2024/25	2025/26	2026/27	2027/28	
DOVECOTE MILCOMBE	Ian Boll	(0.032)	-	-	-	(0.032)	-	-	-	-	-	(0.032)
Bicester Youth Bus	Yvonne Rees	(0.030)	0.010	-	-	(0.020)	0.008	0.008	0.005	-	-	0.000
Sport and Physical Activities	Yvonne Rees	(0.055)	-	-	-	(0.055)	-	0.055	-	-	-	-
Courtyard Youth Arts	Yvonne Rees	(0.009)	0.003	-	-	(0.006)	0.003	0.003	-	-	-	0.000
Housing Reserve	Yvonne Rees	(0.322)	-	-	-	(0.322)	-	-	-	-	-	(0.322)
Home Improvement Agency	Yvonne Rees	(0.100)	0.021	-	-	(0.079)	0.028	0.029	-	-	-	(0.022)
Heat Network Delivery	Ian Boll	(0.010)	0.027	(0.017)	-	0.000	-	-	-	-	-	0.000
Admin for Council Tax rebate Scheme	Michael Furness	(0.069)	-	-	-	(0.069)	-	-	-	-	-	(0.069)
Public Food Safety	Ian Boll	(0.005)	-	-	-	(0.005)	-	-	-	-	-	(0.005)
Revenue Grants												
S31 Reserve	Michael Furness	(10.587)	10.324	-	-	(0.263)	-	-	-	-	-	(0.263)
Covid 19 Reserve	Michael Furness	(1.616)	0.352	-	1.264	-	-	-	-	-	-	-
COMF - general allocation remainder of £913k	Yvonne Rees	(0.683)	0.683	-	-	-	-	-	-	-	-	-
COMF - Targeted Comms	Yvonne Rees	(0.009)	0.009	-	-	-	-	-	-	-	-	-
COMF - Wellbeing	Yvonne Rees	(0.025)	0.025	-	-	-	-	-	-	-	-	-
COMF Active Travel Dr Bike	Yvonne Rees	-	-	-	-	-	-	-	-	-	-	-
COMF COVID Compliance	Yvonne Rees	(0.119)	0.119	-	-	-	-	-	-	-	-	-
COMF Enable Covid safe exercise in banbury	Yvonne Rees	(0.022)	0.022	-	-	-	-	-	-	-	-	-
COMF Support for SMEs	Yvonne Rees	(0.028)	0.028	-	-	-	-	-	-	-	-	-
COMF tenancy support	Yvonne Rees	(0.021)	0.021	-	-	-	-	-	-	-	-	-
Community Dev't grant Admin - Emergency Assistance	Yvonne Rees	(0.093)	0.093	-	-	-	-	-	-	-	-	-
Family Physical Activity Opportunities	Yvonne Rees	(0.042)	0.042	-	-	-	-	-	-	-	-	-
Garden Community Capacity Funding	Ian Boll	(0.125)	0.042	-	-	(0.083)	-	-	-	-	-	(0.083)
National Leisure Recovery Fund	Yvonne Rees	-	0.040	(0.040)	-	-	-	-	-	-	-	-

Appendix 16 - Forecast use of earmarked reserves

		Opening	Forecast 22/23			Closing	Forecast use over MTFS Period					Forecast Balance at end of Period
Title	Owner	Actual Closing Balance 31 March 2022	Transfer FROM Reserve 2022/23	Transfer TO Reserve 2022/23	S151 Review of Reserves	Forecast Closing Balance as at 31 March 2023	2023/24	2024/25	2025/26	2026/27	2027/28	
Next Steps Accommodation Programme	Yvonne Rees	(0.008)	0.017	(0.009)	-	0.000	-	-	-	-	-	0.000
SPARK	Yvonne Rees	(0.029)	0.015	-	-	(0.015)	0.015	-	-	-	-	(0.000)
Wayfinding Scheme	Yvonne Rees	(0.025)	0.025	-	-	-	-	-	-	-	-	-
Rough Sleep Initiative	Yvonne Rees	(0.067)	0.067	-	-	-	-	-	-	-	-	-
Eco Town Revenue	Ian Boll	(0.004)	-	-	-	(0.004)	-	-	-	-	-	(0.004)
Flood Recovery Grant	Ian Boll	(0.040)	-	-	-	(0.040)	-	-	-	-	-	(0.040)
Homelessness Prevention	Yvonne Rees	(0.932)	0.760	-	-	(0.172)	0.065	-	-	-	-	(0.107)
Police & Crime Commissioner	Ian Boll	(0.064)	-	-	-	(0.064)	-	-	-	-	-	(0.064)
Green Deal Pioneer Places	Ian Boll	(0.067)	-	-	-	(0.067)	-	-	-	-	-	(0.067)
Bicester Garden Town	Ian Boll	(1.290)	0.488	-	-	(0.802)	0.625	-	-	-	-	(0.177)
Bicester Village Roundabout	Ian Boll	(0.202)	-	-	-	(0.202)	0.007	0.007	0.007	0.007	0.007	(0.168)
Redmond Review Implementation Grant	Michael Furness	(0.021)	0.021	-	-	-	-	-	-	-	-	-
North Oxfordshire Schools Sports partnership	Yvonne Rees	(0.015)	0.015	-	-	-	-	-	-	-	-	-
Hanwell Fields S106 funding revenue	Ian Boll	(0.081)	-	-	-	(0.081)	-	-	-	-	-	(0.081)
Capital Reserves												
Disabled Facilities Grants	Yvonne Rees	(0.104)	-	-	-	(0.104)	-	-	-	-	-	(0.104)
Capital Receipts Reserve	Michael Furness	(0.100)	-	-	-	(0.100)	-	-	-	-	-	(0.100)
Cherwell Local Lottery - Play Well in Cherwell	Yvonne Rees	(0.165)	-	-	-	(0.165)	-	-	-	-	-	(0.165)
Capital Grants & Contributions	Michael Furness	(7.633)	2.918	-	-	(4.715)	4.250	-	-	-	-	(0.465)
Hanwell Fields S106 funding capital	Ian Boll	(0.046)	-	-	-	(0.046)	-	-	-	-	-	(0.046)
		(53.905)	20.608	(3.527)	0.000	(36.823)	2.581	(0.184)	(0.677)	(1.154)	0.234	(36.024)

Capital Bids - 2023/24

Appendix 17

Reference	Title	Expenditure (£m)						Funding (£m)			
		23/24	24/25	25/26	26/27	27/28	Total Budget	Grant	S106	Capital Receipt	Balance to be funded by Borrowing
CVEHM232	Computer software upgrade for vehicle management	0.012					0.012				0.012
CVEHM233	Bicester Depot Building	2.775	1.200				3.975			(0.750)	3.225
CENVC231	Investing in Additional commercial waste containers		0.025	0.025			0.050				0.050
CENVC232	New Commercial Waste IT System	0.025					0.025				0.025
CBICR231	Transforming the Market Square in Bicester (as part of the Reimaging Bicester Outline Plan)	1.000	3.250				4.250	(4.250)			0.000
CECON231	UK Shared Prosperity Fund (UK SPF) Year Two Investment Plan programme	0.117	0.162				0.279	(0.279)			0.000
CECON233	UKSPF Rural Fund	0.132	0.395				0.527	(0.527)			0.000
Communities Total		4.061	5.032	0.025	0.000	0.000	9.118	(5.056)	0.000	(0.750)	3.312
CGRAN231	DFG Funding	1.239	1.239	1.239	1.239	1.239	6.195	(6.195)			0.000
CCRAR231	S106 Capital Projects	1.673					1.673		(1.673)		0.000
CLEIS231	Inspection and treatment of the structural beams in the main Pool Hall at Spiceball leisure centre		0.100				0.100				0.100
CLEIS232	Replacement of the Sports Hall Roof at Bicester Leisure Centre		0.045				0.045				0.045
CLEIS233	Replacement of 3G Pitch Surface at Bicester Leisure Centre		0.050				0.050				0.050
Chief Executive Total		2.912	1.434	1.239	1.239	1.239	8.063	(6.195)	(1.673)	0.000	0.195
CITBS231	Digital Strategy	0.350					0.350				0.350
CPCAP231	Spiceball Sports Centre - Solar PV Car Ports	0.180					0.180				0.180
CPCAP232	Kidlington Sports Centre - Solar PV Car Ports	0.137					0.137				0.137
CPCAP233	North Oxforshire Academy - Solar Panels	0.018					0.018				0.018
CPCAP234	Community Centres Solar Panels	0.108					0.108				0.108
CPCAP235	Thorpe Lane - Solar Panels	0.034					0.034				0.034
CPCAP236	Thorpe Lane - Heater Replacement (Gas to Electric)	0.028					0.028				0.028
Resources Total		0.855	0.000	0.000	0.000	0.000	0.855	0.000	0.000	0.000	0.855
TOTAL New Capital Bids		7.828	6.466	1.264	1.239	1.239	18.036	(11.251)	(1.673)	(0.750)	4.362

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Key	Corporate Priority
C	Healthy, resilient and engaged communities
EC	An enterprising economy with strong and vibrant
ES	Supporting environmental sustainability
H	Housing that meets your needs
SS	Running the business - support service

Project Description	Year of Approval	Corporate Priority	Budgeted Expenditure (£m)									Funding (£m)				
			Projected Re-profiling	2023/24 Planned	2023/24 Total	2024/25	2025/26	2026/27	2027/28	Future Years' Committed	Total Future Spend	Grant	S106	Capital Receipt	Reserves	Balance to be funded by Borrowing
Discretionary Grants Domestic Properties	Annual	H	0.108	0.150	0.258	0.150	0.150	0.150	0.150		0.858					0.858
North Oxfordshire Academy Astroturf	2016/17	C	0.133		0.133						0.133					0.133
Bicester Leisure Centre Extension	2013/14	C	0.023		0.023						0.023					0.023
Longford Park Art	2022/23	C	0.043		0.043						0.043					0.043
DFG Funding	2023/24	H		1.239	1.239	1.239	1.239	1.239	1.239		6.195	(6.195)				0.000
S106 Capital Projects	2023/24	C	1.310	1.673	2.983						2.983		(2.983)			0.000
Inspection and treatment of the structural beams in the main Pool Hall at Spiceball leisure centre	2023/24	C			-	0.100					0.100					0.100
Replacement of the Sports Hall Roof at Bicester Leisure Centre	2023/24	C			-	0.045					0.045					0.045
Replacement of 3G Pitch Surface at Bicester Leisure Centre	2023/24	C			-	0.050					0.050					0.050
Wellbeing & Community Total			1.617	3.062	4.679	1.584	1.389	1.389	1.389	0.000	10.430	(6.195)	(2.983)	0.000	0.000	1.252
iTrent HR System Upgrades	2022/23	SS		0.030	0.030	0.030	0.030	0.030			0.120					0.120
HR & OD Total			0.000	0.030	0.030	0.030	0.030	0.030	0.000	0.000	0.120	0.000	0.000	0.000	0.000	0.120
Chief Executive Total			1.617	3.092	4.709	1.614	1.419	1.419	1.389	0.000	10.550	(6.195)	(2.983)	0.000	0.000	1.372
Castle Quay 1	2017/18	EC	1.052		1.052						1.052					1.052
Castle Quay 2	2017/18	EC	0.500		0.500						0.500					0.500
Housing & IT Asset System joint CDC/OCC	2018/19	SS	0.006		0.006						0.006					0.006
Bicester East Community Centre	2021/22	C	0.500	0.027	0.527						0.527		(0.425)			0.102
Banbury Museum Pedestrian Bridge	2021/22	EC	0.003		0.003						0.003					0.003
Retained Land	2021/22	EC	0.120		0.120						0.120					0.120
Fairway Flats Refurbishment	2021/22	H	0.362		0.362						0.362					0.362
Affordable Housing	2021/22	H	1.100		1.100						1.100					1.100

Key	Corporate Priority
C	Healthy, resilient and engaged communities
EC	An enterprising economy with strong and vibrant
ES	Supporting environmental sustainability
H	Housing that meets your needs
SS	Running the business - support service

Project Description	Year of Approval	Corp orate Pri ority	Budgeted Expenditure (£m)								Funding (£m)						
			Projected Re- profiling	2023/24 Planned	2023/24 Total	2024/25	2025/26	2026/27	2027/28	Future Years' Committed	Total Future Spend	Grant	S106	Capital Receipt	Reserves	Balance to be funded by Borrowing	
Build Team Essential Repairs & Improvements	2020/21	H	0.149		0.149							0.149					0.149
Kidlington Leisure New Electrical Main	2022/23	ES	0.033		0.033							0.033					0.033
Spiceball Sports Centre - Solar PV Car Ports	2023/24	ES		0.180	0.180							0.180					0.180
Kidlington Sports Centre - Solar PV Car Ports	2023/24	ES		0.137	0.137							0.137					0.137
North Oxfordshire Academy - Solar Panels	2023/24	ES		0.018	0.018							0.018					0.018
Community Centres Solar Panels	2023/24	ES		0.108	0.108							0.108					0.108
Thorpe Lane - Solar Panels	2023/24	ES		0.034	0.034							0.034					0.034
Thorpe Lane - Heater Replacement (Gas to Electric)	2023/24	ES		0.028	0.028							0.028					0.028
Property Total			3.825	0.532	4.357	0.000	0.000	0.000	0.000	0.000	0.000	4.357	0.000	0.000	(0.425)	0.000	3.932
Finance Total			-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Council Website & Digital Service	2021/22	SS	0.085		0.085							0.085					0.085
Digital Strategy	2023/24	SS		0.350	0.350							0.350					0.350
ICT Total			0.085	0.350	0.435	0.000	0.000	0.000	0.000	0.000	0.000	0.435	0.000	0.000	0.000	0.000	0.435
Resources Total			3.910	0.882	4.792	0.000	0.000	0.000	0.000	0.000	0.000	4.792	0.000	0.000	(0.425)	0.000	4.367
East West Railways	2015/16	EC		0.020	0.020	0.020	0.020	0.020			4.189	4.269					4.269
Bicester Library (phase 1b)	2015/16	EC			-							0.000			(0.200)		(0.200)
Transforming the Market Square in Bicester (as part of the Reimaging Bicester Outline Plan)	2023/24	EC		1.000	1.000	3.250						4.250	(4.250)				0.000
UK Shared Prosperity Fund (UK SPF) Year Two Investment Plan programme	2023/24	EC		0.117	0.117	0.162						0.279	(0.279)				0.000
UKSPF Rural Fund	2023/24	EC		0.132	0.132	0.395						0.527	(0.527)				0.000
Growth & Economy Total			0.000	1.269	1.269	3.827	0.020	0.020	0.000	4.189	9.325	(5.056)	0.000	(0.200)	0.000	0.000	4.069

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Key	Corporate Priority
C	Healthy, resilient and engaged communities
EC	An enterprising economy with strong and vibrant
ES	Supporting environmental sustainability
H	Housing that meets your needs
SS	Running the business - support service

Project Description	Year of Approval	Corporate Priority	Budgeted Expenditure (£m)								Funding (£m)						
			Projected Re-profiling	2023/24 Planned	2023/24 Total	2024/25	2025/26	2026/27	2027/28	Future Years' Committed	Total Future Spend	Grant	S106	Capital Receipt	Reserves	Balance to be funded by Borrowing	
Off Road Parking	2011/12	ES	0.018		0.018							0.018					0.018
Vehicle Replacement Programme	Annual	ES	0.566	1.102	1.668	1.916	0.926	1.000	1.400			6.910					6.910
Commercial Waste Containers	2019/20	ES		0.025	0.025							0.025					0.025
On Street Recycling Bins	2019/20	ES	0.018		0.018							0.018					0.018
Street Scene Furniture and Fencing project	2020/21	ES	0.024	0.012	0.036	0.012						0.048					0.048
Depot Fuel System Renewal	2020/21	SS	0.035		0.035							0.035					0.035
Burnehull- Bicester Country Park	2020/21	ES	0.100		0.100							0.100					0.100
Additional Commercial Waste Containers	2022/23	ES		0.010	0.010							0.010					0.010
Market Equipment Replacement	2022/23	ES	0.010		0.010							0.010					0.010
Computer software upgrade for vehicle management	2023/24	SS		0.012	0.012							0.012					0.012
Bicester Depot Building	2023/24	SS		2.775	2.775	1.200						3.975			(0.750)		3.225
Investing in Additional commercial waste containers	2023/24	SS			-	0.025	0.025					0.050					0.050
New Commercial Waste IT System	2023/24	SS		0.025	0.025							0.025					0.025
Environmental Total			0.771	3.961	4.732	3.153	0.951	1.000	1.400	0.000	11.236	0.000	0.000	(0.750)	0.000	10.486	
Regulatory Total			-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Communities Total			0.771	5.230	6.001	6.980	0.971	1.020	1.400	4.189	20.561	(5.056)	0.000	(0.950)	0.000	14.555	
Total Capital Programme			6.298	9.204	15.502	8.594	2.390	2.439	2.789	4.189	35.903	(11.251)	(2.983)	(1.375)	0.000	20.294	

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Cherwell District Council

Capital and Investment Strategy 2023/24

A. Capital Strategy (Including Minimum Revenue Provision (MRP) Statement)

A1. Introduction

- A1.1. The Prudential Code for Capital Finance sets out that to demonstrate that the authority takes capital expenditure and investment decisions in line with service objectives and properly takes account of stewardship, value for money, prudence, sustainability and affordability, authorities should have in place a capital strategy. The capital strategy should set out the long-term context in which capital expenditure and investment decisions are made and gives due consideration to both risk and reward and impact on the achievement of priority outcomes. The Strategy must be approved by full Council.
- A1.2. The objectives of the Prudential Code are to ensure that the capital expenditure plans of local authorities are affordable, prudent, and sustainable and that treasury management decisions are taken in accordance with good professional practice and in full understanding of the risks involved. This strategy should be read alongside and in conjunction with the Treasury Management Strategy and the Investment Strategy.

A2. Capital Expenditure and Financing

- A2.1. Capital expenditure is where the Council spends money on assets, such as property or vehicles, which will be used for more than one year¹. In local government this includes spending on assets owned by other bodies, and loans and grants to other bodies enabling them to buy assets. The Council has some limited discretion on what counts as capital expenditure, for example assets costing below £10,000 are not capitalised and are charged to revenue in year. In 2023/24, the Council is planning capital expenditure of £15.5m as summarised below:

Table 1: Prudential Indicator: Estimates of Capital Expenditure in £ millions

	2021/22 actual	2022/23 forecast	2023/24 budget	2024/25 budget	2025/26 budget
Services	14.0	1.0	0.0	0.0	0.0
Capital investments	25.1	17.3	15.5	8.6	2.4
TOTAL	39.1	18.3	15.5	8.6	2.4

- A2.2. The main capital projects across the period include the Vehicle Replacement Programme, East West Railways, and the new Bicester Depot.

¹ For details of the Council's policy on capitalisation, see Financial Regulations

Governance

- A2.3. Capital project bids linked to corporate or service priorities plus essential need are brought forward by Service Managers as part of the Budget & Business Planning process. These are considered by the senior officer leadership team, both in terms of priority and affordability. The Finance team undertake a calculation of the financing cost of proposals and recommend the level of investment based on affordability. Projects proposed to be included in the Council's capital programme are then considered and appraised by the Budget Planning Committee and provide comments to the Executive on the proposals. The Executive then, taking into consideration any comments, propose which schemes to include in the Capital Programme ahead of the final capital programme being proposed to Council in February each year.

Table 2: Estimates of Capital Expenditure in line with the Council's corporate priorities in £ millions

	2021/22 actual	2022/23 forecast	2023/24 budget	2024/25 budget	2025/26 budget
Healthy, resilient, and engaged communities	0.5	1.8	3.7	0.2	0.0
An enterprising economy with strong and vibrant local centres	15.0	4.7	2.9	3.8	0.0
Supporting environmental sustainability	4.5	4.4	2.4	1.9	0.9
Housing that meets your needs	18.5	3.3	3.1	1.4	1.4
Support Services	0.7	4.1	3.3	1.3	0.1
Total Capital Spend	39.1	18.3	15.5	8.6	2.4

- A2.4. All capital expenditure must be financed, either from external sources (government grants and other contributions), the Council's own resources (revenue, reserves, and capital receipts) or debt (borrowing, leasing, and Private Finance Initiatives). The planned financing of the above expenditure is as follows

Table 3: Capital financing in £ millions

	2021/22 actual	2022/23 forecast	2023/24 budget	2024/25 budget	2025/26 budget
External sources	11.3	4.7	5.5	5.0	1.2
Own resources	1.3	7.1	0.2	1.2	0.0
Revenue resources	3.0	0.0	0.0	0.0	0.0
Debt	23.5	6.5	9.8	2.4	1.2
TOTAL	39.1	18.3	15.5	8.6	2.4

- A2.5. Debt is only a temporary source of finance, since loans and leases must be repaid, and this is, therefore, replaced over time by other financing, usually from revenue which is known as Minimum Revenue Provision (MRP). In addition, proceeds from selling capital assets (known as capital receipts) may be used to replace debt finance. Planned MRP and use of capital receipts are as follows:

Table 4: Replacement of debt finance in £ millions

	2021/22 actual	2022/23 forecast	2023/24 budget	2024/25 budget	2025/26 budget
MRP	1.6	5.2	5.6	5.7	5.9

The Council's minimum revenue provision (MRP) statement is included at Appendix A below.

- A2.6. The Council's cumulative outstanding amount of debt finance is measured by the capital financing requirement (CFR). This increases with new debt-financed capital expenditure and reduces with MRP and capital receipts used to replace debt. The CFR is expected to increase by £4.2m during 2023/24.

Based on the above figures for expenditure and financing, the Council's estimated CFR is as follows:

Table 5: Prudential Indicator: Estimates of Capital Financing Requirement in £ millions

	2021/22 actual	2022/23 forecast	2023/24 budget	2024/25 budget	2025/26 budget
TOTAL CFR	250.2	251.5	255.7	252.4	247.6

Asset management

- A2.7. To ensure that capital assets continue to be of long-term use, the Council has a property management strategy in place. This is a multi-level approach structured as follows:
- At a tenancy level the Comprehensive Asset Register (a database of key lease events) is being updated and used to identify forthcoming lease events such as expiries, rent reviews and breaks. These are allocated to specific asset managers to progress whose work schedules are reviewed periodically.
 - At a property level this can comprise the preparation of asset specific management plans which are then subject to periodic review and updating. This process is ongoing and informs the portfolio strategy as a whole.

Asset Disposals

- A2.8. When a capital asset is no longer needed, it may be sold so that the proceeds, known as capital receipts, can be spent on new assets or to repay debt. The Council is currently also permitted to spend capital receipts on service transformation projects until 2024/25. In addition, there are currently no plans to utilise capital receipts on services transformation projects for 2023/24. Receipts from capital grants, loan repayments and investments also generate capital receipts

A3. Treasury Management

- A3.1. Treasury management is concerned with the management of the local authority's investments and cash flows, its banking, money market and capital market transactions; the effective control of the risks associated with those activities; and the pursuit of optimum performance consistent with those risks.

Surplus cash is invested until required, while a shortage of cash will be met by borrowing, to avoid excessive credit balances or overdrafts in the bank current account. The Council typically has surplus cash in the short-term as revenue income is received before it is spent, but insufficient cash in the long-term as capital expenditure is incurred before being financed. The revenue cash surpluses are offset against capital cash shortfalls to reduce overall borrowing. At 30 September 2022 the Council had borrowings of £230m at an average interest rate of 1.72%, and £101m of investments at an average interest rate of 1.97%. The borrowing position is reported regularly to Accounts, Audit & Risk Committee as part of the Treasury Management reports.

Borrowing Strategy

- A3.2. The Council's main objective when borrowing is to achieve a low but certain cost of finance while retaining flexibility should plans change in future. To meet this objective the Council must review the current market conditions alongside the long-term forecasts from Link to determine how to structure borrowings. Short term loans, which usually have lower interest rates and offer excellent flexibility, are suitable for stable market conditions or when interest rates are forecast to fall. Medium to long term loans offer a certain cost of finance but are generally more expensive and inflexible. The Council must therefore seek to strike a balance between short and medium to long term loans, to meet its objectives, by anticipating both its borrowing need and the forecast interest rates.
- A3.3. Projected levels of the Council's total outstanding debt (which comprises borrowing and leases) are shown below, compared with the capital financing requirement (see above).

Table 6: Prudential Indicator: Gross Debt and the Capital Financing Requirement in £ millions

	31st March 2022 Actual	31st March 2023 forecast	31st March 2024 forecast	31st March 2025 forecast	31st March 2026 forecast
Debt (incl. PFI & leases)	201.2	207.6	217.5	219.8	221.0
Capital Financing Requirement	250.2	251.5	255.7	252.4	247.6

- A3.4. Statutory guidance is that debt should remain below the capital financing requirement, except in the short-term. As can be seen from table 5 above the Council expects to comply with this in the medium term.

Affordable borrowing limit

- A3.5. The Council is legally obliged to set an affordable borrowing limit (also termed the authorised limit for external debt) each year. In line with statutory guidance, a lower “operational boundary” is also set as a warning level should debt approach the limit.

Table 7: Prudential Indicators: Operational boundary and Authorised limit for external debt in £m

	2022/23 limit	2023/24 limit	2024/25 limit	2025/26 limit
Operational boundary total external debt	290	290	290	290
Authorised limit total external debt	310	310	310	310

Further details on treasury investments can be found in the treasury management strategy.

A4. Commercial Activities

- A4.1. To drive leadership of place within Cherwell, stimulate growth, pursue economic regeneration and helping to return confidence to the local economy through investment and facilitating inward investment, the Council invests in commercial property which may also provide some financial gain and generate income to support the Council’s revenue activities.
- A4.2. From a financial perspective, the Council recognises that commercial investments can be higher risk than treasury investments. The principal risk exposures are listed below together with an outline of how those risks are managed:

Illiquidity:	<p>The Council acknowledges illiquidity as a risk in property and whilst it cannot be avoided the risk is mitigated by the following strategies:</p> <ul style="list-style-type: none"> a) The Council invests across a range of sectors and its assets are diversified in terms of lot size. b) Some of the Council's investments are not what is termed 'Investment Grade', but they are fundable – i.e., if sold they could be suitable for debt backed investors. c) The Council's assets are uncharged. It is often lenders who require assets to be sold and whilst gearing does not increase illiquidity per se, it can expose an owner to greater risk of selling an illiquid asset at an inopportune time.
Tenant default:	<p>The Council's portfolio includes both large national concerns and small local businesses (mainly retail or industrial type tenants). Tenant default risk is managed in two ways:</p> <ul style="list-style-type: none"> a) Tenants are vetted when entering the portfolio either as new tenants when property is let or as replacement tenants when existing tenants assign their leases. It has to be acknowledged that there is less control when a tenant applies for consent to assign, though guarantees may be sought. b) Risk is managed by diversification as only a small proportion of tenants will fail in any given year. c) A commercial risk earmarked reserve is held to meet any shortfall in income which may arise in year due to default.
Obsolescence:	<p>A significant proportion of the Council's portfolio comprises industrial / warehouse buildings and retail assets which have relatively low obsolescence compared to office premises which require significant investment to maintain the landlords fit out specification in line with market demands. Where the Council has offices a sinking / replacement fund is put in place with annual sums collected from tenants to put towards high-cost items such as the replacement of lifts or air conditioning.</p> <p>Where matters of Council policy override commercial concerns, the Council's portfolio is more vulnerable. E.g., where significant outlay may be required on plant and machinery at the end of their useful economic lives. This is considered in the Asset Management plan for each asset.</p>
Capital expenditure	<p>Please see above but also note that the Council aims to let space on Full Repairing terms which makes the tenant either explicitly responsible for maintaining the asset or allows CDC to recover the cost of repairs through the service charge provisions of the relevant lease.</p>

Market risk:	<p>Two key market risks are falling rents in response to declining economic conditions and extended marketing voids when leases end or tenants fail. These risks are mitigated in three main ways:</p> <ol style="list-style-type: none"> 1. Lease lengths should be 3 – 5 years + which obviates most market risks during the period of the tenancy. 2. Longer leases which contain regular rent review provisions normally require the rents to be reviewed in an upwards only direction. 3. Tenant failure – see above under Tenant Default, re: vetting and diversification policies plus earmarked reserves held. <p>An additional risk is over-exposure to town centre retailing as the portfolio's largest assets are Castle Quay Shopping Centre in Banbury and Pioneer Square in Bicester. The risks arising from these investments are managed as part of the Strategic Asset Management plan and Asset Actions Plans for each asset.</p>
Returns eroded by inflation:	<p>Most properties are let on lease terms which contain upwards only rent reviews and some are indexed linked guaranteeing rental growth. Although in general rental levels lag against inflation (both when rising and falling due to reviews or renewals being generally every 3-5 years) rents are historically considered to be more stable with less fluctuations.</p>
Rising interest rates:	<p>The portfolio is ungeared and therefore un-mortgaged.</p>

Governance

- A4.3. Decisions on commercial investments are made by Members and Statutory Officers in line with the criteria and limits approved by Council in the Investment Strategy. Property and most other commercial investments are also capital expenditure and purchases will therefore also be approved as part of the capital programme.

Further details on commercial investments and limits on their use can be found in the Investment Strategy (Section B of this report).

- A4.4. The Council also has commercial activities in trading companies, exposing it to normal commercial risks. These risks are managed by the governance structure in place. The Shareholder Committee is regularly informed of the progress of each company. The Shareholder meets with the directors both formally and informally to ensure there is a consistent dialog between the companies and the council.

A5. Revenue Budget Implications

- A5.1. Although capital expenditure is not charged directly to the revenue budget, interest payable on loans and MRP are charged to revenue. The annual charge is known as financing costs; this is compared to the net revenue stream i.e., the amount funded from Council Tax, business rates and general Government grants.

Table 8: Prudential Indicator: Proportion of financing costs to net revenue stream

	2021/22 actual	2022/23 forecast	2023/24 budget	2024/25 budget	2025/26 budget
Financing costs (£m)	3.8	8.7	9.4	9.4	9.4
Revenue funding (£m)	22.4	23.5	28.2	25.5	14.0
Proportion of net revenue stream	17%	37%	34%	37%	67%

Further details on the revenue implications of capital expenditure are in the 2023/24 revenue budget.

Sustainability

- A5.2. Due to the very long-term nature of capital financing, the revenue budget implications of expenditure incurred in the next few years will extend for up to 50 years into the future, which aligns with the attached MRP Statement. The Section 151 Officer is satisfied that the proposed capital programme is prudent, affordable, and sustainable.

A6. Knowledge and Skills

- A6.1. The Council employs professionally qualified and experienced staff in senior positions with responsibility for making capital expenditure, borrowing and investment decisions. For example, the Section 151 Officer is a qualified accountant with many years' experience. The Council pays for junior staff to study towards relevant professional qualifications including CIPFA and RICS.
- A6.2. Where Council staff do not have the knowledge and skills required, use is made of external advisers and consultants that are specialists in their field.

The Council currently employs Link Group as treasury management advisers and a range of property advisors as follows:

- Banbury based surveyors White Commercial, Wild Property Consultancy and Bankier Sloane provide advice on the local property market, and assistance with new lettings, lease renewals, smaller valuations and rent reviews.
- Where specialist advice is required, the Council will ask for competitive quotes.

- Montagu Evans supply asset management and facilities management in respect of Castle Quay Shopping Centre.
- Avison Young supply specialist accounting services in respect of Castle Quay Shopping Centre and Waterfront.
- Montagu Evans and Colliers both provide property valuation services
- BWD and Jackson Criss assist with Castle Quay lettings
- Gardiner Theobald provide project management, QS, CDM and Design services on Castle Quay Waterfront
- Broomfield Property Consultants Ltd and Prime Project Management Ltd provide services relating to Castle Quay and other property related projects

This approach is more cost effective than employing such staff directly and ensures that the Council has up to date access to market knowledge and skills commensurate with its risk appetite.

Appendix A – Minimum Revenue Provision (MRP) Statement

1. Where the Council finances capital expenditure by debt, it must put aside resources to repay that debt in later years. The amount charged to the revenue budget for the repayment of debt is known as Minimum Revenue Provision (MRP). The Council is required by statute to charge an amount of MRP to the General Fund Revenue account each year for the repayment of debt. The MRP charge is the means by which capital expenditure which has been funded by borrowing is paid for by council tax payers.
2. Legislation requires local authorities to draw up a statement of their policy on the annual MRP, for full approval by Council before the start of the financial year to which the provision will relate.
3. The Council is recommended therefore to approve the following statement:

For unsupported capital expenditure incurred after 31st March 2008, MRP will be determined by charging the expenditure over the expected useful life of the relevant asset in equal instalments, starting in the year after the asset becomes operational. MRP on purchases of freehold land will be charged over 50 years. MRP on expenditure not related to fixed assets but which has been capitalised by regulation or direction will be charged over 20 years unless the Council determines an alternative useful life to be more appropriate whilst continuing to be prudent.
4. For capital expenditure incurred in the provision of loans to third parties, MRP will not be charged until the Department for Levelling Up, Housing and Communities has completed its MRP consultation and published revised guidance. This is expected to be completed and ready for implementation by April 2024. Repayments of loan principal received by the council will be treated as capital receipts and used to reduce the CFR or avoid future additional borrowing, thus reducing future annual MRP charges.
5. Where the Council acquires an asset under a finance lease arrangement, MRP will be charged at an amount equal to the rent paid to reduce the balance sheet liability in year.
6. Capital expenditure incurred during 2023/24 will not be subject to an MRP charge until 2024/25.

B. Investment Strategy 2022/23

B1. Introduction

B1.1. The Council invests its money for three broad purposes:

- because it has surplus cash as a result of its day-to-day activities, for example when income is received in advance of expenditure (known as treasury management investments),
- to support local public services by lending to or buying shares in other organisations (service investments), and
- to deliver against its strategic priorities as outlined in its Business Plan (investments in service and commercial property). Such assets may contribute to the delivery of service objectives and generate commercial income.

B1.2. The investment strategy was a new report introduced for 2019/20, meeting the requirements of statutory guidance issued by the Government in January 2018, and focuses on the second and third of these categories.

B2. Treasury Management Investments

B2.1. The Council typically receives its income in cash (e.g. from taxes and grants) before it pays for its expenditure in cash (e.g. through payroll and invoices). It also holds reserves for future expenditure and collects local taxes on behalf of other local authorities and Central Government. These activities, plus the timing of borrowing decisions, lead to a cash surplus which is invested in accordance with guidance from the Chartered Institute of Public Finance and Accountancy. The balance of treasury management investments is expected to be an average of £11.8m during the 2023/24 financial year.

Contribution

B2.2. The contribution that these investments make to the objectives of the Council is to support effective treasury management activities.

Further details

B2.3. Full details of the Council's policies and its plan for 2023/24 for treasury management investments are covered in a separate document, the treasury management strategy.

B3. Service Investments: Loans

Contribution

B3.1. The Council lends money to its subsidiaries, local parishes, local charities to support local public services and stimulate local economic growth. The main loans

issued are to the council's subsidiaries – the Graven Hill Village companies and Crown House Banbury Ltd. Graven Hill is a housing development providing significant housing in Bicester. Crown House is a redeveloped derelict office building in the centre of Banbury which is providing significant rental opportunities in the town centre.

Security

- B3.2. The main risk when making service loans is that the borrower will be unable to repay the principal lent and/or the interest due. In order to limit this risk, and ensure that total exposure to service loans remains proportionate to the size of the council, upper limits on the outstanding loans to each category of borrower have been set as follows:

Table 1: Loans for service purposes in £ millions

Category of borrower	31.3.2022 actual			2023/24
	Balance	Loss allowance	Net figure in accounts	Approved Limit
Subsidiaries	70.39	(0.90)	69.49	85.90
Parishes	0.08	0.00	0.08	0.10
Local charities/Other	1.10	(0.09)	1.01	1.15
TOTAL	71.57	(0.99)	70.58	87.15

** including accrued interest*

- B3.3. Accounting standards require the Council to set aside loss allowance for loans, reflecting the likelihood of non-payment. The figures for loans in the Council's statement of accounts are shown net of this loss allowance. The Council, however, makes every reasonable effort to collect the full sum lent and has appropriate credit control arrangements in place to recover overdue repayments.

Risk assessment

- B3.4. The Council assesses the risk of loss before entering into and whilst holding service loans by approaching each loan request individually. The bulk of the council's loans are to its subsidiaries. When the council considers whether or not to create or acquire a subsidiary a full business case is prepared which sets out the optimal financing of the company. This will include an assessment of the market in which it will be competing, the nature and level of competition, how that market may evolve over time, exit strategy and any ongoing investment requirements. External advisors are used where appropriate to complement officer expertise and second opinions from alternate advisors is sought in order to monitor and maintain the quality of advice provided by external advisors.
- B3.5. Other service loans are evaluated against a set of criteria designed to demonstrate:
- Evidence of project objectives and needs analysis is provided

- The loan must have a demonstrable community impact
- The loan would provide up to 50% of the whole project cost
- Such a loan can only be applied for by constituted voluntary organisations with their own bank account; Town or Parish councils; charitable organisations
- The loan cannot be applied retrospectively
- The applicant has provided evidence of its financial stability and of its ability to manage the proposed scheme.
- Appropriate checks have been carried out on the owners of the organisations to be satisfied as to their integrity and to avoid any potential embarrassment to the Council.
- The applicant has demonstrated that the proposed scheme has been developed following good practice in terms of planning, procurement and financial appraisal.
- The applicant has provided evidence the affordability of their proposed scheme and the loan repayments
- That the project furthers the council's priorities as reflected in its Business Plan

B4. Service Investments: Shares

- B4.1. The council invests in the shares of its subsidiaries to support local public services and stimulate local economic and housing growth. The council currently holds shares in Graven Hill Holding Company Ltd and Crown House Banbury Ltd.
- B4.2. One of the risks of investing in shares is that they can fall in value meaning that the initial outlay may not be recovered. In order to limit this risk, upper limits on the sum invested in each category of shares have been set as follows:

Table 2: Shares held for service purposes in £ millions

Category of company	31.3.2022 actual			2023/24
	Amounts invested	Gains or losses	Value in accounts	Approved Limit
Subsidiaries	35.65	0	35.65	38.26
TOTAL	35.65	0	35.65	38.26

- B4.3. The Council assesses the risk of loss before entering into and whilst holding shares by maintaining close links with the Boards of Directors of the companies through an established Shareholder Committee. Risk is assessed as above in Service Loans.

- B4.4. The maximum periods for which funds may prudently be committed are assessed on a project-by-project basis. The decision will balance both the long-term viability of the subsidiary and the revenue and capital requirements of the Council.
- B4.5. Shares are the only investment type that the council has identified that meets the definition of a non-specified investment in the Government's guidance. The limits above on share investments are therefore also the Council's upper limits on non-specified investments. The council has not adopted any procedures for determining further categories of non-specified investment since none are likely to meet the definition.

B5. Service and Commercial Investments: Property

- B5.1. The Council invests in local commercial and residential property with the intention of regenerating the local economy, and for place shaping which forms a key part of its strategic priorities. The generation of income to support the provision of local public services, whilst a factor, serves as a secondary objective to that of the strategic priorities. The Council's asset portfolio comprises a cross-section of retail, office, and industrial assets together with a health centre which are held to ensure the delivery of services to the local community. Investments made in recent years which the Council continues to hold include:

- Castle Quay, Banbury; a covered shopping centre and newly developed retail complex
- Pioneer Square, Bicester; a modern retail parade of shops
- Franklins House, Bicester; a mixed-use complex comprising offices, hotel, business centre and public library
- Tramway Industrial Estate

- B5.2. These assets are all town centre properties and afford the Council an opportunity to influence the amenity and environment of its two principal strategic centres. Castle Quay will, in particular, allow the development of a new leisure orientated focal point to help revitalise Banbury town centre.

These assets also contribute an aggregate £6.1m gross income to the council's revenue budget.

The major component parts of the asset portfolio are described below:

*Table 3: Investments in Property held for service and commercial purposes in £ millions**

Property	Actual	31.3.2022 Actual			31.3.2023 Expected	31.3.2024 Expected
	Purchase /Development Costs	Net Book Value in accounts 31.3.2021	Expenditure, Gains or (losses)	Net Book Value in accounts 31.3.2022	Net Book Value in accounts	Net Book Value in accounts
Castle Quay Shopping Centre	63.5	21.6	(6.2)	15.4	17.6	18.7
Castle Quay Waterfront, Hotel and Supermarket	66.4	56.4	(24.4)	32.0	33.6	34.1
Pioneer Square	8.2	4.4	(0.3)	4.1	4.1	4.1
Tramway Industrial Estate	9.6	9.3	1.4	10.7	10.7	10.7
Other properties valued under £5m	13.1	10.0	(0.9)	9.1	9.1	9.1
TOTAL	160.8	101.7	(30.4)	71.3	75.1	76.7

*The properties in table 3 are currently held as investment property for the purposes of publication in the Council's financial statements. The categorisation of such assets is reviewed annually to ensure that they meet the criteria for classification in line with the CIFPA Code on Local Authority Accounting.

Security

- B5.3. The Council considers a property investment to be secure where tenant performance, lease duration and property obsolescence are deemed to be at an acceptable level.

Risk assessment

- B5.4. The Council assesses the risk of loss before entering into and whilst holding property investments by cash flow modelling the income and expenditure profile of each investment and interrogating that model across a range of scenarios to test the robustness of the investment. The modelling exercise is informed by the likelihood of tenant default and the chances that individual units will become empty during the hold period.
- B5.5. The property investment market is dynamic, and we are kept abreast of developments by frequent communication and established relationships with local and national agents, supplemented by in-house investigations and reading of published research. The market is, at present, competitive in most asset sectors and our focus is on assets that are local and help to deliver the strategic aims of the Council.
- B5.6. In all acquisitions we take external advice from acknowledged experts in the field and sense-check their input against our in-house knowledge, experience and expertise. The advice sourced covers market value but also, given the purpose of the investment, letting risk, marketability and occupational demand, and likely expenditure over the hold period.

- B5.7. The Council uses a number of local and national advisors and cross reference their views periodically. There is no single party who expects to be instructed by the Council without competition.
- B5.8. Credit ratings are used on acquisitions, new lettings and when tenants request consent to assign their leases. The Council uses D&B ratings as well as reviewing the published accounts of tenants or potential tenants.
- B5.9. A number of other strategies are used to mitigate risk:
- Tenant rent payment histories are analysed on any acquisition.
 - Tenant rent payment patterns and arrears are examined in the existing portfolio.
 - Introducing agents advise the council throughout the acquisition process and their advice includes market commentary at a national and a local level and commentary on perceived risks to the investment.
 - In tandem with the above every acquisition is subject to a third-party RICS Red Book valuation by qualified surveyors who are independent i.e., not acting for the council or the vendor on the acquisition.

Liquidity

- B5.10. Compared with other investment types, property is relatively difficult to sell in order to convert to cash at short notice and can take a considerable period to sell in certain market conditions. To ensure that the invested funds can be accessed when they are needed, for example to repay capital borrowed, the council acknowledges illiquidity as a risk in property and whilst it cannot be avoided the risk is mitigated by the following strategies:
- The Council invests across a diverse range of sectors and lot sizes. This affords the Council the ability to access a range of purchaser types e.g., small local investors, listed property companies or institutions.
 - The Council does not invest in high-risk assets which can be the most illiquid of all other than for the purposes of delivering regeneration which has a different investment objective from pure revenue or capital return.
 - Some of the Council's investments are not what is termed 'Investment Grade', but they are fundable – i.e., if sold they could be suitable for debt backed investors
 - The Council does not invest in specialist properties, where the market tends to be most illiquid.
 - The Council's assets are uncharged. It is often lenders who require assets to be sold and whilst gearing does not increase illiquidity per se, it can expose an owner to greater risk of selling an illiquid asset at an inopportune time.

B6. Loan Commitments and Financial Guarantees

- B6.1. Although not strictly counted as investments, since no money has exchanged hands yet, loan commitments and financial guarantees carry similar risks to the council and are included here for completeness.

The council has contractually committed to the following loan amounts which have yet to be drawn upon (as at 31/3/22)

Table 4: Loan Commitments and Guarantees

Borrower	Purpose	£m Contractually Available
Graven Hill Village Development Company Ltd	Revolving Credit Facility available to the council's subsidiary until 2026	£17m
Graven Hill Village Development Company Ltd	Facility Agreement that has been in place since 2014 to deliver the project.	Nil
Graven Hill Village Development Company Ltd	Loan Note instruments to enable the company to deliver its objectives	Nil
TOTAL		£17m

The Council has also provided bonds and guarantees to the value of £45.34 million to Oxfordshire County Council (OCC) on behalf of Graven Hill Village Development Company Ltd in respect of the Company's obligations to OCC under s.106, s.278 and s.38 agreements.

B7. Capacity, Skills and Culture

Elected members and statutory officers

- B7.1. The majority of senior statutory officers are qualified to degree level and have appropriate professional qualifications. Their shared business experience encompasses both the public and private sectors.

Training and guidance are provided to support members in delivering their roles and support effective decision making.

Commercial Investments

- B7.2. Negotiations are either undertaken directly by Assistant Directors or at a senior level with Assistant Director direct involvement and oversight, alongside input from Directors and Lead Members where required. Assistant Directors are aware of the regulatory regime and convey that to all junior staff.

Corporate governance

- B7.3. There are appropriate corporate governance measures in place which comprise end to end decision making procedures. These include risk assessments within the organisation; presentation to relevant committees including Members, statutory officers' approvals, and relevant project boards. The annual Corporate Investment Strategy provides the reference point against which investment decisions are undertaken.

B8. Investment Indicators

- B8.1. The Council has set the following quantitative indicators to allow elected members and the public to assess the Council's total risk exposure as a result of its investment decisions.

Total risk exposure

- B8.2. The first indicator shows the council's total exposure which includes amounts the council is contractually committed to lend but have yet to be drawn down and guarantees the council has issued over third-party loans. These risks are managed by the Council operating within the Treasury Management, Capital and Investment Strategies and strict governance arrangements around the Council subsidiary Companies.

Table 5: Total investment exposure in £ millions

Total investment exposure	31.03.2022 Actual	31.03.2023 Forecast	31.03.2024 Forecast
Treasury management investments*	52.15	16.97	10.00
Service investments: Loans	71.57	72.11	65.62
Service investments: Shares	35.65	35.65	35.65
Service and Commercial investments: Property**	71.40	75.20	76.80
TOTAL INVESTMENTS	230.77	199.93	188.07
Commitments to lend	11.00	11.00	17.00
TOTAL INVESTMENT EXPOSURE	241.77	210.93	205.07

*The investment forecast for 23/24 includes a forecast loan of £10.57m which may be necessary for the Council to maintain its professional client status with its providers of financial

services. This figure will differ from table 1.3 in the Treasury Management Strategy, as that only takes loans already committed to, into account.

**As per the net book value in Table 3

How investments are funded

Government guidance is that these indicators should include how investments are funded. Since the Authority does not normally associate particular assets with particular liabilities, this guidance is difficult to comply with. However, the following investments could be described as being funded by borrowing. The remainder of the Authority's investments are funded by usable reserves and income received in advance of expenditure.

Table 6: Investments funded by borrowing in £millions

Investments funded by borrowing	31.03.2022 Actual	31.03.2023 Forecast	31.03.2024 Forecast
Service investments: Loans	71.57	72.11	65.62
Service investments: Shares	35.65	35.65	35.65
Service and Commercial investments: Property	139.50	143.32	144.87
TOTAL FUNDED BY BORROWING*	246.72	251.08	246.14

*The total funded by borrowing represents the gross expenditure incurred on service and commercial investments which form part of the Council's CFR. MRP (see capital strategy Appendix A) made to date on these investments has not been included in this total.

Rate of return received

- B8.3. This indicator shows the investment income received less the associated costs, including the cost of borrowing where appropriate, as a proportion of the sum initially invested. Note that due to the complex local government accounting framework, not all recorded gains and losses affect the revenue account in the year they are incurred.

Table 7: Investment rate of return (net of all costs)

Investments net rate of return	2021/22 Actual	2022/23 Forecast	2023/24 Forecast
Treasury management investments	0.11%	1.92%	3.50%
Service investments: Loans	1.5% - 12%	1.5% - 12%	1.5% - 13%
Service and Commercial investments: Property	Variable	Variable	Variable

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Minimum Revenue Provision (MRP) Statement for 2022/23 (Revised)

1. Where the Council finances capital expenditure by debt, it must put aside resources to repay that debt in later years. The amount charged to the revenue budget for the repayment of debt is known as Minimum Revenue Provision (MRP). The Council is required by statute to charge an amount of MRP to the General Fund Revenue account each year for the repayment of debt. The MRP charge is the means by which capital expenditure which has been funded by borrowing is paid for by council tax payers.
2. Legislation requires local authorities to draw up a statement of their policy on the annual MRP, for full approval by Council before the start of the financial year to which the provision will relate.
3. The Council is recommended therefore to approve the following statement:

For unsupported capital expenditure incurred after 31st March 2008, MRP will be determined by charging the expenditure over the expected useful life of the relevant asset in equal instalments, starting in the year after the asset becomes operational. MRP on purchases of freehold land will be charged over 50 years. MRP on expenditure not related to fixed assets but which has been capitalised by regulation or direction will be charged over 20 years unless the Council determines an alternative useful life to be more appropriate whilst continuing to be prudent.
4. For capital expenditure incurred in the provision of loans to third parties, MRP will not be charged until the Department for Levelling Up, Housing and Communities has completed its MRP consultation and published revised guidance. This is expected to be completed and ready for implementation by April 2024. Repayments of loan principal received by the council will be treated as capital receipts and used to reduce the CFR or avoid future additional borrowing, thus reducing future annual MRP charges.
5. Where the Council acquires an asset under a finance lease arrangement, MRP will be charged at an amount equal to the rent paid to reduce the balance sheet liability in year.
6. Capital expenditure incurred during 2022/23 will not be subject to an MRP charge until 2023/24.

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Treasury Management Strategy Statement 2023-24

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1. Introduction

The Authority is required to operate a balanced revenue budget, which broadly means that cash raised during the year will meet cash expenditure. Part of the treasury management operation is to ensure that this cash flow is adequately planned, with cash being available when it is needed. Surplus monies are invested in low-risk counterparties or instruments commensurate with the Authority's low risk appetite, providing adequate liquidity initially before considering investment return.

The other main function of the treasury management service is the funding of the Authority's capital plans. These capital plans provide a guide to the borrowing need of the Authority, essentially the longer-term cash flow planning, to ensure that it can meet its capital spending obligations. This management of longer-term cash may involve arranging long or short-term loans or using longer-term cash flow surpluses. On occasion, when it is prudent and economic, any debt previously drawn may be restructured to meet risk or cost objectives.

The revised Treasury Management Code requires all investments and investment income to be attributed to one of the following three purposes: -

Treasury management

Arising from the organisation's cash flows or treasury risk management activity, this type of investment represents balances which are only held until the cash is required for use. Treasury investments may also arise from other treasury risk management activity which seeks to prudently manage the risks, costs or income relating to existing or forecast debt or treasury investments.

Service delivery

Investments held primarily and directly for the delivery of public services including housing, regeneration and local infrastructure. Returns on this category of investment which are funded by borrowing are permitted only in cases where the income is "either related to the financial viability of the project in question or otherwise incidental to the primary purpose".

Commercial return

Investments held primarily for financial return with no treasury management or direct service provision purpose. Risks on such investments should be proportionate to an authority's financial capacity – i.e., that 'plausible losses' could be absorbed in budgets or reserves without unmanageable detriment to local services. An authority must not borrow to invest primarily for financial return.

Investments held for service or commercial purposes are considered in the Capital and Investment Strategy and should be read in conjunction with this strategy.

1.1 Implementations required due to the revised Treasury Management Code

CIPFA published the revised Treasury Management Code and Prudential Code on 20th December 2021. The revised Treasury Management Code requires the Council to have implemented the following: -

1. **Adopt a new liability benchmark treasury indicator** to support the financing risk management of the capital financing requirement, with material differences between the liability benchmark and actual loans to be explained;
2. Amendment to the **knowledge and skills register** for officers and members involved in the treasury management function - to be proportionate to the size and complexity of the treasury management conducted by each authority;
3. **Environmental, social and governance (ESG)** issues addressed

Currently the Authority's strategy is to have regard to the Environmental, Social and Governance ("ESG") risks presented by its Counterparties (where reported.) The Treasury function aims to assess and monitor, not just Environmental but all, ESG factors when selecting investment options. Full assessment is however restricted by the fact that, at the time of writing, there is no agreed rating framework with which to measure and benchmark specific counterparty ESG metrics. Until this is fully resolved, the Council will favour any counterparty that offers 'green' investments as long as all investment criteria as laid out in this strategy are met.

It is important to note that excluding any one counterparty, on social norms or standards, will likely mean others will similarly have to be avoided and thus impact the Authority's capacity to mitigate risk through diversification.

This issue is to be addressed in detail within an authority's Treasury Management Policies and Practices (TMP1) after further investigation and the approach agreed with members.

The Council employs Link Treasury Services Limited as its external treasury management advisor. However, responsibility for treasury management decisions remains with the Council at all times. The latest economic background, credit outlook and interest rate forecast provided by Link is attached at the end of this report.

1.2 Treasury Management Portfolio

The overall treasury management portfolio as at 31.3.22 and for the forecast position as at 31.03.23 are shown below for both borrowing and investments.

TREASURY PORTFOLIO				
	actual	actual	forecast	forecast
	31.3.22	31.3.22	31.3.23	31.3.23
Treasury investments	£000	%	£000	%
Banks	0	0%	0	0%
Building societies - unrated	0	0%	0	0%
Building societies - rated	0	0%	0	0%
Local authorities	24,000	46%	3,000	18%
DMADF (H.M. Treasury)	22,240	43%	0	0%
Money Market Funds	5,913	11%	13,996	82%
Certificates of Deposit	0	0%	0	0%
Total managed in house	52,153	100%	16,996	100%
Bond Funds	0	0%	0	0%
Property Funds	0	0%	0	0%
Total managed externally	0	0%	0	0%
Total treasury investments	52,153	100%	16,996	100%
Treasury external borrowing				
Local Authorities	99,000	50%	22,000	12%
PWLB	100,000	50%	166,000	88%
LOBOs	0	0%	0	0%
Total external borrowing	199,000	100%	188,000	100%
Net treasury investments / (borrowing)	(146,847)	0	(171,004)	-

1.3 Balance sheet summary and forecast

	31.3.22 Actual £m	31.3.23 Estimate £m	31.3.24 Forecast £m	31.3.25 Forecast £m	31.3.26 Forecast £m
General Fund CFR	250.20	251.50	255.70	252.40	247.60
Less: External borrowing **	199.00	188.00	166.00	145.00	139.00
Less: Service Loans and lease liability	1.56	1.55	8.55	20.78	29.38
Internal/(over) borrowing	49.64	61.95	81.15	86.62	79.22
Less: Usable reserves	53.90	36.82	38.47	38.65	39.33
Less: Working capital	47.88	42.11	42.11	42.11	42.11
Investments / (New borrowing required)	52.14	16.98	(0.57)	(5.86)	2.22

** shows only loans to which the council is currently committed. Therefore 'New Borrowing' includes some refinancing of existing debt

The underlying need to borrow for capital purposes is measured by the Capital Financing Requirement (CFR), while usable reserves and working capital are the underlying resources available for investment. The council's current strategy is to maintain borrowing and investments below their underlying levels, sometimes known as internal borrowing.

CIPFA's *Prudential Code for Capital Finance in Local Authorities* recommends that the Council's total debt should be lower than its highest forecast CFR over the next three years. The table above shows that the Council expects to comply with this recommendation.

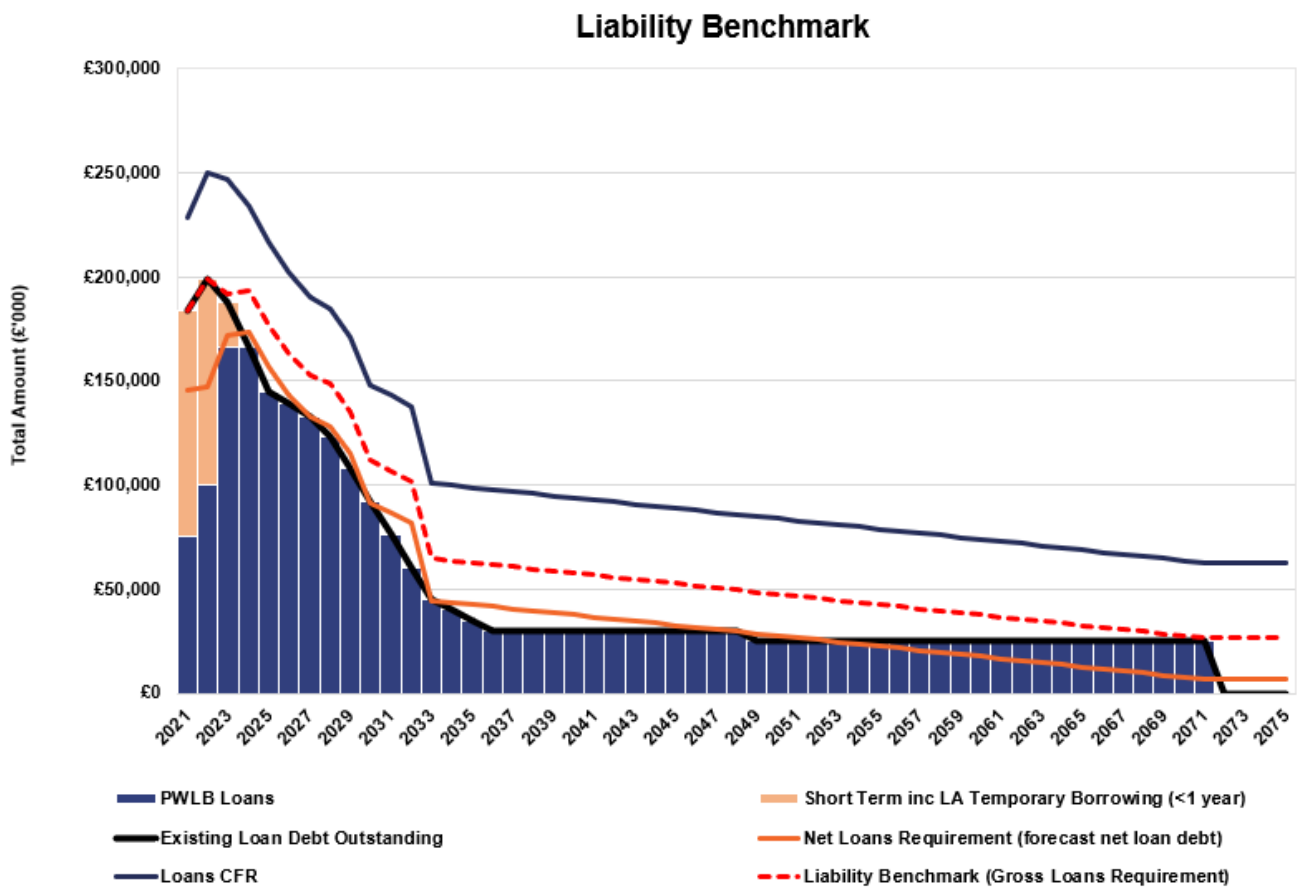
1.4 Liability Benchmark

The Council is pleased to include the Liability Benchmark (LB) as a prudential indicator for 2023/24 in this report. The Authority is required to estimate and measure the LB for the forthcoming financial year and the following two financial years, as a minimum.

There are four components to the LB: -

1. **Existing loan debt outstanding:** the Authority's existing loans that are still outstanding in future years.
2. **Loans CFR:** this is calculated in accordance with the loans CFR definition in the Prudential Code and projected into the future based on approved prudential borrowing and planned Minimum Revenue Provision (MRP.)
3. **Net loans requirement:** this will show the Authority's gross loan debt less treasury management investments at the last financial year-end, projected into the future and based on its approved prudential borrowing, planned MRP and any other major cash flows forecast.

4. **Liability benchmark** (or gross loans requirement): this equals net loans requirement plus short-term liquidity allowance.



The LB graph above demonstrates that the Council is not in an overborrowed position. The difference between net loan requirement and loans CFR is made up of internal borrowing.

1.5 General Balances & Reserves and Expected Investment Balances

Internal borrowing is possible because of the Council’s General Balances and reserves as laid out in the table below. These funds can be used to finance capital expenditure or other budget decisions to support the revenue budget but it is important that there is enough liquidity to ensure that should the funds be called upon that the Council would not be forced to borrow in an unfavourable position.

The other component within this table is working Capital which is made up of a combination of debtors, creditors, long term liabilities and non-capital deferred credits / receipts.

Detailed below are estimates of the year-end balances for each resource and anticipated day-to-day cash flow balances.

Year End Resources	2021/22	2022/23	2023/24	2024/25	2025/26
£m	Actual	Estimate	Estimate	Estimate	Estimate
General Balances	5.95	6.45	6.45	6.45	6.45
Earmarked Reserves	23.69	23.45	25.80	26.00	26.68
Revenue Grants	16.21	1.79	1.09	1.07	1.07
Capital Reserves	8.05	5.13	5.13	5.13	5.13
Total core funds	53.90	36.82	38.47	38.65	39.33
Working capital*	47.88	42.11	42.11	42.11	42.11
Under/(over) borrowing	49.64	61.95	81.15	86.62	79.22
Expected investments	52.14	16.98	(0.57)	(5.86)	2.22

*Working capital balances shown are estimated year-end; these may be higher mid-year

1.6 Treasury Management Indicators

The council measures and manages its exposures to treasury management risks using the following indicators.

Interest rate exposures for both borrowing and investing: This indicator is set to control the council's exposure to interest rate risk. The upper limits on the one-year revenue impact of a 1% rise or a 0.75% fall in interest rates will be:

Interest rate risk indicator	Limit
Upper limit on one-year revenue impact of a 1% rise in interest rates*	± £ 10,000 per £m
Upper limit on one-year revenue impact of a 0.75% fall in interest rates**	£ 88,000

The impact of a change in interest rates is calculated on the assumption that maturing loans and investments will be replaced at current rates.

*This year there is very little interest rate risk as maturing loans have already been refinanced. The interest rate exposure risk would only be applicable to new loans made for Capital purposes. The revenue impact per £m would be a cost for new loans while it could also be an increase in revenue for investments.

** The loss of revenue has been calculated based on a 0.75% decrease in the interest rate for the investment forecast for 23/24 in the budget. There is also an opportunity to save on borrowing should the interest rate fall but as there is no planned borrowing in the budget for 23/24 no limit has been provided.

Maturity structure of borrowing: This indicator is set to control the council's exposure to refinancing risk. The upper and lower limits on the maturity structure of borrowing will be:

Refinancing rate risk indicator	Upper limit	Lower limit
Under 12 months	50%	0%
12 months and within 24 months	50%	0%
24 months and within 5 years	60%	0%
5 years and within 10 years	70%	0%
10 years and above	80%	0%

The upper limit should always be reviewed in line with the Liability benchmark to ensure that refinancing risk is mitigated. While it is important to have flexibility to navigate changing market conditions it is critical that loan repayments are spread appropriately. The lower limit has been considered but kept at zero to ensure that the Council is not forced into taking borrowings in a particular category that would lock us into an unfavourable borrowing situation.

Time periods start on the first day of each financial year. The maturity date of borrowing is the earliest date on which the lender can demand repayment. The upper and lower limits as shown above provide the scope to accommodate new loan(s) in the most appropriate maturity band at the time of borrowing.

Principal sums invested for periods longer than a year: The purpose of this indicator is to control the council's exposure to the risk of incurring losses by seeking early repayment of its investments. The limits on the long-term principal sum invested to final maturities beyond the period end will be:

Price risk indicator	2022/23	2023/24	2024/25
Limit on principal invested beyond year end	£5m	£5m	£5m

1.7 Financial implication of the 23/24 Treasury budget

The budget for treasury investment income in 2023/24 is £0.505m, based on an average investment portfolio of £12m at an average interest rate of 4.30%. This is an increase from the £0.019m budgeted for in 2022/23, based on an average investment portfolio of £21 million at an average interest rate of 0.09%.

The budget for committed debt interest payable in 2023/24 is £3.819m, based on an average debt portfolio of £171m at an average interest rate of 2.46%. This is also an increase from the 2022/23 budget of £2.240m, based on an average debt portfolio of £153.5 million at an average interest rate of 1.46%.

If actual levels of investments and borrowing, or interest rates, differ from those forecasts, performance against budget will be correspondingly different.

2 **Borrowing**

2.1 Borrowing Strategy

The Authority is currently maintaining an under-borrowed position. This means that the capital borrowing need, (the Capital Financing Requirement), has not been fully funded with loan debt as cash supporting the Authority's reserves, balances and cash flow has been used as a temporary measure (as detailed in point 1.5 - Year end Resources table above.) This strategy is prudent as medium and longer dated borrowing rates are expected to fall from their current levels once prevailing inflation concerns are addressed by tighter near-term monetary policy. That is, Bank Rate increases over the first half of 2023.

Against this background and the risks within the economic forecast, caution will be adopted with the 2023/24 treasury operations. The S151 Officer will monitor interest rates in financial markets and adopt a pragmatic approach to changing circumstances for example:

- *if it was felt that there was a significant risk of a sharp FALL in borrowing rates, then long term borrowing will be postponed.*
- *if it was felt that there was a significant risk of a much sharper RISE in borrowing rates than that currently forecast, fixed rate funding will be drawn whilst interest rates are lower than they are projected to be in the next few years.*

Any significant decisions made by the S151 officer will be reported to the Accounts, Audit and Risk Committee (AARC) at the next available opportunity. In addition, the Council may borrow further short-term loans to cover unplanned cash flow shortages.

2.2 Approved Sources of Long and Short-term Borrowing

	Fixed	Variable
Public Works Loan Board (PWLB) and any successor body	●	●
Any other UK public sector body e.g., other local authorities	●	●
Any other bank or building society authorised to operate in the UK	●	●
Any institution approved for investments (see below)	●	●
UK private and public sector pension funds (except Oxfordshire County Council Pension Fund)	●	●
Insurance Companies	●	●
UK Infrastructure Bank	●	●
Overdraft	●	
Internal borrowing (capital receipts & revenue balances)	●	

Other sources of debt finance: In addition, capital finance may be raised by the following methods that are not borrowing, but may be classed as other debt liabilities:

	Fixed	Variable
Finance Leases	●	●
Operating Leases	●	●
Hire purchase	●	●
Private Finance Initiative	●	●

Forecast of borrowing rates: It is expected that the Bank of England base rate will become more stable and slowly reduce from its current forecast rate of 4.30% in March 2023 to 3.40% by March 2025.

2.3 Policy on Borrowing in Advance of Need

The Authority will not borrow more than or in advance of its needs purely in order to profit from the investment of the extra sums borrowed. Any decision to borrow in advance will be taken in consideration of the forecast Capital Financing Requirement, forecast interest rate changes, and will be considered carefully to ensure that value for money can be demonstrated and that the Authority can ensure the security of investing such funds.

Risks associated with any borrowing in advance activity will be subject to prior appraisal and subsequent reporting through the mid-year or annual reporting mechanism.

2.4 Rescheduling

Rescheduling of current borrowing in our debt portfolio is unlikely to occur as there is still a large difference between premature redemption rates and new borrowing rates.

If rescheduling is to be undertaken, it will be reported to the Accounts, Audit and Risk Committee, at the earliest meeting following its action.

3 Investment Strategy

The Authority's investment priorities will be **security first, portfolio liquidity second and then yield (return)**. The Authority will aim to achieve the optimum return (yield) on its investments commensurate with proper levels of security and liquidity and with regard to the Authority's risk appetite.

In the current economic climate, it is considered appropriate to maintain a degree of liquidity to cover cash flow needs but to also consider "laddering" investments for periods up to 12 months with high credit rated financial institutions, whilst investment rates remain elevated, as well as wider range fund options.

This Authority has adopted a prudent approach to managing risk and defines its risk appetite by the following means: -

1. Minimum acceptable **credit criteria** are applied in order to generate a list of highly creditworthy counterparties. This also enables diversification and thus avoidance of concentration risk. The key ratings used to monitor counterparties are the short-term and long-term ratings.
2. **Other information:** ratings will not be the sole determinant of the quality of an institution; it is important to continually assess and monitor the financial sector on both a micro and macro basis and in relation to the economic and political environments in which institutions operate. The assessment will also take account of information that reflects the opinion of the markets. To achieve this consideration the Authority will engage with its advisors to maintain a monitor on market pricing such as "**credit default swaps**" and overlay that information on top of the credit ratings.
3. **Other information sources** used will include the financial press, share price and other such information pertaining to the financial sector in order to establish the most robust scrutiny process on the suitability of potential investment counterparties.
4. **Lending limits**, (amounts and maturity), for each counterparty will be set through applying the matrix table in paragraph 3.1.
5. **Transaction limits** are set for each type of investment in 3.2.
6. This Authority will set a limit for its investments which are invested for **longer than 365 days**, (see point 1.6 Treasury Management indicators).
7. All investments will be denominated in **sterling**.
8. As a result of the change in accounting standards for 2022/23 under IFRS 9, this Authority will consider the implications of investment instruments which could result in an adverse movement in the value of the amount invested and resultant

charges at the end of the year to the General Fund. (The Department for Levelling up, Housing and Communities has announced that Ministers have decided to extend the existing IFRS 9 statutory accounting override for a further 2 years until 31 March 2025 to allow English local authorities time to adjust their portfolio of all pooled investments.)

However, this Authority will also pursue **value for money** in treasury management and will monitor the yield from investment income against appropriate benchmarks for investment performance. Monthly monitoring of investment performance will be carried out during the year.

Changes in risk management policy from last year:

The above criteria are *unchanged* from last year.

3.1 Approved counterparties

The Council may invest its surplus funds with any of the counterparty types in the table below, subject to the cash limits (per counterparty) and the time limits shown.

Approved investment counterparties and limits

Credit rating	Banks unsecured	Banks secured	Government	Corporates	Registered Providers
UK Govt	n/a	n/a	£ Unlimited 50 years	n/a	n/a
AAA	£3m 5 years	£3m 20 years	£5m 50 years	£3m 20 years	£3m 20 years
AA+	£3m 5 years	£3m 10 years	£5m 25 years	£3m 10 years	£3m 10 years
AA	£3 m 4 years	£3m 5 years	£5m 15 years	£3m 5 years	£3m 10 years
AA-	£3m 3 years	£3m 4 years	£5m 10 years	£3m 4 years	£3m 10 years
A+	£3m 2 years	£3m 3 years	£5m 5 years	£3m 3 years	£3m 5 years
A	£3m 13 months	£3m 2 years	£5m 5 years	£3m 2 years	£3m 5 years
A-	£3m 6 months	£3m 13 months	£5m 5 years	£3m 13 months	£3m 5 years
None*	None	None	£5m 2 years	None	None
Pooled funds		£5m per fund or trust			

* Any other UK public sector body e.g. other local authorities

This table must be read in conjunction with the notes below:

Credit rating: Investment limits are set by reference to the lowest published long-term credit rating from a selection of external rating agencies. Where available, the credit rating relevant to the specific investment or class of investment is used, otherwise the counterparty credit rating is used. However, investment decisions are never made solely based on credit ratings, and all other relevant factors including external advice will be taken into account.

Banks unsecured: Accounts, deposits, certificates of deposit and senior unsecured bonds with banks and building societies, other than multilateral development banks. These investments are subject to the risk of credit loss via a bail-in should the regulator determine that the bank is failing or likely to fail. See below for arrangements relating to operational bank accounts.

Banks secured: Covered bonds, reverse repurchase agreements and other collateralised arrangements with banks and building societies. These investments are secured on the bank's assets, which limits the potential losses in the unlikely event of insolvency, and means that they are exempt from bail-in. Where there is no investment specific credit rating, but the collateral upon which the investment is secured has a credit rating, the higher of the collateral credit rating and the counterparty credit rating will be used to determine cash and time limits. The combined secured and unsecured investments in any one bank will not exceed the cash limit for secured investments.

Government: Loans, bonds and bills issued or guaranteed by national governments, regional and local authorities and multilateral development banks. These investments are not subject to bail-in, and there is generally a lower risk of insolvency, although they are not zero risk. Investments with the UK Central Government may be made in unlimited amounts for up to 50 years.

Corporates: Loans, bonds and commercial paper issued by companies other than banks and registered providers. These investments are not subject to bail-in but are exposed to the risk of the company going insolvent. Loans to unrated companies will only be made following an external credit assessment.

Registered providers: Loans and bonds issued by, guaranteed by or secured on the assets of registered providers of social housing and registered social landlords, formerly known as housing associations. These bodies are tightly regulated by the Regulator of Social Housing (in England), the Scottish Housing Regulator, the Welsh Government and the Department for Communities (in Northern Ireland). As providers of public services, they retain the likelihood of receiving government support if needed.

Pooled funds: Shares or units in diversified investment vehicles consisting of the any of the above investment types, plus equity shares and property. These funds have the advantage of providing wide diversification of investment risks, coupled with the

services of a professional fund manager in return for a fee. Short-term Money Market Funds that offer same-day liquidity and very low or no volatility will be used as an alternative to instant access bank accounts, while pooled funds whose value changes with market prices and/or have a notice period will be used for longer investment periods.

Bond, equity and property funds offer enhanced returns over the longer term but are more volatile in the short term. These allow the council to diversify into asset classes other than cash without the need to own and manage the underlying investments. Because these funds have no defined maturity date, but are available for withdrawal after a notice period, their performance and continued suitability in meeting the council's investment objectives will be monitored regularly.

Financial Derivatives: The council will only use standalone financial derivatives (such as swaps, forwards, futures and options) where they can be clearly demonstrated to reduce the overall level of the financial risks that the council is exposed to. Financial derivative transactions may be arranged with any organisation that meets the approved investment criteria. The current value of any amount due from a derivative counterparty will count against the counterparty credit limit and the relevant foreign country limit.

Operational bank accounts: The Council may incur operational exposures, for example through current accounts, collection accounts and merchant acquiring services, to any UK bank with credit ratings no lower than BBB- and with assets greater than £25 billion. These are not classed as investments, but are still subject to the risk of a bank bail-in, and balances will therefore be kept below £50,000 per bank wherever possible e.g. except for overnight balances where funds are received during the day and it is too late to transfer to another counterparty. The Bank of England has stated that in the event of failure, banks with assets greater than £25 billion are more likely to be bailed-in than made insolvent, increasing the chance of the council maintaining operational continuity.

Risk assessment and credit ratings: Credit ratings are obtained and monitored by the council's treasury advisers, who will notify changes in ratings as they occur. Where an entity has its credit rating downgraded so that it fails to meet the approved investment criteria then:

- no new investments will be made until it improves sufficiently to meet our minimum criteria ,
- consideration of risk of default of existing investments and whether they can be recalled or sold at no cost will be made, and
- full consideration will be given to the recall or sale of all other existing investments with the affected counterparty.

Where a credit rating agency announces that a credit rating is on review for possible downgrade (also known as "rating watch negative" or "credit watch negative") so that it

may fall below the approved rating criteria, then only investments that can be withdrawn on the next working day will be made with that organisation until the outcome of the review is announced. This policy will not apply to negative outlooks, which indicate a long-term direction of travel rather than an imminent change of rating.

Other information on the security of investments: The council understands that credit ratings are good, but not perfect, predictors of investment default. Full regard will therefore be given to other available information on the credit quality of the organisations in which it invests, including credit default swap prices, financial statements, information on potential government support, reports in the quality financial press and analysis and advice from the council’s treasury management adviser. No investments will be made with an organisation if there are substantive doubts about its credit quality, even though it may otherwise meet the above criteria.

When deteriorating financial market conditions affect the creditworthiness of all organisations, as happened in 2008 and 2011, this is not generally reflected in credit ratings, but can be seen in other market measures. In these circumstances, the council will restrict its investments to those organisations of higher credit quality and reduce the maximum duration of its investments to maintain the required level of security. The extent of these restrictions will be in line with prevailing financial market conditions. If these restrictions mean that insufficient commercial organisations of high credit quality are available to invest the council’s cash balances, then the surplus will be deposited with the UK Government via the Debt Management Office or invested in government treasury bills for example, or with other local authorities. This will cause a reduction in the level of investment income earned but will protect the principal sum invested.

Investment limits: In order that the council’s revenue reserves available to cover investment losses are not put at risk in the case of a single default, the maximum that will be lent to any one organisation (other than the UK Government) will be £5 million. A group of banks under the same ownership will be treated as a single organisation for limit purposes. Limits will also be placed on fund managers, investments in brokers’ nominee accounts, foreign countries and industry sectors as below. Investments in pooled funds and multilateral development banks do not count against the limit for any single foreign country, since the risk is diversified over many countries.

3.2 Investment limits

	Cash limit
UK Central Government	Unlimited
Any single organisation, including UK public sector body e.g. other local authorities	£5m each
Any group of organisations under the same ownership	£5m per group

Any group of pooled funds under the same management	£5m per manager
Negotiable instruments held in a broker's nominee account	£3m per broker
Registered providers and registered social landlords	£10m in total
Unsecured investments with building societies	£10m in total
Loans to unrated corporates	£5m in total
Money market funds	£15m in total
Real estate investment trusts	£5m in total

Liquidity management: The council uses in-house cash flow forecasting to determine the maximum period for which funds may prudently be committed. The forecast is compiled on a prudent basis to minimise the risk of the council being forced to borrow on unfavourable terms to meet its financial commitments. Limits on long-term investments are set by reference to the council's medium-term financial plan and cash flow forecast.

Governance: Decisions on treasury management investment and borrowing are made daily and are therefore delegated to the Assistant Director of Finance (S151 Officer) and staff, who must act in line with the treasury management strategy approved by Council. Reports on treasury management activity are presented to the Accounts, Audit & Risk Committee. The Accounts, Audit & Risk Committee is responsible for scrutinising treasury management decisions.

3.3 Related Matters

Markets in Financial Instruments Directive (MiFID II): The council has opted up to professional client status with its providers of financial services, including advisers, banks, brokers and fund managers, allowing it access to a greater range of services but without the greater regulatory protections afforded to individuals and small companies. Given the size and range of the council's treasury management activities, the Assistant Director of Finance (S151 Officer) believes this to be the most appropriate status.

General Data Protection Regulation 2018: Relationships with external providers covered by the Treasury management Practices are governed by and operated in accordance with the act.

4 Appendices

4.1 Economic Commentary from the Link Group 31/12/2022

The third quarter of 2022/23 saw:

- A 0.5% m/m rise in GDP in October, mostly driven by the reversal of bank holiday effects;
- Signs of economic activity losing momentum as households increased their savings;
- CPI inflation fall to 10.7% in November after peaking at 11.1% in October;
- A small loosening in the labour market which pushed the unemployment rate up to 3.7% in October;
- Interest rates rise by 125bps over Q4 2022, taking Bank Rate to 3.50%;
- Reduced volatility in UK financial markets but a waning in global risk appetite.

The Chancellor's Autumn Statement on 17th November succeeded in restoring the government's fiscal credibility in the eyes of the financial markets without deepening the recession. The total fiscal consolidation package of £54.9bn (1.8% of GDP) in 2027/28 made the outlook for fiscal policy much tighter than at the beginning of Q4. The package was heavily backloaded, with net handouts of £3.8bn (0.15% of GDP) in 2023/24 and £0.3bn (0.01% of GDP) in 2024/25, and most of the tightening kicking in after 2024/25. The largest fiscal support was the extension of the Energy Price Guarantee for another 12 months, until April 2024, although at a higher price cap of £3,000 from April 2023 rather than £2,500. At the same time, Chancellor Hunt loosened the fiscal rules by requiring debt as a percentage of GDP to be falling in five years' time, rather than three. The Office of Budget Responsibility (OBR) estimated that the Chancellor will meet this new rule with a slim £9.2bn (0.3% of GDP) to spare.

With fiscal policy now doing much less to fan domestic inflation pressures, we think Bank Rate will peak at 4.50%, or at least close to that figure. Despite stepping up the pace of policy tightening to a 75-basis point (bps) rate hike in November, taking Bank Rate from 2.25% to 3.00%, the MPC's communication was dovish. The MPC pushed back heavily against market rate expectations, which at the time were for Bank Rate to peak at 5.25%. The Bank's new forecasts predicted a deeper and longer recession than the analyst

MPC meetings 3rd November and 15th December 2022

- On 3rd November, the Bank of England's Monetary Policy Committee (MPC) increased Bank Rate by 75 basis points to 3.00%, and on 15th December moved rates up a further 50 basis points to 3.50%. The later increase reflected a split vote – six members voting for a 50 basis points increase, one for 75 basis points and two for none.

- Nonetheless, the UK government appears more settled now, with Rishi Sunak as Prime Minister, and Jeremy Hunt as Chancellor. Having said that, a multitude of strikes across several public services and the continued cost-of-living squeeze is going to make for a difficult backdrop to maintain fiscal rectitude without pushing the economy into anything worse than a mild recession.
- Of course, what happens outside of the UK is also critical to movement in gilt yields. The US FOMC has led with increases of 425 basis points in 2022 and is expected to increase rates further in 2023. Similarly, the ECB has also started to tighten monetary policy, albeit from an ultra-low starting point, as have all the major central banks apart from Japan (although the BoJ has “tightened” its policy by widening the accepted yield levels for 10yr JGBs, from 0.25% to 0.5% on 20th December). Arguably, though, it is US monetary policies that are having the greatest impact on global bond markets.
- What happens in Ukraine will also impact the global economy, but particularly in Europe. The search for alternative providers of energy, other than Russia, will take both time and effort. The weather will also play a large part in how high energy prices stay and for how long.

4.2 Link Interest rate forecasts - Quarter Ended 31st December 2022

The Council has appointed Link Group as its treasury advisors and part of their service is to assist the Council to formulate a view on interest rates. The PWLB rate forecasts below are based on the Certainty Rate (the standard rate minus 20 bps) which has been accessible to most authorities since 1st November 2012.

The latest forecast, made on 19th December, sets out a view that both short and long-dated interest rates will be elevated for some little while, as the Bank of England seeks to squeeze inflation out of the economy, whilst the government is also providing a limited package of fiscal loosening to try and protect households and businesses from the ravages of ultra-high wholesale gas and electricity prices. PWLB rates reflect a less elevated yield curve than prevailed under the Truss/Kwarteng government, and the 17th of November Autumn Statement made clear the government’s priority is the establishment and maintenance of fiscal rectitude. In addition, the MPC has tightened short-term interest rates with a view to trying to slow the economy sufficiently to keep the secondary effects of inflation – as measured by wage rises – under control.

Our current and previous PWLB rate forecasts below are based on the Certainty Rate.

Link Group Interest Rate View 19.12.22													
	Dec-22	Mar-23	Jun-23	Sep-23	Dec-23	Mar-24	Jun-24	Sep-24	Dec-24	Mar-25	Jun-25	Sep-25	Dec-25
BANK RATE	3.50	4.25	4.50	4.50	4.50	4.00	3.75	3.50	3.25	3.00	2.75	2.50	2.50
3 month ave earnings	3.60	4.30	4.50	4.50	4.50	4.00	3.80	3.30	3.00	3.00	2.80	2.50	2.50
6 month ave earnings	4.20	4.50	4.60	4.50	4.20	4.10	3.90	3.40	3.10	3.00	2.90	2.60	2.60
12 month ave earnings	4.70	4.70	4.70	4.50	4.30	4.20	4.00	3.50	3.20	3.10	3.00	2.70	2.70
5 yr PWLB	4.20	4.20	4.20	4.10	4.00	3.90	3.80	3.60	3.50	3.40	3.30	3.20	3.10
10 yr PWLB	4.30	4.40	4.40	4.30	4.10	4.00	3.90	3.80	3.60	3.50	3.40	3.30	3.30
25 yr PWLB	4.60	4.60	4.60	4.50	4.40	4.20	4.10	4.00	3.90	3.70	3.60	3.50	3.50
50 yr PWLB	4.30	4.30	4.30	4.20	4.10	3.90	3.80	3.70	3.60	3.50	3.30	3.20	3.20

Link Group Interest Rate View 08.11.22													
	Dec-22	Mar-23	Jun-23	Sep-23	Dec-23	Mar-24	Jun-24	Sep-24	Dec-24	Mar-25	Jun-25	Sep-25	Dec-25
BANK RATE	3.50	4.25	4.50	4.50	4.50	4.00	3.75	3.50	3.25	3.00	2.75	2.50	2.50
3 month ave earnings	3.60	4.30	4.50	4.50	4.50	4.00	3.80	3.30	3.00	3.00	2.80	2.50	2.50
6 month ave earnings	4.20	4.50	4.60	4.50	4.20	4.10	3.90	3.40	3.10	3.00	2.90	2.60	2.60
12 month ave earnings	4.70	4.70	4.70	4.50	4.30	4.20	4.00	3.50	3.20	3.10	3.00	2.70	2.70
5 yr PWLB	4.30	4.30	4.20	4.10	4.00	3.90	3.80	3.60	3.50	3.40	3.30	3.20	3.10
10 yr PWLB	4.50	4.50	4.40	4.30	4.20	4.00	3.90	3.70	3.60	3.50	3.40	3.30	3.20
25 yr PWLB	4.70	4.70	4.60	4.50	4.40	4.30	4.10	4.00	3.90	3.70	3.60	3.50	3.50
50 yr PWLB	4.30	4.40	4.30	4.20	4.10	4.00	3.80	3.70	3.60	3.40	3.30	3.20	3.20

Link Group Interest Rate View 27.09.22													
	Dec-22	Mar-23	Jun-23	Sep-23	Dec-23	Mar-24	Jun-24	Sep-24	Dec-24	Mar-25	Jun-25	Sep-25	Dec-25
BANK RATE	4.00	5.00	5.00	5.00	4.50	4.00	3.75	3.25	3.00	2.75	2.75	2.50	2.50
3 month ave earnings	4.50	5.00	5.00	5.00	4.50	4.00	3.80	3.30	3.00	2.80	2.80	2.50	2.50
6 month ave earnings	4.70	5.20	5.10	5.00	4.60	4.10	3.90	3.40	3.10	3.00	2.90	2.60	2.60
12 month ave earnings	5.30	5.30	5.20	5.00	4.70	4.20	4.00	3.50	3.20	3.10	3.00	2.70	2.70
5 yr PWLB	5.00	4.90	4.70	4.50	4.20	3.90	3.70	3.50	3.40	3.30	3.20	3.20	3.20
10 yr PWLB	4.90	4.70	4.60	4.30	4.10	3.80	3.60	3.50	3.40	3.30	3.20	3.20	3.20
25 yr PWLB	5.10	4.90	4.80	4.50	4.30	4.10	3.90	3.70	3.60	3.60	3.50	3.40	3.40
50 yr PWLB	4.80	4.60	4.50	4.20	4.00	3.80	3.60	3.40	3.30	3.30	3.20	3.10	3.10

- LIBOR and LIBID rates ceased at the end of 2021. In a continuation of previous views, money market yield forecasts are based on expected average earnings by local authorities for 3 to 12 months.
- The Link forecast for average earnings are averages i.e., rates offered by individual banks may differ significantly from these averages, reflecting their different needs for borrowing short-term cash at any one point in time.

4.3 Glossary of terms

Counterparties - an opposite party in a contract or financial transaction. This may include the Central Government, Local Authorities, Banks and Building societies to name a few.

Liability Benchmark – demonstrates how a Local authorities existing debt maturity profile and other cash flows affect their future debt requirement. Its aim is to show whether the local authority is in an over-borrowed position (existing debt maturity profile is greater than their forecast debt requirement) or an under-borrowed position (existing debt maturity profile is less than their forecast debt requirement.) In monitoring this position the Local Authority can aim to secure interest rates at the acceptable rates and manage interest payable costs.

General Balances and Reserves – The General balance has been created by keeping aside surplus funds during the course of an accounting period to meet contingencies or offset future losses. Reserves however are created for a specific purpose. This may be funds that have been received and earmarked for a specific purpose in the future.

Internal Borrowing – Instead of taking external loans to fund activities such as Capital expenditure, a Local Authority may use income and grants received in advance, to fund these activities. Usually, surplus funds are invested to earn interest, however it is prudent to use these funds instead of loaning money as loans generally cost more than could be earned by investing the funds.

Cost of Carry - The difference between the interest payable on borrowing on debt and the interest receivable from investing surplus cash.

Cherwell District Council

Executive

6 February 2023

Monthly Performance, Risk and Finance Monitoring Report December 2022

Report of Assistant Director of Finance and Assistant Director – Customer Focus

This report is public

Purpose of report

To update Executive on the council's performance, risk and financial positions for the period up to the end of December 2022.

1.0 Recommendations

The meeting is recommended:

- 1.1 To note the Performance, Risk and Finance Monitoring Report for December 2022.
- 1.2 To approve the return of £0.025m to the Country Parks Reserve as it is no longer required this financial year.
- 1.3 To approve the return of £0.023m of unspent Queens Jubilee Grant fund back to reserves.

2.0 Introduction

- 2.1 The council actively and regularly monitors its performance, risk and financial positions to ensure it can deliver its corporate priorities and key services for residents but also to respond effectively to emerging issues.
- 2.2 This takes place on a monthly basis to identify potential issues at the earliest opportunity and put measures in place for mitigating and addressing them.
- 2.3 The updates are summarised into a single report given the implications and interdependencies between them, and this is the summary for December.

3.0 Report Details

3.1 This report is split into three sections:

- Finance
- Performance
- Risk

3.2 The Finance section presents the year-end forecasts for the 2022/2023 financial year, based on actual income and expenditure figures up to the end of December.

3.3 The Performance section sets out the council's progress towards achieving its 2022-23 Business Plan (see Appendix 6) by reporting on the actions, projects and programmes for delivering against its strategic themes and priorities. It also sets out the measures we are taking to address performance exceptions, where measures are slightly behind target but within tolerance (10%), or outside of the agreed tolerance (more than 10% off target).

3.4 The Risk section highlights any risks within the council's Leadership Risk Register that have changed in the last month and the mitigating actions to address them. It also includes the latest risk scorecard of all the Leadership risks.

Finance Update

3.5 The council's forecast position for 2022/2023 has improved since November by (£0.156m) and it is now predicting an overspend of £0.141m as shown in Table 1 below. This is as a result of continued work within departments to find solutions to reduce the councils predicted overspend.

Finance report details

Table 1: Forecast Year End Position

Service	Original Budget	Current Budget	December Forecast	December Variance (Under) / Over	% Variance to current budget	November Variance (Under) / Over	Change since Previous (better) / worse
	£m	£m	£m	£m	%	£m	£m
HR & OD	0.822	0.852	0.852	0.000	0.0%	0.000	0.000
Wellbeing & Housing	3.339	4.27	4.430	0.160	3.7%	0.160	0.000
Customer Focus	1.606	1.848	2.008	0.160	8.7%	0.160	0.000
Chief Executive	5.767	6.970	7.290	0.320	4.6%	0.320	0.000
Finance	2.850	3.210	3.296	0.086	2.7%	0.086	0.000
Legal & Democratic	1.709	1.884	2.008	0.124	6.6%	0.110	0.014
ICT	1.235	1.251	1.415	0.164	13.1%	0.214	(0.050)
Property	(3.196)	(1.173)	(1.266)	(0.093)	7.9%	(0.159)	0.066

Resources	2.598	5.172	5.453	0.281	5.4%		0.251	0.030
Planning & Development	1.752	2.137	1.652	(0.485)	-22.7%		(0.345)	(0.140)
Growth & Economy	0.336	1.154	1.144	(0.010)	-0.9%		(0.010)	0.000
Environmental	4.057	4.647	5.407	0.760	16.3%		0.732	0.028
Regulatory	1.112	1.278	1.278	0.000	0.0%		0.020	(0.020)
Communities	7.257	9.216	9.481	0.265	2.9%		0.397	(0.132)
Subtotal for Directorates	15.622	21.358	22.224	0.866	4.1%		0.968	(0.102)
Executive Matters	4.316	0.034	(0.359)	(0.393)	-1155.9%		(0.339)	(0.054)
Policy Contingency	3.554	2.100	1.768	(0.332)	-15.8%		(0.332)	0.000
Total	23.492	23.492	23.633	0.141	0.6%		(0.671)	(0.054)
FUNDING	(23.492)	(23.492)	(23.492)	0.000	0.0%		0.000	0.000
(Surplus)/Deficit	0.000	0.000	0.141	0.141			0.297	(0.156)

Note: A positive variance is an overspend or a reduction in predicted income and a negative is an underspend or extra income received. Green represents an underspend and red represents a overspend for the current month's forecast.

Table 2: Analysis of Forecast Variance – December 2022

Breakdown of current month forecast	Forecast Variance	Forecast Base Budget Over/ (Under)	Savings Non-Delivery
	£m	£m	£m
Chief Executive	0.320	0.129	0.191
Resources	0.281	0.056	0.225
Communities	0.265	(0.052)	0.317
Subtotal Directorates	0.866	0.133	0.733
Executive Matters	(0.393)	(0.393)	0.000
Policy Contingency	(0.332)	(0.332)	0.000
Total	0.141	(0.592)	0.733
FUNDING	0.000	0.000	0.000
(Surplus)/Deficit	0.141	(0.592)	0.733

Table 3 – Budget compared with Forecast

The graph below shows the Forecast for December and November compared to budget for the financial year.

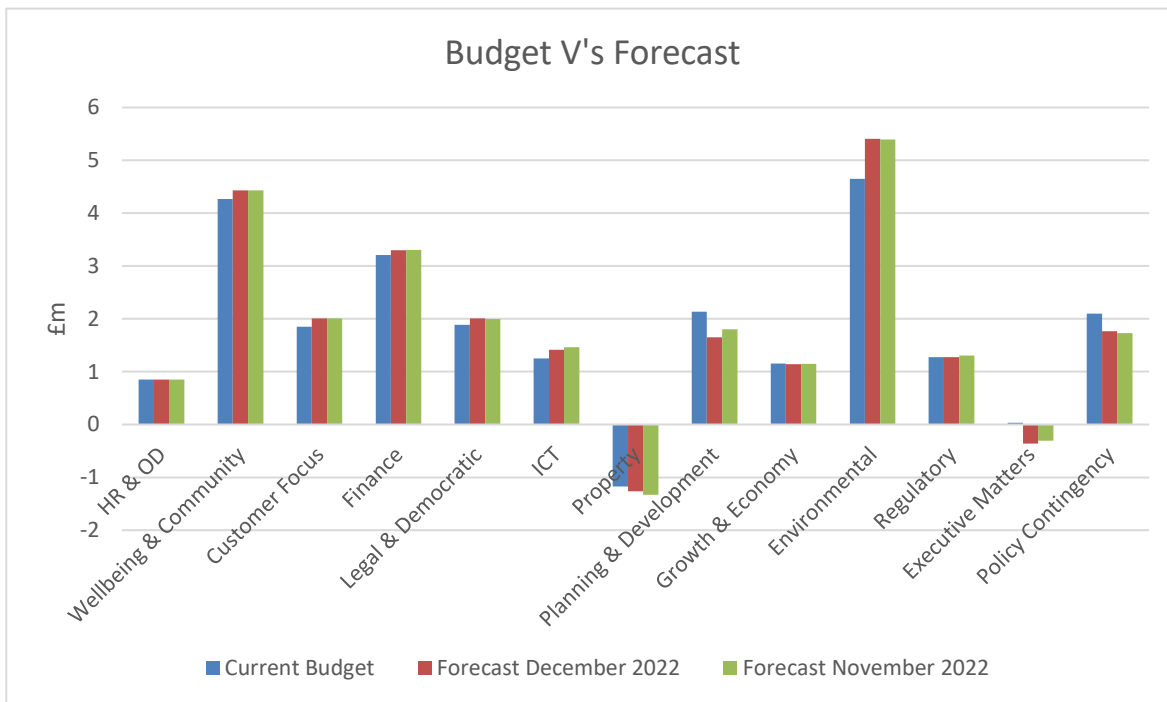


Table 4: Top Five Major Variances:

Portfolio	Current Budget	Variance	% Variance
Car Parks	(0.950)	0.332	-34.9%
Waste & Recycling	2.933	0.459	15.6%
Leisure	0.160	0.209	130.6%
Interest	(2.375)	(0.393)	16.5%
Development Management	0.268	(0.608)	-226.9%
Total	0.036	(0.001)	

The top 5 services are the same as last month although there is an overall improvement of £0.058m.

Car Parks Variance £0.332m [November Variance £0.339m]: -

The majority of the predicted £0.333m overspend is due to a drop in usage and consequently a loss of income of £0.280m. The service is monitoring closely the December figures and will report in February.

Waste & Recycling variance £0.459m [November variance £0.380m (adjusted to be comparable)]: -

The service is predicting additional income from garden waste and savings on vehicle maintenance and mileage but still expecting an overspend of £0.459m. The majority of this overspend is due to using more agency staff to cover staffing shortages – largely long term

sickness which the service is working with Human Resources on how to improve and increased recycling costs.

Leisure Variance £0.209m [November Variance £0.209m]: -

Higher costs for utilities and housing maintenance continue to put pressure on the service budgets but these overspends are at a stable level and not expected to increase significantly over the final quarter.

Interest Variance (£0.393m) [November Variance (£0.339m)]: -

Due to increased interest rates the council is anticipating higher than expected income of (£0.393m).

Planning & Development Variance (£0.485m) [November Variance (£0.345m)]: -

Planning and Development are presently forecasting a (£0.485m) underspend from generating additional income in Development Management.

Policy Contingency Variance (£0.332m) [November Variance (£0.332m)]

A release of inflation contingency of (£0.332m) will partially mitigate some of the inflationary costs the council is experiencing.

Table 5 - Earmarked Reserves and General Balances at December 2022

The table below is a summary of the level of reserves the council holds.

Reserves	Balance 1 April 2022	Original Budgeted use/ (contribution)	Changes agreed since budget setting	Changes proposed December 2022	Forecast Balance 31 March 2023
	£m	£m	£m	£m	£m
General Balance	(5.950)	(0.500)	0.000	0.000	(6.450)
Earmarked	(23.691)	2.262	(0.678)	(0.048)	(22.155)
Ringfenced Grant	(16.215)	11.205	1.141	0.000	(3.869)
Subtotal Revenue	(45.856)	12.967	0.463	(0.048)	(32.474)
Capital	(8.049)	0.000	0.000	0.000	(8.049)
Total	(53.905)	12.967	0.463	(0.048)	(40.523)

For details of proposed changes to reserves please see appendix 5.

Capital

3.6 An underspend of (£9.036m) is currently forecast, of which £7.555m is to be reprofiled in future years. This represents an overall decrease in the total cost of schemes of (£1.481m) due to a number of schemes no longer going ahead.

Table 6 - Capital Spend 2022/2023

Directorate	Budget £m	Outturn 2022/23 £m	Re-profiled beyond 2022/23 £m	Variance to Budget £m	Prior Month Variance to Budget £m
Chief Executives	4.445	2.826	1.617	(0.002)	(0.002)
Resources	15.416	8.753	5.167	(1.495)	(1.517)
Communities	5.241	4.486	0.771	0.016	0.016
Total	25.102	16.065	7.555	(1.481)	(1.503)

Table 7 – How the Capital Programme is financed

Financing	22/23 Budget	Future Years
Borrowing	17.007	9.312
Reserves	1.200	0
External Financing - Capital Grants and S106	6.895	0
	25.102	9.312

Table 8 – Total Capital Project Forecast

3.7 There is a total capital project forecast for the council of £32.883m resulting in an underspend of (£1.497m).

Directorate	Budget £m	Total Outturn 2022/23 £m	Variance to Budget £m	Prior Month Variance to Budget £m
Chief Executives	5.165	5.163	(0.002)	(0.002)
Resources	15.383	13.871	(1.511)	(1.532)
Communities	13.833	13.849	0.016	0.016
Total	34.381	32.883	(1.497)	(1.518)

For further detail please view appendix 1 Finance Capital December 2022

Table 9 - Top Five in Year Capital Variances: -

Code	Assistant Director	Top 5 In-Year Variances	Budget Total £'000	Reprofile to 23/24 £'000
40131	Nicola Riley	S106 Capital Costs	1,744	1,310
40239	Andrew Low	Bicester East Community Centre	1,450	1,250
40262	Andrew Low/Nicola Riley	Affordable Housing	1,200	1,100
40144	Andrew Low	Castle Quay	3,257	1,052
40028	Ed Potter	Vehicle Replacement Programme	1,166	566
			8,817	5,278

The top five variances remain the same as last month however a further £0.750m has been reprofiled into 2023/24, further details below.

S106 Capital : -

Of the 16 projects being funded through S106, 10 totalling £1.310m will now be delivered in 2023/24. We expect the remaining six projects totalling £0.434m to still be delivered in 2022/23.

Bicester East Community Centre: -

We are expecting tender submissions back in February 2023 and to start on site in Q1 23/24. The project is expected to take up to a year, therefore there will be a £1.25m slippage.

Affordable Housing: -

We have engaged design professionals to prepare the specification of works which are required to effect both the repair to the roof and the reinstatement of the living accommodation, which has been affected by the invasive investigative works which we have undertaken. It is anticipated we will be in a position to start the tender process in February 2023 with the aim being to complete the required works within the next 12 – 18 months.

Castle Quay: -

A number of Capital Projects are being reviewed to ensure they meet the strategic direction for Castle Quay and remain relevant to meet the challenges of the changing retail market. This has resulted in reprofiling a number of projects that will be delivered in 2023/2024.

Vehicle Replacement Programme: -

£0.566m is required to be slipped in to 2023/24 due to supply chain issues and availability of electric vehicles.

Performance Summary

- 3.8 The council reports its performance against 16 Business Plan Measures monthly, 17 quarterly and two every six months. For the full details and commentary against each measure see Appendix 7.
- 3.9 During December 2022, of the 33 measures (16 monthly and 17 quarterly), 26 were rated green, two amber and four red. There is also one measure where the data will not be available at the moment (BP 1.2.13 Net Additional Housing Completions – Quarterly) a consolidated update will be published at the end of Quarter 4.

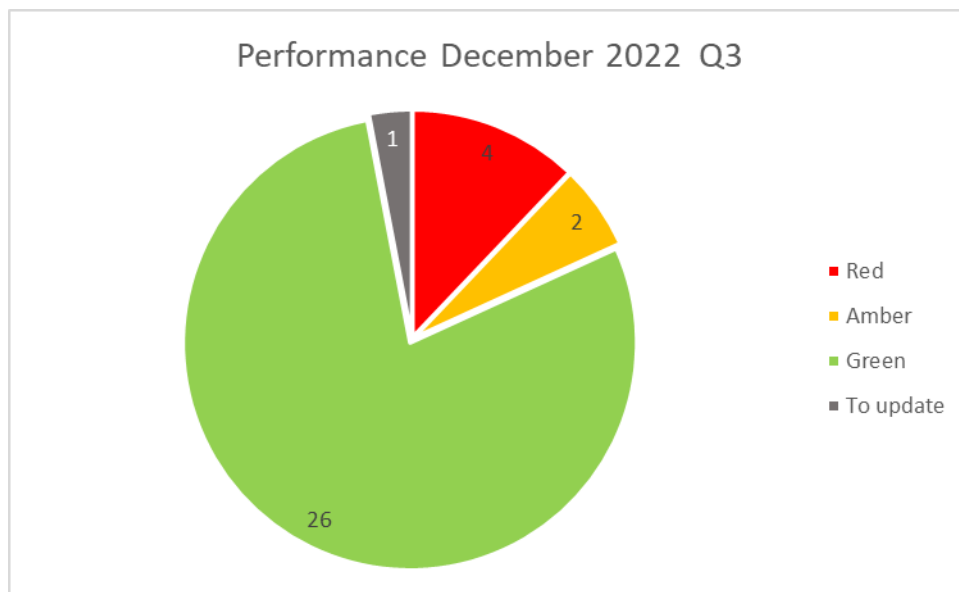


Figure 1: Performance Summary December 2022, 26 measures Green, 2 Amber, 2 Red and 1 to update (mid-January).

3.10 Performance Exceptions

Homelessness Prevention

Priority: Housing that meets your needs

Service: Wellbeing and Housing Services

Assistant Director: Nicola Riley

Reported Amber for December and Green for Year to date (slightly behind schedule).

Comments from service: The Housing Team continues to offer advice and support to clients, as early as possible and ahead of any statutory duties being imposed, to prevent risk of homelessness at the earliest opportunity; however, even with early intervention it is increasingly challenging to resolve the housing situation. Oxfordshire is one of the most expensive areas of the country to live in. Rents, in the private sector, are unaffordable to people on low wages or benefits, and rates of Local Housing Allowances do not cover the amounts landlords in this area can charge. Many landlords and agents will only consider tenants with perfect tenancy-credit history, full employment, and often require guarantors. Many clients can't meet these criteria so securing private rented housing is not a realistic option for them. A further issue is that the demand for social housing far outstrips supply, and waiting times are increasing, on the Housing Register. Housing Register and waiting lists will not provide a quick solution. Given the current economic climate and housing

crisis, it is likely that numbers for emergency assistance will increase, and our ability to prevent homelessness, therefore, continues to be challenging.

Mitigating Actions: The Housing Team is working hard to develop initiatives to ensure and provide the service it can; this includes additional triaging of cases, managing expectations of clients and support-workers, and acting as early as possible. We have increased resources, in the Allocations Team, to ensure clients with the most complex housing needs receive bespoke advice and assistance.

Number of Homeless Households living in Temporary Accommodation (TA)

Priority: Housing that meets your needs

Service: Wellbeing and Housing Services

Assistant Director: Nicola Riley

Reported Red for December and Green for Year to date (39 against a target of 35 – less is better).

Comments from service: Due to continued increase in clients approaching in crisis and delays in moving clients to permanent accommodation offers, numbers in temporary accommodation are increasing.

Mitigating Actions: We secured five more placements for temporary accommodation to meet the specific needs of survivors of domestic abuse, and other vulnerable women recognising that demand in this area is increasing.

Number of Affordable homes delivered including CDC and Growth Deal Targets

Priority: Housing that meets your needs

Service: Wellbeing and Housing Services

Assistant Director: Nicola Riley

Reported Red for December and Green for Year to date (8 against a target of 12).

Comments from service: Four Shared-Ownership homes and four Affordable homes for Rent were delivered. This is below target, but December was a quieter month for developers, in terms of delivery. However, delivery for year-to-date figures is green, and delivering ahead of target (of 120 against a target of 108).

Mitigating Actions: we expect to reach our year-end target.

% of Waste Recycled and Composted

Priority: Supporting Environmental Sustainability

Service: Environmental Services

Assistant Director: Ed Potter

Reported Red for December and Amber for Year to date (49% against a target of 56%).

Comments from service: Recycling rate for the year to date is at 2% below the set target, due to the cost of living reducing the number of products residents buy and a very hot summer, which resulted in less garden waste produced.

Mitigation Actions: This is a national trend and, although Cherwell will do better than most other authorities, our 56% target will be difficult to achieve.

% of Building Regulations Applications acknowledged to within 3 working days of deposit (Quarterly)

Priority: An Enterprising Economy with Strong and Vibrant Local Centres

Service: Planning and Development

Assistant Director: David Peckford

Reported Red for December and Amber for Year to date (80.17% against a target of 90% – more is better).

Comments from service: For Q3, 2022/23, we achieved 97/121 acknowledgements within 3 days of receipt which is 80%, against a target of 90%. This shortfall has been due to temporary shortages of resource, compounded by the number of applications received. Previous quarters recorded 82% and 88% making overall average (to date) 83% against the aspirational target of 90%.

Improve Leisure & Community Facilities (Quarterly)

Priority: Healthy, Resilient and Engaged Communities

Service: Wellbeing and Housing Services

Assistant Director: Nicola Riley

Reported Amber for December and Year to date (slightly behind schedule).

Comments from service: Outdoor pool remedial works took place to enable it to open later in the year and we are expecting pool covers to be installed in Q4.

Mitigating Actions: Proposals were put forward for the modernisation of the swimming pool changing rooms, later in the year at Woodgreen's. We installed a new steam room at Bicester Leisure Centre this quarter to complement the centre's other health suite facilities. Similarly, at Kidlington Leisure Centre, we modernised one of the 'accessible' changing facilities.

3.11 Performance Highlights

- Human Resources - Reduced the council's turnover from over 6% at the start of this year to 2.66% in December
- Finance - Identified over £150,000 of savings to improve the year-end outturn position for the second consecutive month running
- IT - Secured £20,000 of external funding for work needed to inform our emerging IT strategies
- Building control - Launched an online booking system for building control inspections, enabling customers to book these directly through the LABC app on smart devices or through our customer service team. This should lead to improvements in customer satisfaction and the team's capacity to deliver.
- Housing - Increased our temporary housing supply by using funding given to us for supporting victims of domestic violence to fund some units specifically for those seeking refuge.
- Community safety - In partnership with the Police and Crime Commissioner, last year Cherwell was awarded funding from the Home Office Safer Streets Fund for schools educational programmes designed to tackle negative gender based perceptions and increase the confidence of young people to challenge inappropriate behaviour.

Evidence shows that promoting positive gender perceptions in young people can reduce violence and abuse for women and girls. Delivery of three programmes in participating schools around Banbury starting on January.

Risk Update

- 3.12 The council’s Leadership Risk Register contains a list of the strategic risks that are both significant in size and duration and will impact on its reputation and performance, and its ability to deliver its corporate priorities.
- 3.13 The heat map below shows the overall position of all risks contained within the Leadership Risk Register for December 2022.

Risk Scorecard – Residual Risks

		Probability				
		1 - Remote	2 - Unlikely	3 - Possible	4 - Probable	5 - Highly Probable
Impact	5 - Catastrophic			L08 (Amber)		
	4 - Major		L09 (Green)	L03-L04-L05- L06-L07- L11-L14 (Amber)	L01 (Red)	
	3 - Moderate		L10-L15 (Green)	L02-L12-L16 (Green)	L13 (Amber)	
	2 - Minor		L02- (Green)			
	1 - Insignificant					

Figure 2: Risk scorecard showing the risk scores in the Leadership Risk Register for December 2022.

- 3.14 The Corporate Leadership Team reviews the Risk Register as part of the monthly reporting process; however, this is a live document that gets updated as and when deemed necessary.
- 3.15 There were no score changes in the leadership risk register during December. Two risks have been proposed for closure (L15 Covid-19 Community and Customers and L16 Covid-19 Business Continuity).

6.0 Alternative Options and Reasons for Rejection

- 6.1 This report summarises the council’s performance, risk and financial positions up to the end of December, therefore there are no alternative options to consider. However, members may wish to request further information from officers or for inclusion.

7.0 Implications

Financial and Resource Implications

- 7.1 Financial and Resource implications are detailed within paragraphs 3.5 to 3.7 of this report.

Comments checked by:

Michael Furness, Assistant Director of Finance / Section 151 Officer,
Tel: 01295 221845, Michael.Furness@cherwell-dc.gov.uk

Legal Implications

- 7.2 There are no legal implications from this report.

Comments checked by:

Shahin Ismail, Interim Head of Legal Services,
Shahin.Ismail@cherwell-dc.gov.uk

Risk Implications

- 7.3 This report contains a full update with regards to the council's risk position at the end of December 2022.

Comments checked by:

Celia Prado-Teeling, Performance Team Leader, Tel: 01295 221556
Celia.prado-teeling@cherwell-dc.gov.uk

Equalities and Inclusion Implications

- 7.4 There are no direct equalities and inclusion implications as a consequence of this report.

Comments checked by:

Celia Prado-Teeling, Performance Team Leader, Tel: 01295 221556
Celia.prado-teeling@cherwell-dc.gov.uk

Sustainability Implications

- 7.5 There are no direct sustainability implications as a consequence of this report.

Comments checked by:

Ed Potter, Assistant Director Environmental Services
Ed.Potter@cherwell-dc.gov.uk

8.0 Decision Information

Key Decision

Financial Threshold Met: No

Community Impact Threshold Met: No

Wards Affected:

All

Links to Corporate Plan and Policy Framework

<https://www.cherwell.gov.uk/info/189/performance/934/business-plan-2022-to-2023>

Lead Councillor

Councillor Richard Mould – Portfolio Holder for Corporate Services
Councillor Adam Nell – Portfolio Holder for Finance

Document Information**Appendix number and title**

- Appendix 1 – Finance Capital December 2022
- Appendix 2 – Forecast Detailed Revenue Narrative December 2022
- Appendix 3 – Virements December 2022
- Appendix 4 – Funding December 2022
- Appendix 5 – Use of reserves and grant funding December 2022
- Appendix 6 – 2022/23 Business Plan
- Appendix 7 – Monthly Performance December 2022
- Appendix 8 – Leadership Risk Register December 2022

Background papers

None

Report Author and contact details

Celia Prado-Teeling, Performance and Insight Team Leader, Tel: 01295 221556,
Celia.prado-teeling@Cherwell-dc.gov.uk

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Appendix 1

CHERWELL CAPITAL EXPENDITURE 2022-23

CODE	ASSISTANT DIRECTOR/RES POSSIBLE OFFICER	DESCRIPTION	BUDGET TOTAL	YTD ACTUAL	PO COMMITMENTS	Outturn	RE-PROFILED BEYOND 2022/23	Current month Variances £000	Prior month Variances £000	OUTTURN NARRATIVE
40083	Nicola Riley	Disabled Facilities Grants	1,811	1,247	4	1,811	0	-	-	This budget comprises £1.239m Better Care Fund allocation, £0.375m CDC base budget and £0.196m reprofiled from 2021/2022. Projected spend has been increased from £1.700m to £1.811m to reflect increasing demand and persistent inflation of construction costs. No carry forward into 2023/2024 anticipated.
40160	Nicola Riley	Housing Services - capital	190	(733)	0	190	0	-	-	The YTD Actual includes (£0.761m) accrual for a grant payable to Heylo for x18 affordable housing units. The budget allocation is unspent Growth Deal funding reprofiled from 2021/2022 due to delays on some development sites and other sites not being due for completion until 2022/2023. Full spend anticipated in 2022/2023 however, this will depend on the progress made on sites and some units may not complete until 2023/2024.
40084	Nicola Riley	Discretionary Grants Domestic Properties	253	105	1	145	108	-	-	This budget comprises £0.150m core funding and £0.103m reprofiled from 2021/2022. Projected spend for 2022/2023 has been increased from £0.120m to £0.145m in anticipation of high demand for heating-related grants during the winter months. Anticipated carry-forward into 2023/2024 has therefore been reduced from £0.133m to £0.108m.
40010	Nicola Riley	North Oxfordshire Academy Astroturf	183	0	0	50	133	-	-	The delivery of a new Astroturf pitch at North Oxfordshire Academy has been complicated by issues arising from securing appropriate and timely developer contributions. Officers are working closely with colleagues in planning to finalise the position and determine the most appropriate course of action and funding. Meetings took place with United Learning Trust on 11th July and 3rd August to move project forward. Formal presentation to the United Learning Trust as to CDC's intention to move forward. Appointed External Consultant to support with initial scope of works up to a point where a decision on planning permission is made and a detailed specification for the tendering of the works is ready to be advertised.
40019	Nicola Riley	Bicester Leisure Centre Extension	79	0	0	56	23	-	-	Detailed feasibility work now starting on the development of a learner pool in Bicester including environmental impact assessment. Appointment of FMG to support with next stage of feasibility studies. Seeking to undertake measured surveys and have detailed drawings by January/February 2023.
40131	Nicola Riley	S106 Capital Costs	1,744	45	42	434	1,310	-	-	16 projects in total funded by S106 of which 10 projects totalling £1.310m will now be delivered in 2023/24. The remaining 6 projects totalling £0.434m are still due to be delivered in 2022/23.
40181	Nicola Riley	Sunshine Centre (new extension to the front of the site)	0	(2)	0	(2)	0	(2)	(2)	Project completed in 2021/2022.
40251	Nicola Riley	Longford Park Art	45	0	0	2	43	0	0	There is a hold on any Public Art delivery on Longford at the moment due to developers refusing artists permission to carry out installation of art until the country park is approved complete and been handed over to the Council.
40261	Nicola Riley	Replacement Pool Covers at Woodgreen Open Air Pool	40	0	40	40	0	0	0	Quotations received for works and now entering into case study review/evaluation. Contractor now appointed - Site Survey to take place early January. Works to commence and complete February/March 2023.
Wellbeing & Community			4,345	663	87	2,726	1,617	(2)	(2)	
40208	Claire Cox	Project Manager for HR/Payroll system	100	3	96	100	0	0	0	£0.100m required for HR system improvements, project expected to conclude end Q4 2022/2023.
HR & OD			100	3	96	100	0	0	0	
Chief Executive			4,445	666	184	2,826	1,617	(2)	(2)	
40139	Andrew Low	Banbury Health Centre - Refurbishment of Ventilation, Heating & Cooling Systems	100	(4)	6	(4)	100	(4)	(4)	£0.100m reprofiled from 2021/2022. Tenders now complete and currently engaging with the tenants. This needs to be reprofiled - tender withdrawn. New tender package is going out to suppliers in Jan 2023 for commencement in April 23.
40081	Andrew Low	Bicester Town Centre Redevelopment	0	16	0	16	0	16	15	These cost are in connection with the solicitors advising on the latent defect in connection with the failing paintwork on the Sainsburys unit.
40141	Andrew Low	Castle Quay Waterfront	2,111	964	4	1,611	500	0	0	Budget reprofiled from 2021/2022 as a result of delays to completion of Main Contract works for Castle Quay Waterfront following supply chain challenges. This has resulted in a knock on effect and re-profiling the budget.
40144	Andrew Low	Castle Quay	3,257	91	6	2,205	1,052	0	0	A number of Capital Projects are being reviewed to ensure they meet the strategic direction for Castle Quay and remain relevant to meet the challenges of the changing retail market. This has resulted in reprofiling a number of projects that will be delivered in 2023/2024.
40162	Andrew Low	Housing & IT Asset System joint CDC/OCC	8	(18)	0	2	6	0	0	£0.100m allocated project budget of which £0.048m has been reprofiled from 2021/2022. Initial set up cost of £0.052m with £0.002m cost per annum for hosting and software support costs for 3 years (2022/2023 to 2024/2025).
40167	Andrew Low	Horsefair, Banbury	55	0	0	0	55	0	0	The works design is now completed, pending tender. Tender going out Feb 23 for delivery in April 23.
40191	Andrew Low	Bodicote House Fire Compliance Works	141	(8)	15	7	134	(0)	0	Works are ready to be tendered, due to Bodicote House review we are re-evaluating whether the works are now required.
40197	Andrew Low	Corporate Asbestos Surveys	50	1	0	0	20	(30)	0	Review of the work has been carried out and costs have been reassessed so £0.030m no longer needed.
40201	Andrew Low	Works From Compliance Surveys	122	23	0	23	99	(0)	0	Review of the work has been carried out as we progress into the final phase. Design of works now planned for Q1 23/24.
40203	Andrew Low	CDC Feasibility of utilisation of proper Space	100	0	0	50	50	0	0	This amount has been set aside to consider the future office space of the Council. Awaiting development of agile working policy to determine the council's space requirement needs moving forward.
40219	Andrew Low	Community Centre - Works	130	59	20	105	25	0	0	Works to commence in Q4 with anticipated completion in Q1 23/24.
40239	Andrew Low	Bicester East Community Centre	1,450	26	0	200	1,250	0	0	Work is out to tender with return Feb 2023 with an expected start date on site Q1 23/24. £1.25 m slippage because this is 9-12 month project.
40240	Andrew Low	Bicester Dovecote	27	3	(24)	3	0	(24)	(24)	Works complete - no more spend expected.
40241	Andrew Low	Thorpe Place Roof Works	35	0	0	35	0	0	0	£0.035m reprofiled from 2021/2022. Currently scoping the works which will be complete by March 2023.
40242	Andrew Low	H&S Works to Banbury Shopping Arcade	127	0	0	127	0	0	0	£0.127m reprofiled from 2021/2022. Currently scoping the works which will be completed by March 2023.
40246	Andrew Low	Banbury Museum Pedestrian Bridge	77	73	0	74	3	0	0	£0.077m reprofiled from 2021/2022. Works are complete - retention of £3,177 due to be released in Oct 2023.
40249	Andrew Low	Retained Land	286	8	81	166	120	0	0	£0.156m reprofiled from 2021/2022. 2 year scheme - £0.170m in yr1 and £130k in yr 2. Retained land surveys now instructed for delivery. Once surveys are completed a works plan will be created. There is a possibility that works may be completed in year but due to PSDS project, some projects have been delayed. Progress will be reviewed monthly and changed if progress is better than expected. Full spend anticipated by Q2 2023/24.
40225	Andrew Low	Drayton Pavilion - Decarbonisation Works	86	0	0	0	0	(86)	(86)	£0.086m reprofiled from 2021/2022. PSDS Project, Scheme Withdrawn. - In principal, the PSDS works should be treated as one budget and despite some schemes appearing to have overspent, overall there is expected to be an underspend which will require repayment to Salix.
40229	Andrew Low	Stratfield Brake Sports Ground - Decarbonisation Works	159	0	0	0	0	(159)	(159)	£0.159m reprofiled from 2021/2022. PSDS Project, Scheme Withdrawn. - In principal, the PSDS works should be treated as one budget and despite some schemes appearing to have overspent, overall there is expected to be an underspend which will require repayment to Salix.
40226	Andrew Low	Thorpe Lane Depot - Decarbonisation Works	250	131	1	143	0	(107)	(107)	PSDS Project - Project completed. In retention.
40227	Andrew Low	Banbury Museum - Decarbonisation Works	264	335	85	420	0	156	96	PSDS Project - Works at practical completion at 95% pending commissioning of plant.
40228	Andrew Low	Franklins House - Decarbonisation Works	0	77	4	81	0	81	81	PSDS Project - Project completed. In retention.

40230	Andrew Low	Whitelands - Decarbonisation Works	0	81	0	91	0	91	91	PSDS Project - Project completed. In retention
40231	Andrew Low	Bicester Leisure Centre - Decarbonisation Works	604	693	0	729	0	125	125	PSDS Project - Works at practical completion at 97.5% pending commissioning of plant.
40232	Andrew Low	Kidlington Leisure Centre - Decarbonisation Works	675	324	0	348	0	(327)	(327)	PSDS Project - Works at practical completion at 95% pending commissioning of plant and works by district networks operator. £200k for additional project costs to accommodate new electrical mains as per cost centre 40263
40233	Andrew Low	Spiceball Leisure Centre - Decarbonisation Works	991	733	0	780	0	(211)	(211)	PSDS Project - Works at practical completion at 97.5% pending commissioning of plant.
40234	Andrew Low	Woodgreen Leisure Centre - Decarbonisation Works	692	338	0	336	0	(356)	(356)	PSDS Project - Works at practical completion at 97.5% pending commissioning of plant.
40252	Andrew Low	Expiring Energy Performance Certificates plus Associated works	96	0	0	96	0	0	0	Scopes received - expected instruction in Jan 2023
40253	Andrew Low	Energy Performance Certificates Govt Implementation of target B - Strategic Plan	60	0	0	60	0	0	0	Scopes received - expected instruction in Jan 2023
40254	Andrew Low	Thorpe Lane Depot - Renewal of Electrical Incoming Main	270	85	0	270	0	0	0	Works are currently designed pending tender of the Electric Vehicle infrastructure. Works to be coordinated with the District Network Operator (Western Power) to install the new sub station, who are engaged. Waiting for dates from the DNO.
40255	Andrew Low	Installation of Photovoltaic at CDC Property	79	(0)	(14)	0	79	0	0	This will now take place along with the new capital works planned for 23/24
40121	Andrew Low	Bicester Library (phase 1b)	645	2	(11)	10	0	(635)	(635)	Capital project no longer required.
40263	Andrew Low	Kidlington Leisure New Electrical Main	200	167	0	167	33	0	0	Project to install new electrical main for kidlington leisure centre by Scottish and Southern Electricity. Expected to start Q1 23/24 so balance expected to be spent during this period.
40111	Andrew Low	Admiral Holland Redevelopment Project (phase 1b)	61	0	0	61	0	-	-	With construction formally completed end of September 2020 there is the need to budget for retention – the retention is £0.061m.
40118	Andrew Low	Creampot Crescent Cropredy (phase 1b)	(10)	(215)	0	(10)	0	-	-	Retention payment now paid.
40177	Andrew Low	Bulmarsh Close (Phase 2)	17	12	0	12	0	(5)	-	Retention payment now paid.
40213	Andrew Low	Build Team Essential Repairs & Improvements	149	33	22	55	94	(0)	-	Work is currently underway and it is likely that all capital expenditure will take place during financial year 2023/24. Need to combine this with the Affordable Housing capital budget.
40224	Andrew Low	Fairway Flats Refurbishment	362	0	7	0	362	-	-	Instructing the consultants mid Nov to progress the design ready for tendering
40262	Andrew Low/Nicol	Affordable Housing	1,200	0	18	100	1,100	-	-	We have engaged design professionals to prepare the specification of works which are required to effect both the repair to the roof and the reinstatement of the living accommodation, which has been affected by the invasive investigative works which we have undertaken. It is anticipated we will be in a position to start the tender process in February 2023 with the aim being to complete the required works within the next 12 – 18 months.
Property			14,926	4,028	221	8,368	5,082	(1,475)	(1,497)	
40256	Michael Furness	Processing Card Payments & Direct Debits	20	0	0	20	0	0	0	Project to be completed by March 2023.
Finance			20	-	-	20	0	-	-	
40056	Paul Nicol	5 Year Rolling HW / SW Replacement Prog	50	45	0	50	0	0	0	Budget required for hardware refresh, delayed due to Co-Vid and council wide remote working. Project underway and on-track to complete early Q4 2022/2023
40212	Paul Nicol	Procurement of Joint Performance system	20	0	0	0	0	(20)	(20)	Celia has confirmed budget not required post decoupling from OCC. Can be handed back.
40237	Paul Nicol	Council Website & Digital Service	162	29	2	77	85	0	0	2nd stage of project expected to conclude Q4 2022/2023. Further stages of work expected in 2023/2024, delayed from current stage due to other council priorities.
40238	Paul Nicol	IT Shared Services	238	(18)	0	238	0	0	0	The Digital Futures programme is in the process of being established and work is underway to explore areas of improvement to reduce the demand on services and provide proactive services to our citizens.
ICT			470	55	2	365	85	(20)	(20)	
Resources			15,416	4,083	222	8,753	5,167	(1,495)	(1,517)	
40062	Robert Jolley	East West Railways	118	0	0	138	0	20	20	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 EWR project. In partnership with England's Economic Heartland, Cherwell will be contributing towards fibre connectivity 2022/2023.
Growth & Economy			118	0	-	138	-	20	20	
40015	Ed Potter	Car Park Refurbishments	74	0	28	74	0	-	-	This project relates to introduction of pay on exits sites across the district, Claremont in Bicester now identified. Commitment expected in early part of quarter 4 for bay relining. Upgrading of pay machines from 3G to 4G/5G is expected to use the remainder of the budget. Anticipating full spend in 2022/23.
40026	Ed Potter	Off Road Parking	18	0	0	0	18	-	-	£0.018m is required to be slipped in to 2023/24 this is due to resources required for organisation of new management contract. This project relates to LED lighting at various sites.
40028	Ed Potter	Vehicle Replacement Programme	1,166	505	177	600	566	0	0	£0.566m is required to be slipped in to 2023/24 due to supply chain issues and availability of electric vehicles
40031	Ed Potter	Urban City Electricity Installations	15	9	0	11	0	(4)	(4)	Further commitment expected in early part of quarter 4, no slippage required.
40186	Ed Potter	Commercial Waste Containers	25	0	0	25	0	-	-	The business waste service is continuing to grow with 8-10 new customers per month. Each new customer requires a set of bins (recycling & residual). Depending on the size of the customer, often this funds 660 & 1100 litre bins. This capital scheme aim is to provide new bins for new customers (typically the income from a new customer after costs (collection & disposal costs) will fund the capital cost in 12-18 months.
40187	Ed Potter	On Street Recycling Bins	18	0	0	0	18	-	-	£0.018m required to be slipped in to 2023/24 due to negotiations with external clients needed for their requirements.
40188	Ed Potter	Thorpe Lane Depot Capacity Enhancement	158	93	72	158	0	-	-	Full spend anticipated in 2022/23.
40216	Ed Potter	Street Scene Furniture and Fencing project	36	0	0	12	24	0	0	Ongoing issues with lease and land ownership. Optimistic will be resolved and commitment and work carried out in late 2022/23. Additional work required at other sites, £0.024m is required to be slipped in to 2023/24 due to timescales needed to carry out projects.
40217	Ed Potter	Car Parking Action Plan Delivery	175	60	54	175	0	-	-	Anticipating full spend in 2022/23.
40218	Ed Potter	Depot Fuel System Renewal	35	0	0	0	35	-	-	£0.035m slippage required in to 2023/24 once more information on new Bicester Depot site obtained.
40220	Ed Potter	Horsefair Public Conveniences	0	(10)	0	0	0	-	-	Outstanding invoices due for 2021/22.
40222	Ed Potter	Burnehyll- Bicester Country Park	220	46	11	120	100	0	0	Further commitments expected in early part of quarter 4. £0.100m slippage is required in to 2023/24.
40248	Ed Potter	Solar Panels at Castle Quay	53	0	0	53	0	-	-	Anticipating full spend in 2022/23 but dependant on recruitment to Climate Action Manager post, in post early December 2022.
40235	Ed Potter	Chargeable Garden & Food Waste	0	(11)	0	0	0	-	-	Outstanding invoices due for 2021/22.
40257	Ed Potter	Additional Commercial Waste Containers	10	0	0	10	0	-	-	Anticipating full spend in 2022/23.
40258	Ed Potter	Kidlington Public Convenience Refurbishment	90	0	0	90	0	-	-	Anticipating full spend in 2022/23. Commitments expected in early part of quarter 4.

40259	Ed Potter	Market Equipment Replacement	15	0	0	5	10	-	-	Quotes currently being obtained, commitments expected in quarter 3. £0.010m slippage required in to 2023/24.
40260	Ed Potter	Land for New Bicester Depot	3,000	2	0	3,000	0	-	-	Potential for slippage in to 2023/24 and 2024/25. Due to exchange contracts in early 2023.
Environmental			5,108	695	341	4,333	771	(4)	(4)	
40245	Richard Webb	Enable Agile Working	15	0	0	15	0	-	-	Full spend expected in 2022/2023
Regulatory			15	0	0	15	0	0	0	
Communities			5,241	695	341	4,486	771	16	16	
Capital Total			25,102	5,444	746	16,065	7,555	(1,481)	(1,503)	

CHERWELL TOTAL CAPITAL PROJECT EXPENDITURE

CODE	ASSISTANT DIRECTOR/RESPONSIBLE OFFICER	DESCRIPTION	Total 22/23 Project Budget	22/23 Forecast	RE-PROFILED BEYOND 2022/23	22/23 Variance	Future Years Budget	Project Total Budget	Project Total forecast	Project Total Variance	Narrative
40083	Nicola Riley	Disabled Facilities Grants	1,811	1,811	0	0	0	1,811	1,811	0	This budget comprises £1.239m Better Care Fund allocation, £0.375m CDC base budget and £0.196m reprofiled from 2021/22. Projected spend has been increased from £1.700m to £1.811m to reflect increasing demand and persistent inflation of construction costs. No carry forward into 2023/24 anticipated.
40160	Nicola Riley	Housing Services - capital	190	190	0	0	0	190	190	0	This is unspent Growth Deal funding reprofiled from 2021/22 due to delays on some development sites and other sites not being due for completion until 2022/23. Full spend anticipated in 2022/23 however, this will depend on the progress made on sites and some units may not complete until 2023/24.
40084	Nicola Riley	Discretionary Grants Domestic Properties	253	145	108	0	600	853	853	0	This budget comprises £0.150m core funding and £0.103m reprofiled from 2021/22. Projected spend for 2022/23 is circa £0.145m. Anticipated carry-forward into 2023/24 is £0.108m, but demand for these grants can fluctuate so this could vary.
40010	Nicola Riley	North Oxfordshire Academy Astro turf	183	50	133	0	0	183	183	0	Re-profiled from 2021/22. Delivery linked to external partners approval so spend maybe beyond March 2023
40019	Nicola Riley	Bicester Leisure Centre Extension	79	56	23	0	0	79	79	0	Re-profiled from 2021/22 - full spend on feasibility studies expected prior to 31st March 2023
40131	Nicola Riley	S106 Capital Costs	1,744	434	1,310	0	0	1,744	1,744	0	Regular communication with Parish Councils is allowing us to monitor the projects that make up this programme of works. Cherwell hold developer contributions for each project and release funds as requested by the parish. Some projects are taking parishes longer to complete than first anticipated which explains why the spending is slower.
40181	Nicola Riley	Sunshine Centre (new extension to the front of the site)	0	(2)	0	(2)	0	0	(2)	(2)	Project completed in 2021/22
40251	Nicola Riley	Longford Park Art	45	2	43	0	0	45	45	0	Potential for slippage as no further Public Art spend possible until the Country Park is transferred from the developer
40261	Nicola Riley	Replacement Pool Covers at Woodgreen Open Air Pool	40	40	0	0	0	40	40	0	New Scheme for 2022/23 - full spend expected prior to 31st March 2023
Wellbeing & Community			4,345	2,726	1,617	(2)	600	4,945	4,943	(2)	
40208	Claire Cox	Project Manager for HR/Payroll system	100	100	0	0	120	220	220	0	£0.100m required for HR system improvements, project expected to conclude end Q4 2022/23. The future years budget of £0.120m is £0.030m per year for 4 years from 2023/24 and will be used for system improvements
HR & OD			100	100	0	0	120	220	220	0	
Chief Executives			4,445	2,826	1,617	(2)	720	5,165	5,163	(2)	
40139	Andrew Low	Banbury Health Centre - Refurbishment of Ventilation, Heating & Cooling Systems	100	(4)	100	(4)	0	100	96	(4)	£0.100m reprofiled from 2021/2022. Tenders now complete and currently engaging with the tenants. This needs to be reprofiled - tender withdrawn. New tender package is going out to suppliers in Jan 2023 for commencement in April 23
40141	Andrew Low	Castle Quay Waterfront	2,111	1,611	500	0	0	2,111	2,111	0	Budget reprofiled from 2021/2022 as a result delays to completion of Main Contract works for Castle Quay Waterfront following supply chain challenges. This has resulted in a knock on effect and re-profiling the budget.
40144	Andrew Low	Castle Quay	3,257	2,205	1,052	0	0	3,257	3,257	0	A number of Capital Projects are being reviewed to ensure they meet the strategic direction for Castle Quay and remain relevant to meet the challenges of the changing retail market. This has resulted in reprofiling a number of projects that will be delivered in 2023/2024.
40162	Andrew Low	Housing & IT Asset System joint CDC/OCC	8	2	6	0	0	8	8	0	£0.100m allocated project budget of which £0.048m has been reprofiled from 2021/2022. Initial set up cost of £0.052m with £0.002m cost per annum for hosting and software support costs for 3 years (2022/2023 to 2024/2025).
40167	Andrew Low	Horsefair, Banbury	55	0	55	0	0	55	55	0	The works design is now completed, pending tender. Expect full utilisation of budget by Q4 2022/2023. Tender going out Feb 23 for delivery in April 23
40191	Andrew Low	Bodicote House Fire Compliance Works	141	7	134	(0)	0	141	141	(0)	Works are ready to be tendered, due to Bodicote House review we are re evaluating whether the works are now required

40197	Andrew Low	Corporate Asbestos Surveys	50	0	20	(30)	0	50	20	(30)	Review of the work has been carried out and costs have been reassessed so £0.030m no longer needed
40201	Andrew Low	Works From Compliance Surveys	122	23	99	(0)	0	122	122	(0)	Review of the work has been carried out as we progress into the final phase
40203	Andrew Low	CDC Feasibility of utilisation of proper Space	100	50	50	0	0	100	100	0	This amount has been set aside to consider the future office space of the Council. Awaiting development of agile working policy to determine the council's space requirement needs moving forward
40219	Andrew Low	Community Centre - Works	130	105	25	0	0	130	130	0	Works to commence in Q4 with anticipated completion in Q1 23/24
40239	Andrew Low	Bicester East Community Centre	1,450	200	1,250	0	0	1,450	1,450	0	Work is out to tender with return Feb 2023 with an expected start date on site Q1 23/24. £1.25 m slippage because this is 9-12 month project.
40240	Andrew Low	Bicester Dovecote	27	3	0	(24)	0	27	3	(24)	Works complete - no more spend expected
40241	Andrew Low	Thorpe Place Roof Works	35	35	0	0	0	35	35	0	£0.035m repofiled from 2021/2022. Currently scoping the works which will be complete by March 2023
40242	Andrew Low	H&S Works to Banbury Shopping Arcade	127	127	0	0	0	127	127	0	£0.127m repofiled from 2021/2022. Currently scoping the works which will be completed by March 2023
40246	Andrew Low	Banbury Museum Pedestrian Bridge	77	74	3	0	0	77	77	0	£0.077m repofiled from 2021/2022. Works are complete - retention of £3,177 due to be released in Oct 2023
40249	Andrew Low	Retained Land	286	166	120	0	0	286	286	0	£0.156m repofiled from 2021/2022. 2 year scheme - £0.170m in yr1 and £130k in yr 2. Retained land surveys now instructed for delivery. Once surveys are completed a works plan will be created. There is a possibility that works may be completed in year but due to PSDS project, some projects have been delayed. Progress will be reviewed monthly and changed if progress is better than expected. Full spend anticipated by Q2 2023/24
40225	Andrew Low	Drayton Pavillion - Decarbonisation Works	86	0	0	(86)	0	86	0	(86)	All projects are at practical completion. Under the grant conditions we will be returning unspent grant which is in the region of £0.800m. There was a need for the Council to bid for the funding at short notice and after receiving the grant and fully investigating the schemes, realised some were not affordable but were able to redirect some of the resource onto other schemes
40229	Andrew Low	Stratfield Brake Sports Ground - Decarbonisation Works	159	0	0	(159)	0	159	0	(159)	
40226	Andrew Low	Thorpe Lane Depot - Decarbonisation Works	250	143	0	(107)	0	250	143	(107)	
40227	Andrew Low	Banbury Museum - Decarbonisation Works	264	420	0	156	0	264	420	156	
40228	Andrew Low	Franklins House - Decarbonisation Works	0	81	0	81	0	0	81	81	
40230	Andrew Low	Whitelands - Decarbonisation Works	0	91	0	91	0	0	91	91	
40231	Andrew Low	Bicester Leisure Centre - Decarbonisation Works	604	729	0	125	0	604	729	125	
40232	Andrew Low	Kidlington Leisure Centre - Decarbonisation Works	675	348	0	(327)	0	675	348	(327)	
40233	Andrew Low	Spiceball Leisure Centre - Decarbonisation Works	991	780	0	(211)	0	991	780	(211)	
40234	Andrew Low	Woodgreen Leisure Centre - Decarbonisation Works	692	336	0	(356)	0	692	336	(356)	
40252	Andrew Low	Expiring Energy Performance Certificates plus Associated works	96	96	0	0	0	96	96	0	Scopes reviewed - expected instruction in Jan 2023
40253	Andrew Low	Energy Performance Certificates Gov't Implementation of target B - Strategic Plan	60	60	0	0	0	60	60	0	Scopes reviewed - expected instruction in Jan 2023
40254	Andrew Low	Thorpe Lane Depot - Renewal of Electrical Incoming Main	270	270	0	0	0	270	270	0	Works are currently designed pending tender of the Electric Vehicle infrastructure. Works to be coordinated with the District Network Operator (Western Power) to instal the new sub station, who are engaged. Waiting for dates from the DNO.
40255	Andrew Low	Installation of PV at CDC Property	79	0	79	0	0	79	79	0	This will now take place along with the new capital works planned for 23/24
40263	Andrew Low	Kidlington Leisure New Electrical Main	200	167	33	0	0	167	167	0	Project to install new electrical main for kindlington leisure centre by Scottish and Southern Electricity. Expected to start Q1 23/24 so balance expected to be spent during this period.
40121	Andrew Low	Bicester Library (phase 1b)	645	10	0	(635)	0	645	10	(635)	Capital project no longer required.
40111	Andrew Low	Admiral Holland Redevelopment Project (phase 1b)	61	61	0	0	0	61	61	0	With construction formally completed end of September 2020 there is the need to budget for retention – the retention is £0.061m.
40118	Andrew Low	Creampot Crescent Cropredy (phase 1b)	(10)	(10)	0	0	0	(10)	(10)	0	Retention payment now paid.
40177	Andrew Low	Bullmarsh Close (Phase 2)	17	12	0	(5)	0	17	12	(5)	Retention payment now paid.

40213	Andrew Low	Build Team Essential Repairs & Improvements	149	55	94	(0)	0	149	149	(0)	Work is currently underway and it is likely that all capital expenditure will take place during financial year 2023/24. Need to combine this with the Affordable Housing capital budget.
40224	Andrew Low	Fairway Flats Refurbishment	362	0	362	0	0	362	362	0	Instructing the consultants mid Nov to progress the design ready for tendering
40262	Andrew Low/Nicola Riley	Affordable Housing	1,200	100	1,100	0	0	1,200	1,200	0	We have engaged design professionals to prepare the specification of works which are required to effect both the repair to the roof and the reinstatement of the living accommodation, which has been affected by the invasive investigative works which we have undertaken. It is anticipated we will be in a position to start the tender process in February 2023 with the aim being to complete the required works within the next 12 – 18 months.
Property			14,926	8,352	5,082	(1,491)	0	14,893	13,401	(1,491)	
40256	Michael Furness	Processing Card Payments & Direct Debits	20	20	0	0	0	20	20	0	Project to be completed by March 2023.
Finance Total			20	20	0	0	0	20	20	0	
40056	Paul Nicol	5 Year Rolling HW / SW Replacement Prog	50	50	0	0	0	50	50	0	Budget required for hardware refresh, delayed due to Co-Vid and council wide remote working. Project underway and on-track to complete early Q4 2022/2023
40212	Paul Nicol	Procurement of Joint Performance system	20	0	0	(20)	0	20	0	(20)	Budget not required post decoupling from OCC. Can be handed back.
40237	Paul Nicol	Council Website & Digital Service	162	77	85	0	0	162	162	0	2nd stage of project expected to conclude Q4 2022/2023. Further stages of work expected in 2023/2024, delayed from current stage due to other council priorities.
40238	Paul Nicol	IT Shared Services	238	238	0	0	0	238	238	0	The Digital Futures programme is in the process of being established and work is underway to explore areas of improvement to reduce the demand on services and provide proactive services to our citizens.
ICT			470	365	85	(20)	0	470	450	0	
Resources			15,416	8,737	5,167	(1,511)	0	15,383	13,871	(1,491)	
40062	Robert Jolley	East West Railways	118	138	0	20	4,189	4,307	4,327	20	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 EWR project. In partnership with England's Economic Heartland, Cherwell will be contributing towards fibre connectivity 2022/23.
40114	Robert Jolley	Cher Com Led Prog Banbury Supported Housing	0	0	0	0	0	0	0	0	
40103	Robert Jolley	Cher Com Led Prog Old Pace Yard	0	0	0	0	0	0	0	0	
Growth & Economy			118	138	-	20	4,189	4,307	4,327	20	
40015	Ed Potter	Car Park Refurbishments	74	74	0	0	0	74	74	0	Full spend anticipated by March 2024
40026	Ed Potter	Off Road Parking	18	0	18	0	0	18	18	0	Full spend anticipated by March 2024
40028	Ed Potter	Vehicle Replacement Programme	1,166	600	566	0	4,344	5,510	5,510	0	Full spend anticipated by March 2025. Additional bids anticipated as further electric vehicles are introduced to the fleet.
40031	Ed Potter	Urban City Electricity Installations	15	11	0	(4)	0	15	11	(4)	Full spend anticipated by March 2023
40187	Ed Potter	On Street Recycling Bins	18	0	18	0	0	18	18	0	Full spend anticipated by March 2024
40186	Ed Potter	Commercial Waste Containers	25	25	0	0	25	50	50	0	Full spend anticipated by March 2024
40188	Ed Potter	Thorpe Lane Depot Capacity Enhancement	158	158	0	0	0	158	158	0	Full spend anticipated by March 2023
40216	Ed Potter	Street Scene Furniture and Fencing project	36	12	24	0	24	60	60	0	£0.24m slippage required in to 2023/24, full spend anticipated by March 2026.
40217	Ed Potter	Car Parking Action Plan Delivery	175	175	0	0	0	175	175	0	Full spend anticipated by March 2023
40218	Ed Potter	Depot Fuel System Renewal	35	0	35	0	0	35	35	0	Full spend anticipated by March 2024
40220	Ed Potter	Horsefair Public Conveniences	0	0	0	0	0	0	0	0	This project was completed in 2021/22
40222	Ed Potter	Burnehyll- Bicester Country Park	220	120	100	0	0	220	220	0	£0.100m slippage required in to 2023/24, full spend anticipated by March 2024.
40248	Ed Potter	Solar Panels at Castle Quay	53	53	0	0	0	53	53	0	Full spend anticipated by March 2023
40235	Ed Potter	Chargeable Garden & Food Waste	0	0	0	0	0	0	0	0	This project was completed in 2021/22
40257	Ed Potter	Additional Commercial Waste Containers	10	10	0	0	10	20	20	0	Full spend anticipated by March 2024
40258	Ed Potter	Kidlington Public Convenience Refurbishment	90	90	0	0	0	90	90	0	Full spend anticipated by March 2023
40259	Ed Potter	Market Equipment Replacement	15	5	10	0	0	15	15	0	£0.010m slippage required in to 2023/24, full spend anticipated by March 2024.

40260	Ed Potter	Land for New Bicester Depot	3,000	3,000	0	0
Environmental			5,108	4,333	771	(4)
40245	Richard Webb	Enable Agile Working	15	15	0	0
			15	15	0	0
Communities			5,241	4,486	771	16
Capital Total			25,102	16,049	7,555	(1,497)

0	3,000	3,000	0	Potential for slippage in to 2023/24 and 2024/25 as the search for a suitable site for a new Bicester depot continues and spend will be dependant on type of land aquired. A multiple of options will be considered. Eg. Land to be developed - what to include, existing site with buildings but in need of refurbishment.
4,403	9,511	9,507	(4)	
0	15	15	0	
0	15	15	0	
8,592	13,833	13,849	16	
9,312	34,381	32,883	(1,477)	

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Appendix 2 - Report Details – Additional Revenue narrative

Chief Executive

Chief Executives are forecasting an overspend of £0.320m against a budget of £6.970m (4.6%).

HR & OD	HR are forecasting to remain in budget at present.
£0.000m Variance	
Variance to November's forecast £0.000m	

Wellbeing & Community	Higher costs for utilities and housing maintenance continue to put pressure on the service budgets but these overspends are at a stable level and not expected to increase significantly over the final quarter.
Variation £0.160m Overspend	
Variation to November's Forecast £0.000m	

Customer Focus	Customer Focus has maintained last month's year-end position, which is an overspend of £0.160m. The majority of this overspend is down to the costs of establishing the support structure needed to become a standalone authority. As reported previously a further contributing factor is a reduction of land charges income.
Variation £0.160m overspend	
Variation to November's Forecast £0.000m	

Resources

Resources are reporting an overspend of £0.281m against a budget of £5.172m (5.4%).

Finance	£0.086m overspend: Bank Charges has increased for the council due to increasing numbers of card payments being taken by the council and Bank Transfer payments being made by the council £0.068m. Decoupling costs linked to advertising costs for senior posts of £0.038m have been incurred. There are minor variations over the rest of the service as a whole (£0.020m).
Variation £0.086m Overspend	
Variation to November's Forecast £0.000m	

Legal & Democratic	Law and Governance are forecasting an overspend of £0.124m. There are small variances within Elections totalling £0.021m over budget and a further £0.037m has been incurred as a result of staff costs within Democratic Services because extra resources are now required. The remaining additional costs are due to the creation of a new Information Governance position which has enabled the organisation to be proactive in how it deals with information requests, meets legislation and reduces the admin burden across the Council.
Variation £0.124m overspend	
Variation to November's Forecast £0.014m	

ICT	IT are forecasting an overspend of £0.164m. The projected overspend within IT is made up of £0.048m under recovery of income attributable to the decoupling of the IT service and £0.055m costs incurred due to establishing a stand-alone IT service and a new Digital Strategy for Cherwell. A further £0.047m is attributable to increased supplier costs and £0.014m minor overspends.
Variation £0.164m overspend	
Variation to November's forecast (£0.050m)	

Property	Property are forecasting an underspend of (£0.093m). This is a result of (£0.213m) of additional rent which is predicted as being achieved ahead of forecast, despite tricky economic conditions, and we are predicting spending (£0.185m) less on external professional services than anticipated during the year. However, this is offset by an overspend of £0.089m on utilities due to rising energy prices, £0.143m on staff costs (partly as a result of interim staff being required due to decoupling) and £0.073m increased costs which are largely operational (repairs, maintenance, security and rates).
Variation (£0.093m) underspend	
Variation to November's forecast £0.066m	

Communities

Communities are forecasting an overspend of £0.265m against a budget of £9.216m, (2.9%).

Planning & Development	Planning & Development are presently forecasting a (£0.485m) underspend from generating additional income in Development Management, which reflects the level of business they are currently and effectively dealing with.
Variation (£0.485m) underspend	
Variance to November's forecast (£0.140m)	

Growth & Economy	The Growth and Economy department is forecasting, for December 2022, an overall underspend of (£0.010m) for the year - which is the same as was forecast last month.
Variation (£0.010) underspend	The Bicester Garden Town Programme continues to progress with capacity funding being utilised to initiate and develop key projects such as the Market Square regeneration and the Reimagining Bicester town centre workstreams.
Variance to November's forecast (£0.000m)	

Environmental	The forecast variance for Environmental Services for December is £0.760m.
Variation £0.760m Overspend	This is largely due to the continued pressure within Car Parks of £0.333m. There is a £0.280m reduction anticipated in car park income largely due to reduced demand. Other variances across the service totalling £0.053m are due to an increase in premises and contractor costs.
Variance to November's forecast £0.028m	The forecasted pressure of £0.459m within Waste and Recycling is as a result of multiple factors, but predominantly due to a pressure of £0.383m in employee costs due to increased use of agency staff for backfilling vacant posts and several long-term sick, we are working closely with HR to mitigate. In addition, an increase of £0.112m in fuel costs is partly offset by a reduced spend on vehicle maintenance and mileage, and an increase of £0.126m on gate fees for glass recycling & food waste due to a higher rate per tonne than budgeted and previously forecasted.

However additional income of (£0.322m) due to the higher than anticipated take up of garden waste subscriptions offsets under recovery on credits, sale of materials, bulky waste collections and sale of trade sacks resulting in a net (£0.179m).

This forecast is made up of other minor variances across Waste and Recycling totalling £0.059m.

This forecast is made up of other minor variances across Environmental Services totalling (£0.032m).

Regulatory

Variation
£0.000m

Regulatory Services and Community Safety are forecasting a balanced outturn. The change in outturn forecast from the small overspend forecast last month is due to a small increase in expected licensing receipts and small changes to the forecast income from other work following a review of year to date income.

Variance to
November's forecast
(£0.020m)

Executive Matters

Executive Matters is forecasting an underspend of (£0.393m) against the budget of £0.034m, (-1155.9%).

Interest

Variation
(£0.393m) underspend

Due to increased interest rates the council is anticipating higher than expected income of (£0.393m).

Variance to
November's forecast
(£0.054m)

Policy Contingency

Policy Contingency is forecasting an underspend of (£0.332m) against a budget of £2.100m, (-15.8%).

Policy Contingency

Variation
(£0.332m) underspend

There is a currently projected release of (£0.332m) for inflation to partially mitigate some of the inflationary costs that the Council is experiencing.

Variance to
November's forecast
£0.000m

Appendix 3 - Virement Summary

Virement Movement

This table shows the movement in Net Budget from November to December 2022.

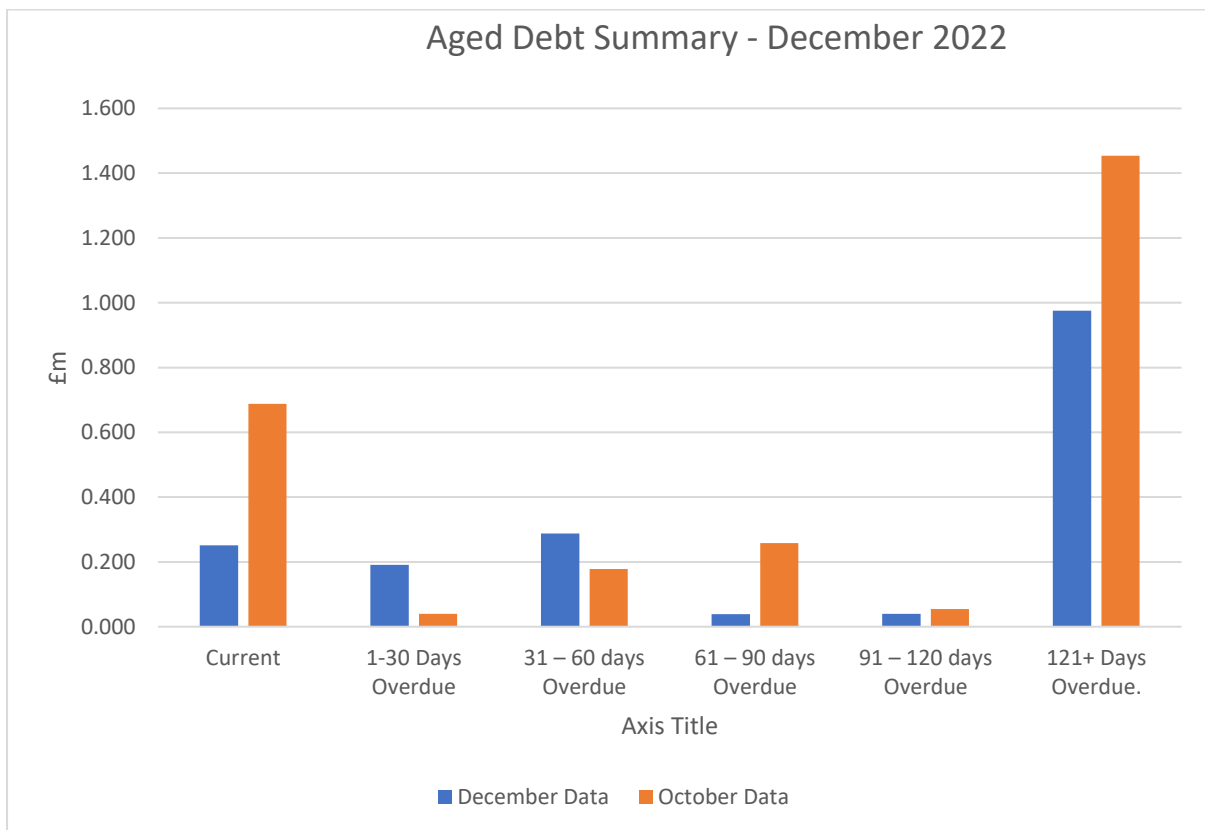
Virements - Movement in Net Budget	£m
Directorate Net Budget - November 2022	21.400
Directorate Net Budget - December 2022	21.358
Movement	(0.042)

Breakdown of Movements	£m
Allocations from/to Reserves	
Other Movement of service budget to Policy contingency due to reduced National Insurance costs	(£0.042)
Total	(£0.042)

Aged Debt Update

We are not proposing to write off any bad debts for Sundry Debts this month, debts are still being actively recovered wherever possible.

The chart below shows an updated Aged Debt position as at December.



Appendix 4 - Funding for 2022/23

Specific Funding

Dept.	Grant Name	Funding
		£
MHCLG	Council Rebate - Discretionary Element	235,800
MHCLG	New Burdens Funding for Council Tax Rebate	78,207
MHCLG	Domestic Abuse Grant	34,413
DWP	Discretionary Housing Payment	186,083
Home Office	Asylum Seekers	22,500
MHCLG	Test & Trace	41,469
BEIS	Heat Networks Delivery Grant	26,800
DEFRA	DEFRA Air Quality grant	5,150
DLUHC	Rough Sleeping Accommodation Programme	15,750
DLUHC	Homeless Prevention Grant	500,016
DLUHC	Re-opening high streets safely fund	37,008
DWP	DWP - new burdens funding	64,186
Health Education England	HEE mental health workshop	7,395
Home Office	Syrian Resettlement Scheme	167,143
Home Office	Afghan Refugee Accommodation Programme	247,975
DLUHC	Pavement licensing New Burdens	1,000
DLUHC	Elections New Burdens Funding	27,126
DWP	Housing Benefit Accuracy Award Grant	8,550
BEIS	New Burdens Funding	14,760
		1,721,331

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Appendix 5 - Reserves and Grant Funding

Uses of/ (Contributions to) Reserves

Specific requests

Directorate	Type	Description	Reason	Amount £m
Chief Executives	Earmarked	Queens Jubilee	Return Unspent Jubilee Grant Monies to Projects Reserve	(0.023)
Communities	Earmarked	Country Parks	Not required this financial year	(0.025)
			Total Earmarked Reserves	(0.048)

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Cherwell District Council business plan 2022 - 2023



Appendix 6



As we come to refresh our business priorities for the next financial year, I am proud to be the leader of a council that listens to its residents and is willing to adapt to deliver the services that residents value most.

Like other local authorities up and down the country, we must chart a careful and responsible path through the challenges presented by uncertainties around government funding, COVID-19 and a growing and ageing population, all of which have presented significant financial pressures in setting our budget for 2022/23.

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But that doesn't mean we should lose sight of our vision for the district – we remain an ambitious authority and will continue to find new ways to deliver services differently and more efficiently, prioritising our resources to where they will have the biggest impact.

In our recent consultation on our 2022/23 budget proposals, local people told us that healthy and resilient communities was their top priority. That means using our influence on the built environment and within the leisure sector to make it easier to lead a healthy lifestyle. It also means making the most of our links to partners in the health system and community and voluntary sectors.

We have been creating new active travel routes, supporting people to ride their bikes and enhancing our green spaces. These examples of action will not only aid our recovery from the pandemic but will secure changes that residents can enjoy well into the future, making north Oxfordshire somewhere where people can truly thrive and enjoy their lives.

Both the budget survey and our annual residents' survey showed that supporting vibrant local centres and a dynamic economy are also top priorities. It has been a pleasure to see the first elements of our investment in Castle Quay Waterfront come to fruition over recent months.

With a much needed town centre supermarket, multi-screen cinema and restaurants coming to Banbury canal side, we've taken a big stride towards securing the town's regional status for years to come and creating new jobs too.

While we have had to take some difficult decisions to ensure a balanced budget for this financial year, where the government has offered funding streams for specific purposes, we have been proactive in securing it. For example, funding to enhance the support that's offered to help prevent homelessness and to help small and medium size businesses navigate change throughout the pandemic.

Our work to become a zero carbon council by 2030 is continuing too, with improvements to reduce emissions at leisure centres and investment to install solar panels at more of our council owned properties.

I am confident that our renewed focus on delivering residents' priorities will help make sure Cherwell remains a great place to live and work for years to come.



Councillor Barry Wood
Leader of Cherwell District Council



Cherwell
DISTRICT COUNCIL
NORTH OXFORDSHIRE



Our priorities:

Housing that meets your needs

- Support the delivery of affordable and green housing.
- Ensure minimum standards in rented housing.
- Work with partners supporting new ways to prevent homelessness.
- Support our most vulnerable residents.
- Deliver the Local Plan.



Supporting environmental sustainability

- Work towards our commitment to be carbon neutral by 2030.
- Promote the green economy.
- Support waste reduction, reuse and recycling.
- Work with partners to improve air quality.



An enterprising economy with strong and vibrant local centres

- Support business retention and growth.
- Work with partners to support skills development and innovation.
- Work with others to support growth.
- Work with partners to promote the district as a visitor destination and attract investment in our town centres.
- Work with businesses to ensure compliance and promote best practice.



Healthy, resilient and engaged communities

- Support and encourage active lifestyles and health and wellbeing.
- Support development of leisure services and facilities meeting the needs of residents.
- Support community and cultural development.
- Work towards our commitment to equalities, diversity and inclusion.
- Work with partners to address the causes of health inequality and deprivation.
- Work with partners to reduce crime and antisocial behaviour.



Delivery themes:

Customers

Deliver high quality, accessible and convenient services that are right first time.



Healthy places

Work collaboratively to create sustainable, thriving communities that support good lifestyle choices connecting us to each other and the natural environment.



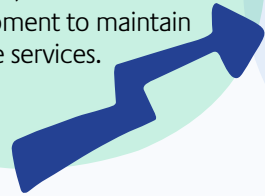
Partnerships

Work with partners across all sectors to deliver and improve services for our residents and communities.



Continuous improvement

Make the best use of our resources and focus on improvement, innovation and staff development to maintain and enhance services.



Climate action

Support residents and local businesses to reduce their carbon emissions. Continue to transform our own estate to deliver our carbon neutral commitments.



CO₂

COVID-19 recovery and renewal

Work with partners in the health and voluntary sectors to help our local business and residents respond, and ensure together, we are in a stronger position to meet the health, economic and social challenges of the future.



Including everyone

Our equalities, diversity and inclusion framework outlines how we plan to create an inclusive community and workplace in Cherwell, through fair and equitable services.

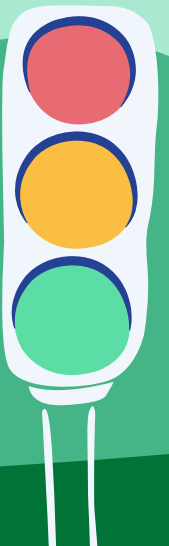


Performance management framework

Cherwell District Council's performance management framework sets out the key actions, projects and programmes of work that contribute to the delivery of the 2022 business plan and the priorities of the council. The supporting measures and key performance indicators are reported on a monthly basis to highlight progress, identify areas of good performance and actions that have been taken to address underperformance or delay.

To measure performance a 'traffic light' system is used. Where performance is on or ahead of target, it is rated green. Where performance is slightly behind the target it is rated amber. A red rating indicates performance is off target.

The monthly performance cycle also includes the management and reporting of leadership risk and financial information. This provides an overview of the council's progress against its strategic priorities and delivery themes as set out earlier in this business plan.



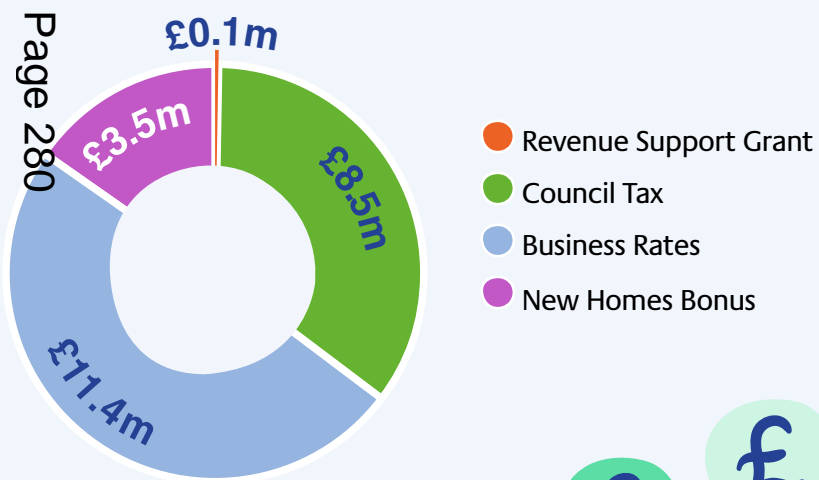
Council funding



Where our money comes from

Thirty six per cent of our funding for services comes directly from Council Tax, with the rest coming from the New Homes Bonus Scheme, Business Rates and Government Revenue Support Grant.

2022/23 funding sources



How we generate income

We generate income by asking people and organisations to pay fees and charges for some of our services such as for planning, car parking and for licences. We also receive rental income from properties the council owns such as Castle Quay and Pioneer Square.



Contact us

Get in touch

Did you know you can access council information and services around the clock at www.cherwell.gov.uk

Email: customer.service@cherwell-dc.gov.uk

Phone: 01295 227001

Find and email your ward councillor here:

www.cherwell.gov.uk/find-member

Write:

Cherwell District Council
Customer Services
Bodicote House
Bodicote
Banbury
Oxfordshire
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Cherwell

DISTRICT COUNCIL
NORTH OXFORDSHIRE

Appendix 7 - Performance December 2022

- Key Performance Indicators -KPI- (Quantitative)
- Programme Measures (Qualitative)

Colour	Symbol	Tolerances for Business Plans Measures	Tolerances for Key Performance Measures (KPIs)
Red		Significantly behind schedule	Worse than target by more than 10%
Amber		Slightly behind schedule	Worse than target by up to 10%
Green		Delivering to plan/Ahead of target	Delivering to target/Ahead of target



Housing that meets your needs - KPI's & Programme Measures 22-23

	Portfolio Holder	Director/Lead Officer*	Result	Target	Status	Commentary	YTD Result	YTD Target	YTD
BP1.2.06 Average time taken to process Housing Benefit New Claims	Cllr A Nell	<ul style="list-style-type: none"> ■ Michael Furness ■ Stephen Hinds 	13.69	18.00	★	Performance is still within target, and we continue to monitor this area.	13.83	18.00	★
BP1.2.07 Average time taken to process Housing Benefit Change Events	Cllr A Nell	<ul style="list-style-type: none"> ■ Michael Furness ■ Stephen Hinds 	3.51	7.00	★	Performance is within target, and we continue to monitor this area.	3.10	7.44	★
BP1.1.02 Deliver the Local Plan	Cllr C Clarke	<ul style="list-style-type: none"> ■ David Peckford ■ Ian Boll 	Delivering to plan	Delivering to plan	★	A draft of our Local Plan has been published for an Overview and Scrutiny Committee meeting, on 11 January 2023.	Slightly behind schedule	Delivering to plan	★
BP1.2.08 % of Major Planning Applications determined to National Indicator	Cllr C Clarke	<ul style="list-style-type: none"> ■ David Peckford ■ Ian Boll 	100.0%	60.0%	★	1 Major Planning Application determined, in December, within the National Indicator target or agreed timeframe.	100.0%	60.0%	★
BP1.2.09 % of Non-Major Planning Applications determined to National Indicator	Cllr C Clarke	<ul style="list-style-type: none"> ■ David Peckford ■ Ian Boll 	94.5%	70.0%	★	91 Non-Major Planning Applications were determined, in December. 86 (94.51%), were within National Indicator target or agreed timeframe.	92.0%	70.0%	★
BP1.2.10 % of Major Applications overturned at appeal	Cllr R Clarke	<ul style="list-style-type: none"> ■ David Peckford ■ Ian Boll 	0.0%	10.0%	★	No Major Planning Application decisions were overturned, at Appeal, by the Planning Inspectorate, in December.	0.0%	10.0%	★
BP1.2.11 % of Non-Major Applications overturned at appeal	Cllr C Clarke	<ul style="list-style-type: none"> ■ David Peckford ■ Ian Boll 	0.0%	10.0%	★	No Non-Major Planning Application decisions were overturned, at Appeal, by the Planning Inspectorate, in December.	0.0%	10.0%	★
BP1.2.03 Net Additional Housing Completions (Quarterly)	Cllr C Clarke	<ul style="list-style-type: none"> ■ David Peckford ■ Ian Boll 	-	286	-	Due to other priorities site visits were not undertaken for Q3 comprehensive update on delivery will be provided for Q4 return	-	856	-

	Portfolio Holder	Director/Lead Officer	Result	Target	Status	Commentary	YTD Result	YTD Target	YTD
BP1.1.01 Homelessness Prevention	Cllr N Mawer	<ul style="list-style-type: none"> ■ Nicola Riley ■ Yvonne Rees 	Slightly behind schedule	Delivering to plan	●	<p>The Housing Team continues to offer advice and support to clients, as early as possible and ahead of any statutory duties being imposed, to prevent risk of homelessness at the earliest opportunity; however, even with early intervention it is increasingly challenging to resolve the housing situation. Oxfordshire is one of the most expensive areas of the country to live in. Rents, in the private sector, are unaffordable to people on low wages or benefits, and rates of Local Housing Allowances do not cover the amounts landlords in this area can charge. Many landlords and agents will only consider tenants with perfect tenancy-credit history, full employment, and often require guarantors. Many clients can't meet criteria. Securing private rented housing is not a realistic option for many. Demand for social housing far outstrips supply, and waiting-times are increasing, on the Housing Register. Housing Register and waiting lists will not provide a quick solution. Given the current economic climate and housing crisis, it is likely that numbers for emergency assistance will increase, and our ability to prevent homelessness, therefore, continues to be challenging.</p> <p>The Housing Team is working hard to develop initiatives to ensure the service we offer, to be the best we possibly can; this includes additional triaging of cases, to manage the expectations of clients, and support-workers, acting as early as possible. We have increased resources, in the Allocations Team, to ensure clients with the most complex housing needs receive bespoke advice and assistance.</p>	Slightly behind schedule	Delivering to plan	★

	Portfolio Holder	Director/Lead Officer	Result	Target	Status	Commentary	YTD Result	YTD Target	YTD
BP1.2.01 Number of Homeless Households living in Temporary Accommodation (TA)	Cllr N Mawer	<ul style="list-style-type: none"> ■ Nicola Riley ■ Yvonne Rees 	39	35	▲	Due to continued increase in clients approaching in crisis and delays in moving clients to permanent accommodation offers, numbers in temporary accommodation are increasing. We secured 5 more placements for temporary accommodation to meet the specific needs of survivors of domestic abuse, and other vulnerable women, recognising that demand in this area is increasing. We hope to maintain a low number of temporary accommodation placements.	34	35	★
BP1.2.02 Number of people helped to live independently through use of DFG & other grants/loans	Cllr N Mawer	<ul style="list-style-type: none"> ■ Nicola Riley ■ Yvonne Rees 	50.00	45.00	★		482.00	405.00	★
BP1.2.03 Homes improved through enforcement action	Cllr N Mawer	<ul style="list-style-type: none"> ■ Nicola Riley ■ Yvonne Rees 	17.00	9.00	★		120.00	81.00	★
BP1.2.04 Number of affordable homes delivered including CDC and Growth Deal targets	Cllr N Mawer	<ul style="list-style-type: none"> ■ Nicola Riley ■ Yvonne Rees 	8.00	12.00	▲	4 Shared-Ownership homes and 4 Affordable homes for Rent delivered. This is below target, but December was a quieter month for developers, in terms of delivery. However, delivery for year-to-date figures is green, and delivering ahead of target (of 120 against a target of 108).	120.00	108.00	★
BP1.2.05 Number of Housing Standards interventions	Cllr N Mawer	<ul style="list-style-type: none"> ■ Nicola Riley ■ Yvonne Rees 	78.00	55.00	★		668.00	495.00	★

Supporting Environmental Sustainability - KPI's & Programme Measures 22-23

	Portfolio Holder	Director/Lead Officer*	Result	Target	Status	Commentary	YTD Result	YTD Target	YTD
BP2.1.01 Work with partners to deliver initiatives to improve air quality in the District	Cllr D Sames	<ul style="list-style-type: none"> ■ Ian Boll ■ Richard Webb 	Delivering to plan	Delivering to plan	★	The review and assessment of air quality continues with diffusion tubes monitoring nitrogen dioxide at 42 sites across the district, also, four portable monitors are monitoring nitrogen dioxide, particulate matter (both PM10 and PM2.5), sulphur dioxide and ozone. Portable monitors located at Hennef Way and Bicester Air Quality Management Areas, and at Hanwell School, in Banbury, and St Edburg's School, in Bicester, are part of the Department for Environment, Food and Rural Affairs grant funded project, aiming to raise awareness on air quality. We have been in discussions with Public Health and Environment and Place, at Oxfordshire County Council, who are working to produce an air quality strategy for the County, with view to launch on 'Clean Air Day' (16 June), in 2023.	Delivering to plan	Delivering to plan	★
BP2.1.02 Promote the green economy	Cllr D Sames	<ul style="list-style-type: none"> ■ Ed Potter ■ Ian Boll 	Delivering to plan	Delivering to plan	★	New Climate Action manager, started in December 22, which prompts the promotion of green economy to increase. Currently, this is on track.	Delivering to plan	Delivering to plan	★
BP2.1.01 % Waste Recycled & Composted	Cllr D Sames	<ul style="list-style-type: none"> ■ Ed Potter ■ Ian Boll 	49.0%	56.0%	▲	Recycling rate is at 2%, below target, due to inflation, reducing the amount of products residents buy and a very hot summer, which reverted in less garden waste produced. This is a national trend and, although Cherwell will do better than most other authorities due to the weekly food waste recycling, our 56% target will not be reached.	53.9%	56.0%	●
BP2.2.02 Reduction of fuel consumption used by fleet	Cllr D Sames	<ul style="list-style-type: none"> ■ Ed Potter ■ Ian Boll 	42,034	45,544	★	Good figures on estimated usage.	42,101	45,127	★

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An Enterprising Economy with Strong and Vibrant Local Centres - KPI's & Programme Measures 22-23

	Portfolio Holder	Director/Lead Officer▲	Result	Target	Status	Commentary	YTD Result	YTD Target	YTD
BP3.1.01 Proactively manage the Cherwell workstreams of the Oxfordshire Housing and Growth Deal	Cllr B Wood	<ul style="list-style-type: none"> ■ Ian Boll ■ Robert Jolley 	Delivering to plan	Delivering to plan	★	Cherwell District Council continues to be engaged and active participant within the Oxfordshire Housing and Growth Deal. The five-year programme entered year-five at the start of April 2022. The Council's Officer Programme Board reviews (set on a regular basis) remains with workstreams involved, such as: Infrastructure and Homes from Infrastructure, local Productivity (the OxLEP Industrial Strategy which is already completed), Affordable Housing workstream, which was also previously completed, and in August 2022, the Oxfordshire Plan 2050 ceased.	Delivering to plan	Delivering to plan	★
BP3.2.01 % of Council Tax collected, increase Council Tax Base	Cllr A Nell	<ul style="list-style-type: none"> ■ Michael Furness ■ Stephen Hinds 	8.86%	8.25%	★	The in-month collection rates recorded 8.86% against target of 8.25%. The cumulative collection rates for 2022/23 were at 83.60%, which exceeded the year-to-date target of 82.30%. Recovery action continued throughout December, with the issuing of reminders and summons to prompt payment.	83.59%	82.30%	★
BP3.2.02 % of Business Rates collected, increasing NNDR Base.	Cllr A Nell	<ul style="list-style-type: none"> ■ Michael Furness ■ Stephen Hinds 	8.70%	8.50%	★	The in-month collection rates were 8.70% against target of 8.5%, with cumulative collection rates for 2022/23 being 84.36% against the year-to-date target of 82.70%. Recovery action has continued throughout December, with outbound calls taking place and the issuing of reminders and summonses to prompt payment.	84.38%	82.80%	★
BP3.2.03 % of Building Regulations Applications acknowledged to within 3 working days of deposit	Cllr C Clarke	<ul style="list-style-type: none"> ■ David Peckford ■ Ian Boll 	80.17	90.00	▲	For Q3, 2022/23, we achieved 97/121 = 80% of target. Previous quarters recorded 82% and 88% making overall (to date) 83% against the aspirational target of 90%. However, this is not affecting market share or satisfaction.	83.08	90.00	●
BP3.2.04 % of valid Full Plan Applications determined or checked within 15 working days of deposit	Cllr C Clarke	<ul style="list-style-type: none"> ■ David Peckford ■ Ian Boll 	100.00	80.00	★	This is a Local authority Building Control (LABC) national performance measure, to which we pay particular attention, and in Q3 2022/23 resulted in we achieving 39/39 = 100% of applications. Previous quarters recorded 92% and 100% making year-to-date figure of 96% against target of 80%.	95.57	80.00	★

Healthy, Resilient and Engaged Communities - KPI's & Programme Measures 22-23

	Portfolio Holder	Director/Lead Officer	Result	Target	Status	Commentary	YTD Result	YTD Target	YTD
BP4.1.01 Tackle Environmental Crime	Cllr E Reeves	<ul style="list-style-type: none"> ■ Ian Boll ■ Richard Webb 	Delivering to plan	Delivering to plan	★	52 fly tips reported and 52 were investigated, in December. Seven warning letters were sent, thirteen interviews (under caution) were carried out (two face-to-face and eleven by letter), and eight notices were served, for waste carrier and duty of care offences.	Delivering to plan	Delivering to plan	★
BP4.1.02 Support Community Safety and Reduce Anti-Social Behaviour	Cllr E Reeves	<ul style="list-style-type: none"> ■ Ian Boll ■ Richard Webb 	Delivering to plan	Delivering to plan	★	In December, the Council's Community Safety Team supported Thames Valley Police at events to promote night-time personal safety, in the run-up to Christmas and promoting home security with shoppers. Regular patrols were also carried at community gardens as a result of concerns raised by community action groups. Team members also attended local Community Forums to discuss matters relating to community safety, and attended The Hill 'Winterfest' event. Work continues to tackle anti-social behaviour (ASB), in Bicester town centre, following the introduction of the Public Spaces Protection Order earlier in the year. A young male was given final warning to desist ASB, and a visit was carried out to his parents. We continue to work with partners to protect vulnerable young people. Throughout December, three young people who had been reported missing from their schools, were located, also support to high-risk young people was prioritised, 'identified' through multi-agency meetings.	Delivering to plan	Delivering to plan	★
BP4.1.03 Promote Health & Wellbeing	Cllr P Chapman	<ul style="list-style-type: none"> ■ Nicola Riley ■ Yvonne Rees 	Delivering to plan	Delivering to plan	★	Household Support Fund 2 concluded - £165,580 was distributed to households through our partnership with Citizens Advice, and Homes for Ukraine – work with partners and communities is still ongoing.	Delivering to plan	Delivering to plan	★

	Portfolio Holder	Director/Lead Officer	Result	Target	Status	Commentary	YTD Result	YTD Target	YTD
BP4.1.04 Improve Leisure & Community Facilities	Cllr P Chapman	<ul style="list-style-type: none"> ■ Nicola Riley ■ Yvonne Rees 	Slightly behind schedule	Delivering to plan	●	Remedial works to the Flume Structure has taken place, during this period, and will be available for use when the Outdoor Pool opens again, later in the year. The installation of pool covers for the Outdoor Pool is planned for the first 3 months of the 2023. Site surveys have been undertaken and currently awaiting installation dates. Proposals were put forward for the modernisation of the swimming pool changing rooms, later in the year at Woodgreen's. Works were completed, this quarter, at Bicester Leisure Centre with the installation of a new steam room, complementing the other health suite facilities. Similarly, at Kidlington Leisure Centre, one of the 'accessible' changing facilities has had full modernisation.	Slightly behind schedule	Delivering to plan	●
BP4.1.05 Support the Voluntary Sector	Cllr P Chapman	<ul style="list-style-type: none"> ■ Nicola Riley ■ Yvonne Rees 	Delivering to plan	Delivering to plan	★	A Parish Liaison meeting was held in 17 November, and a Local Strategic Partnership meeting was held in 01 December. Next session due on the 26 Jan.	Delivering to plan	Delivering to plan	★
BP4.1.06 Support and Safeguard Vulnerable People	Cllr P Chapman	<ul style="list-style-type: none"> ■ Nicola Riley ■ Yvonne Rees 	Delivering to plan	Delivering to plan	★	Safeguarding policy was updated, in December 2022. Focus continued on staff briefings including bespoke safeguarding topics. Safeguarding audits, across leisure facilities within Cherwell, were linked to requirements on assessing commissioned services. Self-Assessment returned to Oxfordshire Safeguarding Board, in December, and our partnership with other county district sharing of best practice and information on Safeguarding, continued. Promoting the importance of safeguarding training for all Councillors, on going.	Delivering to plan	Delivering to plan	★
BP4.1.07 Promote Healthy Place Shaping	Cllr P Chapman	<ul style="list-style-type: none"> ■ Nicola Riley ■ Yvonne Rees 	Delivering to plan	Delivering to plan	★	We are on track to deliver our Healthy Place Shaping ambitions, and underway to deliver our Heyford Park Health Route. Engagement with residents and key partners will take place, in January. The E-bike scheme is also underway and our first residents will be using e-bikes around March/April. The green spaces consultation and report was shared with partners, and we are now working to improve the infrastructure in parks.	Delivering to plan	Delivering to plan	★

	Portfolio Holder	Director/Lead Officer	Result	Target	Status	Commentary	YTD Result	YTD Target	YTD
BP4.2.01 Number of Visits/Usage to District Leisure Centres	Cllr P Chapman	<ul style="list-style-type: none"> ■ Nicola Riley ■ Yvonne Rees 	87,280	40,000	★	Usage figures, at the Leisure Centres, were down against previous months, however, usually for December, are a mix of closures, restrictions in opening hours, bad weather and Christmas. All 4 main Leisure Centres: Spiceball, Kidlington, Bicester and Woodgreen, have shown increase against the same period, in 2021; however, Spiceball Leisure Centre attracted circa 10,000 more visits, in December 2022, than in 2021.	1,039,643	90,000	★
BP4.2.02 No of individuals registered FAST and You Move	Cllr P Chapman	<ul style="list-style-type: none"> ■ Nicola Riley ■ Yvonne Rees 	1,607.00	250.00	★	'You Move' started really well, with an uptake from Cherwell families, were 1,607 individuals and 434 families currently use the programme. 'Youth Activators' are delivering family specific sessions, at school sites from January, along with many discounted offers, such as 50% swimming and more.	1,607.00	250.00	★
BP4.2.03 No of young people who participated in Youth Activator activities	Cllr P Chapman	<ul style="list-style-type: none"> ■ Nicola Riley ■ Yvonne Rees 	1,200.00	650.00	★	'Youth Activators' delivered activities to over 1,200 children, this term, in a range of programmes from mental health activities (through to targeted programmes for children who need a bit more support). 'Thye' have visited 24 schools, in term, 2 also delivering community outreach sessions, in targeted wards, such as: Grimsbury, Ruscote, Bicester West and more.	1,200.00	650.00	★

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Name and Description of risk	Potential impact	Inherent (gross) risk level (no Controls)			Controls	Control assessment	Lead Member	Risk owner	Risk manager	Residual risk level (after existing controls) Pvl			Mitigating actions (to address control issues)	Comments	Last updated
		Probability	Impact	Rating						Probability	Impact	Rating			
L01 - Financial resilience - Failure to react to external financial impacts, new policy and increased service demand. Poor investment and asset management decisions.	Reduced medium and long term financial viability	4	4	16	Medium Term Revenue Plan reported regularly to members.	Fully	Councillor Adam Nell	Michael Furness	Joanne Kaye	4	4	18	Posts are filled by appropriately qualified individuals. When posts become vacant the JD is reviewed to ensure it meets the needs of the wider team and that the essential skill levels and experience are appropriate.	The team is currently fully staffed with appropriately qualified individuals. Continuous Professional Development opportunities are offered and maximised by CIPFA, LGA, Link, Pixel. New financial system helping to support the monitoring process.	Risk reviewed - 18/01/2023 Comments and mitigating actions updated
	Reduction in services to customers				Balanced medium term and dynamic ability to prioritise resources	Fully							Investment Strategy agreed annually. Strategic Place Shaping Board providing a gateway process for capital investment decisions which comply with governance framework.		
	Increased volatility and inability to manage and respond to changes in funding levels				Highly professional, competent, qualified staff	Partially							Timely and good quality budget monitoring reports, particularly property income and capital. Unit 4 financial system provides improved management information.		
	Reduced financial returns (or losses) on investments/assets such as in subsidiaries.				Good networks established locally, regionally and nationally. Strong shareholder function and relationships with subsidiaries. Financial returns from the subsidiaries are not included in the MTFs until they are reasonable assured to materialise.	Fully							Introduction and implementation of an Asset Management Strategy. Shareholder Agreements in place with subsidiaries which require regular management reports to be shared with the Shareholder which allows for dialog between the entities.		
	Inability to deliver financial efficiencies				National guidance interpreting legislation available and used regularly	Fully							Work is underway to maximise the impact of the available space in Barbury town centre, encouraging an enjoyable shopping experience alongside space for non-retail activity to co-exist.		
	Exposure to commercial pressures in relation to regeneration projects.				Progress regeneration plans in a coordinated manner.	Partially							Finance support and engagement with programme management processes, project boards and steering group.		
	Poor customer service and satisfaction				Participate in Oxfordshire Treasurers' Association's work streams	Fully							Integration and continued development of Performance, Finance and Risk reporting.		
	Increased complexity in governance arrangements				Review of best practice guidance from bodies such as CIPFA, LGA and NAO	Fully							Regular involvement and engagement with colleagues across the county as well as involvement in Regional and National finance forums.		
	Lack of officer capacity to meet service demand				Treasury management and capital strategies in place	Fully							Regular member training and support. Briefings provided on key topics to members with particular focus on key skills for specific committees such as audit committee.		
	Lack of financial awareness and understanding throughout the council				Investment strategies in place	Fully							Budget setting will not be an annual event, but will be a continuous process of reviewing budget monitoring and reflecting trends in the MTFs.		
	Increased inflation in the costs of capital schemes				Regular financial and performance monitoring in place	Fully							Updated budget monitoring for 2022/23 with a greater focus on savings delivery and budget management. Introduction of Budget Oversight Group will review budget position monthly in order to challenge budget holders to manage their budgets within approved parameters.		
	Increased inflation in revenue costs				Independent third party advisers in place	Fully							Regular utilisation of advisors as appropriate.		
					Regular bulletins and advice received from advisers	Fully							Internal Audits being undertaken for core financial activity and capital as well as service activity.		
	Property portfolio income monitored through financial management arrangements on a regular basis	Partially	Summarise and distribute announcements to CLT, Leader and Lead Member for Finance as and when announcements are made relating to Spending Reviews and other government announcements affecting Local Government.												

Name and Description of risk	Potential impact	Inherent (gross) risk level (no Controls)			Controls	Control assessment	Lead Member	Risk owner	Risk manager	Residual risk level (after existing controls) P/I			Mitigating actions (to address control issues)	Comments	Last updated
		Probability	Impact	Rating						Probability	Impact	Rating			
					Asset Management Strategy in place and embedded Transformation Programme in place to deliver efficiencies and increased income in the future	Partially Fully							Financial forecasts of resources for 2023/24 had assumed a reduction in resources from business rates compared to February 2022 assumptions. The budget for 2022/23 was agreed with savings proposals identified to address these reductions. Close monitoring of the delivery of the savings programme has been taking place throughout 2022/23 with mitigations required if slippage was identified. Council agreed a balanced 2022/23 budget at its meeting on 28 February 2022. If resources were to fall significantly below the 2022/23 forecast level the Council has made a number of contingencies available in 2022/23 and, if required, a review of which reserves could be made available to mitigate this would be required (e.g. due to greater ongoing impact of Covid-19, or due to further economic shocks in the short-term, e.g the cost of living crisis). A similar approach to reviewing reserve availability could be adopted if the cost of goods we purchase were to increase. Ongoing impacts would be addressed as part of the budget setting process. A business rates reset is assumed from 2025/26 which will significantly reduce the resources available to the Council. Should resources from business rates fall much below this (e.g. due to any further ongoing impacts to the economy) then resources would be supplemented by a "safety net" payment from the Government under the current regime. The budget process for 2023/24 is nearly complete, with savings proposals sought that would enable the Council to operate within the forecast level of resources. Where the Government has issued consultations on future approaches to funding local government CDC has responded to ensure its views are considered. New capital bids submitted will be questioned to ensure increases in cost assumptions have been reflected and that there is an identified business need.	The Council currently anticipates a medium and long term funding shortfall in overall terms. Set alongside the anticipated funding reductions anticipated to start from 2025-26 the financial resilience of the Council could be severely impacted. The Council will set its 2023/24 budget on 27 Feb 2023 and will then monitor the delivery of the budget and begin preparations for the 2024/25 budget process in order to meet the forecast shortfall identified in the MTF5. The Government announced a 3 year Spending Review for 2022/23 - 2024/25 in October 2021. This provided the resource envelope for Government Departments to operate in and has set out an overall increase in local government spending power over the three year period, but did not provide any specific funding allocations for individual local authorities. In the provisional settlement for 2023/24, the government committed to maintaining council spending power, but it is not clear how this commitment will be delivered in the final year of the settlement.	
L02 - Statutory functions - Failure to meet statutory obligations and policy and legislative changes are not anticipated or planned for.	Legal challenge	3	4	12	Embedded system of legislation and policy tracking in place, with clear accountabilities, reviewed regularly by Directors.	Partially	Councillor Barry Wood	Stephen Hinds	Shiraz Sheikh	3	3	9	Establish corporate repository and accountability for policy/legislative changes taking into consideration all of the Council's functions.	Development in legislation continues to be closely monitored as implemented e.g. subsidy control (formerly state aid regime) being reviewed and government guidance tracked as it is developed and published.	Risk reviewed 03/01/2023 - Commentary updated
	Loss of opportunity to influence national policy / legislation				Clear accountability for responding to consultations with defined process to ensure Member engagement	Fully							Review Directorate/Service risk registers.	Additional steps are under way to develop a regular review of legislative developments that will be service team focused to enhance awareness of statutory obligations and legal developments.	
	Financial penalties				National guidance interpreting legislation available and used regularly	Fully							Ensure Committee forward plans are reviewed regularly by senior officers.		
	Reduced service to customers				Risks and issues associated with Statutory functions incorporated into Directorate Risk Registers and regularly reviewed.	Fully							Ensure Internal Audit plan focusses on key leadership risks.		
	Inability to deliver council's plans				Clear accountability for horizon scanning, risk identification / categorisation / escalation and policy interpretation in place	Partially									
	Exposure to commercial pressures				Robust Committee forward plans to allow member oversight of policy issues and risk management, including Scrutiny and Audit.	Fully									
	Reduced resilience and business continuity				Internal Audit Plan risk based to provide necessary assurances	Fully									
	Reduced staff morale, increased workload and uncertainty may lead to loss of good people				Strong networks established locally, regionally and nationally to ensure influence on policy issues. In addition two Directors hold leading national roles.	Fully									
					Senior Members aware and briefed regularly in 1:1s by Directors	Fully							Appointed interim officer regarding FOIs/EDIs and enquiries. Regular reports to CLT and DLT outline our performance regarding meeting statutory deadlines.		
					Arrangements in place to source appropriate interim resource if needed	Fully							Learning and development opportunities identified and promoted by the Chief Executive and Directors. First tranche of Senior Leadership training/development begins in August, and is cascaded throughout 2022/23.		
	Ongoing programme of internal communication	Fully	Regular communications from Chief Executive. Quarterly staff briefings from Assistant Directors.												
	Programme Boards in place to oversee key corporate projects and ensure resources are allocated as required.	Fully	External support secured for key corporate projects including Growth Deal and IT Transformation Programme.												
	CDC Extended Leadership Team (ELT) Meetings established to oversee and provide assurance on key organisational matters including resourcing.	Fully													
L03 - CDC Local Plan - Failure to ensure sound, up to date local plan remains in place for Cherwell resulting in poor planning decisions such as development in inappropriate locations, inability to demonstrate an adequate supply of land for housing and planning by appeal	Poor planning decisions leading to inappropriate growth in inappropriate place.	4	4	16	Local Development Scheme (LDS) is actively managed and reviewed, built into Service Plan, and integral to staff appraisals of all those significantly involved in Plan preparation and review	Partially	Councillor Colin Clarke	Ian Boll	David Peckford	3	4	12	Regular review meetings on progress and critical path review. Regular Corporate Director and Lead Member briefings. LDS updated as required with programme management approach adopted to ensure progress against plan.	The Local Development Scheme (LDS) was last updated in September 2021. It includes programmes for the Oxfordshire Plan 2050, a Local Plan Review, the Banbury Canalside Supplementary Planning Document and work on a Community Infrastructure Levy (CIL). The Oxfordshire Local Planning Authorities agreed to stop work on the Oxon Plan in August 2022. Local Plans for the City and Districts will now provide the framework for the long term planning of Oxfordshire. An issues consultation for the Cherwell Local Plan Review was completed on 14 Sept 2020. An Options consultation was undertaken from 29 September to 10 November 2021. A draft Local Plan was presented to the Overview and Scrutiny Committee on 11 January 2023 and to the Executive on 19 January 2023. Consultation on the Plan was deferred to allow officers to consider the comments made. The programmes for work on the Canalside SPD and CIL are aligned to the Local Plan review timetable and will be updated as work on the Plan progresses.	Risk reviewed and comments updated 24/01/23.
Negative (or failure to optimise) economic, social, community and environmental gain	Team capacity and capability kept under continual review with gaps and pressures identified and managed at the earliest opportunity.				Partially	Regular Corporate Director and Lead Member briefings									
Negative impact on the council's ability to deliver its strategic objectives, including its commitments within the Oxfordshire Housing & Growth Deal						LDS updated as required with programme management approach adopted to ensure progress against plan									
Increased costs in planning appeals						LDS timeline built into Directorate level objectives (e.g. via Service Plans) and incorporated into SMART targets within staff appraisals.									
Reputational damage with investor community of Cherwell as a good place to do business created by uncertainty/ lack of policy clarity	On-going review of planning appeal decisions to assess robustness and relevance of Local Plan policies				Partially	Authority Monitoring Reports continue to be prepared on a regular annual basis.									

Name and Description of risk	Potential impact	Inherent (gross) risk level (no Controls)			Controls	Control assessment	Lead Member	Risk owner	Risk manager	Residual risk level (after existing controls) Pvl			Mitigating actions (to address control issues)	Comments	Last updated
		Probability	Impact	Rating						Probability	Impact	Rating			
L04 - Business Continuity Failure to ensure that critical services can be maintained in the event of a short or long term incident impacting on the delivery of the Council's operations	Inability to deliver critical services to customers/residents	4	4	16	Business continuity strategy, statement of intent and framework in place and all arrangements overseen by a Business Continuity Steering Group	Fully	Councillor Eddie Reeves	Ian Boll	Richard Webb	3	4	12	Business Continuity Statement of Intent and Framework due to be reviewed to align with new incident management framework	The Council maintains businesses continuity plans for services to ensure that critical services can continue to be provided in the event of an emergency incident. Remote working enables most teams to work effectively from home and sustains services in the event of travel disruption or inability to use council buildings. A new incident management framework was approved by CLT in November, has been shared with Duty Directors and has been published on the Intranet. The Council's Intranet pages on Business Continuity have also been updated to provide better information for staff. A document repository and management system is now in place for key business continuity plans and is in the process of being populated with new documents when they are refreshed. Teams have been asked to update BIAs in advance of a complete review of Business Continuity Plans.	Risk Reviewed 03/01/2023 - Comments and mitigating actions updated.
	Financial loss/ increased costs				Services prioritised and ICT recovery plans reflect those priorities and the requirements of critical services	Fully							Cross-council BC Steering Group meets regularly to identify BC improvements needed		
	Loss of important data				ICT disaster recovery arrangements in place with data centre and cloud services reducing likelihood of ICT loss and data loss	Fully							ICT transition to data centre and cloud services has reduced likelihood of ICT loss and data loss		
	Inability to recover sufficiently to restore non-critical services before they become critical				Incident management team identified in Business Continuity Framework	Fully							Corporate ownership and governance revised as a result of separation of OCC and CDC		
	Loss of reputation				All services undertake annual business impact assessments and updates of business continuity plans	Partially							BC Impact assessments and BCPs being updated and reviewed by OCC's Emergency Planning team with supporting document management system being implemented.		
	Reduced service delivery capacity in medium term due to recovery activity				All services maintain business continuity plans	Partially							BC exercises to be arranged Incident management framework in place and revised to reflect arrangements post separation from OCC. The IMF is available on the Intranet to all staff.		

Name and Description of risk	Potential impact	Inherent (gross) risk level (no Controls)			Controls	Control assessment	Lead Member	Risk owner	Risk manager	Residual risk level (after existing controls) P/I			Mitigating actions (to address control issues)	Comments	Last updated
		Probability	Impact	Rating						Probability	Impact	Rating			
					Fully effective Partially effective Not effective										
L05 - Emergency Planning (EP) - Failure to ensure that the local authority has plans in place to respond appropriately to a civil emergency fulfilling its duty as a category one responder	Inability of council to respond effectively to an emergency	4	4	16	Incident Management Framework in place and key contact lists updated monthly.	Fully	Councillor Eddie Reeves	Ian Boll	Richard Webb	3	4	12	Emergency plan contacts list being updated monthly and reissued to all duty managers periodically. Available on ELT Teams channel.	The council is maintaining its duty director rota for any emergency incidents that might arise. Training has been provided for new Extended Leadership Team members to support them in their new role as Duty Director. A new Incident Response Framework was approved by CLT in November, has been provided to Duty Directors and is now published on the Intranet for all staff to access. This new IMF reflects changes following separation from OCC. Duty Directors also have access to this framework on the Cherwell Resilience Direct pages along with a key contacts guide. A 'lessons learned' review of an incident in July (which resulted in no disruption to the council but tested our response arrangements) identified some actions to improve awareness of the council's business continuity incident response arrangements. These actions have been completed.	Risk Reviewed 03/01/2023 - Comments updated.
	Unnecessary hardship to residents and/or communities				Emergency Planning Lead Officer defined with responsibility to review, test and exercise plan and to establish, monitor and ensure all elements are covered	Fully							OCC Emergency Planning providing expert advice and support under a partnership arrangement which continues post decoupling.		
	Risk to human welfare and the environment				Expert advice and support provided by Oxfordshire County Council's Emergency Planning Team under partnership arrangements.	Fully							Supporting officers for incident response identified in the emergency plan and wallet guide.		
	Legal challenge				Council Duty Directors attend training relating to role prior to joining duty director rota and have refresh training annually	Fully							Refreshed incident management plan being developed following separation from OCC.		
	Potential financial loss through compensation claims				Multi agency emergency exercises conducted to ensure readiness	Partially							Training provided for all Duty Directors in late 2021 and early 2022. Training for new duty directors arranged for October and December 2022. All senior managers who provide the Duty Director rota have opportunity attend multi-agency exercises and duty manager training with OCC senior managers.		
	Ineffective Cat 1 partnership relationships				Active participation in Local Resilience Forum (LRF) activities	Fully							On-call rota being maintained and updated to reflect recent staffing changes		
	Reputational damage												Authority continues to be represented at the Local Resilience Forum		
L06 - Safeguarding the Vulnerable - Operational and partnership actions - Failure to work effectively with partners to identify and protect vulnerable people in the district and disrupt exploitation leaving vulnerable people at risk or subject to exploitation.	Increased harm and distress caused to vulnerable individuals and their families.	4	4	16	Community Safety Partnership monitors risks and oversees the actions needed to reduce risks of exploitation	Partially	Councillor Eddie Reeves	Ian Boll	Richard Webb	3	4	12	Engagement with the CE sub-group of Safeguarding Children Board following the Jacob CSRP to identify improvements to local arrangements.	Work is continuing to implement changes to the local arrangements for tackling child exploitation following the Jacob CSRP. A wider partnerships review for the Oxfordshire strategic partnerships has been undertaken and will conclude in early 2023. This is expected to lead to changes in how the strategic partnerships work together. Plans are in development for local reporting on exploitation risks to Community Safety Partnerships which will support the Partnership to ensure that local response arrangements are effective.	Risk Reviewed 03/01/2023 - Comments updated.
	Council subject to external reviews				Engagement with Joint Agency Tasking and Co-ordinating Group (JATAC) and Cherwell Operations Group to share information and plan actions on known risks and vulnerable people with partners.	Fully							Implementing local changes to the multi-agency arrangements in Cherwell seeking to prevent child exploitation to address findings in the Jacob CSRP.		
	Criminal investigations potentially compromised				Representation at county Child Exploitation sub-group of the Safeguarding Children Board, the countywide Modern Slavery Partnership and Safer Oxfordshire Partnership.	Fully							CSP to adopt improved oversight of the local arrangements to ensure these are effective.		
	Potential financial liability if council deemed to be negligent.				Representation at the Children Missing and Exploited Network meetings for north Oxfordshire.	Fully							Community based exploitation disruption models to be developed and implemented.		
	Reputational damage to the council.				Engagement at an operational and tactical level with relevant external agencies and networks to deliver community based disruption and preventative actions.	Partially							Continue to engage with partnership arrangements in place to identify risks.		
					Arrangements in place to ensure local framework of partnership meetings are effective and robustly identify and tackle risks.	Partially									

Name and Description of risk	Potential impact	Inherent (gross) risk level (no Controls)			Controls	Control assessment	Lead Member	Risk owner	Risk manager	Residual risk level (after existing controls) Pvl			Mitigating actions (to address control issues)	Comments	Last updated
		Probability	Impact	Rating						Probability	Impact	Rating			
L07 - Health and safety Failure to ensure effective arrangements are in place for Health and Safety.	Unsafe services leading to fatality, serious injury & ill health to employees, service users or members of the public	5	4	20	Corporate H&S governance arrangements and policies are regularly reviewed and updated by the Corporate H&S Team and monitored by the H&S Assurance Board.	Fully effective	Councillor R. Mould	Claire Cox	Martin Green	3	4	12	As a result of decoupling from OCC the strategic H&S lead is no longer in place but a recruitment campaign in progress to recruit a Health and Safety Manager who will take a corporate lead on Health and Safety matters. Post decoupling CLT will have monthly monitoring of H&S matters as a standing item at CLT meetings. The corporate H&S register will be managed and monitored with a focus on the depots as our highest risk areas. Corporate H&S Auditing and Inspection programme on track. Reports issued to managers and actions tracked for completion.	Risk re-evaluated in light of decoupling from OCC and the need for a Corporate lead to be recruited which has now taken place. The Health and Safety Manager commenced employment on 1 December 2022 and will be taking forward actions arising from the recent Health and Safety Audit report.	Risk reviewed 04/01/2023 - no change
	Criminal prosecution for failings: Breach of legislation and potential for enforcement action.				Directors and service leads are responsible for ensuring H&S arrangements are in place within their areas or responsibility. Managers are responsible for ensuring operational health and safety risks are assessed and effective control measures implemented.	Fully									
	Financial impact (compensation or improvement actions)				Consultation with employee representatives via employer and union consultative committees (Unison)	Fully									
	Reputational Impact				Corporate H&S Training provided via corporate learning and development programme. Training for operational risks may be organised by services.	Fully									
					H&S performance monitored by accident and incident reports and corporate H&S auditing and inspection programme.	Fully									
					H&S information is disseminated via internal communications and updates to ELT and other relevant meetings.	Fully									

Name and Description of risk	Potential impact	Inherent (gross) risk level (no Controls)			Controls	Control assessment	Lead Member	Risk owner	Risk manager	Residual risk level (after existing controls) Pvi			Mitigating actions (to address control issues)	Comments	Last updated
		Probability	Impact	Rating						Probability	Impact	Rating			
L08 - Cyber Security -if there is insufficient security with regards to the data held and IT systems used by the councils and insufficient protection against malicious attacks on council's systems then there is a risk of: a data breach, a loss of service, cyber- ransom.	Financial loss / fine	4	5	20	File and data encryption on computer devices	Fully	Councillor Richard Mould	Stephen Hinds	David Spilsbury	3	5	15	<p>Cyber Security is mandatory e-learning for all staff to be completed annually and is part of new starters induction training.</p> <p>Members given presentations and cyber training with the Police Cyber Security Advisor.</p> <p>The Regional Police Cyber Security Advisor have given a series of all-Council staff awareness sessions.</p> <p>Microsoft Multi-Factor Authentication is embedded to authenticate users providing an enhanced level of cyber security.</p> <p>IT implemented an intrusion prevention and detection system which is monitored, and regular actions are implemented from the resulting reports.</p> <p>Cyber Security advice and guidance regularly highlighted to all staff.</p> <p>External Health Check undertaken each year and Cabinet Office PSN compliance reviewed and certified each year to ensure the infrastructure is secure to connect to the PSN.</p> <p>Internal Audit completed cyber audits with no major issues or significant risks identified.</p> <p>Joint OCC/CDC Cyber Security Officer in place - this is likely to continue after decoupling under SLA.</p> <p>Additional IT security advice provided for all staff during the Covid-19 working at home period including online coronavirus related scams.</p> <p>Cyber Security Manager has reviewed advice and provided assurance on our compliance.</p> <p>All staff reminded to be vigilant to unexpected emails due to the heightened risk of cyber-attack due to escalating tensions in Eastern Europe.</p>	<p>Cyber security incidents are inevitable.</p> <p>The only way to manage this risk is to have effective controls and mitigations in place including audit and review.</p> <p>The controls and any further controls will not reduce the potential impact should the risk occur e.g., if we were subject to a ransomware attack the effect on the council could be catastrophic. We do have controls in place to prevent this happening and plans to deal with and recover from such an incident should it occur.</p> <p>The controls in place have reduced the probability from 'probable' to 'possible', we don't believe that this is reduced further to the point of it being 'unlikely' as it is possible, we could be subjected to either a cyber incident or data breach within the Council.</p> <p>The National Cyber Security Centre (NCSC) advise an increased risk of cyber-attack due to escalating tensions in Eastern Europe. The overall risk score remains the same.</p> <p>A recent Audit of the Cyber function (CDC and OCC jointly) rated the that the system of control is being maintained (Amber) It should be noted that two elements of the Audit were red rated, and these were regarding procedural documentation which since have been resolved.</p>	Risk reviewed 03/01/2023 - No changes
	Prosecution – penalties imposed				Managing access permissions and privileged users through AD and individual applications	Fully									
	Individuals could be placed at risk of harm				Schedule of regular security patching	Fully									
	Reduced capability to deliver customer facing services				Vulnerability scanning	Fully									
	Unlawful disclosure of sensitive information				Malware protection and detection	Fully									
	Inability to share services or work with partners				Effective information management and security training and awareness programme for staff	Fully									
	Loss of reputation				Password and Multi Factor Authentication security controls in place	Fully									
					Robust information and data related incident management procedures in place	Fully									
					Appropriate robust contractual arrangements in place with all third parties that supply systems or data processing services	Fully									
					Appropriate plans in place to ensure ongoing PSN compliance	Fully									
					Adequate preventative measures in place to mitigate insider threat, including physical and system security	Fully									
					Insider threat mitigated through recruitment and line management processes	Fully									
	Increased threat to security due to most staff working from home				A complete restructure and update of the technical approach for the infrastructure has resulted in a move to a zero trust model.	Fully									
	Advice received from NCSC on specific activity alerts, the increased threat of globalised ransomware and malware attacks.	Fully													

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L09 -Safeguarding the vulnerable - Internal procedures- Failure to follow our internal policies and procedures in relation to safeguarding vulnerable adults and children or raising concerns about their welfare. Increased harm and distress caused to vulnerable individuals and their families Council could face criminal prosecution Criminal investigations potentially compromised Potential financial liability if council deemed to be negligent Reputational damage to the council		4	4	16	Safeguarding lead in place and clear lines of responsibility established	Fully	Councillor Phil Chapman	Yvonne Rees	Nicola Riley	2	4	8	Monitoring of implementation of corporate policies and procedures to ensure fully embedded	Members endorsed the annual return and this was submitted on time to the Oxfordshire Adults and Childrens Safeguarding Boards.	Risk reviewed 30/12/2022 - Comments updated
				Safeguarding Policy and procedures in place	Fully	Ensure web pages remain up to date									
				Information on the intranet on how to escalate a concern	Fully	Annual refresher and new training programmes including training for new members									
				Mandatory training and awareness raising sessions are now in place for all staff.	Fully	Attendance at safeguarding boards and participation in learning events									
				Safer recruitment practices and DBS checks for staff with direct contact	Fully	Continue to attend safeguarding board sub groups as necessary to maintain high levels of awareness within the system and compliance with latest practice									
				Data sharing agreement with other partners	Fully	Regular internal cross departmental meetings to discuss safeguarding practice									
				Attendance at Children and Young People Partnership Board (CYPPB)	Fully	Action plan acted upon and shared with Overview and scrutiny committee once a year									
				Annual Section 11 return compiled and submitted as required by legislation.	Fully	Corporate monitoring of all referrals									
L10 -Sustainability of Council owned companies and delivery of planned financial and other objectives - failure of council owned companies to achieve their intended outcomes or fail to meet financial objectives Unclear governance leading to lack of clarity and oversight in terms of financial and business outcomes Failure of council owned companies to achieve their intended outcomes or fail to meet financial objectives Lack of understanding at officer and member level about the different roles of responsibilities required when managing council owned companies		3	5	15	Annual business planning in place for all companies to include understanding of the link between the Council's strategic objectives being delivered and financial impact for the council. A regular Shareholder Representative meeting takes place, a Shareholder Liaison Meeting including the S.151 Officer and Monitoring Officer takes place on a quarterly basis and a Shareholder Committee meeting on a quarterly basis. A governance review is being undertaken and initial recommendations have been approved by the Shareholder Committee.	Fully	Councillor Adam Nell	Yvonne Rees	Stephen Hinds	2	3	6	A Shareholder Representative has been appointed following the decoupling from OCC, the Shareholder Representative is a former Chief Executive, regular governance arrangements are in place.	A formal governance review is being undertaken by the Shareholder Representative and the Monitoring Officer following the decoupling from OCC as part of the overall Transition Plan. The update Governance report was taken to CLT on 14th September. SH transitioned as Stakeholder representative on 24th November, with ongoing support in the interim from NE. The review of the governance is now with a third party assessing this. Work is ongoing between GH and CDC to ensure a viable business plan moving forward. Independent advice has been agreed to review any cases put forward.	Risk reviewed 03/01/2023 - Potential impacts and Comments updated
				Regular meetings are in place between the Council's S.151 Officer and the relevant company Finance Directors. Financial planning for the companies undertaken that will then be included within our own Medium Term Financial Strategy. Financial risks are routinely reported by the Shareholder Representative to the Shareholder Committee.	Fully	Resilience and support being developed across business to support and enhance knowledge around council companies.									
				Clear governance arrangements are in place. A governance review is being undertaken and initial recommendations have been approved by the Shareholder Committee.	Partially	Skills and experience being enhanced to deliver and support development, challenge and oversight.									
				Sound monitoring in place of both business and financial aspects of the companies and the impact on overall council performance through the Shareholder Representative meetings and through the reporting to the Corporate Leadership Team on a monthly basis.	Fully	Work with one company to ensure long term support arrangements are put in place.									
				Training in place for those undertaking Director roles relating to the companies.	Partially										

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		Probability	Impact	Rating						Probability	Impact	Rating			
L11 - Financial sustainability of third-party suppliers and contractors	The financial failure of a third party supplier and contractors results in the inability or reduced ability to deliver a service to customers or provide goods needed. A reduced supply market could also result in increased costs due to the council's loss of competitive advantage.	3	4	12	Ensure contract management in place review and anticipate problems within key service suppliers and partners	Partially	Councillor Adam Nell	Shiraz Sheikh	Simon Moody	3	4	12	Service areas to hold meetings as required with suppliers to review higher risk areas and ensure risks are being managed. Reminders to be sent to all who have Procurement/Contract Management responsibility to regularly meet with key suppliers and partners to gain early understanding of the effects of COVID-19 lockdown, have on supply.	Shiraz Sheikh is taking operational lead with Simon Moody regarding procurement. Communications to go out in December 2022. Shiraz Sheikh extending SLA with Publica. Contracts Register almost complete with over 500 contracts now recorded.	Risk reviewed 03/01/2023 Commentary updated
	Business continuity planning arrangements in place in regards to key suppliers				Partially	The Procurement Team is now providing ELT members and identified Contract Mangers a monthly update of all suppliers with spend above £25k c/w a credit risk rating score to enable contract managers to manage any identified risks, with support from the Procurement Team. Furthermore, as a result of Covid-19 the likelihood of this risk is deemed to have increased and thus the procurement and finance team now hold a weekly joint meeting to consider funding solutions to support At Risk Suppliers in accordance with the national guidance note PPN04/20.									
	Ensuring that proactive review and monitoring is in place for key suppliers to ensure we are able to anticipate any potential service failures				Partially	Business continuity plans in place									
	Intelligence unit set up procurement Hub to monitor supplier and contractor market				Fully										
	Analysis of third party spend undertaken to identify and risk assess key suppliers/contractors				Fully										
Reduced resilience and business continuity															
Increased complaints and/or customer dissatisfaction															
Increased costs and/or financial exposure to the Council due to having to cover costs or provide service due to failure of third party supplier of contractor															

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		Probability	Impact	Rating						Probability	Impact	Rating			
L12 - Corporate Governance - Failure of corporate governance leads to negative impact on service delivery or the implementation of major projects providing value to customers.	Threat to service delivery and performance if good management practices and controls are not adhered to.	4	4	16	Clear and robust control framework including: constitution, scheme of delegation, ethical walls policy etc.	Fully	Councillor Barry Wood	Stephen Hinds	Shiraz Sheikh	3	3	9	Standing item at senior officer meetings – regular review of risk and control measures - through CLT and DLTS. Leadership programme identifying Programme and Project Management is being developed and rolled out to ELT during 2022/23. The Monitoring Officer is a member of full member of CLT. The Annual Governance Statement was produced and has been published. The Corporate Governance Assurance Group continues to map governance processes to ensure visibility and to refresh them.	Risk is currently under complete review. Review of Constitution is underway	Risk reviewed 03/01/2023 - Commentary updated
	Risk of ultra vires activity or lack of legal compliance				Clear accountability and resource for corporate governance (including the shareholder role).	Fully									
	Risk of fraud or corruption				Integrated budget, performance and risk reporting framework.	Fully									
	Risk to financial sustainability if lack of governance results in poor investment decisions or budgetary control.				Corporate programme office and project management framework. Includes project and programme governance.	Partially									
	Failure of corporate governance in terms of major projects, budgets or council owned companies impacts upon financial sustainability of the council.				Internal audit programme aligned to leadership risk register.	Fully									
	Inability to support Council's democratic functions / obligations (e.g. return to physical public meetings and public access to meetings).				Training and development resource targeted to address priority issues; examples include GDPR, safeguarding etc.	Partially									
	Elements of the COVID-19 response and recovery work may be compromised, delayed or not taken forwards.				HR policy framework.	Partially									
					Annual governance statement process undertaken for 2021/22 connects more fully and earlier with ELT and CLT.	Fully									
	Annual Review of the Constitution will take place each Autumn led by the Overview & Scrutiny Committee and approved by Full Council	Fully													

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		Probability	Impact	Rating						Probability	Impact	Rating			
L13 - Oxfordshire Housing and Growth Deal - (contract with HMG)	Failure to meet its obligations as a partner within the Growth Deal could see Cherwell as a factor in Government holding back some or all of its funding and/or cease to extend the arrangement beyond 2023.	4	5	20	Established programme structure and partnership ethos to support effective programme delivery.	Fully	Councillor Barry Wood	Ian Boll	Robert Jolley	4	3	12	A CDC GD programme and programme board capability.	The Infrastructure and Homes from Infrastructure workstream (IHf) is the only remaining live workstream within the Oxfordshire Housing and Growth Deal Programme and is being reviewed to rebalance the programme within financial parameters; work continues with the various local authority partners and the Future Oxfordshire Partnership in pursuit of this objective. It should be noted that the Productivity workstream was completed when OxLEP finalised the Oxfordshire Industrial Strategy and the Affordable Housing workstream has also been completed. Oxfordshire Plan 2050 ceased in August 2022.	Risk reviewed and slight amendment made 05/01/2023.
	Failure to replace Programme Management Officer could adversely affect delivery and stability of the overall Cherwell programme.				Put suitable arrangements in place to deliver the Project Management function.	Fully, when implemented (not implemented yet).							Meetings to take place with key colleagues to implement suitable arrangements to deliver the Project Management function.		
	Infrastructure milestone delivery late (for infrastructure linked to accelerated housing)				Engagement with housing developers to understand their commercial constraints.	Partially							Work stream plans of work (work stream brief, schedule, RAID log) .		
	Delivery of Infrastructure projects fail to accelerate housing delivery as commercial pressures impact house builders				Identify potential "top up" schemes to supplement GD affordable housing scheme.	Fully							Structured engagement with developers to better understand their needs. Appropriate escalation of issues to agree programme flexibilities where required.		
	Delivery of affordable houses below programme targets as GD contributions insufficient to attract sufficient builders/ registered providers				Utilise effective Programme controls to facilitate prompt escalation of issues to enable appropriate decision making and delivery timescale review.	Fully							Improved collaboration working with partners.		
	Oxfordshire Plan delivered late				Develop Year 5 (final year) Plans of Work to detail the expected delivery by CDC for Year 5 of the Growth Deal Programme; building on the experiences and knowledge gained during previous years.	Partially							Ongoing work with partners to realistically reflect deliverable schemes within programme time frame.		
L14 - Workforce Strategy The lack of effective workforce strategies could impact on our ability to deliver Council priorities and services.	Limit our ability to recruit, retain and develop staff	3	4	12	Analysis of workforce data and on-going monitoring of issues.	Partially	Councillor R. Mould	Yvonne Rees	Claire Cox	3	4	12	Development of relevant workforce plans.	There are a number of emerging issues in terms of recruitment and retention within the local government workforce especially at entry level roles where competition with the private sector is fierce and in senior management roles where there tends to be an ageing workforce. HR is working with areas experiencing recruitment and retention difficulties.	Risk reviewed 04/01/2023 - No changes.
	Impact on our ability to deliver high quality services				Key staff in post to address risks (e.g. strategic HR business partners)	Fully							Development of new L&D strategy, including apprenticeships.		
	Overreliance on temporary staff				Weekly Vacancy Management process in place	Fully							Development of specific recruitment and retention strategies. It is planned for CDC to develop a framework that suits the needs of all services ensuring that the Council has access to a much wider pool of staffing agencies at competitive rates.		
	Additional training and development costs				Ongoing service redesign will set out long term service requirements	Partially							There are indications that specific service areas are beginning to experience recruitment difficulties for professional roles. HR is working with the relevant directors to consider alternative resourcing methods. The new IT system has been implemented to improve our workforce data and continues to be develop to improve our ability to interrogate and access key data (ongoing) in order to inform workforce strategies.		

Name and Description of risk	Potential impact	Inherent (gross) risk level (no Controls)			Controls	Control assessment	Lead Member	Risk owner	Risk manager	Residual risk level (after existing controls) Pvl			Mitigating actions (to address control issues)	Comments	Last updated
		Probability	Impact	Rating						Probability	Impact	Rating			
L15 - Covid-19 Community and Customers Significant spread of the Covid-19 virus results in potential impacts in terms of customers and communities. Including community resilience, ability to access services, consequences of prolonged social distancing or isolation, economic impacts to business, including but not limited to the visitor economy.	Possible reductions in frontline service delivery, events, meetings and customer contact.	5	4	20	Business Continuity Plans have been reviewed and tested to ensure the ongoing delivery of priority services.	Fully	Councillor Barry Wood	Ian Boll	Richard Webb	2	3	6	Council and partnership business continuity and emergency planning arrangements for the Covid-19 response suspended in recognition of the current situation. Outbreak planning and Standard Operating Procedures are in place and could be implemented rapidly if required.	There is continuing monitoring of case numbers, infection rates and impacts in the health system through the Oxfordshire System and Cherwell are involved with these groups to understand any increase in risk. Risk currently low due to prevalent strain of Covid-19 not having serious health impacts in most people. Consequentially, the impacts on health system and economy are reduced. Monitoring only at this time.	Risk reviewed 03/01/2023. No changes. Proposed for closure
	Economic hardship impacting local business and potentially the local workforce.				Remote (home based) working in place, to facilitate self isolation and limit impact on service delivery.	Partially									
	Impact on vulnerable residents who may find it harder to access services.				Communications stepped up, to support remote working, reinforce national guidelines and set out the current organisational response.	Fully									
	Increased demand on both frontline and enabling services.				Regular updates from Director of Public Health, shared internally and externally. Partnership communications. Partnership communications enhanced and regular conversations convened.	Fully									
	Prolonged risk of social isolation and the mental and physical consequence thereof.														

Name and Description of risk	Potential impact	Inherent (gross) risk level (no Controls)			Controls	Control assessment	Lead Member	Risk owner	Risk manager	Residual risk level (after existing controls) Pvl			Mitigating actions (to address control issues)	Comments	Last updated
		Probability	Impact	Rating						Probability	Impact	Rating			
L16 - Covid-19 Business Continuity Significant staff absence due to the Covid-19 virus results in potential impacts on frontline service delivery and the council's business on a day to day basis.	Possible reductions in frontline service delivery, events, meetings and customer contact.	3	4	12	Business Continuity Plans in place.	Fully effective	Councillor Barry Wood	Ian Boli	Richard Webb	3	3	9	Council and partnership business continuity and emergency planning arrangements suspended to reflect current low Covid-19 impacts but remain in place for rapid implementation if required. IT remote working arrangements are sustainable. Monitoring for risk escalation only.	The nature of the risk is such that national public health guidelines will determine the council's response. Staff absences due to Covid-19 are low. Agile working and flexibility to continue. Hybrid meetings are tested and operational.	Risk reviewed 03/01/2023. No changes. Proposed for closure
	Potential confusion amongst staff with regards to how to plan and respond to reduced service availability, professional support and maintain business as usual.				Guidance supports managers to enable agile working and is updated in response to changing conditions.	Partially effective									
	Requirement to reprioritise service delivery.				Remote working capability across all relevant council teams.	Fully effective									
	Requirement to offer mutual aid to partner organizations.				Regular updates from Director of Public Health, shared internally and externally.	Fully effective									
	Potential impact in the medium to long term resilience of staff may result in wider wellbeing issues.														

Cherwell District Council

Executive

6 February 2023

Annual Monitoring Report 2022

Report of Assistant Director – Planning and Development

This report is public.

Purpose of report

To seek approval of the Annual Monitoring Report (AMR) 2022

To seek approval of accompanying updates to the Local Plan's Infrastructure Delivery Plan and the Brownfield Land Register.

1.0 Recommendations

The meeting is recommended:

- 1.1 To approve for publication the 2022 Annual Monitoring Report (AMR) presented at Appendix 1.
- 1.2 To approve for publication the 2021/22 Infrastructure Delivery Plan (IDP) update presented at Appendix 2.
- 1.3 To approve for publication the 2021/22 Brownfield Land Register (BLR) presented at Appendix 3.
- 1.4 To authorise the Assistant Director - Planning and Development in consultation with the Lead Member for Planning to make any necessary minor and presentational changes to the Annual Monitoring Report, Infrastructure Delivery Plan update, Brownfield Land Register if required prior to publication.

2.0 Introduction

- 2.1 The Council has a statutory obligation to produce a planning (authorities) monitoring report. An Annual Monitoring Report (AMR) has been prepared for the period 1 April 2021 to 31 March 2022 and is presented at Appendix 1 to this report.
- 2.2 The AMR presents information on development that took place or was permitted over 2021/22.

- 2.3 The AMR reviews progress in preparing the Council's planning policy documents and assesses whether development plan policies are being effective. It incorporates the monitoring indicators and targets from the adopted Cherwell Local Plan 2011-2031 and the Cherwell Local Plan 2011-2031 (Part 1) Partial Review for Oxford's unmet needs.
- 2.4 Subject to approval, the information contained in the AMR will be used to inform policy making, planning consultation responses and in decision making on planning applications. The AMR will be made publicly available but is not subject to consultation as it is a factual update.
- 2.5 The monitoring work undertaken to prepare the AMR has also informed the preparation of an updated Infrastructure Delivery Plan for the adopted Cherwell Local Plan 2011-2031, and the Cherwell Local Plan 2011 – 2031 Partial Review – Oxford's Unmet Housing Need, and a 2021/22 update to the Council's Brownfield Land Register. These are presented at Appendices 2 and 3 to this report for approval.

3.0 Report Details

Annual Monitoring Report

- 3.1 The Annual Monitoring Report's main monitoring results are presented at its Section 5. Key findings are presented below.

Housing Delivery

- 3.2 The AMR's key findings for housing delivery include:
- i. a total of 1,175 (net) housing completions were recorded in 2021/22. Since 2015 the level of housing completions in the district remains high, with five of the last six years exceeding the annualised Local Plan requirement of 1,142 per annum. Total completions for 2011 to 2022 are 10,981 an average of 998 per annum. However, this includes a four-year period before adoption of the Local Plan. Completions from 2015 to 2022 have been 8,930, an average of 1,275 per annum;
 - ii. there were 178 net affordable housing completions during 2021/22;
 - iii. In 2021/22, 29% of completions were at Bicester, 43% at Banbury and 23% elsewhere. 32% of the 1,175 homes delivered during the monitoring year were on previously developed land. Of the 10,981 homes built since 2011, 37% have been at Banbury, 29% at Bicester and 33% elsewhere in the district.
- 3.3 Unlike previous AMRs the 5-year land supply position is not reported within this AMR. The land supply position is presented separately on the agenda. This provides more flexibility to publish a land supply statement earlier in the year along with the annual housing completions, rather than waiting for the AMR in December. Further information is set out within the report accompanying the 5 Year Land Supply Statement.

Policy Villages 2 – Distributing Growth across the Rural Areas

- 3.4 Policy Villages 2 of the adopted Local Plan 2011-2031 provides for an additional 750 dwellings at Category A villages (2014-2031) in addition to the rural allowance for small site 'windfalls' and planning permissions as at 31 March 2014. New planning permissions at the Category A villages from 1 April 2014 and completions on those sites contribute to the requirement of 750 dwellings.
- 3.5 During the 2021/22 there were 184 dwellings completed at Category A Villages that contribute to the Policy Villages 2 requirement of 750 dwellings. Since 2014 there has now been a total of 703 completions with a further 165 under construction totalling 868 dwellings. A further 48 dwellings are likely to be built out which will mean the policy requirement has been met. However, rural sites are likely to continue to be an important source of supply in the district.

Cherwell Local Plan 2011-2031 (Part 1) Partial Review – Oxford's Unmet Housing Need

- 3.6 The Partial Review allocates sites to deliver 4,400 homes to help meet Oxford's unmet housing needs and necessary supporting infrastructure by 2031.
- 3.7 This is the second AMR which reports on the monitoring framework. To date no homes have been delivered on the allocated sites. Nevertheless, members should be aware that work has been progressing. With the exception of PR8 the remaining development briefs have either been published or are at an advanced stage. Applications have also been submitted for PR9 and PR7a (which is a full application rather than an outline) and pre-application discussions are in progress for PR6a.

Travelling Communities

- 3.8 The 2017 Gypsy, Traveller and Travelling Showpeople Accommodation Assessment (GTAA) for Cherwell, Oxford, South Oxfordshire and Vale of White Horse Councils informed the examination and adoption of Local Plans covered by the study area and remains the most up-to-date assessment of need available.
- 3.9 The 2017 GTAA identifies a need for 7 additional pitches for households for Cherwell by 2032 where it is known that they meet the planning definition. It also highlights that there are many households where it is 'unknown' whether or not the new planning definition of Gypsies and Travellers is met. Should further information arise, it states that the overall need could increase by up to 12 pitches. Additionally, a potential need for 8 pitches is highlighted due to the closure of the Smiths Caravan Park in Bloxham.
- 3.10 For Travelling Showpeople, the 2017 GTAA identifies a known need for 12 plots from 2017-2032.
- 3.11 At 31 March 2022, there was a total of 65 gypsy and traveller pitches and 14 travelling showpeople plots in the district. There has been no change since the previous AMR. Specific sites need to be identified to meet identified needs in the Cherwell Local Plan Review 2040.

Employment

- 3.12 The AMR's key findings on employment generating development include:

- i. The district has seen a considerable gain in employment floorspace with over 117,000 sqm completed during 2021/22, following an increase of more than 70,000 sqm in the previous year. Key employment sites include:
 - at Banbury - Land South of Overthorpe Road, adjacent to the M40 and Employment Land North East of Junction 11
 - at Bicester - North West Bicester, Land North East of Skimmingdish Land, South Est of Bicester and adjacent to Oxford Road
 - at Kidlington and the Rural Areas – Heyford Park.
- ii. At 31 March 2022, there was over 411,000 sqm (net) of employment floorspace with planning permission that has yet to be built;
- iii. Overall, only 0.22 hectares of employment land (net) was lost to non-employment uses during 2020/21.

Natural Environment

- 3.13 The AMR's key findings for the natural environment for 2021/22 include:
- i. There were no planning applications granted permission contrary to Environment Agency's advice on flood risk or water quality grounds. This continues the trend from previous AMRs.
 - ii. 27 planning permissions were approved for renewable energy schemes including four for air source heat pumps, 19 for solar photovoltaics (PVs). This is a total increase of 10 schemes compared to the previous monitoring year.
 - iii. There has been a slight decrease in total area of priority habitats from 3,781 ha to 3,780 ha (decrease of 1 ha). But the priority habitat resource in identified Conservation Target Areas has risen from 2,328 ha in 2021 to 2,562 ha in 2022. It is understood that changes in the UK priority habitats largely represent an improved understanding of the habitat resource in Cherwell and confirmation of boundaries for habitat types, rather than the creation or loss of habitat.
 - iv. The area of Local Wildlife Sites (LWS) has decreased slightly from 1,461 ha in 2021 to 1,458 h in 2022. This was the result of a re-definition of the boundary for the Horley Local Wildlife Site to remove an arable field.
 - v. 77.9% of the Sites of Special Scientific Interest (SSSI) units are in "Favourable conditions". This means that the habitats and features are in a healthy state and are being conserved by appropriate management. Not all sites are surveyed annually so this figure can fluctuate.

Local Development Scheme

- 3.14 The AMR reports on progress in preparing the Council's planning policy documents as set out in the Local Development Scheme (LDS) approved by the Executive in September 2021. The LDS contains the overall programme for the Local Plan. The Cherwell Local Plan 2011-2031 (Part 1) Partial Review – Oxford's Unmet Housing

Need was adopted on 7 September 2020. Work has progressed on the Cherwell Local Plan Review 2040 with the Issues consultation undertaken in summer 2020 and a 'Developing Our Options' consultation in the autumn of 2021.

- 3.15 In August 2022 preparation of the Oxfordshire Plan 2050 ceased following an inability to reach agreement on the approach to planning for future housing needs. Since that time, work on a Cherwell Local Plan Review has accelerated with a significant amount of technical work completed including a new Housing and Economic Needs Assessment produced jointly with Oxford City Council. An updated Local Development Scheme with a revised programme for completing the Local Plan will be presented to the Executive at a future meeting.

Neighbourhood Planning

- 3.16 The AMR provides the updated position on Neighbourhood Planning in Cherwell. There continues to be five made Neighbourhood Plans in Cherwell. Since April 2022 further areas have been designated for Bletchington, Hampton Gay and Poyle and there is an application made for Milcombe. Deddington Parish Council continue to make progress and their pre-submission plan was published in late 2022.

Infrastructure Delivery Plan (IDP)

- 3.17 The Infrastructure Delivery Plan (IDP) which supports the adopted Local Plan (2015) is maintained and monitored with the benefit of updates from infrastructure providers including the County Council. An updated 2022 IDP is presented at Appendix 2 and summary tables are included in the AMR. The IDP update also considers the Cherwell Local Plan Partial Review - Oxford's Unmet Housing Need.

2022 Brownfield Land Register

- 3.18 The Town and Country Planning (Brownfield Land Register) Regulations 2017 require local planning authorities to prepare and maintain a register of brownfield sites. Local planning authorities must review the register at least once within each register year. A Brownfield Land Register (BLR), the first to be produced under the new legislation, was published in December 2017. An updated Register, which is the sixth BLR prepared, is presented at Appendix 3.
- 3.19 The Register was reviewed alongside the AMR to include new qualifying sites and to remove sites that are being developed. The base date for planning permissions and completions is 31 March 2022.

4.0 Conclusion and Reasons for Recommendations

- 4.1 The Annual Monitoring Report provides important information to measure the effectiveness of planning policies and to assist policy making and development management decision making. It is the statutory mechanism for monitoring housing delivery.
- 4.2 Its most significant conclusions are that Cherwell is continuing to deliver homes and employment land despite the widely reported national pressures faced by the

industry such as disrupted supply chains and labour shortages. Completions are broadly following similar patterns and trends as previous years.

4.3 Unlike previous years, this AMR does not present the 5 Year Land Supply position for the district. This is reported separately in a Housing Land Supply Position Statement on this agenda.

4.2 It is recommended that all three documents be approved for publication.

5.0 Consultation

5.1 Councillor Colin Clarke – Portfolio Holder for Planning.

6.0 Alternative Options and Reasons for Rejection

6.1 Deferment to seek significant *amendment of the: 2022 Annual Monitoring Report, Infrastructure Delivery Plan or Brownfield Land Register.*

Officers consider the documents to comprise robust factual reporting and updating against relevant indicators and requirements, supported by data and research. Presentation of the documents to the Executive has been unavoidably delayed and Members are therefore asked to consider amendment through delegation and consultation with the Portfolio Holder should they consider significant changes to be necessary.

6.2 *Not to approve the documents for publication*

Production of an Authorities Monitoring Report is a statutory requirement and the AMR's wider information supports the Local Plan implementation and review. Updating the Brownfield Land Register is also a statutory requirement. The Infrastructure Delivery Plan is required to monitor and support delivery of the adopted Cherwell Local Plan 2011-2031 and its Partial Review.

7.0 Implications

Financial and Resource Implications

7.1 There are no direct financial implications arising from this report. The work collecting data and preparing the AMR is met within existing budgets. There are risks of costs associated with unsuccessful refusals of planning permission upon appeal and this risk can be reduced through having a robust AMR.

Comments checked by:

Kelly Wheeler, Finance Business Partner, tel. 01295 221570

Kelly.Wheeler@cherwell-dc.gov.uk

Legal Implications

7.2 The production of a monitoring report and Brownfield Land Register are statutory requirements. Their availability, and that of the IDP update, also assists the Council in making informed decisions.

Comments checked by:
Matthew Barrett, Planning Solicitor, tel. 01295 753798
matthew.barrett@cherwell-dc.gov.uk

Risk Implications

- 7.3 There are no policy decisions or significant risks associated with this report. The data presented can have implications for assessing the effectiveness of the Council's planning policies and may be used in decision making. A Local Plan review is the primary means by which any such implications are considered and a review is in progress.

Comments checked by:
Shona Ware, Assistant Director – Customer Focus, tel. 01295 221652
shona.ware@cherwell-dc.gov.uk

Equality & Diversity Implications

- 7.4 This report in itself makes no recommendations for change in policy but recommends publication of the Annual Monitoring Report 2021. The recommendations do not raise equality implications. Equalities Impact Assessments will be undertaken as an integral part of the preparation of the Local Plan Review 2040.

Comments checked by:
Shona Ware, Assistant Director – Customer Focus, tel. 01295 221652
shona.ware@cherwell-dc.gov.uk

8.0 Decision Information

Key Decision:

Financial Threshold Met No

Community Impact Threshold Met: No

Wards Affected

All

Links to Corporate Plan and Policy Framework

This report directly links to the strategic priorities from the Business Plan 2021/22:

- Housing that meets your needs
- Leading on environmental sustainability
- An enterprising economy with strong and vibrant local centres
- Healthy, resilient and engaged communities

Lead Councillor

Councillor Colin Clarke – Portfolio Holder for Planning

Document Information

Appendix number and title

- Appendix 1 Draft Annual Monitoring Report 2022
- Appendix 2 Infrastructure Delivery Plan Update 2021/22
- Appendix 3 Brownfield Land Register 2021/22

Background papers

None

Report Author and contact details

Eleanor Gingell, Planning Policy Team Leader

01295 221569

Eleanor.gingell@cherwell-dc.gov.uk

Cherwell District Council

Executive

6 February 2023

'Regulation 10A' Planning Policy Review and Housing Land Supply Statement

Report of Assistant Director – Planning and Development

This report is public.

Purpose of report

To seek approval of an updated review of planning policies under Regulation 10A of the Town and Country Planning (Local Planning) (England) Regulations 2012 and a Housing Land Supply Statement for publication.

1.0 Recommendations

The meeting is recommended:

- 1.1 To approve the review of planning policies under Regulation 10A of the Town and Country Planning (Local Planning) (England) Regulations 2012 (Appendix 1)
- 1.2 To approve the Housing Land Supply Statement for publication (Appendix 2) noting the implications and conclusions of the report to the Executive.
- 1.3 To authorise the Assistant Director - Planning and Development in consultation with the Portfolio Holder for Planning to make any necessary minor and presentational changes to the Regulation 10A Review and the Housing Land Supply Statement if required prior to publication in consultation with the Portfolio Holder for Planning.

2.0 Introduction

- 2.1 In December 2022 the Council published a Housing and Economic Needs Assessment (HENA 2022) produced jointly with Oxford City Council to inform their respective Local Plan processes.
- 2.2 The HENA is new up-to-date evidence of housing need, which provides an assessment of housing need which is materially different to that in the 2014 Strategic Housing Market Assessment (SHMA). It indicates that the 2014 SHMA is now out of date.

2.3 The implications of this have been considered in a new review of planning policies under Regulation 10A of the Town and Country Planning (Local Planning) (England) Regulations 2012. The review is presented at Appendix 1 to this report. Upon approval, the review would replace that approved by the Executive in January 2021 (see background documents).

2.4 The review indicates that the policy affected by publication of the HENA 2022 (Policy BSC1 District-wide Housing Distribution) needs updating – a process that will be undertaken through work on the emerging Cherwell Local Plan Review.

2.5 The NPPF (paragraph 74) requires local planning authorities to:

'identify and update annually a supply of specific deliverable sites sufficient to provide a minimum of five years' worth of housing against their housing requirement set out in adopted strategic policies³⁸, or against their local housing need where the strategic policies are more than five years old³⁹.'

2.6 Footnote 39 explains that the housing requirement in adopted strategic policies may continue to be used if the policies have been reviewed and found not to require updating. This is known as a 'Regulation 10A review' (under regulation 10A of the Town and Country Planning (Local Planning) (England) Regulations 2012. Footnote 39 states:

'Unless these strategic policies have been reviewed and found not to require updating. Where local housing need is used as the basis for assessing whether a five-year supply of specific deliverable sites exist, it should be calculated using the standard method set out in national planning guidance.'

2.7 Accordingly, where adopted policies are five years old and in the absence of a review finding them to be up to date, LPAs should use the Standard Method figure for housing land supply monitoring purposes. This necessitates a review of the district's land supply position which is presented in the Housing Land Supply Statement at Appendix 2.

3.0 Report Details

3.1 The Cherwell Local Plan 2011-2031 was adopted in 2015 and hence is over five years old. A 'Regulation 10A' review of the Plan's policies was presented to the Executive in January 2021. The review concluded that the majority of the Plan's policies were generally up to date. This included the Local Plan requirement of 1,142 homes per annum (22,840) which then remained the starting point for the purposes of calculating the five year housing land supply.

3.2 In January 2022, the 2021 Annual Monitoring Report was presented to the Council's Executive. The Executive resolved (1.2):

'To note the district's housing delivery and five-year housing land supply positions (for conventional housing and for Gypsies and Travellers) at Section 5 of the AMR and the need for updating of the land supply positions should these materially change, including consideration of the Vale of White Horse Council's 3 December 2021 Cabinet decision relating to the Regulation 10A review of its Part 1 Plan'.

- 3.3 The Local Plan for Vale of White Horse District Council is based on the 2014 Strategic Housing Market Assessment (SHMA). This is the same evidence which underpins the Cherwell Local Plan 2011-2031.
- 3.4 Vale of White Horse District Council had presented its 'Regulation 10A' review of policies to its Cabinet, concluding that its housing requirement required updating and proposing using the national 'standard method' for the purposes of monitoring housing land supply, plus an annual requirement from Part 2 of its Local Plan for contributing to Oxford's unmet housing need. Vale of White Horse Council approved its 'Regulation 10A' review [insert date].
- 3.5 The Cherwell 2021 AMR published in January 2022, noted:
- '5.37 In finalising this AMR we are aware the Vale of White Horse DC, one of the 5 district councils within Oxfordshire, has suggested that their plan requirement cannot be considered to be up-to-date and that they propose reverting to Local Housing Need (LHN) also known as the 'standard method' for the calculation of the five-year land supply. Furthermore, a new housing need assessment is emerging to support the Oxfordshire Plan process and this will also inform the Cherwell Local Plan review. A draft was published alongside the Summer 2021 consultation on the Oxfordshire Plan and finalisation is pending. The Secretary of State has also indicated that the means by which housing need is calculated is under review (Housing, Communities and Local Government select committee, 8 November 2021)'*
- and
- '5.38 There may therefore be a need in the near future to consider the basis from which the five-year land supply calculations for Cherwell are derived including whether or not LHN is appropriate'.*
- 3.6 The HENA 2022 presents a change of circumstances. It comprises new up to date evidence of housing need, which provides an assessment of housing need which is materially different to that in the 2014 SHMA. It indicates that the 2014 SHMA is now out of date.
- 3.7 Consequently, a new 'Regulation 10A' review of the Council's policies in the Cherwell Local Plan 2011-2031 and saved policies of the Cherwell Local Plan 1996 has been undertaken (Appendix 1).
- 3.8 The Regulation 10A Review of Local Plan Policies (February 2023) shows that nearly all policies are generally consistent with government policy and/or local circumstances do not indicate that the policy needs updating at this time with the exception of Policy BSC1 District-wide Housing Distribution within the Cherwell Local Plan 2011-2031.
- 3.9 This updating will take place through the on-going Cherwell Local Plan Review process which is being prepared to provide new planning policies to address the identified issues, needs and opportunities that face the district.
- 3.10 Therefore, in accordance with national policy, it is appropriate to apply the district's local housing need figure as calculated by the Standard Method for the purpose of assessing housing land supply for Cherwell's needs. This is currently 742 dwellings

per annum. Government guidance on applying the standard method is available on-line at: <https://www.gov.uk/guidance/housing-and-economic-development-needs-assessments>.

- 3.11 It is important to note that applying the Standard Method for the purposes of assessing housing land supply does not mean that the Council is identifying its housing need for the purpose of progressing its new Local Plan. The HENA represents a material change of circumstances leading to a new 'Regulation 10A' review and a 're-basing' of the housing land supply calculation but the housing need scenarios within the HENA still need to be tested through the Local Plan process. The Standard Method figure also appears in the HENA at Table 7.4 (see background papers).
- 3.12 The Partial Review of the Local Plan, which provides for housing to help meet Oxford's unmet housing needs, is not yet five years old (having been adopted in September 2020). The policy of the NPPF at paragraph 74 and footnote 39, to apply local housing need where the strategic policies are more than five years old and to use the standard method, is therefore not applicable to that Plan.
- 3.13 Furthermore, Policy 12a of the Partial Review states:
- 'The Council will manage the supply of housing land for the purpose of constructing 4,400 homes to meet Oxford's needs. A separate five-year housing land supply will be maintained for meeting Oxford's needs'* (emphasis added).
- 3.14 Therefore, the calculation of the five year housing land supply for the unmet housing needs for Oxford will continue to be applied separately using the Partial Review's housing requirement: 340 homes per annum for the period 2021 to 2026 and 540 homes per annum for the period 2026-2031.
- 3.15 The 'Standard Method' figure for Cherwell of 742 homes per annum is therefore only applied to the land supply calculation for Cherwell's needs.

Five Year Housing Land Supply

- 3.16 The two assessments of the five year housing land supply from 'deliverable' housing sites are presented in Housing Land Supply Statement (Appendix 2) which is supported by a Housing Delivery Monitor. The statement includes the NPPF's definition of 'deliverable'.
- 3.17 The supply side of the housing land supply calculation will usually involve having regard to housing completions as well as a forward projection of expected housing delivery. In applying the standard method there is no requirement to apply the annual housing need figure retrospectively; whereas applying a Local Plan requirement involves measuring delivery to date from the start of the Local Plan period and having regard to any shortfall or surplus.
- 3.18 It should also be noted that the NPPF requires a land supply 'buffer' to be included in the calculation. This is explained within the Housing Land Supply Statement.
- 3.19 The review of expected future housing supply from deliverable sites is informed by consultation with individual site promoters or developers and others. The review takes into account housing completion and permission data as at 31 March 2022

and a forward assessment of delivery thereafter for the period 2022-2027 based on the latest information available in December 2022.

- 3.20 The conclusion is that for Cherwell's needs, the district has a **5.4** year housing land supply (for 2022-27). This is an increase from 3.5 years reported in the 2021 Annual Monitoring Report and is largely the result of applying the standard method housing need figure of 742 homes per year from 2022 rather than the Local Plan figure of 1,142 from 2011.
- 3.21 For the requirements of the Partial Review of the Local Plan for Oxford's unmet needs, there is a presently a negligible housing land supply of **0.2** years (for 2022-27) because very little housing is currently expected to be delivered by 2027. However, development briefs are being adopted and some planning applications and pre-application discussions are progressing. The expectations of future delivery will be kept under review.

Implications

Cherwell's Land Supply

- 3.22 In general, having a demonstrable five year housing land supply of deliverable sites for Cherwell's needs places the Council in a stronger position to refuse permission for development not provided for by the Development Plan and which is considered to be unacceptable.
- 3.23 The so-called 'tilted balance' in deciding whether or not to grant planning permission does not become effective for reasons of housing land supply. Without a five year housing land supply, the balance moves in favour of granting permission unless the likely harm should significantly and demonstrably outweigh the benefits of permission. There remains, however, a need to consider the Development Plan as a whole.
- 3.24 Upon approval of this report, the Planning Committee would be advised of the positive change of position in respect of the land supply position for Cherwell's needs.
- 3.25 The Housing Delivery Monitor (HDM) is appended to the Housing Land Supply Statement and summarises the evidence for all included sites. At 1 April 2022 there were extant permissions for 7,626 homes. The assessment of supply from sites considered to meet the NPPF's definition of 'deliverable' is for 4,244 homes to be constructed from 2022 to 2027.
- 3.26 Nevertheless, economic conditions are challenging and it is important that officers continue to seek Local Plan compliant housing delivery to maintain supply and deliver the district's planned development. Having a five year land supply position does not mean that development allowed for by the Local Plan should halt. Indeed, not progressing planned development considered to be acceptable could undermine the land supply position.

Land Supply for Oxford's Unmet Housing Needs

- 3.27 The Partial Review allocates sites to deliver 4,400 homes to help meet Oxford's unmet housing needs and necessary supporting infrastructure by 2031.

- 3.28 Policy PR12b of the Partial Review includes the following: *‘Applications for planning permission for the development of sites to meet Oxford’s needs that are not allocated in the Partial Review will not be supported unless... Cherwell District Council has taken a formal decision that additional land beyond that allocated in the Partial Review is required to ensure the requisite housing supply...’*
- 3.29 Officers do not recommend that such a decision is taken at the current time for the following reasons taken as a whole:
1. The Plan has a specific focus on meeting the identified and unmet needs of Oxford city to 2031. It will not be followed by a replacement plan in the usual way. Particular care is needed not to release more land than is required to deliver the Plan;
 2. The Plan (and therefore its delivery) was delayed by an Examination which ran from March 2018 to July 2020;
 3. The Plan was ‘adopted’ in September 2020 following the receipt of an Inspector’s Report on the examination of the plan which required consideration of the then NPPF’s tests on deliverability and developability;
 4. The residential sites continue to be actively promoted;
 5. Development briefs have been approved by the Planning Committee for all sites bar one (Land East of the A44 - PR8) – which is at an advanced stage of preparation. The briefs ‘front load’ the design process in the interests of providing certainty and clarity and supporting delivery. They should assist in avoiding prolonged pre-application discussions on design principles;
 6. Planning application have been received site PR9 (Land West of the A44), PR7a (South East Kidlington), and PR7b (Stratfield Farm). Pre-application discussions are occurring on most other sites. Planning Performance Agreements have been signed for three sites.
 7. The infrastructure requirements to support all sites are set out within the Infrastructure Schedule accompanying the plan. The County Council was engaged closely in developing site policies and infrastructure needs;
 8. The five-year supply ‘shortfall’ is not a land supply issue as such. The issue is one of timing. Presently, it is considered that the potential release of additional land within the parameters of the Plan’s strategy could be counterproductive to delivering the Plan and its infrastructure requirements.

4.0 Conclusion and Reasons for Recommendations

- 4.1 A Housing and Economic Needs Assessment (2022) has been produced which is materially different to that in the 2014 Strategic Housing Market Assessment (SHMA). It indicates that the 2014 SHMA is now out of date. The Cherwell Local Plan 2011-2031 is over five years old and a new ‘Regulation 10A’ Review of Local Plan Policies has been undertaken (February 2023). This shows that nearly all policies are generally consistent with government policy and/or local circumstances

do not indicate that the policy needs updating at this time with the exception of Policy BSC1 District-wide Housing Distribution.

- 4.2 In accordance with the National Planning Policy Framework and planning guidance a Housing Land Supply Statement has been produced which applies the national defined 'Standard Method' of calculating local housing need for the purposes of land supply monitoring for Cherwell's needs. A comprehensive review of expected housing delivery has also been undertaken. It is shown that the district now has a 5.4 year housing land supply (for 2022-2027) which will need to be taken into account in decision making.
- 4.3 The Partial Review of the Local Plan is less than five years old and its housing requirements continue to apply for housing land supply monitoring. Although the sites allocated in that Plan are progressing, there is presently a negligible land supply assessment of 0.2 years (for 2022-2027). Whilst regard to that should be made in decision making, the Partial Review has a specific policy (Policy PR12b) requiring the Council to make a formal decision that additional land beyond that allocated in the Partial Review is required to ensure the requisite housing supply. For the reasons, set out at paragraph 3.29 of this report, officers do not recommend that such a decision is taken.
- 4.4 Members are invited to approve the Regulation 10A Review and the Housing Land Supply Statement.

5.0 Consultation

- 5.1 Councillor Colin Clarke – Portfolio Holder for Planning.

6.0 Alternative Options and Reasons for Rejection

- 6.1 *Not to approve the Regulation 10A Review or Housing Land Supply Statement*

Officers consider the material change in circumstances arising from publication of the HENA 2022 to have been appropriately considered and the Regulation 10A Review and the Housing Land Supply Statement to be in accordance with national planning policy and guidance and to be robust and defensible positions.

Not to approve Review and Statement would leave the 2021 Regulation 10A Review and the Housing Land Supply position set out in the 2021 AMR unchanged. Officers would need to take further advice in the Council's interest.

7.0 Implications

Financial and Resource Implications

- 7.1 There are no direct financial implications arising from this report. The work has been undertaken existing budgets and there are no implications arising from the recommendations. There is some potential risk of costs associated with unsuccessfully defending refusals of planning permission at appeal and this risk can

be reduced through having a robust housing land supply position published annually.

Comments checked by:

Kelly Wheeler, Finance Business Partner, tel. 01295 221570

Kelly.Wheeler@cherwell-dc.gov.uk

Legal Implications

- 7.2 The review of local plans five years from adoption is a legislative requirement under Regulation 10A of the Town and Country (Local Planning) (England) Regulations 2012 (as amended). Upon approval the 'Regulation 10A Review' here presented would replace that approved by the Executive in January 2021. A decision to approve the Housing Land Supply Statement and thereby apply the Standard Method for the purpose of housing land supply monitoring is considered to be a legitimate and reasonable one, having regard to legislation, national planning policy and guidance and in the circumstances explained in the report. The Review and the Housing Land Supply Statement would, if approved, need to be considered where relevant in development management decision making.

Comments checked by:

Shiraz Sheikh, Monitoring Officer and Assistant Director – Law and Governance

tel. 01295 221651 Shiraz.sheikh@cherwell-dc.gov.uk

Risk Implications

- 7.3 Planning decisions can be challenged through planning appeals and in the courts. Having an up-to-date housing land supply position reduces the risk of challenges related to land supply being successful. The risk is also reduced by having an approach to assessing land supply that complies with national policy and guidance and is which drawn from a comprehensive review of the components of supply.
- 7.4 Planning officers consider the application of the Standard Method to be consistent with national planning policy and guidance and to be appropriate in the circumstances explained on the report. The review of future housing supply has been undertaken on the basis of the best information available and in consultation with respective developers / site promoters.

Comments checked by:

Shona Ware, Assistant Director – Customer Focus, Performance and Transformation, tel. 01295 221652

shona.ware@cherwell-dc.gov.uk

Equality & Diversity Implications

- 7.5 There are no equality and implications. The report considers housing land supply matters.

Comments checked by:

Shona Ware, Assistant Director – Customer Focus, Performance and Transformation, tel. 01295 221652

shona.ware@cherwell-dc.gov.uk

8.0 Decision Information

Key Decision:

Financial Threshold Met No

Community Impact Threshold Met: No

Wards Affected

All

Links to Corporate Plan and Policy Framework

This report directly links to the strategic priorities from the Business Plan 2021/22:

- Housing that meets your needs
- Leading on environmental sustainability
- An enterprising economy with strong and vibrant local centres
- Healthy, resilient and engaged communities

Lead Councillor

Councillor Colin Clarke – Portfolio Holder for Planning

Document Information

Appendix number and title

Appendix 1 Regulation 10A review of Local Plan Policies

Appendix 2 Housing Land Supply Statement

Background papers

None

Executive Papers

1. Housing and Economic Needs Assessment 2022
<https://modgov.cherwell.gov.uk/documents/b11237/Supplement%20-%20Appendix%203%20-%20Housing%20and%20Economic%20Needs%20Assessment%20December%202022%20Thursday%2019-Jan-2023%20.pdf?T=9>
2. Report to the Executive 4 January 2021 and decision: Annual Monitoring Report 2020 and Regulation 10A Review of Local Plan Policies
<https://modgov.cherwell.gov.uk/ieListDocuments.aspx?CId=115&MId=3371&Ver=4> (Minute 86)
3. Report to the Executive 10 January 2022 and decision: Annual Monitoring Report 2021
<https://modgov.cherwell.gov.uk/ieListDocuments.aspx?CId=115&MId=3534&Ver=4> (Minute 90)

4. Report to Cabinet of Vale of White Horse District Council 3 December 2021
<http://democratic.whitehorsedc.gov.uk/ieListDocuments.aspx?CId=507&MId=2854> (Minute 63)

Supporting Documents

National Planning Policy Framework (July 2021)

<https://www.gov.uk/government/publications/national-planning-policy-framework--2>

Government guidance on applying the standard method (December 2020):

<https://www.gov.uk/guidance/housing-and-economic-development-needs-assessments>.

Report Author and contact details

Eleanor Gingell

Planning Policy Team Leader

01295 221569

Eleanor.gingell@cherwell-dc.gov.uk

David Peckford

Assistant Director – Planning and Development

01295 227006

david.peckford@cherwell-dc.gov.uk



Cherwell
DISTRICT COUNCIL
NORTH OXFORDSHIRE

Cherwell District Council

Regulation 10A Review of Local Plan Policies

February 2023

1. A review of Local Plan policies is required to be undertaken 5 years from the Plan's adoption date in accordance with legislation¹. This does not result in Plans becoming automatically out of date, but a review enables Local Planning Authorities to decide whether policies (whether one or more policies or the entire plan) require updating, and if so to update them as necessary. Policy on review is set out in the National Planning Policy Framework (NPPF) at paragraph 33, which provides that reviews should take into account changing circumstances affecting the area, and any relevant changes in national policy. Guidance on review is set out in the Planning Practice Guidance (PPG) at paragraphs 61-062 – 61-070. This is the Council's review in accordance with that legislation, policy and guidance. It has taken into account the requirements of policy and guidance. Regard has also been had to the PAS guidance on plan reviews.
2. The Cherwell Local Plan 2011-2031 Part 1 was formally adopted by Cherwell District Council on 20 July 2015. The Plan provides the strategic planning policy framework for the District. The Plan's commitment in paragraph B.95 to address Cherwell's apportionment of Oxford's unmet housing needs has been fulfilled with the adoption of the Cherwell Local Plan 2011-2031 (Part 1) Partial Review- Oxford's Unmet Housing Need on 7 September 2020.
3. The Council is committed to a review of the Local Plan through the preparation of the Cherwell Local Plan Review 2040. The Council's Executive endorsed the programme of preparation for a review of the Cherwell Local Plan in the Local Development Scheme, December 2018, followed by an endorsement of a timetable for the Cherwell Local Plan Review 2040 in the Local Development Scheme, March 2020. The most recent LDS update was in September 2021.
4. In 2020 the Council undertook a 5 Year Review of the 2015 Local Plan and concluded that the majority of the policies were generally consistent with government policy and/or local circumstances did not indicate that the Local Plan policies needed updating. The review was presented to and approved by the Council's Executive on 4 January 2021.
5. There have been two material changes in circumstance since then which have prompted the 2023 Local Plan Review:
 - termination of the Oxfordshire joint Local Plan work programme; and
 - new evidence in the form of the Housing and Employment Needs Assessment (HENA) 2022
6. In August 2022, the Oxfordshire authorities ceased work on a joint plan for Oxfordshire. Local Plans for the City and Districts will now provide for the long-term planning of Oxfordshire and housing needs will be addressed through individual Local Plans for each of the City and Districts. The Councils will cooperate with each other and with other key bodies as they prepare their Local Plans. In preparing the Local Plan Review 2040 we will need to respond to gather information and evidence to inform local policies on matters including climate change, green infrastructure, transport, housing, health and well-being challenges, town centres and retail and economic

¹ Regulation 10A Town and Country (Local Planning) (England) Regulations 2012 (as amended).

development. Changes to the planning system including changes to the use classes order and permitted development rights are relevant in the context of determining certain planning applications and in the review of policies for the Local Plan Review to 2040.

7. In December 2022 the Council completed the Housing and Economic Needs Assessment (HENA). It has been commissioned by Cherwell and Oxford City to identify the housing needs for Oxfordshire as the Housing Market Area and Functional Economic Market area. It is new up to date evidence of housing need, which provides an assessment materially different to that in the 2014 SHMA.
8. The table below provides a further Regulation 10A review of the Cherwell Local Plan Part 1 (2015) policies and saved policies of the Cherwell Local Plan 1996. Policies in the Cherwell Local Plan Partial Review (2020) are not subject to this 5-year policy review, given that it was found sound and then adopted by the Council in September 2020.
9. The review below considers relevant changes to local circumstances and relevant changes in national policy in accordance with paragraph 33 of the NPPF. The government's Planning Practice Guidance on plan making at paragraph 61-062 states that local planning authorities must review local plans to ensure that policies remain relevant and effectively address the needs of the local community. The guidance explains that reviews should be proportionate to the issues in hand and it sets out matters which authorities may consider when determining whether a plan or policies within a plan should be updated. The Council has taken into account the guidance including at paragraph 61-065. Particular matters and information which have been considered and inform the review include:
 - a. Legislation, policy and guidance
 - b. Information from the Council's Annual Monitoring Report (2022), including Duty to Cooperate matters
 - c. The Council's commitment to a Local Plan Review to 2040
 - d. Evidence and information published since the adoption of the Local Plan. For example, the evidence produced to support the Partial Review of the Local Plan and the emerging Local Plan Review 2040, Housing and Employment Needs Assessment 2022 [Currently published at, Oxfordshire County Council's Local Transport Plan, the Oxfordshire Infrastructure Strategy, and the Council's Climate Change Action Framework
 - e. Supplementary Planning Documents including the Cherwell Design Guide, Banbury Masterplan and Kidlington Framework Masterplan
 - f. Cherwell's Housing Delivery Monitor
 - g. Recent significant development proposals in the District
 - h. Planning appeal outcomes

- i. Policies in 'made' Neighbourhood Plans in the District. These are for the Parishes of Bloxham, Hook Norton and Adderbury and for the 12 Parishes which form the Plan area for the Mid-Cherwell Neighbourhood Plan. The PPG on Plan making (61-072) explains that the requirement to review local plans at least every 5 years does not apply to Neighbourhood Plans. All the made Neighbourhood Plans in Cherwell District were made after the 2015 Local Plan was adopted and they were found to be in general conformity with the strategic policies of the Local Plan. Their policies do not constitute a significant change in circumstances which mean the Local Plan policies need updating at this time. Information about the Neighbourhood Plans in Cherwell is available on-line.
10. The Regulation 10A Review of Local Plan Policies (February 2023) shows that nearly all policies are generally consistent with government policy and/or local circumstances do not indicate that the policy needs updating at this time with the exception of Policy BSC1 District-wide Housing Distribution. Work on the Local Plan Review 2040 has commenced, which recognises that there will come a point in the future at which the policies require updating. That is part of the normal forward planning process and does not mean that the policies need updating at this time. Where policies have some inconsistencies with the NPPF and/or there has been a significant change in local circumstances this is limited to the specific policy and does not lead to wider concerns that the development plan as a whole is out of date. A number of these are site specific policies which relate to proposals that have either been implemented or are now very unlikely to come forward.
 11. New evidence in the form of Housing and Employment Needs Assessment (HENA) 2022 is new up to date evidence of housing need, which provides an assessment materially different to that in the 2014 Strategic Housing Market Assessment (SHMA). It indicates that the 2014 SHMA is now out of date. As the housing requirement in the adopted strategic policies in the 2015 Local Plan is based on the 2014 SHMA, it further indicates that strategic policy BSC1 does, in the words of NPPF para 74 and footnote 39, require updating.
 12. The HENA evidence is a material change. For monitoring and housing land supply purposes, in accordance with national guidance, it is appropriate to apply the Local Housing Need as calculated by the Standard Methodology. This is currently 742 dwellings per year. The Housing requirement will be set through the emerging Local Plan Review 2040 which will consider the distribution and mix of housing across the District. The evidence set out within the HENA will form the basis of this evidence. The Council's latest Annual Monitoring Report (AMR) explains how the Local Plan as a whole is continuing to deliver a high level of growth consistent with the overall plan trajectory. The Council continues to deliver against the NPPF aim of significantly boosting the supply of homes. In terms of housing and employment sites a significant number of planning permissions have been granted on the Council's allocated sites and development continues to be delivered. The Council has exceeded the housing delivery test published by the government (latest DLUHC publication, 14 January 2022). Consideration has been given to the outcome of planning appeals where relevant to the assessment of housing land supply, particularly Inspectors comments regarding evidence for justifying deliverability of sites. Further detail is provided in the Council's AMR concerning housing delivery - <https://www.cherwell.gov.uk/info/33/planning-policy/370/monitoring-reports>

13. The PPG on plan making explains that applications for planning permission must be determined in accordance with the development plan unless material considerations indicate otherwise and it will be up to the decision-maker to decide the weight to give to the policies.

Regulation 10A of the Town and Country Planning (Local Planning) (England) Regulations 2012

POLICY	CONSISTENCY WITH NATIONAL POLICY	EVIDENCE AND CHANGE IN LOCAL CIRCUMSTANCES	CONCLUSIONS
Cherwell Local Plan 2011 – 2031 Part 1			
PSD 1: Presumption in Favour of Sustainable Development	The <u>2021</u> NPPF wording is somewhat different but overall, the aims remain the same. The policy is generally consistent with the NPPF.	There is no longer a requirement for Plans to include such a policy (see the PPG at 61-036).	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will consider the approach to 2040.
SLE 1: Employment Development	The policy seeks to promote economic growth including through the allocation of sites for different types of employment development. The NPPF requires that planning policies set criteria or identify strategic sites to meet anticipated needs over the plan period. The NPPF states that significant weight should be placed on the need to support economic growth and productivity. The NPPF in principle supports alternative uses coming forward on employment sites, particularly for new homes. The policy allows for alternative land uses on sites in some circumstances and if justification is provided. The policy is generally consistent with the NPPF.	The Council’s latest AMR (paragraphs 5.2 – 5.14 <u>under theme One: Developing a Sustainable Local Economy</u>) sets out detailed information relating to the provision of employment development in Cherwell District. Just over half of allocated employment land in the Local Plan is developed or has planning permission. The policy and its criteria-based approach continue to deliver positively against employment requirements in the Plan and NPPF. <u>The AMR reports 203.33 ha employment land available on Local</u>	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will consider the approach to employment to 2040.

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Cherwell Local Plan 2011 – 2031 Part 1			
		<p><u>Plan allocations (this includes the remaining undeveloped land within allocated sites, a proportion of which will have planning permission). Planning permissions are in place on 176 ha of this allocated land.</u></p> <p>The policy makes reference to the Local Plan Part 2 which is no longer in the Council’s LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.</p>	
SLE 2: Securing Dynamic Town Centres	<p>The policy requires a town centres first approach informed by a sequential test and an impact assessment for development over defined thresholds. The 2019–2021 NPPF wording is slightly different with some minor changes to the sequential test but overall, the aims remain the same. The policy is generally consistent with the NPPF.</p>	<p>The Council’s latest AMR does not identify any significant issues with the effectiveness of the policy.</p> <p><u>During 2021/22 no planning applications exceeded the thresholds requiring retail impact assessment set out in Policy SLE 2. For example, there were no permissions granted for residential development at ground floor level in Bicester town centre during 2019/20 (para 5.148).</u></p> <p>The implications on policy of the recent changes to town centre uses in the Use Classes Order <u>and changes to retail and town centres trends collated in the Cherwell Retail Needs Study 2021</u> will</p>	<p>The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will consider the approach to town centres to 2040.</p>

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Cherwell Local Plan 2011 – 2031 Part 1			
		<p>need to be considered by the emerging Cherwell Local Plan Review 2040.</p> <p>The policy continues to deliver positively against town centre objectives and the NPPF.</p>	
SLE 3: Supporting Tourism Growth	<p>Policy SLE3 states that the Council will support proposals for tourist facilities in sustainable locations. The NPPF states that policies should enable sustainable rural tourism and leisure developments which respect the character of the countryside and sets out a town centres first approach to main town centre uses. The policy is generally consistent with the NPPF.</p>	<p>The Council’s latest AMR does not identify any significant issues with the effectiveness of the policy and records an increase in visitors and visitor spend <u>completed tourism developments (AMR 2022 Table 12)d</u>. The policy continues to deliver positively against tourism objectives in the Plan and NPPF.</p>	<p>The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will consider the approach to tourism development to 2040.</p>
SLE 4: Improved Transport and Connections	<p>The policy is generally consistent with the NPPF with the Policy and the NPPF encouraging the use of measures and opportunities to make development more sustainable including through public transport and the consideration of the impacts of development on local roads.</p>	<p>The Policy continues to secure contributions towards the transport mitigation of development proposals and the implementation of transport proposals in the Local Transport Plan as reported in the yearly IDP Updates alongside the AMR (see IDP Update December 2020–2022 Summary Tables). These include highway capacity improvements to peripheral routes at Bicester (including a new highway link in the form of a south-east perimeter road), and improvements to</p>	<p>The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will look at the approach to transport to 2040.</p>

POLICY	CONSISTENCY WITH NATIONAL POLICY	EVIDENCE AND CHANGE IN LOCAL CIRCUMSTANCES	CONCLUSIONS
Cherwell Local Plan 2011 – 2031 Part 1			
		<p>bus and rail links, particularly in the Kidlington area.</p> <p>The policy makes reference to the Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.</p>	
SLE 5: High Speed Rail 2 – London to Birmingham	The policy aims to minimise adverse impacts and maximise benefits of the design and construction of HS2. The policy is consistent with government policy.	Following the approval by Parliament of the route and associated works for HS2 through the District, the Council continues to work with HS2 Ltd to ensure the necessary mitigation and address construction impacts.	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will consider whether there is a need for a policy for HS2 to 2040.
BSC 1: District-wide Housing Distribution	<p>The policy seeks delivery of a wide choice of high-quality homes, sets out the Local Plan's housing distribution and plans for 22,840 dwellings to be delivered between 2011 and 2031, which equates to an annual requirement of 1,142 dwellings to meet the needs of Cherwell.</p> <p>The policy is generally consistent with the NPPF and its objectives in paragraph 5960 of significantly boosting the supply of homes and ensuring sufficient land comes forward where it is needed.</p>	<p>The latest AMR reports (<u>Theme Two: Building Sustainable Communities</u> para <u>5-23 – Housing Completions</u>) that the Council has met this policy's yearly target with <u>1,175</u> 1,159 housing completions during 2019/2021/<u>2022</u>. There are extant planning permissions for <u>9,061</u>7,626 dwellings and there were <u>10,982</u> 8,614 completions between 2011 and 2022<u>20</u>.</p> <p>The AMR explains how the district is experiencing a high level of growth and the policy continues to provide a supply of development land.</p>	<p>In conclusion, policy BSC1 which sets the housing requirement for the district requires updating and is therefore out of date.</p> <p><u>New evidence in the form of the Housing and Employment Needs Assessment (HENA) 2022 is up to date evidence of housing need, which provides an assessment materially different to that in the 2014 SHMA. It indicates that the 2014 SHMA is now out of date. In light of this, it is judged appropriate and in accordance with national</u></p>

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Cherwell Local Plan 2011 – 2031 Part 1			
	<p>Paragraph 33 of the NPPF (referring to Regulation 10A of Town and Country Planning Regulations 2012) sets out the requirements for the review of policies including the updating of local policies if the local housing need (LHN) figure has changed significantly.</p> <p>Paragraph 60-61 of the NPPF states that the housing requirement should be assessed using the standard method unless exceptional circumstances justify an alternative approach. It makes clear that the local housing need using the standard method determines the number of homes needed as a minimum figure.</p> <p>Local authorities are expected to have regard to the Duty to Cooperate when undertaking plan reviews to assess if the plan needs updating.</p> <p><u>Paragraph 74 of the NPPF requires local planning authorities to:</u></p> <p><u>'identify and update annually a supply of specific deliverable sites sufficient to provide a minimum of five years' worth of housing against their housing requirement set out in adopted strategic policies³⁸, or against their local housing need where the</u></p>	<p>In preparing the AMR the Council engaged with site promoters to understand the effect of COVID-19 on future completions and has, as a result, taken a cautious approach to the forecasting of future provision.</p> <p>The comprehensive review of the housing delivery monitor projects a significant fall in the expected completions during 2020/21, 933 homes when compared to the 2019 AMR (1573 homes). This is a reduction of 640 homes or 41%. A reduction of 254 homes (18%) is also expected for the year 2021/22.</p> <p>The Policy was prepared and examined under NPPF 2012 and plans for a housing need higher than the minimum identified through the local housing need (LHN) in the NPPF 2019 <u>2021</u> standard method. The application of the standard method² in Cherwell would identify <u>identify</u> a minimum requirement of 756-742 dwellings per year, or 6,678 8,316 over the remainder of the plan period (2020-2022-2031), rather than the</p>	<p><u>policy to move to the standard method for the purposes of calculating housing land supply.</u></p> <p>New evidence in the form of the Housing and Employment Needs Assessment (HENA) The new HENA 2022 evidence materially altered the circumstances under which the Council calculates Cherwell's five-year housing land supply.</p> <p><u>This means that for monitoring and housing land supply purposes Cherwell's minimum housing requirement is 742 dwellings per year as calculated using the standard method –and in accordance with paragraph 74 of the NPPF.</u></p> <p><u>The housing requirement needs updating. This is currently being undertaken through the emerging Local Plan Review 2040 which will consider the requirement and distribution of housing across the District to 2040.</u></p> <p>New homes are expected to be delivered in line with the</p>

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Cherwell Local Plan 2011 – 2031 Part 1			
	<p>strategic policies are more than five years old³⁹.</p> <p>In footnote 39 the NPPF explains the housing requirement in adopted strategic policies may continue to be used if the policies have been reviewed and found not to require updating.</p> <p>If found to require updating, local housing need is used as the basis for assessing whether a five year supply of specific deliverable sites exists, it should be calculated using the standard method set out in national planning guidance.</p>	<p>1,142 dwelling per year figure under the Local Plan.</p> <p>Cherwell continues to cooperate with all Oxfordshire councils and other key partners on cross boundary strategic matters. The AMR reports on this duty.</p> <p>The housing requirement figure in the Local Plan derives from the Oxfordshire Strategic Housing Market Assessment 2014.</p> <p>In December 2022 the Council completed the Housing and Economic Needs Assessment (HENA). It has been commissioned by Cherwell and Oxford City to identify the housing needs for Oxfordshire as the Housing Market Area and Functional Economic Market area.</p> <p>This is new evidence to inform the emerging Cherwell Local Plan 2040. It is new up to date evidence of housing need, which provides an assessment materially different to that in the 2014 SHMA. It indicates that the 2014 SHMA is now out of date.</p> <p>As the housing requirement in the adopted strategic policies in the 2015 Local Plan is based on the 2014 SHMA,</p>	<p>requirements in the Local Plan policy.</p> <p>The Cherwell Local Plan Review 2040 process will determine if a new policy is required and reflect any changes to the planning system. New evidence including jointly prepared evidence for the Oxfordshire Plan will inform the approach to the provision of new homes in the Local Plan Review.</p> <p>In the interim, Policy BSC1 will continue to be applied for plan making and 5-year land supply purposes.</p> <p>The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will consider the distribution of housing across the District to 2040.</p>

POLICY	CONSISTENCY WITH NATIONAL POLICY	EVIDENCE AND CHANGE IN LOCAL CIRCUMSTANCES	CONCLUSIONS
Cherwell Local Plan 2011 – 2031 Part 1			
		<p>it further indicates that strategic policy BSC1 does, in the words of NPPF para 74 and footnote 39, require updating. This assessment remains the latest cooperative assessment of housing need across the housing market area. It underpins not only the Local Plan, but also the Cherwell Local Plan Part 1 Partial Review, which was found sound by the Inspector in his report as recently as August 2020. A number of other Inspectors have reached the same conclusion in respect of Local Plans adopted across Oxfordshire. It is considered that the 1,142 housing requirement therefore remains appropriate and supported by relevant evidence.</p> <p>Other circumstances relevant to this include:</p> <ul style="list-style-type: none"> • The Oxfordshire Housing and Growth Deal 2018 • Oxfordshire Growth Board's agreement (26.09.16) sets out the latest cooperatively produced agreement about the apportionment of Oxford's unmet housing need for 2011 to 2031, reflected in adopted and emerging Local Plans in Oxfordshire. • Oxfordshire Infrastructure Strategy (OxIS) which identifies, 	

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Cherwell Local Plan 2011 – 2031 Part 1			
		<p>maps and ranks Oxfordshire's strategic infrastructure requirements to 2040 and beyond.</p> <p>In conclusion, policy BSC1 is currently delivering the District's housing requirements. Moreover, it exceeds the starting point established by LHN as a minimum. It is consistent with the NPPF objective of significantly boosting housing supply and NPPF paragraph 60. It is also generally consistent with emerging changes to national policy outlined in the recent document 'Changes to the Current Planning System' and other emerging reforms to the planning system.</p>	
BSC 2: The Effective & Efficient Use of Land – Brownfield Land and Housing Density	This policy requires housing development to make effective and efficient use of land. It encourages the re-use of previously developed land in sustainable locations and sets a minimum density for new residential development. The policy is generally consistent with the NPPF.	The Council's AMR does not identify any significant issues with the effectiveness of the policy. For example, during <u>2019/202021/22</u> , <u>2732%</u> of the <u>1,159-1,175</u> homes delivered were on previously developed land.	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will consider the approach to brownfield land and housing density to 2040.
BSC 3: Affordable Housing	The policy sets out the Council's requirements for affordable housing provision on new developments. The NPPF states that policies should set out the contributions expected from development and this should include setting out the	The Council's AMR does not identify any significant issues with the effectiveness of the policy. There were <u>178 net affordable housing completions during 2021/22 which is lower than the previous year (295).</u>	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan

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Cherwell Local Plan 2011 – 2031 Part 1			
	levels and types of affordable housing provision required. The policy is generally consistent with the NPPF.	<u>This is the first year since 2011 in which affordable housing completions have fallen below the Council’s target of 190 per year. The level of affordable housing completions has continued to exceed the Council’s affordable housing target of 190 dwellings per year. According to the AMR, 446 affordable houses were completed in 2019/20. The Council’s AMR does not identify any significant issues with the effectiveness of the policy at this point given the previous consistent provision above target during the past 11 years.</u>	Review will consider the approach to affordable housing to 2040.
BSC 4: Housing Mix	The policy sets out the Council’s requirements for a mix of housing on new developments. The NPPF requires the size, type and tenure of housing needed for different groups in the community should be assessed and reflected in planning policies. The policy is generally consistent with the NPPF.	<p><u>Exact housing mix is site specific and is dependent on factors such as location, site constraints and local need.</u></p> <p><u>The Policy indicates the mix of housing will be negotiated having regard to the Council’s most up-to-date evidence on housing need and available evidence on local market conditions.</u></p> <p><u>The housing mix indicated in the Local Plan supporting text (paragraph B.122) derives from the Oxfordshire Strategic Housing Market Assessment 2014. New evidence in the form of the Housing and Employment Needs Assessment (HENA) 2022 provides the most up-to-date evidence on housing</u></p>	<p>The policy is generally consistent with the NPPF <u>and continues to be effective in securing a mix of housing in new developments based on most-up-to-date need evidence. The policy does not need updating at this point in time.</u></p> <p>and local circumstances do not indicate that the policy needs updating at this time<u>New housing mix evidence in the recently published HENA 2022 will form the basis of housing mix negotiations in Cherwell alongside available evidence from developers on local market conditions.</u></p>

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Cherwell Local Plan 2011 – 2031 Part 1			
		<p><u>need. This evidence is materially different to that in the SHMA 2014) and alters the circumstances under which the Council negotiates the housing mix of development proposals.</u></p> <p><u>Although HENA 2022 provides updated evidence materially different to that in the SHMA 2014.</u> The policy continues to be effective in securing a mix of housing in new developments.</p> <p>Exact housing mix is site specific and is dependent on factors such as location, site constraints and local need.</p>	The emerging Local Plan Review will consider the approach to housing mix to 2040.
BSC 5: Area Renewal	The policy supports area renewal proposals of benefit to the district and is consistent with paragraph <u>9493</u> of the NPPF. It continues to perform a useful function in delivering the requirements of the NPPF and addressing local issues.	The Council's AMR does not identify any significant issues with the effectiveness of the policy. The Council's Brighter Futures programme continues, and an annual report is available.	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will consider the approach to area renewal to 2040.
BSC 6: Travelling Communities	The policy sets out the Council's requirements for pitches to meet the needs of gypsy and travellers. The NPPF explains that the housing needed for different groups in the community including travellers should be assessed and reflected in planning policy. 'Planning Policy for Traveller Sites' sets out how travellers'	<p>The Council's AMR does not identify any significant issues with the effectiveness of the policy. At 31 March 2020, the total supply of Gypsy and Traveller pitches was 65.</p> <p>The <u>Council's</u> AMR explains that since the adoption of the Local Plan Part 1, a</p>	The policy is generally consistent with the NPPF. However the needs arising from the 2017 GTAA <u>and any new evidence of need</u> will need to be considered. The emerging Local Plan Review will consider the approach to travelling communities to 2040.

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Cherwell Local Plan 2011 – 2031 Part 1			
	<p>housing needs should be assessed for those covered by the definition in Annex 1 of that document. The Policy is generally consistent with the NPPF.</p>	<p>Gypsy, Traveller and Travelling Show people Accommodation Assessment (GTAA) for Cherwell, Oxford, South Oxfordshire and Vale of White Horse Councils was published in June 2017. It identifies a new objective assessment of need for each authority based on the definitions of Gypsies and Travellers and Travelling Show people for planning purposes (Annex 1 of the Government’s Planning Policy for Traveller Sites (PPTS, 2015)).</p> <p><u>The AMR does not identify any significant issues with the effectiveness of the policy. At 31 March 2022, the total supply of Gypsy and Traveller pitches was 65. There has been a net gain of 8 pitches since 1st April 2017.</u></p> <p>The policy makes reference to the Local Plan Part 2 which is no longer in the Council’s LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.</p> <p><u>In recent years, the Oxfordshire authorities have cooperated on planning for gypsies and travellers, and a new county-wide GTAA is being commissioned</u></p>	

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Cherwell Local Plan 2011 – 2031 Part 1			
		<p><u>jointly, and once published it will replace the 2017 GTAA. This updated information will be used to inform the needs of the travelling community in the Local Plan Review</u></p>	
BSC 7: Meeting Education Needs	<p>The policy sets out the Council's requirements for meeting educational needs and how it will work with partners. The NPPF requires that local planning authorities take a proactive, positive and collaborative approach to meeting the need for school places. The policy is generally consistent with the NPPF.</p>	<p>The Council's AMR does not identify any significant issues with the effectiveness of the policy. Since adoption of the Plan, the IDP monitoring updates reporting in the AMR have identified the completion and expansion of primary and secondary schools at Bicester, Banbury and in the rural areas.</p> <p>The Policy alongside Policy INF1 continues to contribute positively to securing infrastructure funding to meet education needs.</p>	<p>The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will consider the approach to meeting educational needs to 2040.</p>
BSC 8: Securing Health and Well-Being	<p>The policy sets out how the Council will support the provision of health facilities in sustainable locations and the replacement of Bicester hospital. The NPPF objective is fostering a well-designed and safe built environment with accessible services and open spaces that reflect current and future needs and support the communities' health. The policy is generally consistent with Chapter 8 of the NPPF.</p>	<p>The Council's AMR does not identify any significant issues with the effectiveness of the policy. <u>Securing health and wellbeing infrastructure and services remains important.</u></p> <p><u>The Policy alongside Policy INF1 continues to contribute positively to securing infrastructure funding towards provision against Policy BSC10. The new Bicester hospital is complete.</u></p>	<p>The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will consider the approach to health and wellbeing to 2040.</p>

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Cherwell Local Plan 2011 – 2031 Part 1			
BSC 9: Public Services and Utilities	The policy sets out how the Council will support proposals which involve new improvements to public services and the requirement for superfast broadband provision. The NPPF explains how advanced, high quality and reliable communications infrastructure is essential for economic growth and social well-being and how planning policies and decisions should support the expansion of electronic communications networks. This policy is generally consistent with the NPPF.	Advances in digital technology, such as 5G have been made since the policy was adopted. The provision of public services remains important.	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will consider the approach to public services to 2040.
BSC 10: Open Space, Outdoor Sport and Recreation Provision	The policy sets out the approach to securing open space, outdoor sport and recreation provision and is generally consistent with the NPPF Chapter 8.	<p>The Council's AMR does not identify any significant issues with the effectiveness of the policy. Some updating of the evidence base has been undertaken since the Plan was adopted including the Sports Facilities Strategy, the Playing Pitch Strategy and the emerging Open Space and Play Strategy, and a number of Local Green Spaces have been designated in Neighbourhood Plans.</p> <p>Since adoption of the Plan, the IDP monitoring updates reporting in the AMR have identified the completion of open space, outdoor sports and recreation infrastructure in Bicester Banbury and the rural areas.</p>	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will consider the approach to open space, outdoor sport and recreation to 2040.

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		<p>The Policy alongside Policy INF1 continues to contribute positively to securing infrastructure funding towards provision against Policy BSC10.</p> <p>The policy makes reference to the Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.</p>	
BSC 11: Local Standards of Provision – Outdoor Recreation	The policy contains local standards of provision for outdoor recreation and is generally consistent with the NPPF Chapter 8.	<p>The Council's AMR does not identify any significant issues with the effectiveness of the policy. Some updating of the evidence base has been undertaken since the Plan was adopted including the Playing Pitch Strategy and the emerging Open Space and Play Strategy.</p> <p>Since adoption of the Plan, the IDP monitoring updates reporting in the AMR have identified the completion of outdoor recreation infrastructure in Bicester Banbury and the rural areas.</p> <p>The Policy alongside Policy INF1 continues to contribute positively to securing infrastructure funding towards provision against Policy BSC11.</p>	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will consider the approach to outdoor recreation to 2040.

POLICY	CONSISTENCY WITH NATIONAL POLICY	EVIDENCE AND CHANGE IN LOCAL CIRCUMSTANCES	CONCLUSIONS
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		<p>The policy makes reference to the Local Plan Part 2 which is no longer in the Council’s LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.</p>	
<p>BSC 12: Indoor Sport, Recreation and Community Facilities</p>	<p>The policy sets out the approach to securing indoor sport, recreation and community facilities and is generally consistent with the NPPF Chapter 8.</p>	<p>The Council’s AMR does not identify any significant issues with the effectiveness of the policy. Some updating of the evidence base has been undertaken since the Plan was adopted including a Sports Facilities Strategy. Improved facilities have been developed at Spiceball and Woodgreen Leisure Centres in Banbury. New community facilities are being delivered in accordance with the policy to support the Plan’s strategic housing allocations.</p> <p>The policy makes reference to the Local Plan Part 2 which is no longer in the Council’s LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.</p>	<p>The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will consider the approach to indoor sport, recreation and community facilities to 2040.</p>
<p>ESD 1: Mitigating and Adapting to Climate Change</p>	<p>The policy sets out the measures that will be taken to mitigate the impact of development within the District. The NPPF</p>	<p>The Council’s AMR does not identify any significant issues with the effectiveness of the policy.</p>	<p>The policy is generally consistent with the NPPF and local circumstances do not indicate that</p>

POLICY	CONSISTENCY WITH NATIONAL POLICY	EVIDENCE AND CHANGE IN LOCAL CIRCUMSTANCES	CONCLUSIONS
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	<p>explains how Plans should take a proactive approach to mitigating and adapting to climate change. The policy is generally consistent with the NPPF.</p>	<p><u>Carbon emissions per capita in the District were 10.4 tonnes in 2010. In 2020, the latest year for which data is available, places the figure at approximately 6.5 tonnes (AMR 2022, reported under Mitigating and adapting to Climate Change)</u></p> <p><u>No permissions were granted with unresolved objections from the Environment Agency during 2021/22. (AMR 2022, reported under Flooding).</u></p> <p>Government policy in respect of zero carbon homes including the emerging Future Homes Standard, and allowable solutions has been revised since the adoption of the Plan. The Council has made a Declaration of Climate Emergency and a Climate Action Framework 2020 has been produced.</p>	<p>the policy needs updating at this time. The emerging Local Plan Review will consider the approach to mitigating and adapting to climate change to 2040.</p>
<p>ESD 2: Energy Hierarchy and allowable Solutions</p>	<p>The policy sets out the Council’s approach to energy hierarchy and allowable solutions. This policy is generally consistent with the NPPF, including Chapter 14.</p>	<p>Government policy in respect of zero carbon homes including the emerging Future Homes Standard, and allowable solutions has been revised since the adoption of the Plan. The Council has made a Declaration of Climate Emergency and a Climate Change Framework 2020 has been produced.</p>	<p>The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will consider the approach to energy hierarchy and allowable solutions to 2040.</p>
<p>ESD 3: Sustainable Construction</p>	<p>This policy sets out the Council’s approach to sustainable construction. This policy is</p>	<p>Government policy in respect of zero carbon homes including the emerging Future Homes Standard, and allowable</p>	<p>The policy is generally consistent with the NPPF and local circumstances do not indicate that</p>

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	generally consistent with the NPPF, including Chapter 14.	solutions has been revised since the adoption of the Plan. The Council has made a Declaration of Climate Emergency and a Climate Change Framework 2020 has been produced.	the policy needs updating at this time. The emerging Local Plan Review will consider the approach to sustainable construction to 2040.
ESD 4: Decentralised energy Systems	The policy sets out how decentralised energy systems will be encouraged in all new developments. The policy is generally consistent with the NPPF, including Chapter 14.	Government policy in respect of zero carbon homes including the emerging Future Homes Standard, and allowable solutions has been revised since the adoption of the Plan. The Council has made a Declaration of Climate Emergency and a Climate Change Framework 2020 has been produced.	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will consider the approach to decentralised systems to 2040.
ESD 5: Renewable Energy	The policy sets out the Council's approach to development involving renewable energy. This policy is generally consistent with the NPPF, including Chapter 14.	The Council's AMR does not identify any significant issues with the effectiveness of the policy. <u>The AMR reports (Table 18) 27 planning applications were approved during 2021/22 for renewable energy schemes which is an increase from 10 in 2020/21. The latest data confirms that at the end of 2021, there had been 3,090 photovoltaic installations in Cherwell. This is an increase of 204 installations since the end of 2020.</u> Government policy in respect of zero carbon homes including the emerging Future Homes Standard, and allowable solutions has been revised since the adoption of the Plan. The Council has made a Declaration of Climate	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will consider the approach to renewable energy to 2040.

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		Emergency and a Climate Change Framework 2020 has been produced.	
ESD 6: Sustainable Flood Risk Management	The policy sets out the Council’s approach to development and flood risk. This policy is generally consistent with NPPF Chapter 14.	The Council’s AMR does not identify any significant issues with the effectiveness of the policy. No planning permissions were granted in 2019/20 2021/22 with unresolved flood related objections from the Environment Agency.	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will consider the approach to sustainable flood risk management to 2040.
ESD 7: Sustainable Drainage Systems (SuDS)	The policy sets out how all development will be required to use sustainable drainage systems. The policy refers to Oxfordshire County Council as SuDS Approval Body. This was a provision of Schedule 3 of the Water Management Act 2010 which was not enacted and instead paragraph 165 of the NPPF indicates major development should incorporate sustainable drainage systems unless demonstrated to be inappropriate, with the local planning authority responsible for approving drainage schemes, taking account of advice from the Lead Local Flood Authority (OCC). This policy is generally consistent with NPPF Chapter 14.	The policy continues to assist the Council and Oxfordshire County Council in ensuring development contains appropriate SUDS.	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will consider the approach to sustainable drainage to 2040.
ESD 8: Water Resources	The policy states that the Council will seek to maintain water quality, ensure adequate water resources and promote sustainability	The Council’s AMR does not identify any significant issues with the effectiveness of the policy. There have been no planning permissions granted	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this

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	in water use. This policy is generally consistent with the NPPF.	during 2019/20 <u>2021/22</u> contrary to an Environment Agency objection on water quality grounds.	time. The emerging Local Plan Review will consider the approach to water resources to 2040.
ESD 9: Protection of the Oxford Meadows SAC	This policy seeks to protect the Oxford Meadows SAC by ensuring new development does not have adverse effects on water quality or obstruct groundwater flows. The policy is generally consistent with Chapter 15 of the NPPF.	The need for the policy was identified through the Habitats Regulations Assessment process and is required to maintain the hydrological regime of the SAC. The Council's AMR does not identify any significant issues or changes in local circumstances which alter the effectiveness of the policy. There were no planning permissions granted within 1000m of the Oxford Meadows SAC contrary to consultee advice during 2019/20 <u>2021/22</u> .	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will consider the approach to the Oxford Meadows SAC to 2040.
ESD 10: Protection and enhancement of Biodiversity and the Natural Environment	The policy sets out the Council's approach to protecting and enhancing biodiversity and the natural environment and is generally consistent with Chapter 15 of the NPPF.	<p>A Nature Recovery Network and Strategy, building on Conservation Target Areas, and Tree Strategy is being developed for Oxfordshire which will inform the Review of the Local Plan.</p> <p>Following the declaration of a climate emergency, the Council has produced a Climate Change Framework 2020. It is aiming to double tree cover in the district by 2045 and has resolved to seek a minimum 10% biodiversity net gain when considering development proposals.</p>	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will consider the approach to the protection and enhancement of biodiversity and the natural environment to 2040.

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ESD 11: Conservation Target Areas	The policy sets out the approach to development proposals within or adjacent to Conservation Target Areas. This policy is generally consistent with Chapter 15 of the NPPF.	<p>A Nature Recovery Network and Strategy, building on Conservation Target Areas is being developed for Oxfordshire which will inform the Local Plan Review 2040.</p> <p>The footnote to NPPF paragraph 174 <u>179</u> indicates that where Nature Recovery Networks are identified in Plans it may be appropriate to specify the types of development that are appropriate within them.</p> <p>Linked to Policy ESD11 and reported in the AMR, the Plan’s IDP records and monitors ecological enhancement and restoration projects in connection with CTAs and identifies potential funding requirements towards enhancement and restoration opportunities.</p>	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will consider the approach to conservation target areas to 2040.
ESD 12: Cotswolds AONB	The policy sets out the Council’s approach to development in and protection of the Area of Outstanding Natural Beauty (AONB). The NPPF states that great weight should be given to conserving and enhancing landscape and scenic beauty in Areas of Outstanding Natural Beauty, which have the highest status of protection in relation to these issues. This policy is generally consistent with Chapter 15 of the NPPF.	The Council’s AMR does not identify any significant issues with the effectiveness of the policy. <u>No planning permissions were granted for major development within the AONB and no permissions were granted for development within the AONB contrary to the advice of the AONB Management Board during 2020/21</u>	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will consider the approach to the AONB to 2040.

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		<u>Following the Glover’s Landscapes Review published in 2019, the Cotswolds Conservation Board announced a change of name in 2020 from Cotswolds AONB to Cotswolds National Landscape.</u>	
ESD 13: Local Landscape Protection and Enhancement	The policy sets out the approach to protecting and enhancing the landscape. NPPF paragraph 170-174 states that policies should contribute to and enhance the natural and local environment by protecting and enhancing valued landscapes, sites of biodiversity or geological value and soils, recognising the intrinsic character and beauty of the countryside, and the wider benefits from natural capital and ecosystem services. This policy is generally consistent with the NPPF.	The policy remains effective in supporting the protection and enhancement of the landscape in the decision-making process.	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will consider the approach to local landscape protection to 2040.
ESD 14: Oxford Green Belt	This policy sets out the approach to proposals in the Green Belt and indicates the need for a small-scale local review of the Green Belt boundary in the vicinity of Langford Lane Kidlington and Begbroke Science Park. The policy is generally consistent with Chapter 13 of the NPPF.	The policy makes reference to the Local Plan Part 2 which is no longer in the Council’s LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will consider the approach to the Oxford Green Belt to 2040.
ESD 15: The Character of the Built and Historic Environment	The Policy sets out requirements in relation to design and the historic environment. In Chapter 12 the NPPF states that the creation of <u>high-quality , beautiful and sustainable</u> buildings and places is fundamental to what the planning and	The Cherwell Residential Design Guide SPD has been published since the adoption of the Plan. <u>A total of seven conservation area appraisals were reviewed in</u>	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will consider the approach to

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	development process should achieve. Good design is a key aspect of sustainable development, creates better places in which to live and work and helps make development acceptable to communities. Chapter 16 of the NPPF requires that heritage assets should be conserved in a manner appropriate to their significance. The policy is generally consistent with the NPPF.	2019/20 and adopted in late 2021: Ardley, Balscote, Duns Tew, Hethe, Horley, Somerton and Stratton Audley	the character of the built and historic environment to 2040.
ESD 16: The Oxford Canal	This policy seeks to protect and enhance the Oxford Canal corridor. Chapter 16 of the NPPF requires that heritage assets should be conserved in a manner appropriate to their significance. This policy is generally consistent with the NPPF.	<p>The Council’s AMR does not identify any significant issues with the effectiveness of the policy.</p> <p>The AMR reported no planning permissions granted contrary to consultee advice on heritage grounds.</p> <p>The policy makes reference to the Local Plan Part 2 which is no longer in the Council’s LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.</p>	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will consider the approach to the Oxford Canal to 2040.
ESD 17: Green Infrastructure	The policy sets out the approach to maintaining and enhancing the district’s green infrastructure network and is generally consistent with Chapters 8, 14 and 15 of the NPPF.	Some updating of the evidence base has been undertaken since the Plan was adopted including the emerging Open Space and Play Strategy and additional sites contributing to the network planned/secured.	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will consider the approach to Green Infrastructure to 2040.

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		<p>A Nature Recovery Network and Strategy, building on Conservation Target Areas, is being developed for Oxfordshire which will inform the Local Plan Review.</p> <p>Following the declaration of a climate emergency, the Council has produced a Climate Change Framework 2020.</p> <p>The policy makes reference in the supporting text to the Local Plan Part 2 which is no longer in the Council’s LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.</p>	
Bicester 1: North West Bicester Eco-Town	<p>The NPPF requires that planning policies set criteria or identify strategic sites to meet anticipated needs over the Plan period. The policy requires the provision of 6,000 new homes (3,293 within the Plan period) and 10 hectares of employment at Bicester on 390 hectares of land. This is a site-specific policy, but it is generally consistent with the NPPF.</p>	<p>The Council’s latest AMR shows that site is under construction with 225 303 new homes have been completions built on the site at 31 March 2021. Housing delivery on this site has fallen behind the local plan trajectory due to delays in the provision of strategic transport infrastructure. These delays have now been largely resolved and construction is now expected to advance. Cherwell District Council is working proactively with partners including Homes England to unlock development. As of January 2023 when updating the Housing</p>	<p>This is a site-specific policy that is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The policy will be reviewed through the Local Plan Review 2040.</p>

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		<p><u>Delivery Monitor a cautious approach has been taken in assessing delivery.</u></p> <p>Outline planning permission for employment development was allowed at appeal in November 2017 (14/01675/OUT) and was varied by 19/00347/OUT, granted in July 2019. Reserved matters pursuant to 19/00347/OUT were granted in July 2019 for Phase 1 of the employment development and earthworks for Phase 2 (19/00349/REM). The Phase 1 development comprises a total of 12 units over plots 3 and 4 (the plots are as defined through the outline permission).</p> <p><u>All of the allocated land for employment development (10 ha) has planning permission and has been completed. All 10 ha of the land allocated for employment development has planning permission and construction of Phase 1 has started on site.</u></p> <p>Outline planning permission for 1,700 homes (14/02121/OUT) was secured in January 2020. There are other outline applications with resolutions to approve for a total of 3,500 homes.</p>	

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		<p><u>The Council reports progress on housing delivery in detail in its yearly Housing Delivery Monitoring (HDM)</u></p>	
<p>Bicester 2: Graven Hill</p>	<p>The policy requires the provision of 2,100 homes and 26 hectares of employment on 241 hectares of land. The NPPF requires that planning policies set criteria or identify strategic sites to meet anticipated needs over the plan period. This is a site-specific policy, but it is generally consistent with the NPPF.</p>	<p>The Council’s latest AMR sets out how the site is under construction with 195 439 completions at 31 March 20202022. Housing delivery on this site has fallen behind the local plan trajectory but the Council’s 2020 AMR illustrates the continued delivery of the Local Plan housing target. This is also primarily a self-build development which has been impacted by the COVID-19 pandemic.</p> <p>Planning permission (11/01494/OUT) for all 26-ha employment provision was granted in August 2014 and this was subsequently amended by a section 73 application (19/00937/OUT), approved in January 2020.</p> <p>Reserved matters, pursuant to 19/00937/OUT relating to a parcel within the employment land were granted in January 2020 for an office and warehouse (RUBB building).</p> <p>No significant employment development has started on site. <u>The Council reports progress on housing</u></p>	<p>The is a site-specific policy that is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The policy will be reviewed through the Local Plan Review 2040.</p>

POLICY	CONSISTENCY WITH NATIONAL POLICY	EVIDENCE AND CHANGE IN LOCAL CIRCUMSTANCES	CONCLUSIONS
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		delivery in detail in its yearly Housing Delivery Monitoring (HDM)	
Bicester 3: South West Bicester Phase 2	The policy requires the provision of 726 homes on 29 hectares of land. The NPPF requires that planning policies set criteria or identify strategic sites to meet anticipated needs over the plan period. This is a site-specific policy, but it is generally consistent with the NPPF.	<p>The Council's latest AMR sets out how the site is under construction with 12 396 completions at 31 March 20222020. Outline/Reserved Matters Application 13/00847/OUT for 709 dwellings was approved on 30 May 2017.</p> <p>A Reserved Matters application for 247 dwellings (18/00647/REM) was approved on 16 October 2018. A separate Reserved Matters for 176 dwellings (18/01777/REM) was approved on 1 March 2019. Reserved Matters application (19/02225/REM) for 226 dwellings was approved on 16 March 2020. The delivery of this site is broadly in line with the local plan trajectory and the Council's 2020 AMR illustrates the continued delivery of the Local Plan housing target.</p> <p>The Council reports progress on housing delivery in detail in its yearly Housing Delivery Monitoring (HDM)</p>	The is a site-specific policy that is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The policy will be reviewed through the Local Plan Review 2040.
Bicester 4: Bicester Business Park	The policy requires the provision of B1 employment on 29.5 hectares of land. The NPPF requires that planning policies set criteria or identify strategic sites to meet	The Council's latest AMR explains how the site is occupied by a superstore and drive through restaurant and planning	This is a site-specific policy that is generally consistent with the NPPF and local circumstances do not indicate that the policy needs

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	<p>anticipated needs over the plan period. This is a site-specific policy, but it is generally consistent with the NPPF.</p>	<p>permission has also been granted for employment development.</p> <p>Part of the site was granted outline planning permission in 2010 for the construction of a B1 business park and a hotel (07/01106/OUT).</p> <p>The northern part of the allocation, adjacent to the A41 has been developed for a superstore and petrol filling station (12/01193/F and minor material amendment 15/01651/F) and a drive-thru restaurant (17/00889/F). Part of this completed development is on land consented as part of the earlier business park permission. The completed superstore and drive-thru restaurant development represents 4.2 ha of the allocated land.</p> <p>Outline planning permission was granted in May 2020 for office development and research and development floorspace (17/02534/OUT) on a 13.1 ha parcel of land to the south and east of the A41 and Oxford Road, adjacent to the Tesco superstore. The land is within the boundaries of Policy Bicester 4. Development has not started. —and there is some overlap between this site</p>	<p>updating at this time. The policy will be reviewed through the Local Plan Review 2040.</p>

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		<p>and that originally granted permission by 07/01106/OUT. <u>There is no planning permission in place for the remaining area of 7.8ha.</u></p>	
Bicester 5: Strengthening Bicester Town Centre	The policy applies to the Bicester town centre and the ‘area of search’ as shown on inset map 5. The NPPF states that planning policies should support the role that town centres play at the heart of local communities, by taking a positive approach to their growth, management and adaptation. The policy is generally consistent with the NPPF.	The policy makes reference in the supporting text to the Local Plan Part 2 which is no longer in the Council’s LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040. The policy continues to deliver positively against town centre objectives and the NPPF.	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will consider the approach to Bicester town centre to 2040.
Bicester 6: Bure Place Town Centre Redevelopment Phase 2	The policy relates to the development of Bure Place in Bicester as identified on inset map 6.	The development is now complete.	The policy has achieved its aim in that the development is now complete and hence does not need updating.
Bicester 7: Meeting the Needs for Open Space, Sport and Recreation	The policy contains measures to address deficiencies in open space, sport and recreation provision in Bicester, and is generally consistent with Chapter 8 of the NPPF.	<p>Some updating of the evidence base has been undertaken since the Plan was adopted including the Sports Facilities Strategy, the Playing Pitch Strategy and the emerging Open Space and Play Strategy.</p> <p>The policy makes reference to the Local Plan Part 2 which is no longer in the Council’s LDS. The policy areas that were to be included in that document</p>	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will consider the approach to meeting needs for open space, sport and recreation to 2040.

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		will now be covered by the emerging Cherwell Local Plan Review 2040.	
Bicester 8: RAF Bicester	The policy applies to the former RAF Bicester as shown on inset map 8. The policy requires a conservation led approach to secure a long-lasting viable future for the site. Chapter 16 of the NPPF requires that heritage assets should be conserved in a manner appropriate to their significance. This is a site-specific policy, but it is generally consistent with the NPPF.	The Council's AMR does not identify any significant issues with the effectiveness of the policy. <u>The new employment units on the technical site of Bicester 8 have been completed. Additional employment units adjacent to Skimmingdish Lane have outline consent but have yet to be implemented.</u> Proposals for employment and other uses which aim to secure a lasting viable future for the site and to encourage tourism including in relation to motorsport are being implemented.	This is a site-specific policy that is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The policy will be reviewed through the Local Plan Review 2040.
Bicester 9: Burial Site Provision in Bicester	The policy concerns provision of a new cemetery and securing developer contributions towards its establishment and is generally consistent with Chapter 3 of the NPPF.	Provision of land suitable for a new burial ground at North West Bicester is required by policy Bicester 1 and the North West Bicester Supplementary Planning Document but has yet to be secured.	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will consider the approach to burial site provision to 2040.
Bicester 10: Bicester Gateway	The policy requires the provision of B1 employment at Bicester on 18 hectares of land. The NPPF requires that planning policies set criteria or identify strategic sites to meet anticipated needs over the plan	The Council's AMR explains how the site has obtained a number of planning permissions for commercial and housing development. <u>All 18 ha of the land allocated for employment development has planning permission.</u>	This is a site-specific policy that is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The policy will

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	<p>period. This is a site-specific policy, but it is generally consistent with the NPPF.</p>	<p><u>The land to the west of Wendlebury Road comprises two parcels of land. Phase 1a which is related to a hotel is completed. The southern parcel (phase 1b) has a reserved matters permission for B1 employment development and includes a small area of unallocated land to the south outside of the Bicester 10 allocation. Phase 1B was granted Reserved matters on the 11th November (beyond the base date of this AMR)</u></p> <p><u>Planning permission for phase 1b has been secured (20/00293/OUT). The application includes residential and employment development and ancillary retail, café and gym facilities. 37% of the proposal site is included within the Bicester 10 allocation whilst the southern portion of the site is located adjacent to the allocation. Approximately 1.17 ha of land being located within the allocation and has not been completed.</u></p> <p><u>Phase 2 comprising the remainder of the Bicester 10 allocation, located to the east of Wendlebury Road was granted planning permission for B1 development and a health and racquets club on 15.8 ha of land in</u></p>	<p>be reviewed through the Local Plan Review 2040.</p>

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		<p>September 2020 (19/01740/HYBRID). Reserved matters consent (20/02779/REM) for phase 1 of the employment development, comprising 4no. units within two separate buildings, was granted in December 2020 and construction has started. The allocation has been brought forward in parts.</p> <p>The land to the west of Wendlebury Road comprises two parcels of land with outline permission having been granted (16/02586/OUT). Reserved matters consent (17/02557/REM) has been granted for the hotel which is now under construction on the northern parcel – phase 1a. The southern parcel (phase 1b) has outline permission for B1 employment development and includes a small area of unallocated land to the south outside of the Bicester 10 allocation.</p> <p>An alternative proposal for phase 1b has a resolution to approve (20/00293/OUT). The application includes residential and employment development and ancillary retail, café and gym facilities. 37% of the proposal site is included within the Bicester 10 allocation whilst the southern portion of the site is located adjacent to the allocation. Approximately 1.17 ha of</p>	

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		<p>land being located within the allocation.</p> <p>Phase 2 comprising the remainder of the Bicester 10 allocation, located to the east of Wendlebury Road was granted planning permission for B1 development and a health and racquets club on 15.8 ha of land in September 2020 (19/01740/HYBRID).</p>	
<p>Bicester 11: Employment Land at North East Bicester</p>	<p>The policy requires the provision of mixed B use class employment at Bicester on 15 hectares of land. The NPPF requires that planning policies set criteria or identify strategic sites to meet anticipated needs over the plan period. This is a site-specific policy, but it is generally consistent with the NPPF.</p>	<p>Outline planning permission (15/01012/OUT) was granted in May 2016 and various reserved matters have been approved pursuant to this outline consent.</p> <p>The Council’s latest AMR sets out how the majority of the site contains completed employment development.</p> <p><u>Development of the northern part of the allocation – 10.5 ha of land – is complete.</u></p> <p>There is no planning permission in place for the remaining 4.5 ha of the allocation. Development of the western side of the site is complete and development of the land on the eastern side of the site is underway. There is no planning permission in place for the remaining 4.5 ha of the allocation.</p>	<p>This is a site-specific policy that is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The policy will be reviewed through the Local Plan Review 2040.</p>

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Bicester 12: South East Bicester	The policy requires the provision of 1500 homes and 40 hectares of employment on 155 hectares of land. The NPPF requires that planning policies set criteria or identify strategic sites to meet anticipated needs over the plan period. This is a site-specific policy, but it is generally consistent with the NPPF.	<p>The AMR explains planning <u>Planning</u> permission has been granted for 1500 dwellings and 18 hectares of employment development (subject to legal agreement). 11 hectares of employment development has been completed. Delivery of this site is behind the local plan trajectory but the Council's 2020 AMR illustrates the continued delivery of the Local Plan housing target.</p> <p><u>The Council reports progress on housing delivery in detail in its yearly Housing Delivery Monitoring (HDM)</u></p>	This is a site-specific policy that is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The policy will be reviewed through the Local Plan Review 2040.
Bicester 13: Gavray Drive	The policy requires the provision of 300 homes on 23 hectares of land. The NPPF requires that planning policies set criteria or identify strategic sites to meet anticipated needs over the plan period. This is a site-specific policy, but it is generally consistent with the NPPF.	<p>The Council's AMR explains how a <u>a</u> planning application for 180 dwellings was refused in June 2017 and dismissed at appeal on 16 July 2018. Delivery of this site is behind the local plan trajectory but the Council's 2020 AMR illustrates the continued delivery of the Local Plan housing target.</p> <p>The site is located in a sustainable location and close to Bicester town centre. Development could provide integration with the existing Langford Village development to the south and west. The appeal was dismissed due to the uncertainty of whether the balance</p>	This is a site-specific policy that is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The policy will be reviewed through the Local Plan Review 2040.

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		<p>of 120 dwellings could be delivered on the eastern part of the site in a manner that would adequately protect and enhance locally significant ecological interest.</p> <p><u>Outline application (21/03558/OUT) for up to 250 dwellings was submitted in October 2021 and is pending consideration.</u></p> <p>At its meeting on 20 July 2015 the Council resolved that the designation of the Conservation Target Area at Gavray Drive (Policy Bicester 13) as a designated Local Green Space through the forthcoming stages of the Cherwell Local Plan Part 2 be positively pursued.</p> <p><u>The Council reports progress on housing delivery in detail in its yearly Housing Delivery Monitoring (HDM)</u></p>	
<p>Banbury 1: Banbury Canalside</p>	<p>The policy requires the provision of 700 homes on 26 hectares of land and other town centre uses. The NPPF requires that planning policies set criteria or identify strategic sites to meet anticipated needs over the plan period. This is a site-specific policy, but it is generally consistent with the NPPF.</p>	<p>The Council's latest AMR explains how planning permission has been granted for 46 dwellings at 31 March 2020. At 31 March 2022, there have been 46 housing completions on site. The delivery of this site is expected to be broadly in line with the local plan trajectory and the Council's 2020 AMR illustrates the continued delivery of the Local Plan housing target.</p> <p>The relocation site for Banbury United Football Club has yet to be secured.</p>	<p>This is a site-specific policy that is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The policy will be reviewed through the Local Plan Review 2040.</p>

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		<p>The policy makes reference to the Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.</p> <p><u>The Council reports progress on housing delivery in detail in its yearly Housing Delivery Monitoring (HDM)</u></p>	
Banbury 2: Hardwick Farm, Southam Road (East and West)	The policy requires the provision of 600 homes on 32 hectares of land. The NPPF requires that planning policies set criteria or identify strategic sites to meet anticipated needs over the plan period. This is a site-specific policy, but it is generally consistent with the NPPF.	<p>The Council's AMR explains that Southam Road East shows the site is under construction with 409–518 completions at 31 March 2020<u>2022</u>. <u>One part of the site has reserved matters for 90 dwellings is secured.</u> The delivery of this site is broadly in line with the local plan trajectory and the Council's 2020 AMR illustrates the continued delivery of the Local Plan housing target.</p> <p><u>The Council reports progress on housing delivery in detail in its yearly Housing Delivery Monitoring (HDM)</u></p>	This site-specific policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The policy will be reviewed through the Local Plan Review 2040.
Banbury 3: West of Bretch Hill	The policy requires the provision of 400 homes on 26.5 hectares of land. The NPPF requires that planning policies set criteria or identify strategic sites to meet anticipated	The Council's AMR explains that shows the site is under construction with 243 <u>362</u> completions at 31 March 2020 <u>2022</u> . The delivery of the site is	This site-specific policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this

POLICY	CONSISTENCY WITH NATIONAL POLICY	EVIDENCE AND CHANGE IN LOCAL CIRCUMSTANCES	CONCLUSIONS
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	needs over the plan period. This is a site-specific policy, but it is generally consistent with the NPPF.	slightly behind the local plan trajectory with the COVID-19 pandemic causing some delays, but the Council's 2020 AMR illustrates the continued delivery of the Local Plan housing target. <u>The Council reports progress on housing delivery in detail in its yearly Housing Delivery Monitoring (HDM)</u>	time. The policy will be reviewed through the Local Plan Review 2040.
Banbury 4: Bankside Phase 2	The policy requires the provision of 600 homes on 27 hectares of land. The NPPF requires that planning policies set criteria or identify strategic sites to meet anticipated needs over the plan period. This is a site-specific policy, but it is generally consistent with the NPPF.	Planning application for 700 dwellings (17/01408/OUT) was received on 30 June 2017 and is pending consideration. A new application (19/01047/OUT) for a residential development of up to 825 dwellings was approved subject to legal agreement on 15 July 2021. Separate outline planning applications for 700 and an alternative for 850 dwellings are pending consideration. Delivery has fallen behind the local plan trajectory, but the Council's 2020 AMR illustrates the continued delivery of the Local Plan housing target. <u>The Council reports progress on housing delivery in detail in its yearly Housing Delivery Monitoring (HDM)</u>	This site-specific policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The policy will be reviewed through the Local Plan Review 2040.
Banbury 5: North of Hanwell Fields	The policy requires the provision of 544 homes on 26 hectares of land. The NPPF requires that planning policies set criteria or	The Council's latest AMR explains that site is under construction with 445 <u>334</u> completions at 31 March 2020 <u>2022</u> .	This site-specific policy is generally consistent with the NPPF and local circumstances do not indicate that

POLICY	CONSISTENCY WITH NATIONAL POLICY	EVIDENCE AND CHANGE IN LOCAL CIRCUMSTANCES	CONCLUSIONS
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	identify strategic sites to meet anticipated needs over the plan period. This is a site-specific policy, but it is generally consistent with the NPPF.	Delivery is broadly in line with the local plan trajectory and the Council's 2020 AMR illustrates the continued delivery of the Local Plan housing target. <u>The Council reports progress on housing delivery in detail in its yearly Housing Delivery Monitoring (HDM)</u>	the policy needs updating at this time. The policy will be reviewed through the Local Plan Review 2040.
Banbury 6: Employment Land West of M40	The policy requires the provision of mixed B use class employment at Banbury on 35 hectares of land. The NPPF requires that planning policies set criteria or identify strategic sites to meet anticipated needs over the plan period. This is a site-specific policy, but it is generally consistent with the NPPF.	The Council's latest AMR explains <u>29.1 ha of development has been completed under various planning permissions.</u> There is no planning permission in place for the remaining area of 5.9 ha that 21 ha of development has been completed under various planning permissions. Planning permission has been granted for the construction of a new logistics warehouse (19/00487/F) on a further 3.3 ha but development has not yet started.	This site-specific policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The policy will be reviewed through the Local Plan Review 2040.
Banbury 7: Strengthening Banbury Town Centre	The policy applies to the Banbury town centre and an 'area of search' as shown on inset map 7. The NPPF states that planning policies should support the role that town centres play at the heart of local communities, by taking a positive approach to their growth, management and adaptation. The policy is generally consistent with the NPPF.	The Council's AMR does not identify any significant issues with the effectiveness of the policy. The policy continues to deliver positively against town centre objectives and the NPPF. The policy makes reference to the Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will consider the approach to Banbury town centre to 2040.

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		will now be covered by the emerging Cherwell Local Plan Review 2040.	
Banbury 8: Bolton Road Development Area	The policy requires the provision of 200 dwellings and town centre uses. The NPPF requires that planning policies set criteria or identify strategic sites to meet anticipated needs over the plan period. This is a site-specific policy, but it is generally consistent with the NPPF.	<p><u>The multi-storey car park has already been demolished and planning applications have been granted for 80 living apartments.</u></p> <p>The Council's AMR shows that development on this proposed mixed-use site has not progressed except for the demolition of a multi-storey carpark. The site is in multiple ownership. Delivery has fallen behind the local plan trajectory, but the Council's 2020 AMR illustrates the continued delivery of the Local Plan housing target.</p> <p><u>The Council reports progress on housing delivery in detail in its yearly Housing Delivery Monitoring (HDM)</u></p>	This site-specific policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The policy will be reviewed through the Local Plan Review 2040.
Banbury 9: Spiceball Development Area	The policy requires the provision of town centre uses. The NPPF states that planning policies should support the role that town centres play at the heart of local communities, by taking a positive approach to their growth, management and adaptation. This is a site-specific policy, but it is generally consistent with the NPPF.	The site is currently being developed for a supermarket, hotel and other town centre uses. The new development is almost complete, but the planning application does not involve redevelopment of the entirety of the allocated site. The Council's AMR does not identify any significant issues with the effectiveness of the policy.	This site-specific policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The policy will be reviewed through the Local Plan Review 2040.

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Banbury 10: Bretch Hill Regeneration Area	<p>The policy requires regeneration of housing, retail and community uses within the area shown on the proposals map (Banbury 10).</p> <p>The NPPF states that Planning policies should consider the social, economic and environmental benefits of estate regeneration. The policy is generally consistent with the NPPF.</p>	<p>The Council continues to implement its Brighter Futures Initiative and developments have come forward within the area including through its Build! Programme. The Council's AMR does not identify any <u>There are no</u> significant issues with the effectiveness of the policy.</p>	<p>The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The policy will be reviewed through the Local Plan Review 2040.</p>
Banbury 11: Meeting the Need for Open Space, Sport and Recreation	<p>The policy contains measures to address deficiencies in open space, sport and recreation provision in Banbury, and is generally consistent with Chapter 8 of the NPPF.</p>	<p>Some updating of the evidence base has been undertaken since the Plan was adopted including the Sports Facilities Strategy, the Playing Pitch Strategy and the emerging Open Space and Play Strategy.</p> <p>The policy makes reference to the Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.</p>	<p>The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will consider the approach to meeting the need for open space, sport and recreation to 2040.</p>
Banbury 12: Land for the Relocation of Banbury United FC	<p>The policy allocates land for the relocation of Banbury United Football Club, with land not required for the football club being suitable for a new secondary school for the town. The policy is generally consistent with Chapter 8 of the NPPF.</p>	<p>The relocation of the football club has not been secured to date and there remains a need for a new secondary school to serve the town.</p> <p>A planning application on part of the allocated site for residential development is currently pending determination.</p>	<p>This site-specific policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. policy will be reviewed through the Local Plan Review 2040.</p>

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Banbury 13: Burial site Provision in Banbury	The policy concerns extending the existing cemetery to meet the needs of the existing and future population and securing developer contributions towards its establishment and is generally consistent with Chapter 3 of the NPPF.	<p>The land for the extension has been secured by the Town Council but the facility is yet to be established.</p> <p>The policy makes reference in the supporting text to the Local Plan Part 2 which is no longer in the Council’s LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.</p>	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will consider the approach to burial site provision in Banbury to 2040.
Banbury 14: Cherwell Country Park	The policy allocates land to be developed as a country park and is generally consistent with Chapter 8 of the NPPF.	<p>The Council’s AMR does not identify any significant issues with the effectiveness of the policy. Changes have been made to the proposed scheme since the adoption of the Plan.</p> <p>Funding has been secured towards phase 1 and the site is now owned by CDC.</p> <p>Tree planting supporting the Climate Action programme has progressed at DCS woodland in the Country Park.</p>	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The policy will be reviewed through the Local Plan Review 2040.
Banbury 15: Employment Land North East of Junction 11	The policy requires the provision of mixed B use class employment at Banbury on 13 hectares of land. The NPPF requires that planning policies set criteria or identify strategic sites to meet anticipated needs over the Plan period. This is a site-specific	The Council’s latest AMR explains that planning permission was granted in July 2020 for commercial development for the whole Banbury 15 site. <u>Part A, which has an area of 3.31 ha is completed. Development on Part B has</u>	This site-specific policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The policy will be reviewed through the Local Plan Review 2040.

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	policy, but it is generally consistent with the NPPF.	not yet started. Initial ground works have recently commenced.	
Banbury 16: South of Salt Way – West	The policy requires the provision of 150 homes on 8 hectares of land. The NPPF requires that planning policies set criteria or identify strategic sites to meet anticipated needs over the plan period. This is a site-specific policy, but it is generally consistent with the NPPF.	The Council's latest AMR explains how the site is under construction with 94 <u>196</u> completions at 31 March 2020 <u>2022</u> . <u>Outline application (14/01188/OUT) for 350 dwellings was approved on 13 November 2015. Reserved Matters application 17/00669/REM for 318 dwellings was approved on 12 October 2017. A new Reserved Matters application (18/01973/REM) was approved on 29 March 2019. Delivery has fallen behind the local plan trajectory and has been impacted by COVID-19 but the Council's 2020 AMR illustrates the continued delivery of the Local Plan housing target. The Council reports progress on housing delivery in detail in its yearly Housing Delivery Monitoring (HDM)</u>	This site-specific policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The policy will be reviewed through the Local Plan Review 2040.
Banbury 17: South of Salt Way – East	The policy requires the provision of 1,345 homes on 68 hectares of land. The NPPF requires that planning policies set criteria or identify strategic sites to meet anticipated needs over the plan period. This is a site-specific policy, but it is generally consistent with the NPPF.	The Council's latest AMR explains how the site is under construction with 145 <u>193</u> completions at 31 March 2020 <u>2022</u> . Delivery has fallen behind the local plan trajectory and has been impacted by COVID-19 but the Council's 2020 AMR illustrates the continued delivery of the Local Plan	This site-specific policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The policy will be reviewed through the Local Plan Review 2040.

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Cherwell Local Plan 2011 – 2031 Part 1			
		<p>housing target. Reserved Matters application for 280 homes (19/00895/REM) was approved in July 2020 and an Outline application for 1,000 homes (14/01932/OUT) was approved in December 2019.</p> <p><u>The Council reports progress on housing delivery in detail in its yearly Housing Delivery Monitoring (HDM)</u></p>	
Banbury 18: Land at Drayton Lodge Farm	The policy requires the provision of 250 homes on 15 hectares of land. The NPPF requires that planning policies set criteria or identify strategic sites to meet anticipated needs over the plan period. This is a site-specific policy, but it is generally consistent with the NPPF.	<p>The Council's latest AMR explains how an Outline application for 320 dwellings has been approved. The delivery rates are broadly in line with the local plan and the Council's 2020 AMR illustrates the continued delivery of the Local Plan housing target.</p> <p><u>The Council reports progress on housing delivery in detail in its yearly Housing Delivery Monitoring (HDM)</u></p>	This site-specific policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The policy will be reviewed through the Local Plan Review 2040.
Banbury 19: Land at Higham Way	The policy requires the provision of 150 homes on 3 hectares of land. The NPPF requires that planning policies set criteria or identify strategic sites to meet anticipated needs over the plan period. This is a site-specific policy, but it is generally consistent with the NPPF.	<p>The Council's latest AMR explains how a <u>A</u> planning application for approximately 200 dwellings is pending consideration. Delivery has fallen behind the local plan trajectory but the Council's 2020 AMR illustrates the continued delivery of the Local Plan housing target. This is a brownfield site in a very sustainable location. The site</p>	This site-specific policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The policy will be reviewed through the Local Plan Review 2040.

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		<p><u>is included in the Brownfield Register (Site BLR12) updated 2022. Delivery has fallen behind the local plan trajectory. The Council is in ongoing dialogue with the agents to resolve some planning issues in relation to the outline application. The Council will also review the opportunities for other uses in this very sustainable location as part of the Local Plan Review 2040.</u></p> <p><u>The Council reports progress on housing delivery in detail in its yearly Housing Delivery Monitoring (HDM)</u></p>	
<p>Kidlington 1: Accommodating High Value Employment Needs</p>	<p>The policy indicates that the Council will undertake a small-scale local review of the Green Belt to accommodate identified high value employment needs at Langford Lane/Oxford Technology Park/London Airport Kidlington, and Begbroke Science Park. The policy contains site specific design and place shaping principles, with the Green Belt review to be undertaken in Local Plan Part 2. The NPPF requires that planning policies set criteria or identify strategic sites to meet anticipated needs over the plan period. The policy is generally consistent with the NPPF.</p>	<p>Notwithstanding the fact that the proposed small scale local Green Belt review in the Local Plan Part 2 has not yet occurred, planning permission for a new technology park comprising 40,362 sqm of employment floorspace has been granted at Land East of Evenlode Crescent and South of Langford Lane, Kidlington. Reserved Matters permission for Phase 1 was granted in 2017 and construction started during 2018/19.</p> <p>The policy makes reference to the Local Plan Part 2 which is no longer in the Council’s LDS. The policy areas that</p>	<p>The policy is generally consistent with the NPPF and local circumstances, including the fact that the Green Belt review has not yet occurred, do not indicate that the policy needs updating at this time. The policy will be reviewed through the Local Plan Review 2040.</p>

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		were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.	
Kidlington 2: Strengthening Kidlington Village Centre	The policy applies to the Kidlington village centre as shown on Kidlington inset map 2. The NPPF states that planning policies should support the role that town centres play at the heart of local communities, by taking a positive approach to their growth, management and adaptation. The policy is generally consistent with the NPPF.	<p>The Council’s AMR does not identify any significant issues with the effectiveness of the policy. The Kidlington Framework Masterplan was adopted in December 2016.</p> <p>A residential development off Sterling Approach (Co-Op, 26 High Street) including conversion of offices above existing store and alteration to existing retail store was approved in January 2018 and is now completed. The scheme is currently under construction.</p> <p>The policy makes reference to the Local Plan Part 2 which is no longer in the Council’s LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.</p>	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will consider the approach to Kidlington centre 2040.
Villages 1: Village Categorisation	The policy categorises villages in the District and sets out the requirements for development within the built-up limits. The NPPF states that to promote sustainable development in rural areas, housing should be located where it will enhance or maintain the vitality of rural communities.	There are Neighbourhood Plans in place for Mid Cherwell, Hook Norton, Adderbury and Bloxham. The Weston on the Green Neighbourhood Plan is at the referendum stage.	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will consider the approach to

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	<p>Planning policies should identify opportunities for villages to grow and thrive, especially where this will support local services. The policy is generally consistent with the NPPF.</p>		<p>development in the District’s villages to 2040.</p>
<p>Villages 2: Distributing Growth Across the Rural Areas</p>	<p>The policy indicates 750 homes will be delivered to Cherwell’s Category A villages with sites to be identified through the preparation of Local Plan Part 2. Criteria are included to guide identification of sites. The NPPF states that to promote sustainable development in rural areas, housing should be located where it will enhance or maintain the vitality of rural communities. Planning policies should identify opportunities for villages to grow and thrive, especially where this will support local services. The policy is generally consistent with the NPPF.</p>	<p>There are Neighbourhood Plans in place for Mid Cherwell, Hook Norton, Adderbury and Bloxham. The Weston on the Green Neighbourhood Plan is at the referendum stage.</p> <p>The policy makes reference to the Local Plan Part 2 which is no longer in the Council’s LDS. Notwithstanding this the Council’s AMR shows that <u>During 2021/22 there were 184 dwellings completed at Category A villages that contribute to the Policy Villages 2 requirement of 750 dwellings. Since 2014 there has now been a total of 703 completions with a further 165 under construction totalling 868 dwellings. A further 48 dwellings are likely to be built out which will mean the policy requirement has been met.</u>at 31 March 2020 608 dwellings are either completed or under construction on sites with planning permission in Category A villages.</p>	<p>The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will consider the approach to development in the District’s villages to 2040.</p>

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		<p>The policy is delivering and is up to date as a significant majority of the 750 homes have come forward or are coming forward even in the absence of the Part 2 Plan.</p> <p>The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.</p> <p><u>The Council reports progress on housing delivery in detail in its yearly Housing Delivery Monitoring (HDM)</u></p>	
Villages 3: Rural Exception Sites	<p>The policy supports the identification of small-scale rural exception schemes and states that market housing will only be considered in certain circumstances. The NPPF states that Local Planning Authorities should support opportunities to bring forward rural exception sites that will provide affordable housing to meet identified local needs and consider whether allowing some market housing on these sites would help to facilitate this. The policy is generally consistent with the NPPF.</p>	<p>The policy continues to support positively rural housing as part of the Local Plan and Neighbourhood Plans.</p>	<p>The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will consider the approach to rural exception sites to 2040.</p>
Villages 4: Meeting the Need for Open Space, Sport and Recreation	<p>The policy contains measures to address deficiencies in open space, sport and recreation provision in the rural areas, and is generally consistent with Chapter 8 of the NPPF.</p>	<p>Some updating of the evidence base has been undertaken since the Plan was adopted including the emerging Open Space and Play Strategy.</p>	<p>The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will consider the approach to</p>

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Cherwell Local Plan 2011 – 2031 Part 1			
		<p>The policy makes reference to the Local Plan Part 2 which is no longer in the Council’s LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.</p>	<p>meeting the need for open space, sport and recreation in villages 2040.</p>
Villages 5: Former RAF Upper Heyford	<p>The policy requires the provision of in total 2,361 homes on land at the former RAF Upper Heyford. The NPPF requires that planning policies set criteria or identify strategic sites to meet anticipated needs over the plan period. This is a site-specific policy, but it is generally consistent with the NPPF.</p>	<p>The Council’s latest AMR explains that at 31 March 2020<u>2022</u> there have been 598<u>451</u> net housing completions at the former RAF Upper Heyford Airbase. Planning permission was granted in December 2011 for 1,075 dwellings (gross) with a net gain of 761 dwellings and more recently for revised proposals. Delivery is broadly consistent with the local plan trajectory and the Council’s 2020 AMR illustrates the continued delivery of the Local Plan housing target. <u>The Council reports progress on housing delivery in detail in its yearly Housing Delivery Monitoring (HDM)</u></p>	<p>This site-specific policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The policy will be reviewed through the Local Plan Review 2040.</p>
INF 1: Infrastructure	<p>The Policy explains that the Council’s approach to infrastructure will identify the infrastructure to meet the District’s growth, to support the strategic sites and ensure delivery. The NPPF sets out how Plans should make provision for infrastructure and work with infrastructure providers. The policy is generally consistent with the NPPF.</p>	<p>The Council’s AMR does not identify any significant issues with the effectiveness of the policy. The Policy continues to contribute positively to the provision of infrastructure and securing S106s as shown in the Council’s IDP updates reported yearly</p>	<p>The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan Review will consider the approach to Infrastructure to 2040.</p>

POLICY	CONSISTENCY WITH NATIONAL POLICY	EVIDENCE AND CHANGE IN LOCAL CIRCUMSTANCES	CONCLUSIONS
Cherwell Local Plan 2011 – 2031 Part 1			
		as part of the AMR and the Council's Infrastructure Funding Statement.	

POLICY	CONSISTENCY WITH NATIONAL POLICY	EVIDENCE AND CHANGE IN LOCAL CIRCUMSTANCES	CONCLUSIONS
Saved Policies of the Cherwell Local Plan 1996			
Policy GB2 Outdoor recreation in the Green Belt	The policy sets out criteria for assessing applications for outdoor recreation and related buildings in the Green Belt. The policy is generally consistent with Chapter 13 of the NPPF but includes additional criteria.	The policy contains development management criteria. When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider the approach to outdoor recreation in the Green Belt to 2040.
Policy GB3 major developed sites in the Green Belt	<p>The policy contains criteria for assessing proposals for complete or partial redevelopment of Oxford Airport and Thames Water Utilities Depot, identified as Major Developed Sites in the 1996 Plan.</p> <p>The NPPF no longer refers to Major Developed Sites in the Green Belt, only to the limited infilling or the partial or complete redevelopment of previously developed land. The policy does not conflict with paragraph 145 Chapter 13 of the NPPF but contains additional criteria relevant to the identified sites.</p>	<p>Oxford Airport and Thames Water Utilities Depot lie within the area identified under policies ESD 14 and Kidlington 1 to be the subject of a small scale Green Belt review to accommodate identified high value employment needs. This will be undertaken through the Local Plan Review.</p> <p>The policy contains development management criteria. When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local</p>	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider the approach to previously developed land in the Green Belt to 2040 and incorporate a small-scale Green Belt review in the vicinity of Oxford Airport and Thames Water Utilities Depot.

POLICY	CONSISTENCY WITH NATIONAL POLICY	EVIDENCE AND CHANGE IN LOCAL CIRCUMSTANCES	CONCLUSIONS
Saved Policies of the Cherwell Local Plan 1996			
		Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.	
Policy H16 White land at Yarnton	<p>The policy protected land at Yarnton as white land for the duration of the Plan.</p> <p>Paragraph 139-143 of the NPPF allows for the identification of safeguarded land between the urban area and the Green Belt in order to meet development needs beyond the Plan period.</p>	The white land has been developed.	The policy has achieved its aim in that the development is now complete and hence does not need updating.
Policy H17 Replacement dwellings	The policy states that proposals for the one-for-one replacement of an existing statutorily unfit or substandard dwelling will normally be permitted provided certain criteria are met. The NPPF states that planning policies and decisions should avoid the development of isolated homes in the countryside unless one or more circumstances apply including: the development would re-use redundant or disused buildings and enhance its immediate setting and that the design is of exceptional quality, in that it would significantly enhance its immediate setting, and be sensitive to the defining characteristics of the local area. The policy is generally consistent with the NPPF.	The policy contains development management criteria. When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider the approach to replacement dwellings to 2040.

POLICY	CONSISTENCY WITH NATIONAL POLICY	EVIDENCE AND CHANGE IN LOCAL CIRCUMSTANCES	CONCLUSIONS
Saved Policies of the Cherwell Local Plan 1996			
Policy H18 New dwellings in the countryside	Policy H18 states that planning permission will only be granted for the construction of new dwellings beyond the built-up limits of settlements if certain criteria are met. The policy is generally consistent with the NPPF which states that planning policies should avoid the development of isolated homes in the countryside unless one or more circumstances apply, but there are some differences including in relation to the NPPF allowing for consideration of exceptional design.	The policy contains development management criteria. When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.	The policy has some inconsistency with the NPPF but this is limited to this specific policy and does not lead to wider concerns that the development plan is out of date. The emerging Local Plan will consider the approach to new dwellings in the countryside to 2040.
Policy H19 Conversion of buildings in the countryside	Policy H19 states that proposals for the conversion of a rural building, whose form, bulk and general design is in keeping with its surroundings to a dwelling in a location beyond the built-up limits of a settlement will be favourably considered provided that certain criteria are met. The policy is generally consistent with the NPPF which allows for the conversion of existing buildings, requires policies to recognise the intrinsic character and beauty of the countryside and the desirability of sustaining and enhancing the significance of heritage assets, putting them to viable uses consistent with their conservation.	The policy contains development management criteria. When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider the approach to conversion of buildings in the countryside to 2040.
Policy H20 Conversion of farmstead buildings	Policy H20 states that the council will normally resist proposals to convert rural buildings to provide two or more dwellings within a farmstead situated beyond the	The policy contains development management criteria.	The policy has some inconsistency with the NPPF but this is limited to this specific policy and does not lead to wider concerns that the

POLICY	CONSISTENCY WITH NATIONAL POLICY	EVIDENCE AND CHANGE IN LOCAL CIRCUMSTANCES	CONCLUSIONS
Saved Policies of the Cherwell Local Plan 1996			
	built-up limits of a settlement unless the buildings are unsuitable for conversion to an employment generating use. The NPPF allows for the conversion of buildings and states that planning policies should avoid the development of isolated homes in the countryside unless one or more circumstances apply which includes the re-use of redundant or disused buildings. There is some inconsistency with NPPF as the policy gives priority to employment development.		development plan is out of date. The emerging Local Plan will consider the approach to conversion of farmstead buildings to 2040.
Policy H21 Conversion of buildings in settlements	Policy H21 states that within settlements the conversion of suitable buildings to dwellings will be favourably considered unless conversion to a residential use would be detrimental to the special character and interest of a building of architectural and historic significance. The policy is generally consistent with the NPPF which allows for the conversion of existing buildings, requires policies to recognise the intrinsic character and beauty of the countryside and the desirability of sustaining and enhancing the significance of heritage assets, putting them to viable uses consistent with their conservation.	The policy contains development management criteria. When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider the approach to conversion of buildings in the countryside to 2040.
Policy H23 Residential Caravans	Policy H23 states that planning permission will be granted for residential caravans to be located for a temporary period within the curtilage of a house or in close	The policy contains development management criteria. When the 2015 Plan was adopted the intention was to review non-strategic and development	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this

POLICY	CONSISTENCY WITH NATIONAL POLICY	EVIDENCE AND CHANGE IN LOCAL CIRCUMSTANCES	CONCLUSIONS
Saved Policies of the Cherwell Local Plan 1996			
	association with an existing land use provided the development accords with the other policies in the plan. The NPPF does not mention caravans (except in a footnote in relation to flood risk) and it is important to retain a local policy. The policy is generally consistent with the NPPF.	management policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.	time. The emerging Local Plan will consider policies to manage development and meet local priorities to 2040.
Policy H26 Residential Canal Moorings	Policy H26 states that planning proposals for the siting of permanent residential moorings on the Oxford canal will be considered favourably provided criteria are met. The NPPF does not mention canal moorings but it is important to retain a local policy. The policy is generally consistent with the NPPF.	The policy contains development management criteria. When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider policies to manage development and meet local priorities to 2040.
Policy EMP1 Employment Sites	EMP1 states that employment generating development will be permitted on the sites shown on the proposals map, subject to the other relevant policies in the plan. Policy EMP1 was retained in the 2015 Plan only for rural sites.	All the sites in the 1996 Local Plan have been delivered. Policy SLE1 and its criteria-based approach continues to deliver positively against employment requirements.	The policy has achieved its aim in that the sites are now complete and hence does not need updating.
Policy S22 Provision of rear servicing Kidlington	Policy S22 states that redevelopment schemes will be required to include adequate provision for rear servicing and wherever physically possible servicing should be linked, to restrict the number of individual accesses to High Street.	The policy contains development management criteria. It continues to guide positively redevelopment schemes minimising conflict between users and providing safe servicing of commercial uses.	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider policies to manage

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	Although the NPPF does not mention rear servicing specifically it guides development to address the efficient delivery of goods, and access by service and emergency vehicles and to create places that are safe, secure and attractive with emphasis on minimising conflict between pedestrians, cycles and vehicles (NPPF paragraph 110 112). The policy is generally consistent with the NPPF.	When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.	development and meet local priorities to 2040.
Policy S26 Small scale ancillary retail development in the rural areas	Policy S26 states that proposals for small-scale retail outlets which are ancillary to existing acceptable land uses will normally be permitted subject to the other policies in the Plan. The NPPF states that planning policies should enable the retention and development of accessible local services and community facilities, such as local shops in rural areas. The retail sequential test in the NPPF is not required for small scale rural development. The policy is generally consistent with the NPPF.	<p>The policy contains development management criteria. It continues to support positively the diversification of the rural economy.</p> <p>When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.</p>	<p>The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time.</p> <p>The emerging Local Plan will consider policies to manage development and meet local priorities to 2040.</p>
Policy S27 Garden centres in the rural areas	Policy S27 states that proposals for garden centres will generally only be permitted when the location is on the edge of a settlement and will be subject to the other policies in the plan. The NPPF does not mention garden centres specifically but in terms of the retail sequential test states	<p>The policy contains development management criteria. It continues to guide positively the sustainable location of garden centres.</p> <p>When the 2015 Plan was adopted the intention was to review non-strategic</p>	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider policies to manage

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	preference should be given to accessible sites which are well connected to the town centre. The policy is generally consistent with NPPF.	and development management policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.	development and meet local priorities to 2040.
Policy S28 Small shops or extensions to existing shops required to serve local needs	The policy states that favourable consideration will be given to proposals for small shops or extensions to existing shops required to serve local needs, subject to the other policies in the plan. The NPPF states that planning policies should enable the retention and development of accessible local services and community facilities, such as local shops in rural areas and ensure that established shops, facilities and services are able to develop and modernise. The retail sequential test in the NPPF is not required for small scale rural development and the NPPF explains that the town centre excludes small parades of shops of purely neighbourhood significance. The policy is generally consistent with the NPPF.	The policy contains development management criteria. It continues to contribute positively to the provision of local services. When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider policies to manage development and meet local priorities to 2040.
Policy S29 Loss of existing village services	Policy S29 states that proposals that will involve the loss of existing village services which serve the basic needs of the local community will not normally be permitted. The NPPF states that to provide the social, recreational and cultural facilities and	The policy contains development management criteria which continue to be relevant. Alongside Policy S28, it seeks to prevent to loss of services.	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider policies to manage

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	services the community needs, planning policies should ensure that established shops, facilities and services are able to develop and modernise, and are retained for the benefit of the community. The policy is generally consistent with the NPPF.	When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.	development and meet local priorities to 2040.
Policy TR1 Transportation Funding	The policy relates to the provision of transport measures as a consequence of new development. The NPPF states that transport issues should be considered from the earliest stages of development proposals, so that the potential impacts of development on transport networks can be addressed. The policy is generally consistent with the NPPF.	<p>The policy contains development management criteria. It continues to contribute positively to securing transport mitigation.</p> <p>When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.</p>	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider policies to manage development to 2040.
Policy TR7 Development attracting traffic on minor roads	Policy TR7 states that development that would regularly attract large commercial vehicles or large numbers of cars onto unsuitable minor roads will not normally be permitted. The NPPF states that it will be important that development does not have an unacceptable impact on local roads and that transport issues should be considered	<p>The policy contains development management criteria. It continues to contribute positively to the sustainable location of development and highway safety.</p> <p>When the 2015 Plan was adopted the intention was to review non-strategic</p>	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider policies to manage development to 2040.

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Saved Policies of the Cherwell Local Plan 1996			
	<p>from the earliest stages of plan-making and development proposals, so that the potential impacts of development on transport networks can be addressed.</p> <p>NPPF paragraph 111–113 requires all developments that will generate significant amounts of movement to provide a travel plan, and applications to be supported by a transport statement or transport assessment so that the likely impacts of the proposal can be assessed.</p>	<p>and development management policies through Local Plan Part 2 which is no longer in the Council’s LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.</p>	
<p>Policy TR8 Commercial facilities for the motorist</p>	<p>Policy TR8 states that beyond the built-up limits of settlements the release of new sites for petrol filling stations and other commercial facilities for the motorist will be permitted only where the need for such facilities can be clearly demonstrated. The NPPF states that planning policies should provide for any large-scale transport facilities that are needed to be located in the area and roadside services are given as an example. It makes clear that the primary function of roadside services should be to support the safety and welfare of the road user (and most such proposals are unlikely to be nationally significant infrastructure projects). The policy is generally consistent with the NPPF.</p>	<p>The policy contains development management criteria. It continues to contribute positively to the sustainable location of development based on local need.</p> <p>When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local Plan Part 2 which is no longer in the Council’s LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.</p>	<p>The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider policies to manage development to 2040.</p>

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Policy TR10 Heavy Goods Vehicles	<p>Policy TR10 is concerned with heavy goods vehicles. The NPPF states that it will be important that development does not have an unacceptable impact on local roads that transport issues should be considered from the earliest stages of plan-making and development proposals, so that the potential impacts of development on transport networks can be addressed.</p> <p>The NPPF responds to the locational needs of local business but still seeks to ensure the development is sensitive to its surroundings, does not result in an unacceptable impact on local roads and seeks to make a location more sustainable.</p> <p>NPPF paragraph 111<u>113</u> requires all developments that will generate significant amounts of movement to provide a travel plan, and applications to be supported by a transport statement or transport assessment so that the likely impacts of the proposal can be assessed. The policy is generally consistent with the NPPF.</p>	<p>The policy continues to contribute positively to the sustainable location of development and highway safety.</p> <p>When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.</p>	<p>The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider policies to manage development to 2040.</p>
Policy TR11 Oxford Canal	<p>The policy concerns consideration of proposals to transfer freight to the Oxford Canal. The NPPF refers to canals as an example of open space and requires that heritage assets should be conserved in a manner appropriate to their significance but does not specifically mention the use of</p>	<p>Policy TR11 contains development management criteria. The policy helps to protect the future use of the canal. When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local Plan Part 2 which</p>	<p>The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider policies to manage development to 2040.</p>

POLICY	CONSISTENCY WITH NATIONAL POLICY	EVIDENCE AND CHANGE IN LOCAL CIRCUMSTANCES	CONCLUSIONS
Saved Policies of the Cherwell Local Plan 1996			
	canals and there is a need to retain a local policy. This policy is generally consistent with the NPPF.	is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.	
Policy TR14 Highway accesses	<p>The policy is concerned with preventing new accesses to the inner relief road and Hennef Way. Paragraph 109 of the NPPF indicates that development should only be prevented or refused on highway grounds if there would be an unacceptable impact on highway safety, or the residual cumulative impact would be severe.</p> <p>NPPF paragraph 111<u>113</u> requires all developments that will generate significant amounts of movement to provide a travel plan, and applications to be supported by a transport statement or transport assessment so that the likely impacts of the proposal can be assessed.</p>	<p>Connecting Oxfordshire (LTP4) was adopted in 2015. It continues to support the function of the inner relief road (eastern corridor) and Hennef Way.</p> <p>The County Council is the highway authority and will be consulted or involved in planning applications for accesses and new highway proposals are in its Local Transport Plan which it produces in consultation with the Council.</p> <p>The likely impact of proposals are assessed as part of the Transport Assessment accompanying planning applications following Local Highways Authority advice.</p>	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider policies to manage development and deliver infrastructure to 2040.
Policy TR16 Access improvements in the vicinity of Banbury Railway station	The policy is concerned with preventing development that would create significant traffic being served from Bridge Street and proposes a new road as an option linking the railway station to Cherwell Street. Paragraph 109 <u>111</u> of the NPPF indicates that development should only be	Connecting Oxfordshire (LTP4) was adopted in 2015. It seeks to strengthen Banbury's position on the rail network through revitalising the railway station area and improving pedestrian, cycle and bus access to the station (Policy BAN 3).	There is some inconsistency with the Banbury Masterplan SPD but this does not lead to wider concerns that the development plan is out of date. The Local Plan Review will consider the approach to development in central Banbury to 2040.

POLICY	CONSISTENCY WITH NATIONAL POLICY	EVIDENCE AND CHANGE IN LOCAL CIRCUMSTANCES	CONCLUSIONS
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	prevented or refused on highway grounds if there would be an unacceptable impact on highway safety, or the residual cumulative impact would be severe.	Planning policy for this area is covered by Policy Banbury 1 in the 2015 adopted Local Plan and the Banbury Masterplan SPD which does not propose a road linking to Cherwell Street. The County Council is the highway authority and will be consulted or involved in planning applications for new highway proposals and significant proposals are in its Local Transport Plan which it produces in consultation with the Council.	
Policy TR22 Reservation of land for road schemes in the countryside	The policy sets out road schemes that land will be reserved for. Paragraph 104-106 of the NPPF indicates that where there is robust evidence, planning policies should protect routes critical in developing infrastructure to widen transport choice and realise opportunities for large scale development.	The County Council is the highway authority and significant proposals are in its Local Transport Plan which it produces in consultation with the Council. The schemes proposed have been either completed or are no longer being progressed.	The schemes proposed have been either completed or are no longer being progressed and hence the policy does not need updating. The emerging Local Plan will consider infrastructure needs to 2040 in collaboration with the Local Highways Authority.
Policy R1	The policy reserves sites identified on the 1996 Proposals Map for recreation use. The policy is generally consistent with Chapter 8 of the NPPF.	Whilst most of the areas allocated for recreation use have either been secured, or have been developed for other uses, some allocations have not been secured but may remain appropriate for recreation use.	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider the need to allocate land for recreation use to 2040.

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Saved Policies of the Cherwell Local Plan 1996			
Policy R5 Re-use of railway lines	Policy R5 states that the Council will support proposals for use of redundant railway lines which are no longer feasible to reopen for passenger or freight use and disused quarries for recreation purposes. Alternative proposals which would preclude such use will be resisted. The NPPF states that planning policies should promote and support the development of under-utilised land and buildings including railway infrastructure, especially if this would help to meet identified needs for housing. The restriction in the policy for re-use for recreation is inconsistent with the NPPF.	The policy contains development management criteria.	The policy has some inconsistency with the NPPF but this is limited to this specific policy and does not lead to wider concerns that the development plan is out of date. The emerging Local Plan will consider policies to manage development to 2040.
Policy T2 Proposals for hotels, motels and guest houses within settlements	Policy T2 states that hotels, motels and guest houses will be approved within the built-up limits of settlements. The NPPF identifies hotels as a main town centre use and requires a town centres first approach for main town centre uses. This is inconsistent with the policy which supports town centre uses within the wider built up settlement. There is some inconsistency with the NPPF.	Policy SLE2 'Securing Dynamic Town Centres' will continue to positively support town centre uses.	The policy has some inconsistency with the NPPF but this is limited to this specific policy and does not lead to wider concerns that the development plan is out of date. The emerging Local Plan will consider policies to manage development to 2040.
Policy T3 Land reserved for a hotel and leisure at junction 11, Banbury	This is a site-specific policy.	A hotel and restaurants have been constructed and development is complete.	The policy has achieved its aim in that the development is now complete and hence does not need updating.

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Policy T5 Proposals for new hotels, motels and guesthouses	Policy T5 seeks to direct the demand for premises towards existing buildings which are suitable for conversion or towards existing commercial sites which may be acceptably redeveloped to provide tourist accommodation in order to protect the character of the countryside. The NPPF states that planning policies should recognise the intrinsic character and beauty of the countryside and enable sustainable rural tourism and leisure developments which respect the character of the countryside. The policy is generally consistent with the NPPF.	<p>The policy contains development management criteria. It continues to contribute positively to the sustainable location of development.</p> <p>When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.</p>	<p>The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time.</p> <p>The emerging Local Plan will consider policies to manage development to 2040.</p>
Policy T7 Conversion of buildings beyond settlements to self-catering holiday accommodation	The policy states that proposals for the conversion of a suitable building beyond the limits of a settlement to self-catering holiday accommodation will be favourably considered if certain criteria are met. The policy is generally consistent with the NPPF which allows for the conversion of existing buildings and requires policies to recognise the intrinsic character and beauty of the countryside and the desirability of sustaining and enhancing the significance of heritage assets, putting them to viable uses consistent with their conservation.	<p>The policy contains development management criteria. It continues to contribute positively to the sustainable location of development.</p> <p>When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.</p>	<p>The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider policies to manage development to 2040.</p>
AG2 Construction of farm buildings	Policy AG2 states that farm buildings and associated structures requiring planning	The policy contains development management criteria. It continues to	The policy is generally consistent with the NPPF and local

POLICY	CONSISTENCY WITH NATIONAL POLICY	EVIDENCE AND CHANGE IN LOCAL CIRCUMSTANCES	CONCLUSIONS
Saved Policies of the Cherwell Local Plan 1996			
	<p>permission should normally be so sited that they do not intrude into the landscape or into residential areas. The policy is generally consistent with the NPPF which encourages the diversification of agriculture, allows for the conversion of existing buildings and requires policies to recognise the intrinsic character and beauty of the countryside and to ensure that development is appropriate for its location.</p>	<p>contribute positively to the sustainable location of development and rural diversification.</p> <p>When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.</p>	<p>circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider policies to manage development to 2040.</p>
AG3 Siting of new or extension to existing intensive livestock and poultry units	<p>Policy AG3 states that new intensive livestock and poultry units or extensions to existing units that require planning permission will be resisted where they would have a materially detrimental effect on nearby settlements or dwellings due to smell. The policy is generally consistent with the NPPF which encourages the diversification of agriculture and requires policies to ensure that development is appropriate for its location. There is no specific mention of the impact of smell in the NPPF and it is important to retain a local policy.</p>	<p>The policy contains development management criteria. It continues to contribute positively to addressing environmental health matters arising from development proposals.</p> <p>When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.</p>	<p>The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider policies to manage development to 2040.</p>
AG4 Waste disposal from	<p>The policy states that proposals for new intensive livestock or poultry units or extensions to existing units as may be</p>	<p>It continues to contribute positively to addressing environmental health</p>	<p>The policy is generally consistent with the NPPF and local circumstances do not indicate that</p>

POLICY	CONSISTENCY WITH NATIONAL POLICY	EVIDENCE AND CHANGE IN LOCAL CIRCUMSTANCES	CONCLUSIONS
Saved Policies of the Cherwell Local Plan 1996			
intensive livestock and poultry units	permitted in the plan area will be required to include suitable provision for waste disposal. The NPPF seeks to minimise waste and pollution including on health and the natural environment and requires that policies make sufficient provision for waste management. There is no specific mention of farming waste in the NPPF and it is important to retain a local policy. The policy is generally consistent with the NPPF.	<p>matters arising from development proposals.</p> <p>When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.</p>	the policy needs updating at this time. The emerging Local Plan will consider policies to manage development to 2040.
AG5 Development involving horses	The policy states that proposals for horse related development will normally be permitted subject to certain criteria. The policy is generally consistent with the NPPF which encourages the diversification of agriculture and requires policies to ensure that development is right for its location. There is no specific mention of horse related development in the NPPF and it is important to retain a local policy. The policy is generally consistent with the NPPF.	<p>The policy contains development management criteria. It continues to support positively the sustainable location of development and diversification of the rural economy.</p> <p>When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.</p>	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider policies to manage development to 2040.
C5 Protection of ecological value and rural character	The policy applies to specific areas for protection in the District. The NPPF states that to protect biodiversity, plans should safeguard components of local wildlife-rich	The policy contains development management criteria. It continues to support positively the protection of specified features of ecological value.	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this

POLICY	CONSISTENCY WITH NATIONAL POLICY	EVIDENCE AND CHANGE IN LOCAL CIRCUMSTANCES	CONCLUSIONS
Saved Policies of the Cherwell Local Plan 1996			
	habitats and wider ecological networks and promote the protection of priority habitats. The policy is generally consistent with the NPPF.	When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.	time. The emerging Local Plan will consider policies to manage development to 2040.
C6 Development proposals adjacent to the river Thames.	The policy states that development adjacent to the river Thames will normally be resisted. The NPPF states that to protect biodiversity, plans should safeguard components of local wildlife-rich habitats and wider ecological networks and promote the protection of priority habitats. The policy is generally consistent with the NPPF and it is important to retain a local policy.	The policy contains development management criteria. It continues to support positively the protection of ecological resources. When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider policies to manage development to 2040.
C8 Sporadic development in the open countryside	Policy C8 states that sporadic development in the open countryside including developments in the vicinity of motorway or major road junctions will generally be resisted. The policy is generally consistent with the NPPF which requires policies to recognise the intrinsic character and	The policy contains development management criteria. It continues to support positively the sustainable location of development. When the 2015 Plan was adopted the intention was to review non-strategic	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider policies to manage development to 2040.

POLICY	CONSISTENCY WITH NATIONAL POLICY	EVIDENCE AND CHANGE IN LOCAL CIRCUMSTANCES	CONCLUSIONS
Saved Policies of the Cherwell Local Plan 1996			
	<p>beauty of the countryside and to ensure that development is appropriate for its location. It states that planning policies should avoid the development of isolated homes in the countryside.</p> <p>Paragraph 84-85 of the NPPF responds to the locational needs of local business but still seeks to ensure the development is sensitive to its surroundings, does not result in unacceptable impact on local roads and seeks to make a location more sustainable.</p> <p>NPPF paragraph 111-113 requires all developments that will generate significant amounts of movement to provide a travel plan, and applications to be supported by a transport statement or transport assessment so that the likely impacts of the proposal can be assessed.</p>	<p>and development management policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.</p>	
<p>C11 Protection of the vista and setting of Rousham Park</p>	<p>The policy seeks to protect the vista and setting of Rousham Park. Chapter 16 of the NPPF requires that heritage assets should be conserved in a manner appropriate to their significance. The policy is generally consistent with the NPPF and it is important to retain a local policy.</p>	<p>The policy contains development management criteria. It continues to support positively the protection of heritage assets.</p> <p>When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in</p>	<p>The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider policies to manage development to 2040.</p>

POLICY	CONSISTENCY WITH NATIONAL POLICY	EVIDENCE AND CHANGE IN LOCAL CIRCUMSTANCES	CONCLUSIONS
Saved Policies of the Cherwell Local Plan 1996			
		that document will now be covered by the emerging Cherwell Local Plan Review 2040.	
C14 Countryside Management projects	The policy states that in exercising its development control functions the council will normally accept opportunities for countryside management projects. The policy is generally consistent with the NPPF which requires policies to recognise the intrinsic character and beauty of the countryside and plans should safeguard components of local wildlife-rich habitats and wider ecological networks and promote the protection of priority habitats. There is no specific mention of countryside management projects in the NPPF and it is important to retain a local policy.	<p>The policy contains development management criteria. It supports projects promoting landscape conservation and the protection ecological resources.</p> <p>When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.</p>	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider policies to manage development to 2040.
C15 Prevention of coalescence of settlements	The policy is concerned with the prevention of the coalescence of settlements. The policy is generally consistent with the NPPF which requires policies to recognise the intrinsic character and beauty of the countryside and to ensure that development is appropriate for its location. It states that planning policies should avoid the development of isolated homes in the countryside.	<p>The policy contains development management criteria. It continues to support positively the sustainable location of development.</p> <p>When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by</p>	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider policies to manage development to 2040.

POLICY	CONSISTENCY WITH NATIONAL POLICY	EVIDENCE AND CHANGE IN LOCAL CIRCUMSTANCES	CONCLUSIONS
Saved Policies of the Cherwell Local Plan 1996			
		the emerging Cherwell Local Plan Review 2040.	
C18 Development proposals effecting a listed building	The policy is concerned with development proposals effecting a listed building. Chapter 16 of the NPPF requires that heritage assets should be conserved in a manner appropriate to their significance and when considering the impact of a proposed development on the significance of a designated heritage asset, great weight should be given to the asset’s conservation. The policy is generally consistent with the NPPF.	<p>The policy contains development management criteria. It continues to support positively the protection of heritage assets.</p> <p>When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local Plan Part 2 which is no longer in the Council’s LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.</p>	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider policies to manage development to 2040.
C21 Proposals for the re-use of listed building	The policy is concerned with proposals for the re-use of a listed building. Chapter 16 of the NPPF requires that heritage assets should be conserved in a manner appropriate to their significance and when considering the impact of a proposed development on the significance of a designated heritage asset, great weight should be given to the asset’s conservation. The policy is generally consistent with the NPPF.	<p>The policy contains development management criteria. It continues to support positively the protection of heritage assets.</p> <p>When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local Plan Part 2 which is no longer in the Council’s LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.</p>	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider policies to manage development to 2040.

POLICY	CONSISTENCY WITH NATIONAL POLICY	EVIDENCE AND CHANGE IN LOCAL CIRCUMSTANCES	CONCLUSIONS
Saved Policies of the Cherwell Local Plan 1996			
C23 Retention of features in a conservation area	The policy states there will be a presumption in favour of retaining buildings, walls, trees or other features which make a positive contribution to the character or appearance of a conservation area. Chapter 16 of the NPPF requires that heritage assets should be conserved in a manner appropriate to their significance and when considering the impact of a proposed development on the significance of a designated heritage asset, great weight should be given to the asset's conservation. The policy is generally consistent with the NPPF.	The policy contains development management criteria. It continues to support positively the protection of heritage assets. When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider policies to manage development to 2040.
C25 Development affecting the site or setting of a scheduled ancient monument	The policy is concerned with Development affecting the site or setting of a scheduled ancient monument. Chapter 16 of the NPPF requires that heritage assets should be conserved in a manner appropriate to their significance and when considering the impact of a proposed development on the significance of a designated heritage asset, great weight should be given to the asset's conservation. The policy is generally consistent with the NPPF.	The policy contains development management criteria. It continues to support positively the protection of heritage assets. When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider policies to manage development to 2040.
C28 Layout, design and external	The policy is concerned with the layout, design and external appearance of new development. In Chapter 12 the NPPF	The Cherwell Residential Design Guide SPD has been published since the adoption of the Plan. The policy	The policy is generally consistent with the NPPF and local circumstances do not indicate that

POLICY	CONSISTENCY WITH NATIONAL POLICY	EVIDENCE AND CHANGE IN LOCAL CIRCUMSTANCES	CONCLUSIONS
Saved Policies of the Cherwell Local Plan 1996			
<p>appearance of new development</p>	<p>states that the creation of <u>high quality, beautiful and sustainable buildings and places</u>high-quality buildings and places is fundamental to what the planning and development process should achieve. Good design is a key aspect of sustainable development, creates better places in which to live and work and helps make development acceptable to communities. The policy is generally consistent with the NPPF.</p>	<p>contains development management criteria. It continues to support the provision of high-quality design.</p> <p>When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.</p>	<p>the policy needs updating at this time. The emerging Local Plan will consider policies to manage development to 2040.</p>
<p>C29 Appearance of development adjacent to the Oxford Canal</p>	<p>The policy states that Council will seek to ensure that all new buildings, extensions and alterations to existing buildings adjacent to the Oxford canal, are designed to a high standard which complements the traditional characteristics of the waterside setting in terms of their design, materials and landscaping. Chapter 12 of the NPPF states that the creation of <u>high quality, beautiful and sustainable buildings and places</u>high-quality buildings and places is fundamental to what the planning and development process should achieve. The NPPF does not specifically mention canals in this context, however the policy is generally consistent with the NPPF and there is a need to retain a local policy.</p>	<p>The Cherwell Residential Design Guide SPD has been published since the adoption of the Plan.</p> <p>Policy C29 contains development management criteria. It continues to support the provision of high-quality design and guide sensitively designed proposals.</p> <p>When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.</p>	<p>The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider policies to manage development to 2040.</p>

POLICY	CONSISTENCY WITH NATIONAL POLICY	EVIDENCE AND CHANGE IN LOCAL CIRCUMSTANCES	CONCLUSIONS
Saved Policies of the Cherwell Local Plan 1996			
<p>Policy C30 Design control</p>	<p>This policy seeks to protect the character of a residential area by controlling design and layout. The policy is generally consistent with the NPPF.</p>	<p>The Cherwell Residential Design Guide SPD has been published since the adoption of the Plan.</p> <p>Policy C30 contains development management criteria. It continues to support the provision of high-quality design and guide sensitively designed proposals.</p> <p>When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.</p>	<p>The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider policies to manage development to 2040.</p>
<p>Policy C31 Compatibility of proposals in residential areas</p>	<p>This policy seeks to prevent the introduction of incompatible non-residential uses in residential areas. It is generally consistent with the NPPF.</p>	<p>The policy contains development management criteria. It continues to support effective integration of new developments.</p> <p>When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by</p>	<p>The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider policies to manage development to 2040.</p>

POLICY	CONSISTENCY WITH NATIONAL POLICY	EVIDENCE AND CHANGE IN LOCAL CIRCUMSTANCES	CONCLUSIONS
Saved Policies of the Cherwell Local Plan 1996			
		the emerging Cherwell Local Plan Review 2040.	
Policy C32 Provision of facilities for disabled people	This policy supports measures that provide, improve or extend access facilities for disabled people. It is generally consistent with the NPPF.	<p>The policy contains development management criteria. It continues to support the needs of people with disability and reduced mobility.</p> <p>When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.</p>	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider policies to manage development to 2040.
Policy C33 Protection of important gaps of undeveloped land	This policy seeks to retain any undeveloped gap of land which is important in preserving the character of a loose-knit settlement structure or in maintaining the setting of a listed building or an important view. This policy is generally consistent with the NPPF.	<p>The policy contains development management criteria. It continues to support positively the sustainable location of development and guide sensitively designed proposals.</p> <p>When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.</p>	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider policies to manage development to 2040.

POLICY	CONSISTENCY WITH NATIONAL POLICY	EVIDENCE AND CHANGE IN LOCAL CIRCUMSTANCES	CONCLUSIONS
Saved Policies of the Cherwell Local Plan 1996			
<p>Policy C34 Protection of views of St Mary's Church, Banbury</p>	<p>This policy seeks to resist development whose height or appearance would spoil views of St Mary's Church, Banbury, a Grade 1 listed building. The policy is generally consistent with the NPPF.</p>	<p>The policy contains development management criteria. It continues to support the protection of heritage assets and guide sensitively designed proposals.</p> <p>When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.</p>	<p>The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider policies to manage development to 2040.</p>
<p>Policy C38 Satellite dishes in conservation areas and on listed buildings</p>	<p>This policy seeks to prohibit satellite dishes in conservation areas or on listed buildings which would be visible from a public highway. The NPPF requires that in determining applications in conservation areas or to a listed building Local Planning Authorities should consider the impact of the proposed development on the significance of the designated heritage asset. The policy, in seeking to impose a blanket ban on satellite dishes which are visible from the public highway, therefore has some inconsistencies with the NPPF.</p>	<p>The policy contains development management criteria. The policy continues to provide protection to heritage assets.</p>	<p>The policy has some inconsistency with the NPPF but this is limited to this specific policy and does not lead to wider concerns that the development plan is out of date. The emerging Local Plan will look at policies to manage development to 2040.</p>
<p>Policy C39</p>	<p>This policy sets out the requirements for masts and other telecommunications</p>	<p>The policy contains development management criteria. There has been</p>	<p>The policy has some inconsistency with the NPPF but this is limited to</p>

POLICY	CONSISTENCY WITH NATIONAL POLICY	EVIDENCE AND CHANGE IN LOCAL CIRCUMSTANCES	CONCLUSIONS
Saved Policies of the Cherwell Local Plan 1996			
Telecommunication masts and structures	structures. The NPPF states that policies should support the expansion of electronic communications networks and that they should not impose a ban in certain areas. This policy therefore has some inconsistencies with the NPPF.	advances in telecommunications technology since the Plan was adopted.	this specific policy and does not lead to wider concerns that the development plan is out of date. The emerging Local Plan will look at policies to manage development to 2040.
Policy ENV1 Development likely to cause detrimental levels of pollution	This policy seeks to ensure that environmental amenities are not unduly affected by existing or proposed development which may cause environmental pollution. It is generally consistent with the NPPF	<p>The policy contains development management criteria. It continues to contribute positively to addressing environmental health matters arising from development proposals.</p> <p>When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.</p>	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider policies to manage development to 2040.
Policy ENV2 Redevelopment of sites causing serious detriment to local amenity	This policy supports the redevelopment of small-scale sites whose existing use causes serious detriment to local amenities. It is generally consistent with the NPPF.	<p>The policy contains development management criteria. It continues to contribute positively to addressing environmental and public health matters arising from development proposals.</p> <p>When the 2015 Plan was adopted the intention was to review non-strategic and development management</p>	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider policies to manage development to 2040.

POLICY	CONSISTENCY WITH NATIONAL POLICY	EVIDENCE AND CHANGE IN LOCAL CIRCUMSTANCES	CONCLUSIONS
Saved Policies of the Cherwell Local Plan 1996			
		policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.	
Policy ENV6 Development at Oxford Airport, Kidlington likely to increase noise nuisance	This policy seeks to resist development at Oxford Airport which is likely to increase noise nuisance from aircraft. This policy is generally consistent with the NPPF.	<p>The policy contains development management criteria. It continues to contribute positively to addressing environmental and public health matters arising from development proposals.</p> <p>When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.</p>	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider policies to manage development to 2040.
Policy ENV10 Development proposals likely to be damaged or be at risk from hazardous installations	This policy seeks to resist proposed housing and other land uses in close proximity to existing hazardous substance installations. This policy is generally consistent with the NPPF, particularly paragraph 9545 .	<p>The policy contains development management criteria. It continues to contribute positively to addressing environmental and public health matters arising from development proposals.</p> <p>When the 2015 Plan was adopted the intention was to review non-strategic</p>	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider policies to manage development to 2040.

POLICY	CONSISTENCY WITH NATIONAL POLICY	EVIDENCE AND CHANGE IN LOCAL CIRCUMSTANCES	CONCLUSIONS
Saved Policies of the Cherwell Local Plan 1996			
		and development management policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.	
Policy ENV11 Proposals for installations handling hazardous substances	This policy seeks to protect the safety of housing and other land uses in close proximity to proposed hazardous substance installations. This policy is generally consistent with the NPPF, particularly paragraph 95-45 .	<p>The policy contains development management criteria. It continues to contribute positively to addressing environmental and public health matters arising from development proposals.</p> <p>When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.</p>	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider policies to manage development to 2040.
Policy ENV12 Development on contaminated land	This policy provides safeguards when considering the development of known or suspected contaminated land. This policy is generally consistent with the NPPF which seeks to ensure that a site is suitable for its proposed use taking in to account, amongst other things, contamination.	The policy contains development management criteria. It continues to contribute positively to addressing environmental and public health matters arising from development proposals.	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider policies to manage development to 2040.

POLICY	CONSISTENCY WITH NATIONAL POLICY	EVIDENCE AND CHANGE IN LOCAL CIRCUMSTANCES	CONCLUSIONS
Saved Policies of the Cherwell Local Plan 1996			
		When the 2015 Plan was adopted the intention was to review non-strategic and development management policies through Local Plan Part 2 which is no longer in the Council's LDS. The policy areas that were to be included in that document will now be covered by the emerging Cherwell Local Plan Review 2040.	
Policy OA2 Protection of land at Yarnton Road Recreation ground, Kidlington for a new primary school	This policy seeks to safeguard part of the Yarnton Road recreation ground for a new primary school for the Kidlington area. This policy is generally consistent with paragraphs 94-95 of the NPPF.	The Cherwell Local Plan 2011-2031 (Part 1) Partial Review: Oxford's Unmet Housing Need makes provision for new schools in the Kidlington area. However, there may be a need for alternative community facilities to serve the Kidlington area.	The policy is generally consistent with the NPPF and local circumstances do not indicate that the policy needs updating at this time. The emerging Local Plan will consider policies to manage development to 2040.

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Cherwell District Council

Housing Land Supply Statement

February 2023

(Draft for Executive)

Introduction

1. This Housing Land Supply Statement has been prepared in February 2023. The housing completion and permission data it relies up is that verified at 31 March 2022.
2. The review of the projections for future delivery was undertaken in December 2022 informed by consultations with the development industry, development management colleagues, infrastructure providers and historic information.
3. This statement assesses the housing land supply position for Cherwell for the five-year period 1 April 2022 to 31 March 2027.
4. Previously the five-year housing land supply was presented as part of the Annual Monitoring Report.
5. Separate Housing Land Supply Statements will be published from hereon to provide more flexibility in when the Council produces its statement in response to significant changes of circumstance and to enable reporting earlier in the calendar year following the verification of housing completion and permission data (usually May/June).
6. The next 'annual' update will be published following completion of the annual completion and permission monitoring following the end of the monitoring year 2022/23.

National Policy Context

7. The five-year housing land supply (or '5YHLS') is an important 'test'. Where authorities fall below 5 years the 'tilted balance' in the National Planning Policy Framework (NPPF) applies with the presumption in favour of sustainable development.
8. The NPPF (paragraph 74) requires local planning authorities to:
"identify and update annually a supply of specific deliverable sites sufficient to provide a minimum of five years' worth of housing against their housing requirement set out in

adopted strategic policies, or against their local housing need where the strategic policies are more than five years old³⁹.”

9. Footnote 39 to paragraph 74 explains that the housing requirement in adopted strategic policies may continue to be used if the policies have been reviewed and found not to require updating. This is known as a regulation 10A review (under regulation 10A of the Town and Country Planning (Local Planning) (England) Regulations 2012. Footnote 39 states:

“Unless these strategic policies have been reviewed and found not to require updating. Where local housing need is used as the basis for assessing whether a five-year supply of specific deliverable sites exist, it should be calculated using the standard method set out in national planning guidance”.

10. Accordingly, where adopted strategic policies are five years old and in the absence of a review finding them to be up to date, LPAs should use their Standard Method figure for monitoring purposes.
11. The Cherwell Local Plan 2011-2031 was adopted in 2015 and hence is over five years old. A review of the Plan’s policies was presented to the Executive in January 2021. The review concluded that the majority of the Plan’s policies were generally up to date. This included the Local Plan requirement of 1,142 homes per annum (22,840) which then remained the default starting point for the purposes of calculating the 5-year supply.
12. In January 2022, the 2021 Annual Monitoring Report was presented to the Council’s Executive. The Executive resolved (1.2):

‘To note the district’s housing delivery and five-year housing land supply positions (for conventional housing and for Gypsies and Travellers) at Section 5 of the AMR and the need for updating of the land supply positions should these materially change, including consideration of the Vale of White Horse Council’s 3 December 2021 Cabinet decision relating to the Regulation 10A review of its Part 1 Plan’.

13. The Local Plan for Vale of White Horse District Council is based on the 2014 Strategic Housing Market Assessment (SHMA). This is the same evidence which underpins the Cherwell Local Plan 2011-2031.
14. Vale of White Horse District Council had presented its ‘Regulation 10A’ review of policies to its Cabinet, concluding that its housing requirement required updating and proposing using the national ‘standard method’ for the purposes of monitoring housing land supply, plus an annual requirement from Part 2 of its Local Plan for contributing to Oxford’s unmet housing need. Vale of White Horse Council approved its Regulation 10A review on 3 December 2021.

15. The Cherwell 2021 AMR published in January 2022, noted:

'5.37 In finalising this AMR we are aware the Vale of White Horse DC, one of the 5 district councils within Oxfordshire, has suggested that their plan requirement cannot be considered to be up-to-date and that they propose reverting to Local Housing Need (LHN) also known as the 'standard method' for the calculation of the five-year land supply. Furthermore, a new housing need assessment is emerging to support the Oxfordshire Plan process and this will also inform the Cherwell Local Plan review. A draft was published alongside the Summer 2021 consultation on the Oxfordshire Plan and finalisation is pending. The Secretary of State has also indicated that the means by which housing need is calculated is under review (Housing, Communities and Local Government select committee, 8 November 2021)', and

'5.38 There may therefore be a need in the near future to consider the basis from which the five-year land supply calculations for Cherwell are derived including whether or not LHN is appropriate.'

Current Circumstances

Cherwell Local Plan 2011-2031

16. Since the publication of the 2021 AMR, there has been a material change in circumstances.
17. In December 2022 the Council published a Housing and Economic Needs Assessment (HENA) produced jointly with Oxford City Council to inform their respective Local Plan processes. The HENA considers the Oxfordshire's Functional Economic Market Area (FEMA) and the Oxfordshire Housing Market Area (HMA).
18. The HENA is new up-to-date evidence of housing need, which provides an assessment of housing need which is materially different to that in the 2014 Strategic Housing Market Assessment (SHMA). It indicates that the 2014 SHMA is now out of date.
19. The implications of this have been considered in a new review of planning policies under Regulation 10A of the Town and Country Planning (Local Planning) (England) Regulations 2012 presented to the Council's Executive on 6 February 2022. The review replaces that approved by the Executive in January 2021.
20. The review indicates that the policy affected by publication of the HENA 2022 (Policy BSC1 District-wide Housing Distribution) needs updating – a process that will be undertaken through work on the emerging Cherwell Local Plan Review.
21. In view of these circumstances, it is appropriate to apply the standard method for the assessment of local housing need for Cherwell for the purpose of calculating the five-year housing land supply in accordance with Paragraph 74 and Footnote 39 of the NPPF.

22. A partial review of the Local Plan to meet Oxford’s unmet needs was adopted in September 2020. The Partial Review makes provision for 4,400 homes over the plan period of which 1,700 are to be delivered 2021-2026 and the remaining homes by 2031 (i.e. over a 10-year period). This results in a stepped housing requirement as follows:

Year	2021/22 – 2025/26	2026/27 – 2030/31	Total
Housing requirement	340 x 5 years	540 x 5 years	4400

23. Policy 12a of the Partial Review states:

“The Council will manage the supply of housing land for the purpose of constructing 4,400 homes to meet Oxford’s needs. A separate five-year housing land supply will be maintained for meeting Oxford’s needs” (emphasis added).

24. As the Partial Review Plan is not yet five years old (adopted in 2020), there is no justification to change the approach to monitoring land supply associated with this plan. Furthermore, the unmet need figure is fixed, following agreement through a duty-to-cooperate process, and has recently been found sound and adopted after examination of Oxford City’s Local Plan and Cherwell’s Partial Review Plan (amongst others), and so the reliance on the 2014 SHMA is less important. As the adopted strategic policies (which contain the unmet need component of the housing requirement) in the Partial Review Plan are less than five years old, the Standard Method does not apply for the purposes of calculating unmet need for Oxford.
25. In view of these circumstances, the housing requirements of the Partial Review of the Local Plan will continue to be applied for the purpose of calculating the five-year housing land supply for Cherwell’s contribution to Oxford’s unmet housing need.

Five Year Housing Land Supply Assessments

26. The standard method local housing need figure for Cherwell District of is presently 742 dwellings per annum (dpa). This figure has been calculated using the Government’s Planning Practice Guidance¹, in accordance with NPPF paragraph 74 footnote 39. A requirement of 742 homes per annum will therefore be applied to assessing the five-year supply of **deliverable** housing sites for Cherwell.

27. The NPPF defines the word ‘deliverable’:

*“**Deliverable:** To be considered deliverable, sites for housing should be available now, offer a suitable location for development now, and be achievable with a realistic prospect that housing will be delivered on the site within five years. In particular:*

¹ <https://www.gov.uk/guidance/housing-and-economic-development-needs-assessments>

a) sites which do not involve major development and have planning permission, and all sites with detailed planning permission, should be considered deliverable until permission expires, unless there is clear evidence that homes will not be delivered within five years (for example because they are no longer viable, there is no longer a demand for the type of units or sites have long term phasing plans).

b) where a site has outline planning permission for major development, has been allocated in a development plan, has a grant of permission in principle, or is identified on a brownfield register, it should only be considered deliverable where there is clear evidence that housing completions will begin on site within five years.”

Paragraph 74 also states that: *“The supply of specific deliverable sites should in addition include a buffer (moved forward from later in the plan period) of:*

a) 5% to ensure choice and competition in the market for land; or

b) 10% where the local planning authority wishes to demonstrate a five year supply of deliverable sites through an annual position statement or recently adopted plan⁴⁰, to account for any fluctuations in the market during that year; or

c) 20% where there has been significant under delivery of housing over the previous three years, to improve the prospect of achieving the planned supply⁴¹.”

28. Footnote 40 does not apply as the Local Plan Part 1 is not recently adopted. It should also be noted that at the present time the Council has not decided to submit an annual position statement on its five-year supply to the Planning Inspectorate for consideration.
29. Footnote 41 cross-refers to the Government’s Housing Delivery Test results whereby if delivery is under 85% then the Council needs to apply a 20% buffer to the deliverable supply. The most recent Housing Delivery Test² result for Cherwell is 153% therefore the 5% buffer under paragraph 74 a) should be applied to the five-year supply calculation.

Cherwell’s Five Year Housing Land Supply

30. A Housing Delivery Monitor is appended to this statement setting out the district’s position in relation to housing completions, permissions, and housing supply from deliverable and other sites.
31. The AMR contains the details of housing completions since the base date of the Local Plan (1 April 2011).

² <https://www.gov.uk/government/publications/housing-delivery-test-2021-measurement>

32. In applying the standard method there is no requirement to apply the annual housing need figure retrospectively; whereas applying a Local Plan requirement involves measuring delivery to date from the start of the Local Plan period and having regard to any shortfall or surplus.
33. The Housing Delivery Monitor appended to this statement details the sources of housing supply for the period from April 2022.
34. A further review will be undertaken once housing completions have been confirmed for the period 2022/23.
35. Evidence on the deliverability of sites including information on anticipated build-out has been recorded as of December 2022. This is reflected in the commentary that accompanies all deliverable and developable supply included within the Housing Delivery Monitor to provide an accurate picture of available supply. Sources of evidence include:
- Questionnaires sent to all known agents/developers requesting updates on projected buildout
 - Discussions with Development Management Officers and other council departments engaged in the delivery of sites
 - A review of Building Control Records to establish if notices have been received to indicate that developers are aligning the necessary additional consents ahead of construction.
36. A summary of supply from deliverable sites over the five year period is shown below:

	Projection 22/23	Projection 23/24	Projection 24/25	Projection 25/26	Projection 26/27	Projected Supply
Banbury	344	317	335	257	300	1660
Bicester	384	309	209	160	250	1242
Other Areas	295	293	260	207	124	1139
Windfall	0	0	0	100	100	200
CDC Total Supply	1023	919	804	724	774	4244

Banbury

37. Strategic allocations in Banbury account for most of the supply in Banbury over the next 5 years (1660 dwellings). These are predominantly from South of Salt Way (Banbury 16 & Banbury 17) and Drayton Lodge Farm (Banbury 18) which together account for 1009

dwellings. The remaining supply is from a mixture of smaller allocated sites in the urban area and unallocated sites with planning permission.

Bicester

38. Delivery at Bicester has been somewhat slower than at Banbury with many of the allocations still only at Outline stage. Whilst the projection for delivery is still significant at some 1,242 homes over 5 years this is substantially below that envisaged in the 2015 plan. There are several reasons for this including the delivery of essential infrastructure to deliver growth. Cherwell District Council is working proactively with partners including Homes England to unlock development. As of January 2023 when updating the Housing Delivery Monitor a cautious approach has been taken in assessing delivery. For example, it is anticipated that delivery from Northwest Bicester will be around 50 dwellings in the proceeding 5 year period with the remainder expected to come forward in years 6-10 and beyond the plan period.

Other Areas

39. The total for Other Areas includes Heyford Park which is expected to deliver 562 homes over the next 5 years. The remaining 577 homes are drawn from a range of smaller sites.

Windfalls

40. No windfall allowance is included within the deliverable supply for the first 3 years. This is to avoid double counting as the known sites are included within the allowance for small sites (sites less than 10 dwellings) or, where they are larger than 10 dwellings are included within the monitor. After year 3 an allowance of 100 dwellings is included. This reflects past trends.

Calculation of Cherwell's five year housing land supply

41. Using the standard method local housing need figure as the requirement and the projected supply for the period 2022-27, the five-year housing land supply calculation for the district is set out below.

42. The five-year housing land supply position in the district excluding the Partial Review area is **5.4 years**.

Step	Description	Five Year Period 2022-27
a	Requirement (2022 - 2031) (Standard Method)	6678
b	Annual Requirement (a / 5)	742
c	5 Year Requirement (b x years)	3710
d	5 Year Requirement plus 5% buffer (c + 5%)	3895.5
e	Revised Annual Requirement over next 5 years (d / 5)	779.1
f	Deliverable Supply over next 5 Years	4244
g	Total years supply over next 5 years (f/ e)	5.4
h	'Surplus' (f – d)	349

Calculation of Partial Review five housing land supply – Oxford's unmet housing needs

43. There has been some progress on the allocated sites within the Partial Review since the last monitoring update with several of the development briefs now adopted and applications submitted. As such, 80 homes in total is considered to be a reasonable assumption based on discussions with case officers and information received from the development industry and promoters. Nevertheless, this leaves a land supply for Cherwell's contribution to Oxford's Unmet Housing Needs as **0.2** years. The expectations of future delivery will be kept under review.

Step	Description	Five Year Period 2022-27
a	Partial Review requirement 2021-26	1700
b	Annual Requirement (a / 5)	340
c	Partial Review requirement 2026-31	2700
d	Annual Requirement (c / 5)	540
e	Requirement to date (b x years)	340
f	Completions 2021/22	0
g	Shortfall at 31/3/22 (f - e)	340
h	Base requirement over next 5 years ((b x 4) + (d x 1))	1900
i	Base requirement over next 5 years ((b x 4) + (d x 1)) plus shortfall	2240
j	Base requirement over next 5 years plus 5% buffer (h x 1.05)	2352
k	Revised Annual Requirement over next 5 years (d / 5)	470.4
l	Deliverable Supply over next 5 Years	80
m	Total years supply over next 5 years (f/ e)	0.2
n	'Shortfall' (f – d)	2272

44. Policy PR12b of the Partial Review includes the following: *'Applications for planning permission for the development of sites to meet Oxford's needs that are not allocated in the Partial Review will not be supported unless... Cherwell District Council has taken a formal decision that additional land beyond that allocated in the Partial Review is required to ensure the requisite housing supply...'*
45. The Council has not made a decision that additional land is required at the current time for the following reasons taken as a whole (to be confirmed by the Executive):
1. The Plan has a specific focus on meeting the identified and unmet needs of Oxford city to 2031. It will not be followed by a replacement plan in the usual way. Particular care is needed not to release more land than is required to deliver the Plan;
 2. The Plan (and therefore its delivery) was delayed by an Examination which ran from March 2018 to July 2020;
 3. The Plan was 'adopted' in September 2020 following the receipt of an Inspector's Report on the examination of the plan which required consideration of the then NPPF's tests on deliverability and developability;
 4. The residential sites continue to be actively promoted;
 5. Development briefs have been approved by the Planning Committee for all sites bar one (Land East of the A44 - PR8) – which is at an advanced stage of preparation. The briefs 'front load' the design process in the interests of providing certainty and clarity and supporting delivery. They should assist in avoiding prolonged pre-application discussions on design principles;
 6. Planning application have been received site PR9 (Land West of the A44), PR7a (South East Kidlington), and PR7b (Stratfield Farm). Pre-application discussions are occurring on most other sites. Planning Performance Agreements have been signed for three sites.
 7. The infrastructure requirements to support all sites are set out within the Infrastructure Schedule accompanying the plan. The County Council was engaged closely in developing site policies and infrastructure needs;
 8. The five-year supply 'shortfall' is not a land supply issue as such. The issue is one of timing. Presently, it is considered that the potential release of additional land within the parameters of the Plan's strategy could be counterproductive to delivering the Plan and its infrastructure requirements.

	Projection 22/23	Projection 23/24	Projection 24/25	Projection 25/26	Projection 26/27	5 year supply	Projection 27/28	Projection 28/29	Projection 29/30	Projection 30/31	Post 2031	Total Completions and Projected Completions 2011-2031
CDC Total Supply	1023	919	804	724	774	4244	1217	1266	1343	1410	7959	13724
Banbury Supply	344	317	335	257	300	1553	488	522	460	360	761	4936
Bicester Supply	384	309	209	160	250	1312	431	430	533	700	6573	4718
Other Areas	295	293	260	207	124	1179	98	114	150	150	625	2870
Windfall	0	0	0	100	100	200	200	200	200	200	0	1200

Area	Category	Site name and address	Site Area (ha)	Local Plan status	Planning application reference	Permission type (Allocation, Full, Outline, Reserved Matters)	Available and achievable evidence	Scheme status at 01/04/22	Conclusion	Planning Permissions at 31/03/22 minus units built & recorded at 31/03/22 (net)	Completions 01/04/11 to 31/03/22	Projection 22/23	Projection 23/24	Projection 24/25	Projection 25/26	Projection 26/27	Projection 27/28	Projection 28/29	Projection 29/30	Projection 30/31	Post 2031	Total Completions and Projected Completions 2011-2031	
Banbury	BANBURY - UNALLOCATED SITES (10 or more dwellings)	Land to the rear of 7 and 7A High Street	0.12	-	18/00487/F	Full	This is a small brownfield site in a very sustainable location. Full planning permission is secured. No progress has been made to discharge the pre-commencement conditions. The developer has indicated the plans are not currently economically viable in the current climate. The 14 units are therefore pushed to the end of the 5 year period (year 4) to allow for a change in market conditions.	Granted	Deliverable	14	0	0	0	0	14	0	0	0	0	0	0	0	14
Banbury	BANBURY - UNALLOCATED SITES (10 or more dwellings)	OS Parcel 6372 South East Of Milestone Farm, Broughton Road, Banbury	3.18	-	21/03644/OUT	Outline	Outline planning application (21/03644/OUT) for up to 49 dwellings, associated open space, sustainable urban drainage systems, and access was approved on 27 June 2022. The application was submitted by Lone Star Land, a land promoter.	-	Developable	0	0	0	0	0	0	0	25	24	0	0	0	0	49
Banbury	BANBURY - UNALLOCATED SITES (10 or more dwellings)	Land Opposite Hanwell Fields Recreation, Adj To Dukes Meadow Drive, Banbury	3.64	-	21/03426/OUT	Outline	Outline planning application (21/03426/OUT) for up to 78 dwellings and associated open space was approved subject to legal agreement on 7 April 2022. The application was submitted on behalf of a housebuilder, Manor Oak Homes, who will be developing the site. A further permission for an adjoining parcel ref 22/03064/OUT was submitted in October 2022 for 176 additional dwellings (awaiting permission) but demonstrating the intent to build out the site	-	Developable	0	0	0	0	0	0	0	50	28	0	0	0	0	78
Banbury	BANBURY - SMALL SITES (1 to 9 dwellings)	-	-	-	-	WINDFALL	Small sites	Small sites	Deliverable	99	469	33	33	33	-	-	-	-	-	-	-	-	568
Bicester	BICESTER - COMPLETED SITES (10 or more dwellings)	Bicester Community Hospital Kings End	0.9	-	12/00809/F	Full	-	Site completed in March 2017 (2016/17).	Complete	0	14	0	0	0	0	0	0	0	0	0	0	0	14
Bicester	BICESTER - COMPLETED SITES (10 or more dwellings)	Former Oxfordshire County Council Highways Depot	0.56	Identified for 30 dwellings in the Non-Statutory Local Plan (2011)	06/01003/OUT 06/01166/REM 09/01077/REM 09/01076/F 13/01708/CDC	Reserved matters Full	-	Site completed in March 2016 (2015/16).	Complete	0	62	0	0	0	0	0	0	0	0	0	0	0	62
Bicester	BICESTER - COMPLETED SITES (10 or more dwellings)	Land at Bessemer Close / Launton Road	3.35	Identified for 70 dwellings in the Non-Statutory Local Plan (2011)	15/02074/OUT 17/01253/REM	Reserved matters	-	Site completed in December 2019 (2019/20).	Complete	0	70	0	0	0	0	0	0	0	0	0	0	0	70
Bicester	BICESTER - COMPLETED SITES (10 or more dwellings)	Land at Skimmingdish Lane	2.4	-	14/00697/F	Full	-	Site completed in September 2019 (2019/20).	Complete	0	46	0	0	0	0	0	0	0	0	0	0	0	46
Bicester	BICESTER - COMPLETED SITES (10 or more dwellings)	Land South of Talisman Road	3.83	-	09/01592/OUT 13/01226/REM	Reserved matters	-	Site completed in March 2018 (2017/18).	Complete	0	125	0	0	0	0	0	0	0	0	0	0	0	125
Bicester	BICESTER - COMPLETED SITES (10 or more dwellings)	Transco Depot, Launton Road	0.4	Identified for 25 dwellings in the Non-Statutory Local Plan (2011)	12/01216/F	Full	-	Site completed in December 2013 (2013/14).	Complete	0	23	0	0	0	0	0	0	0	0	0	0	0	23
Bicester	BICESTER - COMPLETED SITES (10 or more dwellings)	West of Chapel St. & Bryan House	0.5	-	10/00106/F	Full	-	Site completed in September 2012 (2012/13).	Complete	0	5	0	0	0	0	0	0	0	0	0	0	0	5
Bicester	BICESTER - COMPLETED SITES (10 or more dwellings)	Winners Bargain Centres, Victoria Road	0.33	-	15/00412/F	Full	-	Site completed in September 2016 (2016/17).	Complete	0	42	0	0	0	0	0	0	0	0	0	0	0	42
Bicester	BICESTER 1 - NORTH WEST BICESTER	North West Bicester Eco-Town Exemplar Project	22.4	Local Plan allocation (2015) - Bicester 1 Identified in Annex A of the Eco-Towns PPS (2009).	10/01780/HYBRID	Full	The site is being developed by 2 housebuilders (A2 Dominion and Crest Nicholson) and is very advanced with phases 1, 2 and 3 already built. The Council's latest monitoring information shows that only Crest Nicholson remain on site, developing phase 4.	Under construction	Deliverable	36	303	36	0	0	0	0	0	0	0	0	0	0	339
Bicester	BICESTER 1 - NORTH WEST BICESTER	North West Bicester Eco-Town Exemplar Project	22.4	Local Plan allocation (2015) - Bicester 1 Identified in Annex A of the Eco-Towns PPS (2009).	19/01036/HYBRID	Hybrid	Full planning permission for 16 flats above the local centre units is secured. The Council's latest monitoring information shows that construction of the local centre units is not yet started. However, Delivery is currently expected in late 2023	Granted	Deliverable	16	0	0	16	0	0	0	0	0	0	0	0	0	16
Bicester	BICESTER 1 - NORTH WEST BICESTER	North West Bicester Eco-Town Exemplar Project	22.4	Local Plan allocation (2015) - Bicester 1 Identified in Annex A of the Eco-Towns PPS (2009).	21/01227/F	Full	This is a partial re-plan of the western part of phase 4 and proposes an additional 3 dwellings to the 54 originally approved on this part of the site under 10/01780/HYBRID. The site is being developed by Crest Nicholson and the Council's latest monitoring information shows that 12 starts were recorded in Q4 2021/22.	Under construction	Deliverable	57	0	14	43	0	0	0	0	0	0	0	0	0	57
Bicester	BICESTER 1 - NORTH WEST BICESTER	North West Bicester Phase 2	322.6	Local Plan allocation (2015) - Bicester 1	14/02121/OUT	Outline	Outline planning permission for 1700 homes on land to the north of Middleton Stoney Road, forming part of the wider North West Bicester strategic allocation was secured by P3EcoLtd on 30 January 2020. 500 of these homes are subject to a pending Reserved Matters application for phase 1 of Himley Village.	Granted	Developable	1200	0	0	0	0	0	0	0	0	100	300	800	400	
Bicester	BICESTER 1 - NORTH WEST BICESTER	North West Bicester Phase 2	322.6	Local Plan allocation (2015) - Bicester 1	14/02121/OUT 21/02339/REM	Outline	A Reserved Matters application (21/02339/REM) for 500 of the 1700 homes (forming phase 1) was submitted on behalf of Countryside Properties in July 2021 and was subsequently withdrawn. A variation to the condition requiring submission of the condition requiring submission of the RM has been approved and discussions with the developer are ongoing to find a resolution. To support NW Bicester, 2 bridges were installed under the railway at the start of April 2021. The delivery of roads is to follow and work is ongoing to resolve any funding gaps. The Reserved Matters application on this parcel is unlikely to be restricted by the supporting road infrastructure. However, due to the delay this site is now considered developable, rather than deliverable as per the 2021 HDM.	Granted	Deliverable	500	0	0	0	0	0	20	80	100	150	150		500	

Area	Category	Site name and address	Site Area (ha)	Local Plan status	Planning application reference	Permission type (Allocation, Full, Outline, Reserved Matters)	Available and achievable evidence	Scheme status at 01/04/22	Conclusion	Planning Permissions at 31/03/22 minus units built & recorded at 31/03/22 (net)	Completions 01/04/11 to 31/03/22	Projection 22/23	Projection 23/24	Projection 24/25	Projection 25/26	Projection 26/27	Projection 27/28	Projection 28/29	Projection 29/30	Projection 30/31	Post 2031	Total Completions and Projected Completions 2011-2031	
Other Areas	OTHER AREAS - UNALLOCATED SITES (10 or more dwellings)	The Ley Community, Sandy Lane, Yarnton	1.3	-	20/01561/F	Full	Full planning permission is secured and the Council's latest monitoring information shows that all 10 homes are under construction. Sweetcroft Homes confirmed that residential units have been accelerated due to prevailing market conditions. 10 Residential Homes and 73 care beds	Under construction	Deliverable	10	0	10	0	0	0	0	0	0	0	0	0	0	10
Other Areas	OTHER AREAS - SMALL SITES (1 to 9 dwellings)	-	-	-	-	WINDFALL	Small sites	Small sites	Deliverable	185	817	60	60	65	-	-	-	-	-	-	-	-	1002
Windfall	Small sites windfall	District-wide small sites windfall allowance	-	-	-	WINDFALL	Small sites	Small sites	Deliverable	-	-	0	0	0	100	100	100	100	100	100	100	-	600
Windfall	Large sites windfall	District-wide large sites windfall allowance	-	-	-	WINDFALL	Small sites	Small sites	Deliverable	-	-	0	0	0	0	0	100	100	100	100	100	-	400
TOTALS										7626	10981	1023	919	804	724	774	1217	1266	1343	1410	7959		
5 Year Total																	4244					5236	

Category	Site name and address	Site Area (ha)	Local Plan status	Planning application reference	Permission type (Allocation, Full, Outline, Reserved Matters)	Available and achievable evidence	Scheme status at 01/04/22	Conclusion	Planning Permissions at 31/03/22 minus units built & recorded at 31/03/22 (net)	Completions 01/04/11 to 31/03/22	Projection 22/23	Projection 23/24	Projection 24/25	Projection 25/26	Projection 26/27	Projection 27/28	Projection 28/29	Projection 29/30	Projection 30/31	Post 2031	Total Completions and Projected Completions 2011-2031
PARTIAL REVIEW SITES - OXFORD'S UNMET NEED	Land East of Oxford Road, North Oxford	48	Local Plan allocation (2020) - PR6a (690 homes)	-	Allocation	A Scoping Opinion has been received. A draft Development Brief was subject to public consultation between January and March 2022 and is due for approval in September 2022. The expected delivery rates allow for lead-in times of planning applications (outline followed by reserved matters) and construction.	-	Developable	0	0	0	0	0	0	0	25	50	75	100	440	250
PARTIAL REVIEW SITES - OXFORD'S UNMET NEED	Land West of Oxford Road, North Oxford	32	Local Plan allocation (2020) - PR6b (670 homes)	-	Allocation	A draft Development Brief was subject to public consultation between January and March 2022 and is due for approval in September 2022. The expected delivery rates allow for lead-in times of planning applications (outline followed by reserved matters) and construction.	-	Developable	0	0	0	0	0	0	0	30	75	75	100	390	280
PARTIAL REVIEW SITES - OXFORD'S UNMET NEED	Land South East of Kidlington, Kidlington	32	Local Plan allocation (2020) - PR7a (430 homes)	-	Allocation	A Development Brief for the site was approved in June 2022. Outline application (22/00747/OUT) for 370 homes was submitted in March 2022 and is pending consideration. The expected delivery rates allow for lead-in times of planning applications (outline followed by reserved matters) and construction.	-	Deliverable	0	0	0	0	0	0	30	50	100	100	100	50	380
PARTIAL REVIEW SITES - OXFORD'S UNMET NEED	Land at Stratfield Farm, Kidlington	10.5	Local Plan allocation (2020) - PR7b (120 homes)	-	Allocation	A Development Brief for the site was approved in November 2021. Outline application (22/01611/OUT) for 118 homes was submitted on behalf of a housebuilder (Manor Oak Homes) in May 2022 and is pending consideration. Full application (22/01756/F) for alterations and repairs to farmhouse and annexe; refurbishment and partial rebuilding of existing outbuildings to provide 2 no dwellings and erection of 2 no new dwellings was submitted in June 2022 and is pending consideration. The expected delivery rates allow for lead-in times of planning applications (outline followed by reserved matters) and construction.	-	Deliverable	0	0	0	0	0	20	30	40	30	0	0	0	120
PARTIAL REVIEW SITES - OXFORD'S UNMET NEED	Land East of the A44, Begbroke	190	Local Plan allocation (2020) - PR8 (1950 homes)	-	Allocation	The expected delivery rates allow for lead-in times of planning applications (outline followed by reserved matters) and construction.	-	Developable	0	0	0	0	0	0	0	50	100	225	225	1350	600
PARTIAL REVIEW SITES - OXFORD'S UNMET NEED	Land West of Yarnton, Yarnton	99	Local Plan allocation (2020) - PR9 (540 homes)	-	Allocation	A Development Brief for the site was approved in November 2021. Outline application (21/03522/OUT) for 540 homes was submitted in October 2021 and is pending consideration. The expected delivery rates allow for lead-in times of planning applications (outline followed by reserved matters) and construction.	-	Deliverable	0	0	0	0	0	30	75	75	75	75	210	330	

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Cherwell District Council

Executive

6 February 2023

Tenants Charter

Report of Assistant Director Wellbeing and Housing

This report is public

Purpose of report

To endorse the approach of a Tenants Charter for the tenants within the Council's housing stock portfolio and receive a draft proposed Charter for approval at a future meeting of the Executive.

To receive a further report to update Executive on the engagement of Registered Social Landlords and Private Landlords.

1.0 Recommendations

The meeting is recommended:

- 1.1 To approve the drafting of a Tenants Charter. The Tenants Charter will set out a new service standard that all tenants can expect to receive from the Council whilst they are living within properties the Council manages. This Charter will be developed in consultation with our tenants.
- 1.2 To note that as part of the drafting and future adoption of the Charter, the Council and its Officers engage with Registered Social Landlords and Private Landlords to seek improvements in the services that they are providing to their residents in Cherwell.

2.0 Introduction

- 2.1 The Council has a small mixed tenure stock portfolio of circa 180 properties.
- 2.2 The way social housing is regulated has changed a number of times over the past two decades. Following the Grenfell Tower Fire in 2017, HM Government set out bringing new Legislation forward following the questions raised as a result of the fire for everyone involved in social housing, with an aim of learning lessons.
- 2.3 HM Governments new Charter for social housing residents (White Paper) sets out seven key aspects of what residents in social housing properties should be able to expect;

- To be safe in your home
- To know how your landlord is performing
- To have complaints dealt with promptly and fairly
- To be treated with respect
- To have your voice heard by your landlord
- To have a good quality home and neighbourhood to live in
- To be supported to take your first step to ownership

2.4 Reviewing the relationship that the Council has with the residents that live in its properties is therefore timely to ensure that the Council can comply with future legislation and to ensure that tenants are receiving quality services.

2.5 In addition to the White Paper relating to Social Housing, there is additional legislation proposed for those renting privately. The Renters Reform Bill proposes a set of new standards within the private sector to reform the landlord and tenant relationship within the sector. Provisions within the Bill include a ban on Section 21 'no-fault' evictions, an improvement of standards of accommodation within the sector and give tenants stronger powers to challenge poor practice, such as arbitrary rent review.

2.6 At the 19 December 2022 Council meeting, an Amendment to a Motion was carried to call on the Executive to;

- Establish a Tenants Charter setting out minimum standards that the Council and that all Council tenants expect
- To ask Officers to engage with registered social landlords and private landlords to seek improvements in standards, in line with those this Council will adopt.
- To call on the government to bring forward the Private Renters Reform Bill, the promised ban on 'no fault' evictions and to commit to the national campaign of insulating poor homes

2.7 The Amendment that relates to the Renters Reform Bill has been progressed and the Housing Minister has been written to by the Portfolio Holder.

3.0 Report Details

3.1 The Tenants Charter will set out, in broad themes and specific actions, what tenants can expect from their landlord. It will take into account the expectations set out by government following the Grenfell Tower Fire and the response expected by social housing providers.

3.2 The recent tragic death of Awaab Ishak in Rochdale, within a social housing property provided by a registered provider, has again brought the landlord and tenant relationship and the standards of social housing into sharp national focus. A key area that the Tenants Charter will look to address is the relationship between the tenant and their housing provider and ensuring that issues raised are acted upon and feedback used effectively to improve services. Another key factor will be ensuring that properties that are provided by the Council are free from hazards like damp and mould and compliant with relevant legislation on health and safety within residential property.

- 3.3 The Tenants Charter will be produced in consultation with residents, to reflect the concerns that they may have and understand what more the Council could do when discharging its housing management functions, to improve services to residents.
- 3.4 The Council will take a leadership role within Cherwell in developing the Tenants Charter and will advise other registered providers of social housing of the completed Charter with a view to wider implementation across social housing in Cherwell of an equivalent set of standards for their tenants.
- 3.5 In addition to the Tenants Charter, but as part of this leadership role, the Council will also work to engage positively with private landlords operating in Cherwell to ensure that they are supported to meet their new obligations, to improve the relationship between landlord and tenant but also to hold them to account for poor practice, now and in the future, using our role and powers that we have with regards to enforcement.

4.0 Conclusion and Reasons for Recommendations

- 4.1 Further to the Motion at Council on 19 December 2022, the Tenants Charter will be implemented during 2023 for Cherwell District Council tenants.

5.0 Consultation

Not applicable

6.0 Alternative Options and Reasons for Rejection

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

Option 1: Not to bring forward a Tenants Charter.
This option would be contrary to a Motion from Council

Option 2: To bring forward a Tenants Charter for all tenants in Cherwell, regardless of their landlord
This option would not be practical. It is up to the landlord to manage their own tenancies in accordance with the contractual relationships they have with their own tenants. The Council can instead look to encourage and influence good practice within the District and enforce poor practice where legally necessary.

7.0 Implications

Financial and Resource Implications

- 7.1 There are no direct financial implications identified. The work on the Tenants Charter can be completed within existing budget and resources.

Comments checked by:
Leanne Lock, Strategic Finance Business Partner,

01295 227098 leanne.lock@cherwell-dc.gov.uk

Legal Implications

- 7.2 There are currently no statutory requirements for those that provide social housing, like Cherwell District Council, to have a Tenants Charter. However, a Tenants Charter will provide tenants with a clear set of principles and service standards that they can expect from the Council.

Comments checked by:

Shahin Ismail, Interim Head of Legal Services, Shahin.ismail@cherwell-dc.gov.uk

Risk Implications

- 7.3 A Tenants Charter will be directly relevant and applicable to our small number of tenants within our own housing stock. Whilst it is important that changes are well managed for reputational risk reasons, the sample size is small. Any related risks will be managed through the service operational risk frameworks and escalated as and when necessary.

Comments checked by:

Shone Ware, Assistant Director – Customer Focus
01295 221652 shona.ware@cherwell-dc.gov.uk

Equalities and Inclusion Implications

- 7.4 In line with our Equalities and Inclusion Framework guidelines, it will be necessary to complete an equalities impact assessment when the completed Tenants Charter is presented for consideration. But not as a direct consequence of this report.

Comments checked by:

Shone Ware, Assistant Director – Customer Focus
01295 221652 shona.ware@cherwell-dc.gov.uk

Decision Information

Key Decision

Financial Threshold Met: No

Community Impact Threshold Met: Yes

Wards Affected

All

Links to Corporate Plan and Policy Framework

A Tenants Charter would link to a key Business Plan priority of “Housing that meets your needs”

Lead Councillor

Councillor Nicholas Mawer, Portfolio Holder for Housing

Document Information

Appendix number and title

None

Background papers

None

Report Author and contact details

Richard Smith – Housing Services Manager

Richard.Smith@cherwell-dc.gov.uk

Tel: 01295 221640

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Cherwell District Council

Executive

6 February 2023

A Grant Scheme for Parishes for the Coronation of King Charles III

Report of Assistant Director Wellbeing and Housing

This report is public

Purpose of report

To consider a grant scheme and other arrangements to encourage community celebrations of His Majesty King Charles III's coronation, ensuring communities in Cherwell have sufficient time to get plans in place to celebrate; especially for road closures and large-scale town or village-wide events.

1.0 Recommendations

The meeting is recommended:

- 1.1 To agree the grant scheme and promotional measures as outlined in the report.
- 1.2 To work with colleagues from neighbouring authorities and the Lord Lieutenants office to coordinate and join up support for communities planning celebrations,
- 1.3 To promote the available local and national funding streams through a co-ordinated communications plan and dedicated webpage.

2.0 Introduction

- 2.1 Across the whole of the UK communities will be encouraged to take part in activities to celebrate the coronation of King Charles III. As with previous celebrations and in particular the Queen's Platinum Jubilee, towns and parishes are generally expected to take the lead on organising these activities in their communities with CDC enabling celebrations with a variety of supporting actions.
- 2.2 It is anticipated that communities will come together to celebrate by holding;
 - Street Parties
 - Community celebrations
 - Gatherings to watch the TV feed.

- 2.3 For Cherwell District Council's part, it is proposed to establish a "one-off" grants scheme that will encourage and assist local communities across the district to hold celebratory events during April, May or June 2023. It is proposed that this be similar in nature to the successful grant scheme which the Council offered to celebrate the Queen's Platinum Jubilee in 2022.
- 2.4 Additionally, it is proposed to cover the fees for temporary road closures and Temporary Event Notices (TENs) where these are required by community events celebrating the Coronation.
- 2.5 A dedicated web page with resources for organisations community celebrations will be set up and further information will be publicised when available.

3.0 Report Details

Proposed Grant Scheme

- 3.1 **Eligible events:** Grants will be awarded to events that facilitate and encourage participation by the whole local community. Events should aim to bring people together and strengthen community spirit. Examples might be street parties or village festivals. Events must take place between April and June 2023. It is anticipated that most events will take place on the Coronation weekend of 6 May - 8 May 2023 (with 8 May now being an additional [Bank Holiday](#)), but the leeway is given for Coronation celebrations taking place in association with established annual events.
- 3.2 **Applicant eligibility:** Parish authorities will be given the first opportunity to apply for grants. If a Parish Authority does not wish to apply, then it may nominate a properly constituted community group to apply for a grant towards a celebration in that parish (or ward in the cases of Banbury, Bicester & Kidlington).
- 3.3 **Grant award levels:** Awards will be based on size of parish / ward population and on the scope/nature of the event. Applications will be assessed, and grants awarded on a first come, first served basis, subject to budget availability.
- Rural Parishes – From £100 per parish for smallest parishes, up to £850 per parish for largest parishes (plus 25% uplift where the parish is split into two settlements)
 - Kidlington – £1,500 plus 25% uplift per ward.
 - Banbury and Bicester - £2000 each, plus 25% uplift per ward
- 3.4 **Budget:** If all parishes were to be awarded their full allocations and if requirement of street closure or TEN is similar to last year's Platinum Jubilee scheme, the budget required would be around £45,000, this would be met from general reserves (previous experience suggests that full take-up is unlikely – overall cost of the Platinum Jubilee scheme was £31,700).
- 3.5 **Temporary Road Closures and Temporary Event Notices:** It is proposed that the cost of these (where required for an approved event) will be borne by the grant fund, in addition to the grant awarded. The council's offer of free support for the 2022 Platinum Jubilee celebrations totalled a cost of around £3,500. It is expected that this will be similar.

- 3.6 **Eligible costs:** Grants can be spent on equipment and venue hire, entertainment, insurance, and local promotion/publicity. Commemorative items and food/drink are among the costs that are not eligible. Religious or political events will not be funded.
- 3.7 **Decision making:** Applications will be assessed by the Healthy Communities Manager, and grant awards made in consultation with the Assistant Director Wellbeing, Lead Member for Wellbeing and Leader of the Council or his deputy.
- 3.8 **Audit:** The grant will be paid out in advance in order to aid cash flow and minimise the administrative burden for organisers in the lead-up to their events. Each organiser will be required to submit a short post-event report, including copies of eligible receipts to at least the value of the grant awarded. In the event of an underspend, the appropriate sum must be repaid to Cherwell District Council. Applications must be submitted by the end of June 2023, so the maximum budget required will be known by that time and any remainder can be returned to general funds.
- 3.9 **Publicity and Guidance:** Guidance will be available from a new Coronation page on the CDC website. This will also direct to third party guidance on organising street parties and participating in national Coronation celebrations It will also provide links to other Coronation funding sources when information becomes available.
- 3.10 **Equalities and Inclusion:** The purpose of the grant is to facilitate open, inclusive events that aim to bring people together and strengthen community spirit. This is made clear in the guidance notes for applicants. The application form will require confirmation that equalities and inclusion have been properly considered.

4.0 Conclusion and Reasons for Recommendations

- 4.1 The proposed grant scheme will allow local communities to celebrate and pay tribute to King Charles III. It will encourage community cohesion and neighbourliness in Cherwell's parishes and urban communities.

5.0 Consultation

None

6.0 Alternative Options and Reasons for Rejection

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

Option 1: Consideration has been given to extending eligibility to informal neighbourhood groups. This has not been recommended because the money would be paid over to individuals rather than established, accountable organisations.

Option 2: Consideration has been given to restricting grants to events taking place on the Coronation weekend. Given the work involved in organising an event and the short lead-in times to apply for this grant, it is considered fairer to extend eligibility to events from April to June 2023.

Option 3: Not to establish a grants scheme to celebrate the Coronation of King Charles III.

7.0 Implications

Financial and Resource Implications

- 7.1 The Council's proposed budget for 2023/24 assumes a release of reserves of £45,000 to fund the grant scheme. Any unspent grant should be returned to reserves.

Comments checked by:

Michael Furness, Assistant Director of Finance (S151 Officer), 01295 221845, michael.furness@cherwell-dc.gov.uk

Legal Implications

- 7.2 There are no legal implications arising from this report.

Comments checked by:

Shiraz Sheikh, Assistant Director Law & Governance | Monitoring Officer
shiraz.sheikh@cherwell-dc.gov.uk

Risk Implications

- 7.3 There is financial risk associated with making advance payments. It is appropriately mitigated in this case by the eligibility criteria and the follow-up audits. Also, previous grant schemes have been successfully run on this model (Platinum Jubilee and Queen's 90th Birthday).

Comments checked by:

Shona Ware, Assistant Director, Community Focus shona.ware@cherwell-dc.gov.uk 01295 221652

Equalities and Inclusion Implications

- 7.4 Equalities and inclusion are appropriately addressed in the proposed scheme guidance notes and the application / assessment processes.

Comments checked by:

Shona Ware, Assistant Director, Community Focus shona.ware@cherwell-dc.gov.uk 01295 221652

Sustainability Implications

- 7.5 Local communities should be encouraged to organise events in a sustainable way, e.g. thinking about where they source any supplies, how they deal with (and in fact minimise) waste, avoiding single use plastic, encouraging participants to walk rather than drive.

Comments checked by:

Jo Miskin, Climate Action Manager, Tel: 07900 227103,

Jo.Miskin@cherwell-dc.gov.uk

8.0 Decision Information

Key Decision

Financial Threshold Met: No

Community Impact Threshold Met: No

Wards Affected

All

Links to Corporate Plan and Policy Framework

Healthy, resilient and engaged communities

Lead Councillor

Councillor Phil Chapman, Portfolio Holder for Healthier Communities

Document Information

Appendix number and title

- None

Background papers

None

Report Author and contact details

Kevin Larner, Healthy Communities Manager

Kevin.larner@cherwell-dc.gov.uk, 01295 221706

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Cherwell District Council

Executive

6 February 2023

Revisions to the Council's Taxi and Private Hire Licensing Policy

Report of Assistant Director of Regulatory Services and Community Safety

This report is public

Purpose of report

In October 2022 the Executive agreed to commence consultation on proposed changes to the Council's Taxi and Private Hire Licensing Policy ('the policy'). This public consultation commenced on 1 December 2022 and closes on 31 January 2023.

Changes to the policy require approval by Full Council. The 28 February 2023 Full Council meeting will consider proposed changes to the policy. This report provides a summary of the background to the proposed changes to the policy, the consultation process being followed, a summary of consultation responses to date and the proposed revisions to the policy resulting from those responses.

The Council has a statutory duty to ensure the proper administration of taxi licensing legislation in the district. Taxi services are an important part of the local economy and therefore fulfilling this statutory duty contributes to the Council's priority to ensure the district has an enterprising economy with strong and vibrant local centres. The primary purpose of the licensing regime is to promote public safety and therefore the Council's work to licence taxi drivers, vehicles and operators also supports the commitment to work with partners to reduce crime and antisocial behaviour. Further, the proposed revisions to the licensing policy include measures to reduce the carbon emissions of the taxi fleet in support of the council's commitment to protect the environment and to help achieve net zero targets.

1.0 Recommendations

The meeting is recommended to:

- 1.1 Consider the proposed changes to the Council's Taxi and Private Hire Licensing Policy and the comments received during the consultation process and determine the final policy revisions to be presented to Full Council on 28 February 2023.

2.0 Introduction

- 2.1 The Department for Transport recommends that all licensing authorities make publicly available a cohesive policy document that brings together all their procedures on taxi and private hire licensing. The Council's Taxi and Private Hire Licensing Policy addresses the Council's primary aim in carrying out its taxi and private hire licensing function to protect and promote public safety. The Council must ensure that licensed vehicles are fit for purpose and that licensed drivers are 'fit and proper' in accordance with the Town Police Clauses Act 1847 and Local Government (Miscellaneous Provisions) Act 1976.
- 2.2 The Government's Modern Crime Prevention Strategy included a commitment to protect children and young people from the risk of child sexual abuse and exploitation by working with local authorities to introduce rigorous taxi and private hire vehicle licensing regimes. As a result, the Department for Transport has introduced Statutory Taxi and Private Hire Vehicle Standards to replace relevant sections of the Best Practice Guidance that was issued in 2010. The introduction to the standards states -
"There is consensus that common core minimum standards are required to regulate better the taxi and private hire vehicle sector, and the recommendations in this document are the result of detailed discussion with the trade, regulators and safety campaign groups. The Department therefore expects these recommendations to be implemented unless there is a compelling local reason not to."
- 2.3 In 2022 a new National Register of Revocations and Refusals was introduced to enable local authorities to better share information about refusals or revocations of taxi driver or private hire vehicle driver's licences. The Council utilises this new register.
- 2.4 In 2020 the Council introduced a Climate Action Framework following the declaration of a climate emergency. In doing so the Council committed to "do its part to achieve a net zero carbon district by 2030". Emissions from taxis and private hire vehicles contribute to vehicle emissions in the district and therefore the Climate Action Framework included a commitment to facilitate and encourage electric taxis.
- 2.5 These changes provide the background to the requirement to update the Council's taxi and private hire vehicle licensing policy.

3.0 Report Details

- 3.1 The hackney carriage ("taxi") and private hire vehicle (minicab and chauffeur driven vehicle) trades provide a vital service to residents and visitors to Cherwell District in both the day and night-time economy, in particular in the areas of the district with limited public transport.
- 3.2 Currently the Council, through the Licensing Team, licences:
- 484 Hackney Carriage / Private Hire Drivers (dual licences)
 - 123 Hackney Carriage Vehicles
 - 313 Private Hire Vehicles
 - 80 Private Hire Operators (providers of a base and radio network)

- 3.3 In order to effectively administer the licensing regime, the Council requires a policy framework. The purpose of the policy is to:
- Ensure the safety of the public.
 - Ensure that drivers are fit and proper and vehicles are safe and suitable.
 - Provide a robust, and legally compliant, decision-making framework which protects the Council should decisions be challenged in the Courts.
 - Provide information to the trade, elected members, officers and the wider public on how the Council administers taxi / private hire licensing.
- 3.4 The authority's current Taxi and Private Hire Licensing Policy was adopted by Council at its meeting on 14 December 2015 and took effect in January 2016.
- 3.5 The Council's licensing team have prepared a revised draft taxi licensing policy. This draft policy is in appendix 1 of this paper with the associated policy appendices in appendix 1b. A list of the proposed changes and comments on those is in Appendix 2 and the Equality and Community Impact Assessment is included in Appendix 3. The text in the appendices in red shows the revisions to the policy that were made prior to the public consultation. The revisions in purple are those made as a result of the comments received and responses to the consultation. In 2022 the Council's Executive agreed that a public consultation should be instigated on the policy revisions proposals in red in the appendices.
- 3.6 The proposed updates to the policy include:
- Requirements of the new National Standards issued by the Department for Transport in July 2020.
 - Updated driver "fitness and propriety", and "safety and suitability" requirements (driving and medical records, criminal history, knowledge test, personal conduct and behaviour).
 - The introduction of the National Register of Revocations and Refusals (NR3) and how the council will use this register.
 - Changes to the policy requirements on the relevance and significance of any previous criminal convictions.
 - Amended driver testing and training requirements (both pre- and post- licence).
 - Amended vehicle testing, safety, access and condition requirements.
 - Clarification on duration of licences.
 - Updated driver and vehicle licence conditions (for example: on-going training, notifying changes in circumstances, dress code, etc.).
 - Clarified criteria for deciding whether to grant, renew, suspend or revoke licences.
 - Clarifications on enforcement of licence conditions.
- 3.7 In addition, the revision of the policy provides opportunity to set a framework for the reduction in emissions of the taxi fleet over time. There is clearly a need to balance the environmental benefits of reducing the emissions of the taxi fleet against the financial impact on drivers and operators of replacing vehicles. The policy provisions on emissions standards must meet the business needs of vehicle operators taking account of vehicle use/ journeys and charging infrastructure and duration. A new appendix G of the policy proposes a phased approach to raising the emissions standard requirements for licensed vehicles.

- 3.8 Concern has been expressed in recent years over the role played by taxi and private hire drivers in large scale organised Child Sexual Exploitation (CSE) in the country. In response the Council already has robust procedures in place for both the licensing of drivers and the investigation of complaints. The Council continues to work with partners in order to strengthen licence conditions in relation to awareness and prevention of CSE. The proposed policy changes reflect the latest operating arrangements with the Police and local partners.
- 3.9 The National Register of Revocations and Refusals (NR3) is a nationally agreed mechanism enabling all licensing authorities to share information concerning individuals who have had licences refused or revoked. The Council's Licensing Team have started to use this register. The objective is to ensure that this authority is able to take properly informed decisions on whether an applicant is fit and proper, in the knowledge that another authority has previously reached a negative view on the same applicant. The Register also ensures that all other subscribed authorities are made aware of instances where Cherwell District Council has refused or revoked a licence, so ultimately improving public safety nationally.
- 3.10 Consultation on the proposed changes to the policy commenced on 1 December 2022 and closes on 31 January 2023. All current holders of taxi or private vehicle licences have been contacted directly to notify them of this consultation and two opportunities have been provided for licensees to meet with Licensing Team members to discuss the proposed changes and clarify any aspect of the proposed policy revisions. In addition, key partner organisations (e.g. Thames Valley Police, Oxfordshire County Council, etc.) have also been notified of the consultation and invited to comment. A report on the consultation outcomes will be provided at the meeting.
- 3.11 A Licensing Committee meeting was held on 18 January 2023 to review the proposed policy changes and to provide comment on the proposed revised policy for consideration by the Executive. The Committee endorsed the proposed policy changes including those proposed as a result of the consultation feedback. In addition they asked that the policy revisions do not result in reductions in wheelchair accessible vehicles and that 'vintage' vehicles can still be licensed for use for celebratory events such as weddings.
- 3.12 In order that the Executive can decide on the final policy revisions to be presented to Full Council at their meeting on 28 February 2023 it is necessary to publish the Executive meeting paper before the public consultation closes. The policy and proposed revisions in the appendices to this paper were prepared to reflect all formal and informal comments received through the consultation process before the publication deadline for the Executive meeting. Further revision to the policy proposals may be necessary to respond to consultation responses received late in the consultation period. A verbal update will be provided at the Executive meeting on any further consultation responses received and any policy changes that may be required as a result of those responses.
- 3.13 Comments received during the consultation process highlighted some practical problems with the proposed policy revisions in relation to emission standards. In particular, drivers and operators commented that there are limited options for wheelchair accessible vehicles which meet the Ultra-Low Emission Standards (ULEV) and such vehicles are prohibitively expensive. In addition, the more limited range for ULEV vehicles makes some airport transfers challenging without adding

significant cost to allow for charging time. Therefore, the policy revision proposals have been revised to achieve a balance between being practicable and affordable for the trade whilst still being consistent with climate change objectives.

- 3.14 The revised policy proposals in relation to emissions introduces standards which would apply to all applications for new vehicle licences from the date of adoption and includes standards which would apply from 1st March 2024 (one year after anticipated date of adoption of new policy) for both new vehicles and licence renewals. The revisions also allow any vehicle that was licensed prior to the adoption of the new policy to continue to be licensed until the 10 year age limit is met. This reflects the feedback from the trade about the cost of replacing new vehicles which they had purchased with the intention of using for 10 years.
- 3.15 The policy still includes a requirement that from 2030 all vehicles at the time of first licensing must be propelled by either electric or hydrogen. However, the policy states that this clause will be reviewed at the time of the next 5-year policy review to consider the availability of sufficient infrastructure to support electric and hydrogen vehicles, the availability of such vehicles and suitability of models for the needs to the trade whilst also considering the affordability of those vehicles. This review is necessary in order to ensure that the introduction of the policy requirement in 2030 is practicable.
- 3.16 Further amendments as a result of consultation feedback are:
- Clarify that vehicles that are written off as a result of an accident can be replaced on a like-for-like basis with reference to the emissions standards that applied at the time of first licence of the written-off vehicle. Applications for grant of licences for replacement vehicles must be submitted with 6 months (policy paragraphs 11.2.5 and 11.1.8 and 11.8.4).
 - Added a requirement that licensed private hire operators should utilise drivers and vehicles licensed by the Council. This is intended to ensure that the licensed trade operating in Cherwell meets our standards. It is accepted that operators may need to utilise drivers licensed by other authorities on occasion but that this should be in exceptional circumstances only. Therefore, as guidance the revised policy states that the Council expects at least 75% of journeys arranged by licensing operators to be completed by Cherwell licensed drivers (policy paragraph 13.2.2).
 - Clarify the proposed policy provisions in paragraph 13.6.2 and 13.6.3 which restrict parking in the vicinity of operators licensed premises to ensure parking on private premises is not restricted and explain that 'Vicinity' will be assessed as parking within 10 metres of the licensed operator's premises. This provision is intended to reduce problematic parking around operator's offices which obstructs footpaths or the highway.
 - Clarify the policy requirements relating to drivers suffering from diabetes to require annual diabetes medical reports in line with DVLA medical standards (policy paragraph 9.6).
 - Added a requirement that licensed vehicles are required to have 6 monthly MOTs. This replaces the provision in the previous policy that the vehicle be subject to annual MOT and 6 monthly vehicle condition check (policy paragraph 11.2.1 and 11.2.2).

- Added a requirement that drivers notify the Council of road traffic offences committed that are discharged by way of speed awareness training or similar rather than fine or conviction (policy paragraph 6.7).
- Added a qualifying time-limit for the validity of safeguarding training undertaken as a requirement of licence applications so that there is clarity that safeguarding training should be completed within 3 months of the application and that the safeguarding training certificate is valid for 3 years (policy paragraph 8.4).
 - Amended to requirements in relation to lost property to reflect the fact that the police will no longer accept lost property at all Police stations (appendix B).

3.17 In addition comments were received on the proposal that the policy no longer allows the licensing of vehicles that have previously been written off by insurers. The current policy allows such vehicles to be licensed if supported by evidence that the vehicles has been examined with no faults or safety concerns being identified.

3.18 A further comment made during the consultation process related to the requirement in policy paragraph 7.2 that applicants who spend three months or more continuously outside the UK obtain a criminal record check or a certificate of good conduct. We were asked to consider a longer period than 3 months for this requirement. However, the DfT standards refer to 3 months and therefore it is not recommended that this period be extended for the purposes of our local policy.

4.0 Conclusion and Reasons for Recommendations

4.1 In order to effectively discharge the Council's taxi licensing legal obligations a policy framework is required. The current policy requires updating. The proposed new policy reflects changes to the statutory standards, provides clearer guidance on the taxi and private hire licensing process, and explains how the Council will make decisions in relation to the licensing of vehicles, drivers and operators. It also seeks to reduce the carbon emissions of the taxi fleet in the district.

4.2 It is recommended that the Executive review the proposed policy revisions shown in the Appendices and agree the final policy proposals recommendation to Full Council in February 2023.

5.0 Consultation

5.1 As outlined above, a public consultation on the proposed changes to the policy took place between 1 December 2022 and 31 January 2023. This consultation took place through the council website with information being sent to all of the taxi licensed trade in the district to notify them of the consultation process. Licensing Team members responded to any requests for clarification on the revised policy both through two licensing forums and on an ad-hoc basis. In addition, key stakeholders have also been notified of the consultation process being followed and the Licensing Committee has met to review and comment on the proposals as outlined above.

6.0 Alternative Options and Reasons for Rejection

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

Option 1: Not review the policy. It is a requirement that the policy is reviewed at least every five years, so this option is rejected.

Option 2: Re-issue the policy with no changes. This option was rejected since revisions of the policy were considered necessary to take into account changes in policy and guidance and commitments provided.

7.0 Implications

Financial and Resource Implications

- 7.1 There are no financial implications arising directly from this report. The proposed changes to the Council's Taxi and Private Hire Licensing Policy will be met within existing budget.

Comments checked by:

Kelly Wheeler, Finance Business Partner

kelly.wheeler@cherwell-dc.gov.uk 01295 221570

Legal Implications

- 7.2 This report sets out the Council's approach to the review of its taxi licensing policy. The purpose of the policy is to set out how the Council will seek to protect and promote public safety and ensure that licensed vehicles are fit for purpose and that licensed drivers and operators are 'fit and proper' in accordance with the Town Police Clauses Act 1847 and Local Government (Miscellaneous Provisions) Act 1976.

The proposed policy changes include:- the Statutory Taxi and Private Hire Vehicle Standards which aim to protect the most vulnerable; utilising the new National Register of Revocations and Refusals to better share information; the upholding of the Council's commitment to achieve a net zero carbon district by 2030; and achieving greater access to taxi and private hire vehicles for those who are disabled.

Statutory Taxi and Private Hire Vehicle Standards

The review of the policy has taken in to account the guidance issued by central government (Department for Transport) and other regulatory bodies, namely the Statutory Taxi and Private Hire Vehicle Standards, to ensure it is consistent with those nationally and within Oxfordshire. The Department for Transport expects the recommendations to be implemented unless there is a compelling local reason not to. The process of consultation enables the trade, public and any other person to offer evidence that there is a compelling reason no to implement those standards in whole or in part. If any reasons are proposed the Officers Report will identify, discuss and recommend accordingly. If there is a deviation from the standards you

the Committee need to be persuaded that there is a compelling local reason based on the evidence before you.

National Register of Revocations and Refusals

Cherwell District Council has signed up to the National Register of Refusals and Revocations (NR3 register). This means that when an application for a taxi driver's licence is refused, or when an existing taxi driver's licence is revoked, that information will be placed on the register. The details of all applicants will also be checked against the information held on the register. This is for information only.

Commitment to Achieve Net-Zero

CDC having declared a climate emergency seeks to adhere to its 2020 Climate Action Framework. In order to achieve the aims set out in that framework there are various proposed amendments to the policy. It is acknowledged that those changes may require the trade to spend on more environmentally friendly vehicles post-Covid and during a cost-of-living crises. The Officer's Report has provided comment on initial feedback received during the consultation and how the policy proposals may need to be amended accordingly to aid the trade in responding to the proposed policy changes. Decisions need to ensure they support the aims set out in the Framework, incorporate how consultation response has been considered in light of those aims, and be balanced and within reason.

Access to taxis and private hire vehicles for disabled users

Further guidance on 'Access to taxis and private hire vehicles for disabled users' has given rise to a number of amendments within the draft policy. These amendments may also give rise to further expenditure and careful consideration needs to be given as per the principles outlined above, i.e. decisions need to incorporate how the consultation response has been considered in light of the aims of the guidance on 'Access to taxis and private hire vehicles for disabled users', and be balanced and within reason.

ECIA

The ECIA concludes that the proposed policy revisions offer no negative impacts that need to be mitigated. It identifies positive impacts on the environment and in relation to accessibility of taxis and private hire vehicles.

Comments checked by:

Nathan Mountney, Litigation Solicitor

nathan.mountney@cherwell-dc.gov.uk 01295 753776

Risk Implications

- 7.3 The Council is required to have a taxi and private hire licensing policy and any risks arising from the implementation of this policy and its revisions will be managed within the service area.

Comments checked by:

Celia Prado-Teeling, Performance and Insight Team Leader

Celia.Prado-Teeling@Cherwell-DC.gov.uk, 01295 221556

Equalities and Inclusion Implications

- 7.4 An Equalities Impact Assessment has been completed as part of this proposal, identifying a positive impact in regard to equalities and climate implications. All council's proposals, changes and decisions are done taken careful consideration of our commitments to equalities and inclusion as set in our equalities framework, keeping those principles at the core of all we do.

Comments checked by:

Celia Prado-Teeling, Performance and Insight Team Leader

Celia.Prado-Teeling@Cherwell-DC.gov.uk 01295 221556

7.5 Sustainability Implications

Transport is the largest source of greenhouse gas emissions in the district and therefore has the largest role to play in helping the district to become carbon net zero.

Supporting taxis to transition away from fossil fuel vehicles is entirely consistent with the council's 2020 Climate Change Framework and our commitment to enable the district to become carbon net zero.

Furthermore, the move towards EV and hydrogen fuelled vehicles will support improvements in the district's air quality which is in line with our commitment to enable residents to lead healthy lives.

Comments checked by:

Jo Miskin, Climate Action Manager, Environmental Services. jo.miskin@cherwell-dc.gov.uk 01295 221748

8.0 Decision Information

Key Decision: N/A

Financial Threshold Met: No

Community Impact Threshold Met: Yes

Wards Affected

All

Links to Corporate Plan and Policy Framework

The work contributes to the Council's strategic priorities as outlined in the report above.

Lead Councillor

Councillor Eddie Reeves, Portfolio Holder for Safer Communities

Document Information

Appendix number and title

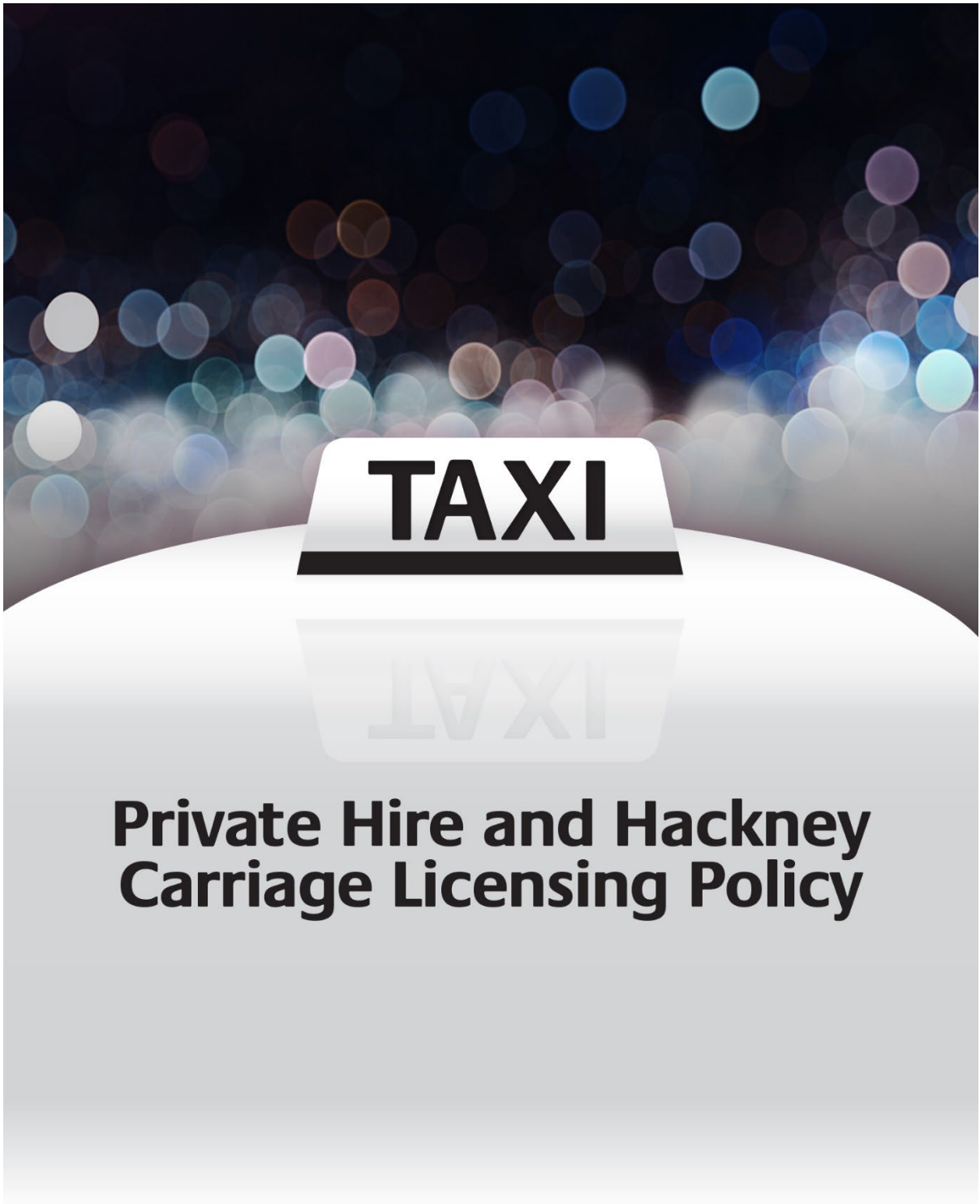
- Appendix 1. Draft updated Taxi and Private Hire Licensing Policy and Appendices
- Appendix 2. Summary of proposed changes to the Taxi and Private Hire Licensing Policy
- Appendix 3. Equality and Community Impact Assessment.

Background papers

None

Report Author and contact details

Richard Webb – Assistant Director; Regulatory Services and Community Safety
07831 161996 richard.webb@cherwell-dc.gov.uk



Private Hire and Hackney Carriage Licensing Policy

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Appendices

Appendix A – Criminal Records Policy

Appendix B – Driver Application Process and Conditions

Appendix C – Vehicle Application Process and Conditions

Appendix D – Operator Application Process and Conditions

Appendix E – Private Hire and Hackney Carriage Penalty Points Scheme

Appendix F - The National Register of Refusals and Revocations (NR3 register)

Appendix G – Vehicle emission standards

Version	Date	Author
V3.2	09/03/2022	Richard Rockall
V3.3	13/01/2022	Richard Rockall
V3.4	18/01/2023	Richard Webb

1. Introduction

- 1.1 Cherwell District Council is responsible for the licensing and enforcement of Private Hire and Hackney Carriage Vehicle trades within their district. The key objectives of the Private Hire and Hackney Carriage Vehicle licensing regime are ensuring public safety and the protection of residents and visitors to the district.
- 1.2 This policy and the appendices detail how the licensing of drivers, vehicles and operators will be undertaken by the Council. The policy has immediate effect and will be applied to all existing licences and all new applications.
- 1.3 The Council reserves the right to review and if necessary, reverse any decision if information comes to light that identifies the initial decision as being incorrect.
- 1.4 In developing this policy the Council has had regard to the following:
 - Local Government (Miscellaneous Provisions) Act 1976
 - Town Police Clauses Act 1847
 - Guidance on the Rehabilitation of Offenders Act 1974 – March 2014
 - Disclosure Barring Service Information Note on Rehabilitation of Offenders Act 1974 and Police Act 1997 Orders – 2013
 - Taxi and PHV Licensing Criminal Convictions; Policy, Local Government Regulation, Sept 2010
 - Equalities Act 2010
 - Regulators Code 2014
 - Road Traffic Acts
 - Crime and Disorder Act 1998
 - Health Act 2006
 - Data Protection Act 1998
 - **General Data Protection Regulations 2018**
 - Jay Report into Child Sexual Exploitation (CSE) in Rotherham
 - The Serious Case Review into Child Sexual Exploitation in Oxfordshire
 - Cherwell District Council Enforcement Policy
 - **Policing & Crime Act 2017**
 - **Department for Transport Statutory Taxi & Private Hire Vehicle Standards**
 - **The Care Act 2014**
 - **The Public Interest Disclosures Act 1998 (PIDA)**
 - **Safeguarding and Vulnerable Groups Act 2006**
 - **Taxi and Private Hire Vehicle (Safeguarding and Road Safety) Act 2022**
 - **The National Register of Refusals and Revocations (NR3 register)**
 - Other relevant legislation
- 1.5 In this document the term Council means Cherwell District Council, it's Scheme of Delegation and decision-making framework as set out in the Council's constitution.

2. Scope

- 2.1 This policy sets out the process for applying for a Private Hire or Hackney Carriage driver, operator and vehicle licence; the requirements to hold a licence; the conditions to be adhered to, and the grounds for and process by which the Council may take action against a licence.

3. Policy Statement

- 3.1 The Council recognise the important role that Private Hire and Hackney Carriage Vehicle drivers play in enabling people to travel around the districts and while doing so act as ambassadors for their Council. In promoting these licensing aims and objectives the Council will expect licence holders to continuously adhere to **the National Minimum Standards issued by the Department for Transport, along with** the high standards outlined within this policy. This will help portray a positive image of both the Council and the licensed trade.

To ensure continued Public Safety, and legislative compliance, the Council may update or alter the policy periodically. Such changes would be published on the Cherwell District Council website and affected license holders would be notified in advance of all such changes.

- 3.2 The principal purpose of Private Hire and Hackney Carriage Vehicle licensing is to protect the public and promote public safety. Cherwell District Council (The Council) will adopt and carry out the Private Hire and Hackney Carriage licensing functions with a view to promoting the following:
- The protection of the public
 - Safeguarding children and the vulnerable
 - The prevention of crime and/or disorder
 - The safety and health of public and drivers
 - Vehicle safety and suitability
 - **The protection of the environment**
- 3.3 The protection of the public, safeguarding children and the vulnerable, and the prevention of crime and /or disorder:
- Raising awareness amongst licensees of issues of safeguarding children and the vulnerable
 - Operating rules, conditions and disciplinary processes
 - Vetting, training and monitoring of licensees
 - Commitment to work with the police, neighbouring authorities and other relevant agencies
 - An expectation that licensees will treat all customers, members of the public and authorised licensing officers with respect and courtesy at all times

3.4 The safety and health of the public and licensees:

- Consideration of history of convictions, cautions, formal warnings, arrests, complaints and information received from partner agencies and other local authorities.
- Knowledge of the relevant Council topography
- Health and fitness of licensees
- Relevant safeguarding training
- A relevant professional driving qualification

3.5 Vehicle safety and suitability:

- Standards of vehicles
- Regular testing of vehicles including roadside checks
- Location of ranks
- Provision of wheelchair accessible vehicles

3.6 The protection of the environment

- Reducing harmful car emission into the environment
- Promoting the use of sustainably fuelled vehicles.

4. Background and definitions

- 4.1 The Local Government (Miscellaneous Provisions) Act 1976, as amended and the Town Police Clauses Act 1847 is the legislative framework for the Hackney Carriage and Private Hire licences.
- 4.2 This policy applies to the following:
- 4.2.1 **Hackney Carriages:** A vehicle available to transport members of the public that has no more than 8 seats for passengers, which is licensed to ply for hire. A Hackney Carriage may stand at designated taxi ranks and/or be hailed in the street by members of the public. A Hackney Carriage may also undertake pre booked journeys.
- 4.2.3 **Private Hire Vehicles:** These are licensed to carry no more than 8 passengers and must be booked in advance through a licensed Private Hire Operator. A Private Hire Vehicle cannot ply for hire nor use any designated taxi ranks.
- 4.2.4 **Private Hire Operators:** These are required to take and record bookings for Private Hire vehicles. Bookings must be recorded, and records be made available for inspection within the specified timescales.
- 4.2.5 **Hackney Carriage and Private Hire Drivers:** Licensed individuals who have undertaken certain tests and checks. Only a licensed driver can drive a licensed vehicle.

5. Private Hire and Hackney Carriage Drivers

- 5.1 This licence allows a person to drive a licensed vehicle, whether it is a Hackney Carriage or a Private Hire vehicle. The Council issues a joint Hackney Carriage and Private Hire driver licence. Licences shall be issued for a maximum period of 3 years but can be granted for a lesser period if deemed appropriate. The only exemptions to this are those applicants whose right to remain and/or work in the UK is for less than the 3-year period. In such cases the licence shall only be issued for the same period as the leave to remain or right to work allows.
- 5.2 All applicants must satisfy the Council that they are a fit and proper person to hold a Hackney Carriage and Private Hire Drivers Licence (HCPHD). **The term 'fit and proper' involves assessing that the applicant may be 'Safe and Suitable' to hold such a licence. When considering whether an applicant or licensee is fit and proper to pose oneself the following question, 'Without any prejudice, and based on the information before you, would you allow a person for whom you care, regardless of their condition, to travel alone in a vehicle driven by this person at any time of the day or night?'** Once the licence has been granted the licence holder must remain a fit and proper person throughout the duration of the licence. The fitness and propriety of the licence holder will be monitored and assessed throughout the licence period. Where licence holders have broken any licence condition, or any complaints and/ or criminal behaviour are brought to the attention of the Council the licence holder may be subject to enforcement action. This may result in the revocation of a licence.
- 5.3 All applicants for a HCPHD licence must act with honesty and integrity and ensure all information that is provided is correct and up to date. Throughout the application process the applicant must provide and disclose all necessary information in a timely manner. This includes information relating to previous convictions, warnings, cautions, arrests, or any current or pending criminal investigations being undertaken, as well as any civil actions, injunctions or other factors which may bring into question the suitability of the applicant. Failure to do so will have a negative impact on the assessment of the application and may result in the licence being refused.
- 5.4 The process for applying for a HCPHD licence is provided in Appendix B. It is essential that all applicants understand and are familiar with this process prior to application and renewal to ensure that information requested is provided within the specified timescales. Failure to do so may result in the application being refused.
- 5.5 **All applications to renew a taxi drivers' licence should be made through the Cherwell District Council website.**
- <https://www.cherwell.gov.uk/directory-record/1881/taxi---hackney-carriageprivate-hire-driver-licence/category/44/taxis>
- 5.6 **Cherwell District Council has signed up to the National Register of Refusals and Revocations (NR3 register). This means that when an application for a taxi driver's licence is refused, or when an existing taxi driver's licence is revoked, that information will be placed on the register. The details of all applicants will also be checked against the information held on the register.**

6. The Fit and Proper Person Test

6.1 Sections 51 and 59 of the Local Government (Miscellaneous Provisions) Act 1976 require that all applicants and licence holders are, and remain, fit and proper to hold a licence. There is no legal definition of what constitutes a fit and proper person for the purposes of Private Hire and Hackney Carriage Vehicle licensing. However, the Council must be satisfied, based on the information provided, that the applicant or licence holder is suitable to hold a licence and the public will be safe with the licence holder.

6.2 In determining whether a person is fit and proper to hold a licence, the Council is effectively asking the following question:

“Without any prejudice, and based on the information before you, would you allow a person for whom you care, regardless of their condition, to travel alone in a vehicle driven by this person at any time of day or night”?

6.3 If, on the balance of probabilities, the answer to the question is ‘no’, the individual should not hold a licence. If the answer to the question is an unqualified “yes”, then the applicant or licence holder can be considered to be fit and proper. If there are any doubts in the minds of the Council, then further consideration will be given as to whether the applicant or licence holder should hold a licence.

6.4 All decisions on the suitability of an applicant or licensee are made on the balance of probability. This means that an applicant or licensee should not be ‘given the benefit of doubt’. If the delegated officer is only “50/50” as to whether the applicant or licensee is ‘fit and proper’, they should not hold a licence. The threshold used here is lower than for a criminal conviction (that being beyond reasonable doubt) and can take into consideration conduct that has not resulted in a criminal conviction. If there is any doubt as to the suitability of the applicant or licence holder the Council will undertake any checks and apply any process necessary to ensure that licences are not issued or held by unsuitable persons. It is important to note that applications and any issues with current licence holders are dealt with on a case-by-case basis and as such it is not possible to detail an exhaustive list of all checks or requirements that may be asked of the applicant or licence holder in order to satisfy these criteria, but any decision will be transparent and relayed to the applicant/licence holder.

6.5 The Council will consider a number of factors when determining if an individual is a fit and proper person:

- Criminality
- Driving history
- Driving ability
- Right to work
- Medical history
- Standard of verbal and written English
- Any previous licensing history

- Anything else that may bring into question the applicant's suitability to hold a licence.

A more detailed, but non- exhaustive list, is provided in Appendix A.

- 6.6 In addition the Council will consider any further information provided by other agencies including, **but not limited to**, the Police, Neighbouring Authorities, Child and Adult Safeguarding Boards, **Multi Agency and Information Sharing groups (MASH)**, and County Councils that may have a bearing on the fit and proper standard of the individual.
- 6.7 The Council may at any time throughout the duration of the licence access the DVLA records of the applicants to ensure their driving meets the requirements of this policy. Licence conditions in Appendix B require all licensed drivers to notify the licensing authority within **48 hours of any DVLA offences**. **Road traffic offences which are discharged by way of speed awareness training or similar, must be reported to the council. Cherwell District Council will note such offences, and their method of discharge.** Failure to notify will result in the licenced driver receiving Council penalty points, under the Penalty Point Scheme (See Appendix E)
- 6.8 In submitting an application to the Council for a driver's licence, the applicant will be required to sign certain disclosures relating to the application form and their information. Details contained within the application may be shared with other agencies including but not limited to the Police, Immigration and HM Customs and Excise. In addition, declarations must be signed that allow for the applicants Driver and Vehicle Licensing Agency (DVLA) record to be reviewed throughout the duration of the licence, alongside their Disclosure and Barring Service (DBS) record. Applicant through the online update service. The Council retains and shares information in accordance with Information Sharing Agreements, **the Data Protection Act 1998, and the General Data Protection Regulations 2018.**
- 6.9 **Applicants and licensees must disclose if they hold or have previously held a licence with another authority. An applicant or licensee is also required to disclose if they have had an application for a licence refused, or a licence revoked or suspended by any other licensing authority. When such licences have been disclosed the council will contact that authority to gather further details. Failure to disclose such information may result in the refusal or revocation of a licence.**
- 6.10 An applicant will not be considered to be a fit and proper person to hold a licence if there is any evidence that the applicant has been dishonest in making the application or it can be evidenced that an applicant or an existing licence holder has **omitted information**, misled, or attempted to mislead, the Council (officers or elected members of the licensing committee) during any part of the application process or with the administration of the licence throughout its duration.

7. Disclosure and Barring Service (DBS)

- 7.1.1 A criminal record check for any driver is essential and is an important safety measure in ensuring that an applicant is a fit and proper person and to protect public safety. All applicants will be required to undergo an Enhanced Disclosure through the Disclosure and Barring Service. This will list information on all live and spent convictions, police cautions and other relevant information. Details of the DBS application process can be found within Appendix B as part of the application process.
- 7.1.2 Private Hire and Hackney Carriage Drivers are included as “exceptions” within the Rehabilitation of Offenders Act 1974 (Exceptions) Order 1975. As such all applicants will be asked to disclose on their application form any conviction or caution regardless of the date of the conviction or caution. The DBS certificate will disclose convictions and cautions and where these have not been disclosed on the application form by the applicant the integrity and honesty of the applicant will be questioned. All licence holders must notify the Council of any convictions, caution, **or formal Police interactions taken place during** their licence period as stated in the licence conditions. Failure to do so may result in **penalty points being issued to that licence, or the suspension or revocation of the licence.**
- 7.1.3 All applicants (both new and renewals) must declare on the application form all convictions, cautions, informal warnings, fixed penalty notices, driving offences, civil actions, county court judgements, arrests and any criminal, civil or traffic related investigation. It is essential that ALL information is declared. If applicants are unsure about what the above means, please contact the Council. Failure to inform the Council of any information may result in the application being refused or a licence being suspended or revoked.
- 7.1.4 Applicants **and licence holders** are responsible for the costs of obtaining DBS services. It is a licence condition that applicants sign up to the DBS online update service and on the grant of a licence, the licence holder must maintain the subscription. The subscription costs are the responsibility of the applicant / licence holder and permission must be given to the Council to undertake checks of the DBS status. **All applicants and licence holders will be subject to 6 monthly DBS checks throughout their licence period, and at times when the Council consider it necessary and appropriate to do so. The DBS online update service, and subscription to the service is a compulsory requirement for all licence holders. It will be used to monitor the criminal record of the licence holder throughout the term of the licence.**
- 7.1.5 In order to sign up to the online service the applicant, on receipt of their completed Enhanced DBS Certificate, must register for the service within 19 days of the DBS certificate issue date. Upon licence renewal the applicant will need to provide the Council with their original certificate in order for the update service to be checked.
- 7.1.6 DBS Certificates will only be accepted when the application has been made through Cherwell District Council. However, DBS certificates from other local authorities **may** be accepted providing the applicant has signed up to Update Service and has been checked to an enhanced level.

- 7.1.7 A Licence will not be issued without a current enhanced DBS certificate.
- 7.1.8 Where licence holders fail to maintain the online DBS subscription, or have not provided the council with the necessary information to check their DBS report, when required to do so, that licence will be suspended until such checks have been completed and the 'fit and proper' status of the licence holder has been fully assessed.
- 7.1.9 In the interests of public safety, the council will not issue a licence to any individual that appears on either barred list on the DBS reporting systems.

7.2 Applicants with Residency Periods Outside of the UK

- 7.2.1 Where an applicant has spent **three** months or more continuously outside the UK evidence of a criminal record check from the Country/Countries visited covering the duration overseas will be required. For stays longer **than 3 months** outside of the European Union a certificate of good conduct is required to be authenticated by the relevant embassy. [The Home Office publish guidance on applying for overseas criminal record information or 'Certificates of Good Character'](#).

7.3 Right to Work in the UK

- 7.3.1 All applicants must provide evidence of their right to work in the UK. This is required for the first application and all renewals.
- 7.3.2 The list below states what evidence needs to be provided to prove the applicant has a right to work in the UK, this list is not exhaustive and other documents may be accepted (please follow this link; <https://www.gov.uk/government/organisations/uk-visas-and-immigration>), however this must be discussed with the Council in advance of the application being submitted. Any issues with the documentation provided may result in a delay in issuing the licence or renewal of an existing licence.
- A UK passport confirming that the holder is a British Citizen (or citizen of another EEA country – including Switzerland),
 - Passport or other travel document endorsed to show that the holder is allowed to stay in the United Kingdom and undertake paid employment,
 - Full UK Birth/Adoption Certificate,
 - An Immigration Document issued by the Border and Immigration Agency to the holder which indicates that the person named in it can stay in the United Kingdom and undertake paid employment,
 - A work permit or other approval to take employment issued by the Home Office or the Border and Immigration Agency when produced in combination with either a passport or another travel document endorsed to show the holder is allowed to stay in the United Kingdom and is allowed to undertake paid employment.

7.4 Convictions, Cautions and Driving Offences

- 7.4.1 Where convictions and cautions have been declared by the applicant or disclosed on the DBS Certificate the Council must ensure that it is satisfied that the applicant is a fit and proper person to hold a licence. The Council will refer to The Criminal Records Policy for guidance

which can be found in Appendix A.

- 7.4.2 Where convictions, cautions and driving offences have been imposed on a licence holder the same Criminal Records Policy will be referred to in order to determine that the licensed driver remains a fit and proper person to hold the licence.

8. The Knowledge Test

- 8.1 All applicants are required to pass the Council's Knowledge Test. The purpose of the test is to ensure that the applicant has sufficient knowledge in the following areas:
- Numeracy
 - Topography
 - Communications
 - Road Safety
 - Safeguarding and **Child Sexual Exploitation and Child Drug Exploitation (CDE)**.
- 8.2 Applicants are entitled to 2 attempts at the Knowledge Test as part of the application.
- Should an applicant fail they will be able to book onto the next available test date
 - A further 4 tests will be permitted per application
 - The 4 additional tests will be charged at the current rate
 - After 6 failures the applicant will be deemed to be not "fit and proper" and their application will be refused
- 8.3 In addition to the Knowledge Test all applicants will be required to attend (at their own cost) Council approved Safeguarding, CSE, **CDE and disability awareness** training prior to **completing** their applications.
- 8.4 The Safeguarding, CSE/**CDE** and disability awareness training is mandatory for all applicants and licence holders regardless of whether the application is for a new or renewed licence. This is to ensure that applicants and licensed drivers are receiving the most up to date information at the time of the application.
- **Safeguarding certificates issued no more than 3 months prior to the application date will be accepted by the authority.**
 - **Failure to provide Cherwell District Council with a valid safeguarding certificate will prevent that license being issued, or existing licenses being suspended until the requirements have been met and documented.**

9. Medical Fitness Assessments

- 9.1 It is essential the licensed drivers are in good health and meet the requirements of Group 2 Standards of Medical Fitness as stated by the DVLA. Licensed drivers are expected to carry passengers' luggage and shopping, will drive on the road for longer periods than most car drivers and may have to assist disabled passengers. The Council must therefore be satisfied that the applicant /licensed driver is fit enough to undertake these tasks. Any pre-existing

medical condition must be disclosed and be under control to the satisfaction of a General Practitioner and the Council.

- 9.2 Applicants shall submit to the Council the supplied medical form completed by their own General Practitioner or a doctor who has full access to the applicant's medical records at the time of their application. A medical examination form will be required upon first application, then at the point of renewal of a 3-year licence until the applicant reaches the age 65 when an annual medical fitness assessment is required. Where an applicant has applied for a licence at the age of 64 and turns 65 within the first year the applicant will not be required to complete another medical assessment until renewal. Where certain conditions are noted by the GP, additional medicals or an alternative frequency may be required.
- 9.3 All licence holders must advise the licensing authority within 7 working days if any pre-existing medical conditions have deteriorated, or his / her health has changed in any way that may affect the licence holder's fitness to drive.
- 9.4 Under the D.V.L.A. Group 2 Medical standards applicants and licensed drivers suffering from diabetes and using insulin must have an annual diabetes medical report. The diabetes specific medical report must be completed, and endorsed, by their diabetes care unit, or a medically qualified practitioner authorised by the Council. Oxfordshire University Hospitals diabetes specialists' units are authorised by the council to complete all diabetes assessments Failure to evidence a driver's medical fitness may result in the refusal, suspension, or revocation of the licence. This diabetes specific medical is in addition to all other medical assessment requirements.
- 9.5 Where the licensing authority is in any doubt as to the medical fitness of the applicant, further medical examinations may be required to be undertaken. Any costs relating to these additional assessments shall be paid for by the applicant.
- 9.6 Third party medicals - DVLA Group 2 medical assessments will be accepted from approved third party assessors if the licence applicant provides the council with a copy of their full medical records. Once viewed those medical records will not be retained or stored by the Council.

10. Assistance Dogs

- 10.1 All licensed drivers are under a legal duty to carry guide, hearing and any other assistance dogs in their vehicles without any additional charge to the passenger. A licensed driver may only refuse to do so where s/he has a medical exemption. A medical exemption may be granted by the licensing authority where the licensed driver has provided detailed medical evidence that shows a medical condition will be aggravated by exposure to dogs. If the medical exemption is granted, then the licensed driver will be issued with an exemption certificate and a notice of exemption. The notice must be displayed in the vehicle by fixing it in a prominent position facing outwards on the dashboard.
- 10.2 When hired to carry a guide dog, the owner should be asked where s/he would prefer their

dog to be.

- 10.3 Most dogs are trained to lie in the front passenger foot well between the feet of their owner. If the vehicle is fitted with front and side air bags, it is essential that the dog is lying down at all times. Licensed drivers must inform the owner accordingly. Assistance dogs are trained not to move and will not harm a licensed driver in any way.
- 10.4 If the front foot well is not large enough to accommodate the dog, the owner should be advised to travel in the rear of the vehicle with the dog in the foot well behind the front passenger seat. The seat should be pushed forward to make room for the dog.

11. Private Hire and Hackney Carriage Vehicle Licences

- 11.1.1 As with driver licensing, the objective of vehicle licensing is to protect the public, who trust that the vehicles dispatched are above all else safe. It is important therefore the council are assured that those granted a vehicle licence also pose no threat to the public and have no links to serious criminal activity. Although vehicle proprietors may not have direct contact with passengers, they are still entrusted to ensure that the vehicles and drivers used to carry passengers are appropriately licensed and so maintain the safety benefits of the licensing regime.
- 11.1.2 All vehicle licence holders will be required to meet the same level of the 'fit and proper' assessment outlined in the Hackney Carriage Private Hire Drivers section of the policy and appendices. For vehicle licence applicants this assessment will be partly based on a DBS Basic disclosures report as a minimum DBS report. All applicants and licence holders must subscribe to and maintain a subscription to the DBS on-line update service, and will be subject to annual DBS checks, or further checks when required by the Council. Failure to maintain this subscription, or provide the information required for such DBS checks may result in that licence being suspended or revoked.
- 11.1.3 The procedure for applying for a Private Hire Vehicle or Hackney Carriage Vehicle Licence is detailed in Appendix C.
- 11.1.4 Only vehicles less than 6 years old and which meet the requirements of Appendix G will receive a new licence.
- 11.1.5 Existing licensed vehicles cannot have their licence transferred to a higher polluting vehicle (for example, a D.V.L.A. Cat 6 electric vehicle cannot be replaced with a D.V.L.A. Cat 5 Hybrid vehicle).
- 11.1.6 The Council will not licence vehicles that are currently licensed by another local authority.
- 11.1.7 The Council will not licence vehicles which fall with the D.V.L.A categories which indicate that the vehicle has been damaged or written off by insurers.
- 11.1.8 Applications should be made using the Council website: <https://cherwell.uat.jadu.net/directory/29/licences-and-permits/category/44/categoryInfo/9>

11.1.9 In order for an application to be considered the applicant must submit the following documentation to the Council:

- The fully completed vehicle licence application form
- Application Fee
- The original of the Vehicle Registration Document (Logbook/V5) certificate of registration for the vehicle (the new keeper's supplement section of the V5 document will be accepted in the case of vehicles that are not licensed at the time that the application is made, and the vehicle has recently been purchased by the applicant (documentary evidence will be required). Licences will not be renewed unless the full V5 document is made available to the Council at the time of application)
- The original insurance or insurance cover note for the vehicle. The document must state that the vehicle is insured for Private Hire (Hire and Reward) or Hackney (Public Hire)
- A valid MOT no older than 28 days from an approved MOT testing station within the Council's district.
- Newly registered vehicles with less than 500 miles on the odometer will not require a MOT prior to licensing.
- Evidence of the vehicle's emissions, no older than 28 days at the time of submitting the licence application.

11.1.10 In addition to the above, incomplete application forms, incorrect fees and or supporting documentation that does not conform will result in the application being rejected. Only when a complete application has been provided will the assessment process begin.

11.2 Grant and Renewal of Vehicle Licences

- 11.2.1 Vehicle licences are for a period of 1 year and will be subject to MOT every 6 months. All MOT test reports must show that the vehicle has no faults, or advisories, and has passed the MOT test. Where advisories have been reported, the applicant must document the completion of any remedial works required to correct the advisory fault/s.
- 11.2.2 Vehicles must be less than six years old at the time of first licensing and must have working stop/start engine technology if it is propelled by petrol, diesel, or hybrid engines. That stop/start technology must be fully functional throughout the term of the licence.
- 11.2.3 From 2030 all vehicles at the time of first licensing must be propelled by either electric or hydrogen. *Please note, this clause will be reviewed again at the time of the next 5-year Policy review in 2028 which occurs before the above clause comes into force. That Policy review will consider the availability of sufficient infrastructure to support electric and hydrogen vehicles, the availability of such vehicles and suitability of models available whilst also considering the affordability of those vehicles.*
- 11.2.4 The council will only continue to licence vehicles less than 10 years old.
- 11.2.5 Once a vehicle is licensed, that licence cannot be transferred to another vehicle, whether temporary or otherwise, which has been categorised by the DVLA as emitting levels of pollution higher than the current licensed vehicle. When a vehicle has been replaced following a vehicle accident/damage, the replacement vehicle may be like for

like with regards to emissions and euro categorisations up to the accident vehicle age reaching 10 years old. After the 10-year age threshold has been met, or exceeded, the existing licensed vehicle will not be renewed, and any replacement vehicle must meet the relevant policy euro category.

11.2.6 **Once a wheelchair accessible vehicle is licensed, that licence cannot be transferred to another vehicle, whether temporary or otherwise, to non-wheelchair accessible vehicle.**

11.3 Insurance

11.3.1 All insurance documents for the vehicle to be licensed must be provided with all the other relevant information at the time of application. In order to satisfy the Council that appropriate insurance is in place for the vehicle, the following is required:

- A valid Certificate of Insurance or Cover Note. This must confirm that insurance is in place for each driver of the vehicle and specify that it is covered for its use as a Hackney Carriage or Private Hire vehicle
- A Hackney Carriage vehicle requires insurance to cover public hire
- A Private Hire vehicle requires insurance to cover Private Hire and hire and reward
- A Cover Note will be accepted, and the licence issued on the understanding that a certificate of insurance will be presented as soon as possible.

11.3.2 All insurance dates are noted on the Council system at the time of application and follow ups will be undertaken to ensure the vehicle is appropriately insured. Where a new insurance certificate has not been submitted to the Council for that vehicle it will be deemed to have no insurance and the licence suspended until such time as an appropriate insurance document is provided and penalty points will be issued to the licence holder.

11.4 Vehicle Specifications

11.4.1 The Council has set down a number of specifications, in order to apply for a vehicle to be licensed as a Private Hire or Hackney Carriage Vehicle it must comply with the specifications at the time of application.

The specifications for Private Hire and Hackney Carriage Vehicles are detailed in Appendix C

11.5 Licensed Vehicle Conditions

11.5.1 Conditions are imposed on all operator, driver and vehicle licences and the Council is empowered to impose any conditions that are considered reasonably necessary in the granting of a licence. The conditions will be attached to the licence upon issue and are detailed in Appendix C. All applicants will be expected to have read and understood these conditions, any breach in the conditions will result in penalty points being issued or the licence considered for review.

11.6 Identification of Vehicles as a Private Hire Vehicle or Hackney Carriage

11.6.1 All vehicles must clearly indicate to the public that the vehicle is licensed. The public must be able to clearly distinguish the difference between a Private Hire and Hackney Carriage

Vehicle. No signs, stickers or insignia shall be added/ attached to the vehicle unless in compliance with Council requirements. Permission will be required in writing. The Vehicle Licence conditions in Appendix C provide detail on the following:

- The position/location of the licence plates
- The position of permanent door signs
- Required wording for the door signs and roof lights
- Requirements to display certain notices in the vehicles

11.7 Tyres

11.7.1 It is essential that the tyres on all licensed vehicles are in good condition. All tyres must conform to the following requirements:

- Tyre treads are designed to efficiently and effectively remove water from the road surface and provide maximum grip. All tyres fitted to the vehicle must have at least 2.0 mm tread depth throughout a continuous band in the centre 3/4 of the tread and around the entire circumference of the tyre. (Please be aware that this is a more stringent standard than the MOT test)
- Tyre fitted to a motor vehicle or trailer must be fit for purpose and be free from any defects which might damage the road or endanger any person. Fit for purpose means that a tyre must:
 - be compatible with the types of tyres fitted to the other wheels,
 - not have any lump, bulge or tear caused by separation or partial failure of the structure,
 - not have a cut or tear in excess of 25mm or 10% of the sectional width of the tyre, whichever is the greater, and which is deep enough to reach the ply or cord,
 - not have any part of the ply or cord exposed.
- Tyres must be correctly inflated to the vehicle/tyre manufacturer's recommended pressure.
- All replacement tyres fitted to licensed vehicles must be new (i.e. not have been used previously on any other vehicle) and have been fitted by a reputable vehicle maintenance company/contractor. Vehicle proprietors are required to retain invoices/receipts to show that any tyre that is purchased meets this requirement.
- The fitting of part worn tyres to licensed vehicles is not permitted.
- 'Space saving' spare wheels must only be used in an emergency, and then only in accordance with the manufacturer's instructions. Should the use of a 'space saving' spare wheel become necessary during a period of hire then the journey may continue, but the wheel must be replaced before another journey commences.

11.8 Accidents

11.8.1 If, at any time, a licensed vehicle is involved in any kind of accident, regardless of how minor or who was at fault, the driver must inform the Council of the accident within 72 hours of the accident; this can be done by via email, or through the [Cherwell District Council website: https://forms.cherwell.gov.uk/xfp/form/427?council=cdc](https://forms.cherwell.gov.uk/xfp/form/427?council=cdc)

An accident report form must be completed and submitted to the Council along with photographs of the damage within 24 hours of reporting the accident.

11.8.2 Following submission of the accident report form the Council will review and determine whether, by nature of the accident, or the stated damage caused, the vehicle must be inspected by the Council Licensing Officers. Such an inspection requirement would be to ensure the safety of the vehicle, for public use. Any such inspection request would be at the licence holders' own expense. If the damage (whether mechanical or cosmetic) means the vehicle is no longer fit to be licensed a Section 68 notice will be issued. The notice requires that the vehicle is repaired and inspected by an authorised officer within 2 months of the Section 68 notice issue date.

Under the Local Government (Miscellaneous Provisions) Act 1976 that license is automatically revoked if those requirements are not met. When a license is subject to revocation under these circumstances, the LA will allow a license grant application for a like for like vehicle with regards to emissions and euro categories, and vehicle type, up to the original accident vehicle age reaching 10 years old. Such a replacement vehicle grant application must be submitted within 6 months of the issue date of the Section 68 notice.

11.8.3 Once the accident damage has been repaired, the vehicle must be assessed by a Cherwell District Council Licensing officer. This vehicle assessment report will ensure the above assessment meets the Councils Taxi Licensing Policy and determine if the repaired vehicle meets the requirements of the policy. Any rescinding of notices following the vehicle/policy assessment will be notified in writing to the licence holder.

11.8.4 Vehicles written off by insurers will not be licensed or have a suspended license re-instated.

11.9 Meters

11.9.1 All Hackney Carriages must be fitted with an approved meter. This forms part of the vehicle test. Meters must be calibrated to the tariff set by the Council.

11.10 Additional Provisions for Private Hire Vehicles Only

11.10.1 Advertisements

Limited advertising is allowed on a Private Hire Vehicle subject to pre-approval by the C.

11.11 Additional Provisions for Wheelchair accessible vehicles.

Existing licensed vehicles from the policy implementation date, will continue to have their licenses renewed until vehicle age limits are reached.

11.11.1 Wheelchair Accessibility Requirements: -

1. Wheelchair spaces requirements: 1200mm length, 700mm width, 1350mm height (min).
2. Wheelchair areas must allow at least 305mm (12") leg room from the wheelchair frame/seat to any structure in front of the seat. There must be enough roof space to allow the wheelchair used to be seated comfortably inside the vehicle.
3. Acceptable intrusions into the wheelchair space: One or more tipping, folding or easily removed seats. Padded head and back restraint. Handrails or handholds provided that they do not extend into the wheelchair space by more than 90mm. Wheelchair restraint system and wheelchair user restraint system and appropriate anchorages and fittings.

4. Wheelchair user safety provisions: Every wheelchair space shall be fitted with a wheelchair tie-down system and a wheelchair user restraint system.
5. The vehicle must have type approval certification i.e. EU Whole Type Approval Certificate or UK Low Volume Type Approval Certificate.

11.11.2. Boarding Lifts and Ramps

1. Dimensions: Single piece ramp – width 700mm (min), length 1600mm (max)
2. Ramp gradients: Side entry: Kerb (125mm): 14 degrees (max) Ground: 19 degrees (max)
3. Slip resistant surfaces: all surfaces over which a wheelchair user may travel shall have a slip resistant finish applied.
4. Colour contrasting edge marks: a band contrasting with the remainder of the boarding ramp surface, 45mm to 55mm in width around and abutting the edge of the ramp or lift surface.
5. Control and failsafe mechanisms or power operated equipment: power operated equipment shall only be capable of operation from a control adjacent to the ramp.
6. Load sensors and re-cycling mechanisms for power-operated equipment: a device to stop the movement of the boarding ramp when motion is likely to cause injury.
7. Manual override provisions for power operated equipment: a provision to repeatedly operate the equipment in the event of power failure shall be provided.
8. Manual/portable ramp: Such ramps must have a designated stowage location which can store the equipment such that it does not present a risk of injury.

11.12. Entrances and Exits

1. Number and position: a minimum of 1 located on the nearside
2. Minimum doorway width: 740mm
3. Minimum doorway height: 1230mm

11.13 Taxi Ranks

A list of taxi ranks will be made available upon request.

Private Hire Vehicles are not permitted to park on taxi ranks. Private Hire Vehicles are not permitted to pick up or set down passengers on a taxi rank. Where Private Hire drivers are found to be using a taxi rank, penalty points may be issued.

12. Executive Hire (discreet plates)

- 12.1 Any vehicle proposed to be used for Executive Hire must be licensed as a Private Hire Vehicle. Vehicles used for this purpose must meet the requirements for Private Hire Vehicles. An application for a discreet plate must be made and approved by the Council. A discreet plate means that the vehicle does not need to display the same number of signs that a standard vehicle is required to do. However, these vehicles must carry **an external** plate issued by the Council, which states details of the vehicle, issue date and the number of persons allowed to be carried. The driver must also have in the vehicle a copy of a letter from the council confirming that the vehicle does not have to display a plate. **The internal licence details must be displayed in the vehicle at all time, on the top left (passenger side) of the vehicle's windscreen.** This must be produced on request to an authorised officer or police officer in uniform. Licences will be conditioned to reflect any restrictions that the Council feels necessary.
- 12.2 Drivers of Executive Vehicles must complete the licensing application process in the same way as any other licensed driver.
- 12.3 Vehicles with discreet plates must never be used for **non-contractual** day to day Private Hire work.
- 12.4 Applicants wishing to apply for a discreet plate must satisfy the following Council requirements:
- Vehicles accepted include luxury brands such as Mercedes Benz, BMW, Jaguar, Rolls Royce, Bentley and Lexus. The highest specification executive type cars from other manufacturers may also be considered. American style stretched vehicles will normally qualify for discreet plates.
 - The vehicle must be in immaculate condition with no visible defects, dents or blemishes to the external bodywork or internal trim.
 - The type of work undertaken is 'executive' in nature. This would mean that the vehicle is used specifically for clients that for security reasons would not want the vehicle to be identifiable. Documentary evidence of contracts will be required.

Applications for exemption will be made to the Licensing Authority in writing by a person holding a Private Hire operator's licence issued by the Council. The application must be accompanied by documentation to evidence compliance with points a) and c).

Provided that conditions a) and c) are satisfactorily met, an appropriate appointment will be made to inspect the vehicle to satisfy the requirement of clause b).

If all points above are satisfied discreet plates will be issued.

13. Private Hire Vehicle Operators

- 13.1.1 **As with driver licensing, the objective of operator licensing is to protect the public, who trust that the vehicles dispatched are above all else safe. It is important therefore the council are assured that those granted an operator's licence also pose no threat to the public and have no links to**

serious criminal activity. Although operators may not have direct contact with passengers, they are still entrusted to ensure that the vehicles and drivers used to carry passengers are appropriately licensed and so maintain the safety benefits of the licensing regime.

- 13.1.2 All operators, and each individual/director associated with the licence, will be required to meet the same level of the 'fit and proper' assessment outlined in the Hackney Carriage Private Hire Drivers section of the policy and appendices. For applicants this assessment will be partly based on a DBS Basic disclosures report as a minimum DBS report. All applicants and licence holders must subscribe to and maintain a subscription to the DBS on-line update service, and will be subject to annual DBS checks, or further checks when required by the Council. Failure to maintain this subscription, or provide the information required for such DBS checks may result in that licence being suspended or revoked.
- 13.1.3 Operators are required to evidence that they have had sight of a Basic DBS check on all individuals listed on their register of booking and dispatch staff and must ensure that Basic DBS checks are conducted on any individuals added to the register and that this is compatible with their policy on employing ex-offenders. DBS certificates provided by the individual must have been issued within two weeks of employment commencing. When individuals start taking bookings and dispatching vehicles for an operator they are required, as part of their employment contract, to advise the operator of any convictions while they are employed in this role. Operators will be required to conduct Basic DBS checks on their register of booking and dispatch staff every three years, as a minimum. All such DBS checks must be documented on an employee's register.
- 13.1.4 The register shall be a 'living document' that maintains records of all those in these roles for the same duration as booking records are required to be kept, this will enable cross-referencing between the two records. Operator must record that they had sight of a basic DBS check certificate, and in doing so must list the DBS certificate number, date of issue, and generalised comments regarding the DBS report. The certificate itself should not be retained. The employee should be retained their DBS report for the duration that the individual remains employed and on the register. All a new basic DBS certificate should be requested and sight of this recorded. The register must be stored in a secure location at the Operators listed address and be available for inspection upon request of authorised officers.
- 13.1.5 The Private Hire Vehicle Operator licence is not transferable and the person to whom it is issued must display it in a prominent position at each business premises recorded on the licence. The licence must be displayed at all times during the duration of the licence, so as to be on view to members of the public, except on such occasions as the licence is presented to the Council for amendment or if it is required to be produced for inspection by an Authorised Licensing Officer of the Council or a Police Officer.
- 13.1.6 A separate licence will be issued in respect of each approved secondary booking office if applicable.

13.2 Requirement for a Private Hire Vehicle Operator Licence

- 13.2.1 A licensed Private Hire Vehicle can only be dispatched to a customer by a licensed Private Hire Vehicle Operator. The operator licence requires the operator to ensure all its Private Hire Vehicle drivers are licensed by the same Council along with their vehicles.
- 13.2.2 A Private Hire Vehicle operator may sub- contract work to operators licensed in other districts if unable to fulfil a booking with its own licensed drivers. Accurate records of any sub-contracting must be kept by the operator and be available for inspection on request. A Private Hire Vehicle operator can also dispatch work to any Hackney Carriage. **Operators may outsource booking and dispatch functions, but they cannot pass on the obligation to protect children and vulnerable adults. Operators are required to evidence, by documentation, that comparable protections are applied by the company to which they outsource these functions. Such documentation must be made available to authorised officers upon request.**
- Any private hire operator making provision for the invitation or acceptance of bookings in Cherwell needs to hold a private hire operator's licence with Cherwell. The Council expects Operators licensed by the Council to utilise vehicles and drivers licensed by Cherwell so as to ensure that the licensed trade working in Cherwell conform to the standards set by the Council and can be subject of local compliance.
 - In addition, as part of the Council's 'fit and proper' test, it would not expect an operator to obtain a licence in Cherwell to simply make vehicles licensed by another authority available for booking via sub-contracting on a regular basis. As such whilst any licensed vehicle may enter Cherwell to pick up or drop off customers, the Council would not expect vehicles licensed outside of Cherwell to be waiting in Cherwell and be made available for bookings as this diminishes the Council's ability to set local standards and local control. As such, any Operator acting to deliberately reduce the Council's ability for local control would not be meeting the required public safety objectives and standards expected of a professional, licensed, fit and proper private hire operator, and may have their licence to make provision to invite or accept bookings in Cherwell revoked.

By way of guidance, the Council would expect at least 75% of journeys received by a Cherwell licensed operator commencing or finishing in Cherwell in a 3 month period to be completed by Cherwell licensed private hire vehicles (or Cherwell licensed hackney carriage vehicles completing pre-booked work).

- 13.2.3 Applications for a Private Hire Vehicle operator licence must be made on the Council application form, with the appropriate fee and the applicant must undergo a Basic Disclosure Barring Service check if not already a licensed driver within the Council area. The Council will then decide whether the applicant is a fit and proper person to hold an operator licence. The Council will grant operator licences for a period of 5 years. A licence will only be granted for less than 5 years in exceptional circumstances.

13.3 Fitness and propriety

- 13.3.1 Applications will only be granted where the Council is satisfied that the applicant is a fit and

proper person to hold a Private Hire Vehicle Operator licence. In order to determine the applicant's fitness, the following will be considered:

- Criminal record (including convictions, cautions, warnings and reprimands),
- Factors such as demeanour, general character, non-criminal behaviour, honesty and integrity,
- Previous conduct (particularly in cases where the applicant holds or has previously held a licence issued by either Council),
- Business practices demonstrated by the applicant (for example standard of record keeping, compliance with other regulatory requirements, financial practices etc.)

13.3.2 In addition the Council will also consider further information sources such as the Police (including abduction notices), Children and Adult Safeguarding Boards, other licensing authorities and statutory agencies.

13.3.3 If an application is received from a person that is not a driver licensed by the Council the applicant will be required to provide a Basic Disclosure from the Disclosure and Barring Service.

13.4 Insurance

13.4.1 Every operator shall put in place Public Liability Insurance for the premises that are to be licensed. Where the operators directly employ the licensed taxi drivers Employer's Liability Insurance must also be in place. Evidence of these insurances should be provided as part of the application.

13.5 Conditions

13.5.1 The Council has the power to impose conditions on an operator licence and will do so upon issue. A copy of the operator conditions is provided in Appendix D.

13.5.2 Additional conditions may be added to a licence when it is deemed necessary by the Council. Failure of the operator to adhere to the conditions of the licence will lead to enforcement action which may include the issuing of penalty points, suspension or revocation of the licence or prosecution.

13.6 Operator responsibility

13.6.1 The Council expects licensed operators to work with the Council and to support the aim of improving safety and safeguarding. Operators must alert the Council to any concerns as to public safety or safeguarding and failure to do so will call into question the fitness and propriety of the operator to hold a licence.

13.6.2 All Operators must ensure that drivers and vehicle working on behalf of their licensed business do not park outside, or within the vicinity*, of their licensed premises other than on their own property, unless picking up or dropping off a paying customer. Failure of the operator to adhere to this condition of the licence will lead to enforcement action which may include the issuing of penalty points, suspension or revocation of the licence or prosecution.

13.6.3 *Vicinity may be assessed as parking within 10 metres of the licensed operator's premises.

14. Driver, Vehicle and Operator Licence Conditions and Application Process

- 14.1 Conditions are attached at the time of the issuing of the relevant licence. These conditions are available to view in Appendices B, C and D and are sent out with the application packs. Applicants and licence holders must be aware of these conditions and adhere to them at all times throughout the duration of the licence.
- Failure to do so may result in penalty points being issued which could result in the suspension or revocation of the licence.
- 14.2 The application process for driver, vehicle and operator licences can be found in Appendices B, C and D respectively.

15. Enforcement, Compliance and Complaints

- 15.1.1 The purpose of licensing the taxi trade is to protect the public and promote public safety. The Council will utilise all legislative powers available to ensure the public are protected. The Council has an overarching Enforcement Policy to ensure that enforcement is efficient, targeted, proportionate and transparent. The Enforcement Policy is available on the Council's website.
- 15.1.2 All complaints and enforcement actions will be recorded on the councils licensing database, and where patterns of behaviour or traits are outlined by that data, the council will review the suitability of that licence holder against the 'fit and proper' criteria, and the balance of probability.

15.2 Enforcement Penalty Points

- 15.2.1 The Council operates a penalty point Scheme.
- Where breaches of the terms and conditions of any licence (drivers, vehicle or operator) are determined by the Council, penalty points may be issued. Details of the penalty point's scheme can be found in Appendix E.
- 15.2.2 The Scheme is a way of formalising warnings being issued to licence holders. Every licence holder will know what penalty points are attributed to the different types of breaches. Greater penalty points are issued for the condition breaches that are the most serious.
- 15.2.3 The penalty points are issued per incident and are cumulative. If one incident has resulted in several breaches of the licence conditions the points issued may reach a trigger level that would require further action against the licence. This could result in suspension or revocation of the licence. [See appendix E for further details.](#)
- 15.2.4 All Authorised Licensing Officers are authorised to operate the scheme and issue points accordingly.

15.3 Suspension or Revocation of a Licence

- 15.3.1 Where a vehicle fails to meet the licence conditions determined by an Authorised Licensing Officer, action may be taken by an Authorised Licensing Officer to suspend the licence until the vehicle meets the required standard.
- 15.3.2 Where a vehicle is found to be suffering defects, a Section 68 Notice may be served suspending the use of the vehicle until the defects are remedied. The suspension will only be lifted once the vehicle has been inspected by an Authorised Licensing Officer and the Officer is satisfied that the defects have been rectified. A Section 68 Notice may also result in Penalty Points being issued.
- 15.3.3 If an Authorised Licensing Officer considers that a given situation presents a serious risk to the safety of the public, under delegated powers then an Authorised Licensing Officer is permitted to suspend or revoke the licence of a driver, vehicle, or operator with immediate effect, **and any such actions will be notified to Thames Valley Police.**
- 15.3.4 The Council does not suspend or revoke licences lightly but will not hesitate to do so if it is felt it is necessary for the protection of the public.
- 15.3.5 **In certain circumstances the council will make referrals to the DBS, following enforcement actions such as refusing or revoking a licence, when the applicant/licence holder is thought to present a risk of harm to children or vulnerable individuals.**

Referrals will be made when:

- i. **An individual has harmed or poses a risk of harm to a child or vulnerable adult.**
- ii. **An individual has satisfied the 'harm test', as described in the Disclosure and Barring service (DBS) guidance about making referrals.**
- iii. **Where an individual has received a caution or conviction for a relevant offence.**
- iv. **Where the individual being referred is or may in the future be working in regulated activities.**

Such referrals may result in that individual being added to the DBS 'barred' list, and would be made in line with the DBS referrals guidance:

<https://www.gov.uk/guidance/making-barring-referrals-to-the-dbs>

15.4 Refusal to Renew a Licence

- 15.4.1 Any renewal application where new criminal convictions are shown on the DBS or there are any other concerns may result in that application being refused.
- 15.4.2 A person whose licence renewal application is refused may appeal such a decision to the Magistrates' Court.
- 15.4.3 Where an applicant has failed to provide all relevant information or documentation or has failed to comply with any of the requirements needed to renew a licence, the application and renewal of the licence may be refused.

15.5 Prosecution of Licence Holders

15.5.1 The Council may prosecute licence holders for relevant offences in accordance with the Council Enforcement Policy.

15.6 Appeals

15.6.1 Information on any right of appeal will be issued when a decision is made on any enforcement action.

15.7 Service Requests and Complaints

15.7.1 The Council has a duty to investigate complaints made by members of the public or partner agencies and any such complaint will be logged as a service request and investigated.

15.7.2 In determining the most appropriate course of action the Council will have regard to the evidence collated and the credibility of both the licence holder and the complainant.

15.7.3 The Council operates a complaints process should any person be unhappy with the service received from the Council. Details can be found on the Council website:

<https://www.cherwell.gov.uk/info/189/performance/341/comments-and-complaints>

15.8 Whistleblowing Policy

15.8.1 The Public Interest Disclosure Act 1998 (PIDA), commonly referred to as whistleblowing legislation, provides protection for those that have a reasonable belief of serious wrongdoing, including failure to comply with professional standards. In the normal course of events, if a licence holder or person, reveals information that his employer, or colleagues do not want revealed it may result in having a negative impact on the 'whistle-blower'. The 'Whistle-blowers' Policy enables licence holders and persons who 'blow the whistle' about wrongdoing to be protected from any such negative impacts.

15.8.2 The Council is committed to the highest possible standards of openness, probity and accountability. In line with that commitment, it expects and encourages licence holders, and others that it deals with, who have serious concerns about any aspect of the Taxi licensing regime and related work, to come forward and voice those concerns. It is recognised that most cases will have to proceed on a confidential basis. Any licence holder/person who wishes to disclose information to the Council will be protected, and the source of this information will not be disclosed to other parties.

15.8.3 This policy document makes it clear that such issues can be raised without fear of victimisation, subsequent discrimination, or disadvantage. This Confidential Reporting Policy is intended to encourage and enable licence holders, or persons, to raise serious concerns within the Council rather than overlooking a problem or 'blowing the whistle' outside. When a licence holder wishes to use the 'Whistle-blowers' policy, they should contact a Licensing Enforcement Officer, or the Licensing Manager. Alternatively, dependent upon the nature, seriousness and sensitivity of the issues involved and the person suspected of malpractice, the matter may be raised with the Chief Executive (Monitoring Officer), Solicitor to the Council (Deputy Monitoring Officer), or Head of Corporate Services. When reporting under this policy, the reporter should request the enactment of the 'whistle-blowers' policy before divulging any information.

15.8.4 Concerns may be raised verbally or in writing. Persons who wish to raise a concern should provide details of the nature of the concern or allegation and its background including relevant dates. The detail should be enough to demonstrate reasonable grounds for concern, although proof beyond doubt of an allegation is not expected at this stage

15.8.5 This Confidential Reporting Policy is intended to cover major concerns that fall outside the scope of the normal complaints procedures.

Areas covered by this Confidential Reporting Policy include:

- criminal or other misconduct
- breaches of the Council's Policies/code of conduct or conditions of licence
- contravention of the Council's accepted standards, policies/procedures, or conditions
- disclosures relating to miscarriages of justice
- health and safety risks
- damage to the environment
- Public protection risk
- fraud or corruption
- sexual, physical, or verbal abuse of any person or group
- other conduct not in keeping with a licence holders' responsibilities/requirements
- the concealment of any of the above.

15.8.6 Any serious concerns about any aspect of service provision or the conduct of a licence holder, Members of the Council, or others acting on behalf of the stated, can be reported under the Confidential Reporting Policy.

15.8.7 The policy on Personal Harassment is designed to protect licence holders/persons from all forms of harassment. The Council is committed to good practice and high standards and endeavours to be supportive of its licence holders and public. The Council will not tolerate any forms of harassment or victimisation and will take appropriate action to protect licence holders/persons who raise a concern in good faith.

15.8.8 All concerns will be treated in confidence and the identity of the person raising the concern will not be revealed without his or her consent (subject to any legal requirements or decisions). At the appropriate time, however, the person may be expected to come forward as a witness.

15.8.9 Concerns expressed anonymously are likely to be difficult to deal with effectively. Consequently, persons are encouraged to put their name to any allegation. Any action taken in response to an anonymous allegation will be influenced by factors including the seriousness of the issues raised and the likelihood of confirming the allegation from attributable sources.

15.8.10 If an allegation is made in good faith, but it is not confirmed by the investigation, no action will be taken against the person making the allegation. If, however, an allegation is made that is deemed to be frivolous, malicious or for personal gain, action may be taken against the person/licence holder in accordance with the Council's Taxi Licensing Policy.

15.8.11 Information received by Officers under the 'whistle-blowers' policy will only be divulged to other authorities when that information refers to, or presents as a risk in the areas of:

- The protection of the public

- Safeguarding children and the vulnerable
- The prevention of crime and/or disorder
- The safety and health of public and others

15.8.12 The Officer with whom the concern has been raised will initially respond in writing within ten working days, and will:

- acknowledging that the concern has been received
- indicating how it is proposed to deal with the matter
- giving an estimate of how long it will take to provide a final response
- stating whether any initial enquiries have been made
- supplying information on staff support mechanisms
- stating whether further investigations will take place and if not, why not.
- Inform the whistle-blower of the results of the investigation, and actions taken against the accused.

15.8.13 This policy does not replace the Council's Service Requests and Complaints Procedure.



Appendices A - G

Appendices (V3.2)

Appendix A – Criminal Records Policy

Appendix B – Driver Application Process and Conditions

Appendix C – Vehicle Application Process and Conditions

Appendix D – Operator Application Process and Conditions

Appendix E – Hackney Carriage and Private Hire Driver Penalty Points Scheme

Appendix F – The National Register of Refusals and Revocations (NR3 Register)

Appendix G – Vehicle Emission Standards

Criminal Records Policy

1. Introduction

- 1.1 Cherwell District Council is responsible for issuing Hackney Carriage and Private Hire licences under the Local Government (Miscellaneous Provisions) Act 1976 and therefore must ensure, to the best of their ability, that those who are granted a licence are 'fit and proper'. In undertaking this duty, the Council's primary concerns are protecting public safety.

2. Scope

- 2.1 This policy provides guidance for licence applicants on what is taken into account when determining if an applicant is a 'fit and proper' person to hold a licence. This policy relates to any application regardless of whether it is a new or a renewal application and will also apply to current licence holders. Whilst criminal convictions will play a large part in the determination of the application other information relating to the applicant's honesty and integrity, driving ability and information provided by the Police or any other body will also be taken into account.
- 2.2 This policy mainly relates to the determination of a driver licence application/ renewal however its principles are equally applicable in the determination of a Hackney Carriage/ Private Hire Vehicle licence and a Private Hire Vehicle Operator licence. Therefore, when a conviction is noted on any application form and is considered relevant in determining if an applicant is 'fit and proper' this policy will be referred to in order to assist the determination of the application.
- 2.3 This policy applies from the date of publication to all current licences and to all new licence and renewal applications after the publication date.

3. Background

- 3.1 In order to protect public safety the Council is mindful of the following:
- That a person is a **fit and proper** person in accordance with Sections 51 and 59 of the Local Government (Miscellaneous Provisions) Act 1976 (Part II)
 - That the person does not pose a threat to the public
 - That the public are safeguarded from dishonest persons
 - The safety of children, young persons and vulnerable adults
- 3.2 There is no strict legal definition for what constitutes a 'fit and proper person', and it will be in the opinion of the Council as to whether or not an applicant is a 'fit and proper', or **'Safe and Suitable' person**.
- 3.3 To assist in determining whether an applicant is a 'fit and proper' (**'Safe and Suitable'**) person to hold a licence the Council will undertake any checks deemed necessary and will take every step to ensure that licences are not issued to or used by unsuitable people.

This also applies to current licence holders. The Council will take the following into consideration:

- Criminality – details provided from the Disclosure Barring Service (DBS) Certificate or intelligence from the Police
- Period of holding a DVLA driver's licence – An applicant who has not held their licence for at least **consecutive** three **years prior to their application**, will not be eligible to apply for a licence
- Number of endorsed driving licence penalty points – as detailed in the DVLA licence check
- Right to work – Evidence that the applicant is eligible to work in the UK must be provided within the application. If the leave to work is less than the drivers licence (3 years) the licence will only be issued for the same period however the fee remains the same.
- Medical fitness – A completed medical must be provided, with the application, conducted by a doctor who has full access to the applicant's medical records and history. If we are not satisfied with the medical submitted further assessments may be required
- The Standard of verbal and written English
- The Standard of driving/driving ability
- General conduct/standards of behaviour (including online activity)
- The conduct of the applicant in making the application (e.g. whether they have acted with integrity during the application process) – For example, where an applicant has not disclosed all criminal convictions on the application form as requested but the DBS Certificate details convictions this will be considered to be dishonest and the application may not be looked on favourably
- The previous licensing history of existing/former licence holders – including information sought from **other** local authorities' areas where the applicant may have previously worked
- Knowledge and understanding of requirements of a licensed driver
- Or anything else that may bring into doubt the applicant's suitability to hold a licence
- **To ask the question “Would you allow your son or daughter, spouse or partner, mother or father, grandson or granddaughter or any other person for whom you care, to get into a vehicle with this person alone?”**

3.4 The Council may also take into account information and intelligence provided by other agencies including, but not limited to, the Police, Immigration Services, Children and Adult Safeguarding Teams.

3.5 This policy is a guide for applicants, Council officers and Members, however, it is not possible to detail every possible situation and every application is dealt with on a case-by-case basis. If exceptional circumstances dictate, it may be necessary for the Council to depart from the policy and the Council reserves the right to do so.

3.6 For the avoidance of doubt, where it is detailed in this policy that a specified period of time from conviction is required to elapse before an application will be considered, the date of conviction is the date upon which an applicant pleads guilty or is found guilty. Where it is detailed in this policy that a specified period of time from the completion of sentence/ licence period is required to elapse before an application will be considered,

the completion of sentence is the date upon which an applicant's sentence, including any licence period, is completed.

3.7 The Council reserves the right to review and if necessary, reverse any previous decisions if new and/or previously unused information comes to light.

4. General Policy

4.1.1 A previous conviction is not an automatic bar to an applicant being granted a licence. The criteria set out below (4.1.3) will be considered and an applicant with a previous conviction will be expected to: -

1. Have remained free of further convictions for a specified period of time; and
2. Provide evidence that s/he is a fit and proper person to hold a licence. It is the applicant's responsibility to produce any evidence s/he thinks relevant to assist in the determination of his/ her 'fit and proper' status. Simply remaining free from convictions is not necessarily enough to demonstrate that an applicant is fit and proper, particularly in light of evidence of poor driving or where the behaviour of the applicant has been called into question.

4.1.2 The criteria set out below (4.1.3) would normally be applied in the determination of all applications. The Council may depart from this policy where required to do so by exceptional circumstances. The otherwise good character and driving record of the applicant or licence holder will not ordinarily be considered as exceptional circumstances.

4.1.3 Applicants must include on the application form all details of: -

- Any arrest or request to voluntarily attend a police station for interview or formal questioning;
- Convictions, cautions, binding overs, reprimands or final warnings;
- Being charged with an offence or summonsed to court;
- Issued with a Fixed Penalty Notice;
- DVLA driving licence endorsements;
- Civil proceedings, orders or injunctions.

4.2 Appeals

4.2.1 Any applicant refused a driver or operator licence, or who has a licence suspended or revoked on the grounds that the Council is not satisfied that the applicant is a fit and proper person to hold such a licence has a right to appeal to the Magistrate's Court within 21 days of the notice of refusal [Local Government (Miscellaneous Provisions) Act 1976, S 77 (1)].

4.3 Powers

4.3.1 **Section 61 of the Local Government Miscellaneous Provisions Act 1976:** Allows the Council to suspend, revoke or refuse to renew a licence if the applicant licence holder has been convicted of an offence involving dishonesty; indecency; violence; failure to comply with the provisions of the Town Police Clauses Act 1847; failure to comply with the provisions of Part II of the Local Government (Miscellaneous Provisions) Act 1976; or any

other reasonable cause.

4.3.2 The Rehabilitation of Offenders Act 1974 (Exceptions) Order 1975: Allows the Council to take into account all convictions recorded against an applicant or licence whether 'spent' or not. The Council will have regard to all relevant convictions, particularly where there is a long history of offending or a recent pattern of repeat offending.

Applicants need to be aware that, in accordance with this Act, all convictions, cautions, warnings and reprimands must be declared. The time periods post-conviction referred to later in this policy are guidelines only. For example, being 10 years clear of an arson offence will not mean a licence will be automatically granted.

4.3.3 Sections 51, 55 and 59, Local Government (Miscellaneous Provisions) Act 1976: The Councils are required to ensure that an applicant for the grant or renewal of a Hackney Carriage and/or a Private Hire Vehicle driver licence or Operator Licence is a "fit and proper" person to hold such a licence. However, if an applicant has any convictions, cautions, warnings, charges awaiting trial or on-going investigations, the Council will consider:

- How relevant the offence(s) are to the licence being applied for
- How serious the offence(s) were
- When the offence(s) were committed
- The date of the conviction, warning, caution etc.
- Circumstances of the individual concerned
- Any sentence imposed by the court
- The applicant's age at the time of offence/incident leading to the conviction, warning, caution etc.
- Whether the conviction, caution, warning etc. forms part of a pattern of offending
- Any other character check considered reasonable (e.g. personal references)
- Any other factors that might be relevant, for example:
 - The previous conduct of an existing or former licence holder,
 - Whether the applicant has intentionally, knowingly, or recklessly misled the Council or lied as part of the application process,
 - Information provided by other agencies/Council departments.

4.3.4 In accordance with the conditions attached to the licence, existing holders of a driver licence or operator licence are required to notify the licensing department of the Council in writing, by letter or email within 3 days of his/ her being: -

- Arrested or requested to voluntarily attend a police station for interview or formal questioning;
- **Enforcement interactions with official bodies or Authorities;**
- Administered with a **verbal or written** caution, binding over, reprimand or final warning;
- Charged with an offence, summonsed to court, **or is under official investigation;**
- Convicted of an offence;
- Issued with a Fixed Penalty Notice;
- Receiving a DVLA driving licence endorsement;
- The subject of any civil proceedings, orders or injunctions.

- 4.3.5 All drivers will have an enhanced Disclosure Barring Service (DBS) check undertaken at the time of application. All new and renewal applicants must attend the Council Offices for the DBS check to be completed. Once the certificate has been received by the applicant the applicant must sign up to the DBS Online Update Service within 19 days of the certificate issue. The costs of all DBS checks are the responsibility of the applicant. The DBS Online Update Service is a less expensive service that ensures a quicker turnaround of the certificate; the fee for the service must be paid on an annual basis by the applicant. The applicant must sign up to the service before the licence is issued as it is a condition of the licence that the applicant / licence holder has signed up and remains signed up to the service.
- 4.3.6 Information as to the suitability of the applicant may be sought from any external organisations. The Common Law Disclosure Policy used by all Police forces may result in receiving information which calls into question the suitability of the applicant. Such information may be provided to the Council at the point of application or throughout the duration of the licence.
- 4.3.7 It is an offence for any person to intentionally, knowingly, or recklessly make a false declaration, or to omit any material particular in giving information required by way of the application for a licence (s57 Local Government (Miscellaneous Provisions) Act 1976). Where an applicant has made a false statement or a false declaration on the application for the grant or renewal of a licence, the licence will normally be refused.
- 4.3.8 Any offences or behaviour not stated in this Policy will not prevent the Council from taking into account those offences or behaviours.

4.4 Options when Determining an Application and Reviewing a Licence

4.4.1 When determining an application or reviewing an existing licence the Council has the following options:

- approve the application or take no further action
- refuse the application/ revoke the licence/ suspend the licence
- issue a warning which may include the use of enforcement penalty points

5. Serious Offences Involving Violence

5.1 Licensed drivers have close regular contact with the public. Serious consideration will be given to applicants and licence holders convicted of offences of violence. No application will be granted and an existing licence revoked where a conviction offence has resulted in a loss of life.

5.1.2 A licence application will be refused, or an existing licence revoked where the applicant / licence holder has a conviction or is convicted of any of the following offences:

- Murder
- Rape
- Offences related to Child Sexual Exploitation
- Manslaughter
- Manslaughter or Culpable Homicide while Driving
- Offences related to Child Sexual Exploitation

- Terrorism
- Any offences (including attempted or conspiracy to commit offences) that are similar to those above.

5.1.3 Where an applicant or licensee has been convicted of a crime involving, related to, or has any connection with abuse, exploitation, use or treatment of another individual irrespective of whether the victim or victims were adults or children, they will not be licensed. This includes slavery, child sexual abuse, exploitation, grooming, psychological, emotional, or financial abuse, but this is not an exhaustive list

5.1.4 Consideration will only be given to the granting of a licence if at least 10 years have passed since the completion of any sentence and/ or licence period following conviction the following offences: -

- Arson
- Malicious wounding
- Actual bodily harm
- Grievous bodily harm
- Robbery
- Possession of firearm
- Riot
- Assault Police
- Violent disorder/**Violence against persons**
- Resisting arrest
- Any racially aggravated offence against a person or property
- Common assault
- Affray
- Any offence that may be categorised as domestic violence
- Any Public Order Act 1986 offence (harassment, alarm or distress, intentional harassment, or fear of provocation of violence)
- Any offence (including attempted or conspiracy to commit offences) that are similar to those above.

A licence application will be refused if the applicant has more than one conviction for an offence of violence, irrespective of the dates of conviction.

An existing licence will ordinarily be revoked if the licence holder is convicted of an offence of violence.

5.1.5 Consideration may only be given to the granting of a licence if at least 5 years have passed since the completion of sentence and/ or licence period following conviction for an offence shown below:

- Obstruction
- Criminal damage
- Any offence (including attempted or conspiracy to commit offences) that are similar to those above.

5.2 Possession of a Weapon

5.2.1 If an applicant or licence holder has been convicted of possession of a weapon or any other weapon related offence, this will give serious concern as to whether the applicant/ licence holder is a fit and proper person to hold such a licence. At **least 7 years** must

have passed since the completion of the sentence/ and or licence period, before a licence is granted.

6. Sexual and Indecency Offences

6.1 Licensed drivers often carry unaccompanied and vulnerable passengers; the Council will take a strong line in relation to applicants or existing licence holders with convictions for sexual offences. All sexual and indecency offences will be considered as serious. Convictions for sexual or indecency offences will result in the refusal of an application or revocation of an existing licence. Such offences include:

- Rape
- Assault by penetration
- Offences involving children or vulnerable adults
- Trafficking, sexual abuse against children and/or vulnerable adults and preparatory offences (as defined within the Sexual Offences Act 2003)
- Making or distributing obscene material
- Possession of indecent photographs depicting child pornography
- Sexual assault
- Indecent assault
- Exploitation of prostitution
- Soliciting (kerb crawling)
- Grooming
- Making obscene/indecent telephone calls
- Indecent exposure
- Any similar offence (including attempted or conspiracy to commit) offences which replace the above.

6.2 In addition to the above the Council will not grant a licence to any applicant who is currently on the Sex Offenders Register, **barred list**, or any other similar register.

7. Dishonesty

7.1 A licensed Hackney Carriage/Private Hire Vehicle driver is expected to be trustworthy. In the course of their working duties a Hackney Carriage/ Private Hire Vehicle driver will deal with cash transactions and valuable property may be left in their vehicles. Drivers will also deal with passengers who are vulnerable or intoxicated and potentially easily confused. For these reasons, a serious view is taken of any conviction involving dishonesty.

7.2 In general, a minimum period **of 7 years** free of conviction or at least 5 years have passed since the completion of sentence/ and or licence period should be required before granting a licence to an applicant convicted of a dishonesty offence. Offences involving dishonesty include:

- Theft
- Burglary
- Fraud
- Benefit fraud
- Handling or receiving stolen goods
- Forgery
- Obtaining money or property by deception
- Other deception

- Taking a vehicle without consent
- Or any similar offence (including attempted or conspiracy to commit) offences which replace the above.

7.3 An existing licence will ordinarily be revoked if the licence holder is convicted of an offence of dishonesty.

8. Alcohol and Drugs

8.1 A serious view is taken of any drug related offence. Taking drugs and driving poses an obvious risk to public safety. Whilst applicants who have convictions for the supply of drugs should also be treated with considerable concern, the nature and quantity of the drugs, whether for personal use or supply are issues which will be considered carefully.

8.2 Hackney Carriage / Private Hire Vehicle drivers are professional, vocational drivers and a serious view is taken by the Council of convictions for driving or being in charge of a vehicle while under the influence of alcohol or drugs. More than one conviction for an alcohol or drug related offence raises significant doubts as to the fitness of an applicant / driver to drive the public. At **least 7 years**, after the restoration of the driving licence following a drink drive conviction should elapse before an application will be granted. If there is any suggestion that the applicant is alcohol or drug dependent, a satisfactory special medical report must be provided before the application can be granted.

8.3 A licence will not be granted where the applicant has a conviction for an offence related to the supply of drugs and a current licence will be revoked, because of the nature of a driver's involvement with the public.

8.4 A licence will not be granted where the applicant has a conviction for offences related to the possession of illegal/controlled drugs until at **least 7 years have** passed since the completion of any sentence and/ or licence period, and only then after full consideration of the nature of the offence and the quantity/type of drugs involved.

8.5 If there is evidence of persistent alcohol or drugs use, misuse or dependency, a specialist medical examination (in accordance with DVLA Group 2 medical standards) and a satisfactory medical report may be required before the licence is granted. If the applicant is a recovering addict evidence will be required to **show 7 years free** from alcohol / drug use after detoxification treatment is required.

9. Driving Offences involving the Loss of Life

9.1 A very serious view is to be taken of any applicant or licensed driver convicted of a driving offence that resulted in the loss of life. A Hackney Carriage/Private Hire Vehicle driver licence will be refused or revoked if the applicant/licensed driver has a conviction for:

- Causing death by dangerous driving
- Causing death by careless driving whilst under the influence of drink or drugs
- Causing death by careless driving
- Causing death by driving: unlicensed, disqualified, or uninsured drivers
- Or any similar offences (including attempted or conspiracy to commit) offences which replace the above.

10. Other Traffic Offences

- 10.1 Traffic offences such as obstruction, some speeding offences (usually dealt with by means of a fixed penalty), pedestrian crossing offences, traffic light offences, waiting in a restricted area, or offences of a similar nature may not ordinarily merit the refusal of an application, but the application will be subject to consideration as part of the Council's Penalty Points Scheme. However, if an applicant has more than 6 points or 6 points for a singular offence the application will be refused. If a licensed driver totals up more than 6 DVLA points or has his/ her licence endorsed with 6 DVLA points for a singular offence, the licence will be revoked. Hackney Carriage/Private Hire Vehicle drivers are professional drivers and the Council expects such drivers to maintain the highest standards of driving.
- 10.2 **Using a hand-held device whilst driving. Where an applicant has a conviction for using a held-hand mobile telephone or a hand-held device whilst driving, a licence will not be granted until at least five years have elapsed since the conviction or completion of any sentence or driving ban imposed, whichever is the later.**
- 10.3 Traffic offences such as driving without due care and attention, reckless driving, more serious speeding offences (usually dealt with by a court rather than a fixed penalty), or offences of a similar nature will give rise to serious doubts about the applicant's suitability to be a driving professional. An applicant with any such convictions will be required to show a period of at least one year free of such convictions. For applicants with more than one offence this should normally be increased to two years.
- 10.4 Where the courts have imposed a disqualification in respect of the DVLA driving licence, the periods stated above should normally commence from the date of the restoration of the licence.
- 10.5 A list of all DVLA offence codes can be found here: <https://www.gov.uk/penalty-points-endorsements/endorsement-codes-and-penalty-points>

11. Outstanding Charges or Summonses

- 11.1 If an applicant is the subject of an outstanding charge or summons his/ her application may be suspended until the matter is resolved. If an existing licence holder is subject to an outstanding charge or summons his/ her licence may be suspended or revoked dependant on the information available. Such a decision will be made on a case-by-case basis.

12. Non-Conviction Information

- 12.1 The Council will also take into account situations and circumstances that have not resulted in a prosecution or conviction. This may include acquittals, circumstances in which convictions were quashed due to misdirection by the court, circumstances where the decision was taken not to prosecute, situations where the applicant or licence holder has been arrested and bailed but not yet charged, and complaints from the public. In considering the most appropriate action to take in relation to non-conviction information (or a complaint), the credibility of the witness/ complainant and the licence holder will also be taken into account.

- 12.2 If an applicant has been arrested or charged, but not prosecuted or convicted, in relation to a serious offence which calls into question his/ her fit and proper status, serious consideration will be given to refusing the application. An existing licence holder in the same situation is subject to the same. His/ her licence may be suspended or revoked dependant on the information available. Such offences include violent and/ or sexual offences, offences of dishonesty and drug related offences.
- 12.3 In assessing the action to take, the safety of the travelling public will be the overriding consideration.

13. Licensing Offences

- 13.1 Certain offences under the Hackney Carriage / Private Hire Vehicle licensing legislation such as plying for hire, overcharging (Hackney Carriages), refusing to carry disabled persons or assistance dogs (in the absence of the requisite exemption) will prevent a licence being granted. An existing licence holder should expect his/ her licence to be revoked following a conviction for a licensing offence. In such circumstances a licence will not be granted until a period of 3 years has passed since the date of conviction.

14. Insurance Offences

- 14.1 A serious view will be taken of convictions of driving or being in charge of a vehicle without insurance. An isolated incident in the past will not necessarily prevent a licence being granted provided the applicant has been free of conviction for 3 years; however strict warning should be given as to future behaviour. More than one conviction for these offences will prevent a licence being granted or renewed. If the second conviction occurs whilst a licence is held that licence will be revoked.
- 14.2 An operator found guilty of aiding and abetting the driving of passengers for hire and reward whilst without insurance will have an Operator licence revoked immediately and will not be permitted to hold a licence for a period of at least three years from the date of conviction.

15. Applicants with Periods of Residency outside the UK

- 15.1 If an applicant has spent 6 continuous months or more overseas (since the age of 16) the Council will expect to see evidence of a criminal record check from the Country/Countries visited covering the 6-month period.
- 15.2 Due to the potential lifetime relevance for some of the most serious offences mentioned in this policy, the Council will need to ensure that sufficient background checks are conducted for those applicants who have lived overseas. For EU nationals a disclosure that is similar to the UK DBS will be required; for those Countries for which checks are not available, the Council will require a Certificate of Good Conduct authenticated by the relevant Embassy.

16. Summary

- 16.1 A previous conviction will not always automatically result in the refusal of a licence and a conviction obtained during the period of a licence will not always automatically result in

the revocation of an existing licence. In most cases, an applicant or licence holder whose licence has been revoked as a result of a conviction would be expected to have remained free from conviction for 3 to 10 years (depending on the offence committed before an application is likely to be successful. If there is any doubt about the suitability of an individual to be a licence holder, the Council's primary consideration is the need to protect the public.

- 16.2 While it is possible that an applicant may have a number of convictions that, individually, meet the above guidelines, the overall offending history must be considered when assessing an applicant's suitability to be licensed. A series of convictions over a period of time is more likely to give cause for concern than an isolated conviction, but in all cases the protection of the public is the Council's primary consideration.
- 16.3 A suspension or revocation of the licence of an existing licence holder takes effect at the end of the period of 21 days beginning with the day on which notice is given to the licence holder. If it appears that the interests of public safety require the suspension or revocation of the licence to have immediate effect, and the notice given to the licence holder includes such a statement and explanation, the suspension or revocation takes effect when the notice is given to the driver [s61(2B) of the Local Government (Miscellaneous Provisions) Act 1976].
- 16.4 NR3 will be used by this authority to share and disclose information on a more consistent basis. This will mitigate the risk of non-disclosure of relevant information by applicants.
- 16.5 From April 2022 all applicants/ licence holders who are unable to provide sufficient documentation of their right to work in the UK must demonstrate their right to work using the Home Office right to work checking service: <https://www.gov.uk/prove-right-to-work> This service will issue the applicant a 9 digit code which must be provided to the licensing authority as part of their application.

Driver Application Process and Conditions

The Application Process

If you are a new driver wishing to apply for a driver's license for a Hackney Carriage/Private Hire Vehicle, please visit www.cherwell-dc.gov.uk to download an application form. Alternatively, you can email licensing@cherwell-dc.uk to request a copy be emailed to you.

If you are already a driver and your license is due for renewal, your renewal date will appear on the paper counterpart of your license, you will not receive a separate reminder. Please allow sufficient time before expiry when booking your appointment, leaving it to the latter part of the month may result in your application not being processed in time. It is your responsibility to apply to renew your license in time.

All applications to renew a taxi drivers' licence should be made through the Cherwell District Council website:

<https://www.cherwell.gov.uk/directory-record/1881/taxi---hackney-carriageprivate-hire-driver-licence/category/44/taxis>

You must complete all sections of the application form. It is important to note that the following matters must be disclosed on the application form, irrespective of the age of the matter: -

- Arrests and/ or voluntary attendances at police station for interview or formal questioning;
- Released pending investigation.
- Convictions, cautions, binding overs, reprimands or final warnings;
- Charges awaiting trial; Summons to court;
- Fixed Penalty Notices
- DVLA driving license endorsements;
- Civil proceedings, orders or injunctions.

The Council is seeking to ensure the honesty and integrity of the Hackney Carriage / Private Hire Vehicle drivers it licenses and will not look favorably at an application where offences have not been detailed on an application form, but appear on the Disclosure Barring Service Certificate, or if the Council receives information from other agencies which should have been disclosed on the application form.

If an applicant has spent six months or more, continuously, outside the UK evidence of a criminal record check from the Country/Countries visited covering the duration overseas will be required. For stays longer than 6 months outside of the European Union a certificate of good conduct is required to be authenticated by the relevant embassy. If the applicant has resided in this country for less than 5 years a Certificate of Good Conduct is required from either the local Police from where they lived or the Embassy of that country where they resided previously. This also applies to overseas stays of 6 months more during that 5-year period.

All applicants must provide evidence of their right to work in the UK. This is required for the first application and all renewals.

The list below states what evidence needs to be provided to prove the applicant has a right to work in the UK, this list is not exhaustive and other documents may be accepted (please follow this link; <https://www.gov.uk/government/organisations/uk-visas-and-immigration>), however this must be discussed with the Council in advance of the application being submitted. Any issues with the documentation provided may result in a delay in issuing the licence or renewal of an existing licence.

- A UK passport confirming that the holder is a British Citizen (or citizen of another EEA country – including Switzerland),
- Passport or other travel document endorsed to show that the holder is allowed to stay in the United Kingdom and undertake paid employment,
- Full UK Birth/Adoption Certificate,
- An Immigration Document issued by the Border and Immigration Agency to the holder which indicates that the person named in it can stay in the United Kingdom and undertake paid employment,
- A work permit or other approval to take employment issued by the Home Office or the Border and Immigration Agency when produced in combination with either a passport or another travel document endorsed to show the holder is allowed to stay in the United Kingdom and is allowed to undertake paid employment. You must make an appointment to attend the Council Offices with your completed application and supporting documentation.

All applicants must have held a UK or equivalent qualifying driving licence for **consecutive** three years at point of application. If the licence was issued outside the UK it must be converted to a DVLA licence before a Private Hire/Hackney Carriage Drivers licence will be issued.

During your appointment your application and supporting documentation will be reviewed. Your DVLA record will be checked online and your Disclosure Barring Service (DBS) application form checked to ensure it has been completed correctly. For licence renewals a check of the DBS Online Update Service will be undertaken if you have brought your current certificate to your appointment. If you have not signed up to the DBS Online Update Service your application may be delayed or refused.

Payment for the application must be made at the time of submitting the paperwork and a receipt will be given. An application will not be progressed until:

- The application is completed in full*
- Group 2 Medical form completed by a doctor with access to your patient records has been received*
- Payment for the application has been made*
- All supporting documents required have been seen and photocopied (including 2 passport photographs) *
- The Disclosure Barring Service application has been completed*
- Council approved safeguarding **and disability awareness** training has been undertaken*
- **A HM Revenue and Customs (HMRC) tax check code has been supplied***
- A Council approved **Spoken English assessment**.
- A Council approved driving qualification has been produced
- Topographical Knowledge Test has been passed

All requirements marked with a * need to be carried out at renewal as well

If you have any offences on your application form or Disclosure Barring Service (DBS) Certificate the Council will refer to the Criminal Convictions Policy (see appendix A) in determining your application.

Once your DBS Certificate has been posted to you, you must apply to the DBS Online Update Service as part of the terms and conditions of your license within 19 days of the certificate being issued. This ensures that your criminal record can be checked throughout the duration of your license and enables a faster license renewal application process at a lower cost. The license fee for your application/renewal is in addition to this fee. To register your Certificate visit: www.gov.uk/dbs-update-service.

All driver licenses will be issued for a period of three years unless otherwise determined by the Council. All licenses will be a joint Hackney Carriage/ Private Hire Vehicle driver license.

All applications for a Hackney Carriage / Private Hire Vehicle drivers license are to be made on the Council's official form and must be submitted together with all necessary documentation.

License applications will be determined by an Authorised Licensing Officer.

The council will not issue licenses to cover periods while an applicant is waiting for documentation as part of the application process.

Driver Licence Conditions

1. Driver Badge/License

- 1.1 The driver must at all times, when driving a licensed vehicle for hire or reward, wear the driver's badge issued by the Council in a prominent visible place on the outer clothing. The badge must be clearly visible to passengers and made available on request.
- 1.2 The driver's badge remains the property of the Council. The badge must be returned to the Council immediately if the license is suspended or revoked. Upon expiry the badge must be returned to the Council within 7 days.
- 1.3 The driver of a Hackney Carriage / Private Hire Vehicle /shall submit the original Private Hire Vehicle Driver's license to his/ her employer (Private Hire Vehicle Operator) before commencing employment as a driver of Private Hire Vehicle. The employer (Private Hire Vehicle Operator) shall retain the original Private Hire Vehicle Driver's license until such time as the driver ceases to be so employed.
- 1.4 Hackney Carriage and Private Hire Vehicles shall not be driven by unlicensed drivers under any circumstances.
- 1.5 **Drivers aware of a child or vulnerable person is at risk of harm must immediately contact the police, or licensing team, or otherwise they should:**
 - use the local safeguarding process, the first step of which is usually to contact the safeguarding lead within the local authority;
 - call Crime Stoppers on 0800 555 111.

2. Conduct of Driver

- 2.1 The driver of a Hackney Carriage/Private Hire Vehicle shall at all times when the vehicle is being driven for hire be clean and smartly dressed.
- 2.2 The driver shall not at any time behave in an abusive, aggressive, intimidating or threatening manner to **any member of the public**, officer of the Council or any **other Authority**.
- 2.3 Drivers of Private Hire Vehicles shall not ply the street for hire nor shall s/he use Hackney Carriage stands (taxi ranks).
- 2.4 Drivers must at all times when working with vulnerable passengers comply with the below detailed safeguarding principles: -

A vulnerable passenger is a passenger whose age or disability means that she/he is more susceptible to harm than a typical passenger. Vulnerable passengers include children, elderly persons or somebody with learning difficulties. In addition, an individual should be considered vulnerable if she/he does not fall within one of the above categories, but whose condition is such as to render him/ her more susceptible to harm than may otherwise be the case (for example as a result of being under the influence of alcohol).

The following safeguarding principles aim to promote good safeguarding practice for drivers and staff working with vulnerable passengers in the Hackney Carriage or Private Hire trade. The following safeguarding principles must be complied with and embedded into driver working practice:

- Drivers must carry photo ID at all times and wear it in accordance with the conditions of the license.
- A lone vulnerable passenger must not be transported in the front passenger seat of the vehicle.
- The driver/operator must confirm that appropriate provision has been made for the vulnerable person prior to accepting the booking or commencing the journey. This does not necessarily mean that the driver/operator is responsible for the provision of appropriate measures, however if appropriate measures are not in place then the driver/operator must not undertake the journey.
- Drivers should always ask if a vulnerable passenger needs help and should not make assumptions.
- Drivers must remain professional at all times and should not:
 - Touch a person inappropriately
 - Make offensive or inappropriate comments (such as the use of swearing, sexualised or discriminatory language)
 - Behave in a way that may make a passenger feel intimidated or threatened
 - Attempt to misuse personal details obtained via the business about a person; these standards are equally applicable when working with vulnerable and non-vulnerable passengers.
- Drivers and operators must remain alert to issues around the safeguarding of children and vulnerable adults. Drivers should ensure that children and vulnerable adults leave the vehicle directly onto the kerb and immediately outside their destination (if it is safe and legal to do so). If a driver/operator is concerned about the safety, welfare or behavior of a vulnerable person, the

driver must report this to the police by telephoning 101 (or in appropriate cases by calling 999).

- If a driver/operator is concerned about someone else's conduct, they should report any concerns to the Council's Licensing Department; Cherwell District Council 01295 753744, Police (101) or Crimestoppers (0800 555111).

- 2.5 Licensed Drivers must comply with all reasonable requirements of any person hiring or being conveyed in the vehicle.
- 2.6 Licensed Drivers must afford all reasonable assistance with passenger luggage and shopping as may be required. At the conclusion of the journey the driver must similarly offer all reasonable assistance to passengers leaving the vehicle and assist them with luggage, shopping, disability aids or wheelchair.
- 2.7 Licensed Drivers must take all reasonable steps to ensure the safety of passengers entering, travelling in, or alighting from the vehicle, especially those passengers with a disability.
- 2.8 Licensed Drivers must not smoke tobacco or a similar substance, or E-Cigarettes /Vaping Cigarettes in the vehicle at any time as provided by the Health Act 2006.
- 2.9 Licensed Drivers must at all times when driving a licensed vehicle ensure that the vehicle is clean, roadworthy and well maintained, meets Council vehicle license conditions.
- 2.10 Licensed Drivers must ensure that none of the markings/signs/notices that are required to be displayed on the vehicle become concealed from public view or be so damaged or defaced that any figure or material particular is rendered illegible. The license plate must be securely attached externally to the rear of the vehicle.
- 2.11 Licensed Drivers must, when aware that the vehicle has been hired to be in attendance at an appointed time and place, or when otherwise instructed by the operator or proprietor of the vehicle to be in attendance at an appointed time and place, punctually attend at the appointed time and place unless delayed or prevented by sufficient cause.
- 2.12 Licensed Drivers must undertake an inspection of any vehicle being driven whilst working as a Hackney Carriage/ Private Hire Vehicle driver. This inspection must be undertaken at least daily and before the first carriage of a fare paying passenger in the vehicle whilst it is being driven by the licensed driver.

3. Change of Address

- 3.1 Licensed Drivers must notify the Council in writing within 7 days of any change of his/her address taking place during the period of the license, whether permanent or temporary.

4. Customer and Other Personal Information

- 4.1 Personal information must not be used for any other purpose other than that for which it was collected without the express permission of the individual to which the information relates.

For example, telephone numbers provided by customers so that they can be alerted/ updated by SMS text message with regard to a booking they have made must only be

used for this purpose. The information must not be retained by the driver after the text message has been sent and/or used for any other purpose (such as unsolicited marketing calls). If a driver is found to be contacting a customer after the booking has been completed his/ her license may be suspended or revoked.

5. Accidents

- 5.1 If at any time the vehicle is involved in an accident, however minor, the driver must inform the Council of this fact as soon as possible and in any event within 72 hours (by telephone or email). An accident report form (available through the council's website) must then be completed and submitted to the Council, along with photographs of the vehicle damage, within 24 hours of reporting the accident (except in exceptional circumstances when the report must be made as soon as possible after the accident – an example of an exceptional circumstance would be that the driver is incapacitated due to the accident and physically unable to make the notification).

6. Fares

- 6.1 Licensed Drivers must not, if driving a licensed vehicle fitted with a taximeter, cause the fare to be cancelled or concealed until the hirer has had the opportunity of examining it and has paid the fare. When fitted to a Hackney Carriage taximeter must be used on every hire journey, and charges cannot exceed the metered fare.
- 6.2 Licensed Drivers must not demand from any hirer of a licensed vehicle a fare in excess of any previously agreed for that hiring between the hirer and the operator or if the vehicle is fitted with a taximeter, and there has been no previous agreement as to the fare, the fare shown on the face of the taximeter.
- 6.3 Licensed Drivers must, if requested by the hirer, provide a written receipt for the fare paid. The receipt must bear the name and address of the proprietor of the vehicle together with the badge number of the driver. Where payment is made through contactless electronic means, the driver must issue a receipt to the customer identifying the taxi license number, date, time, and drivers badge number.

7. Passengers

- 7.1 The license holder must not carry more persons than is permitted by the vehicle license.
- 7.2 Licensed Drivers will not allow to be conveyed in the front of a licensed vehicle:
- more than one person, unless the vehicle is manufactured to carry two front seat passengers, and seat belts are fitted for both passengers, and
 - any child under the age of 13 years old unless a County Council contract permits otherwise.
- 7.3 Licensed Drivers must not, without the consent of the hirer of the vehicle, convey or permit to be conveyed any other person in that vehicle.
- 7.4 Licensed Drivers must provide all reasonable assistance to passengers and especially those with a disability. The Equality Act 2010 places the following duties on licensed Hackney Carriage/ Private Hire Vehicle drivers:

Duty to Assist Passengers in Wheelchairs

Section 165 of the Equality Act 2010 places a duty on the driver of a designated *wheelchair accessible Hackney Carriages and Private Hire vehicles to:

- Carry the passenger while in the wheelchair;
- Not to make any additional charge for doing so;
- If the passenger chooses to sit in a passenger seat to carry the wheelchair;
- To take such steps as are necessary to ensure that the passenger is carried in safety and reasonable comfort; and
- To give the passenger such mobility assistance as is reasonably required.

* Designated vehicles are those listed by the Council under section 167 of the Equality Act 2010 as being a 'wheelchair accessible vehicle'. (a list can be obtained on request)

8. Duty to Carry Guide Dogs and Assistance Dogs

- 8.1 Drivers must not fail or refuse to carry out a booking by or on behalf of a person with disabilities who is accompanied by an 'assistance dog' unless the driver has a Medical Exemption granted by the Council and the Notice of Exemption is displayed in the approved manner by it being fixed in a prominent position facing outwards on the dashboard.
- 8.2 Any animal belonging to or in the custody of any passenger should remain with that passenger and may be conveyed in the front or rear of the vehicle.
- 8.3 Drivers hired to carry a guide dog must ask the owner where s/he would prefer the dog to be. Most dogs are trained to lie in the front passenger footwell between the feet of the owner. If the vehicle is fitted with front and side air bags, it is essential that the dog is lying down at all times. Drivers must let the visually impaired person know that this applies.
- 8.4 If the front foot well is not large enough to accommodate the dog, the guide dog owner must be advised to travel in the rear of the vehicle with the dog in the footwell behind the front passenger seat. The seat should be pushed forward to make room for the dog.

9. Found Property

Licensed Drivers must, following the setting down of passengers, ascertain if any property belonging to the hirer(s) has been left in the vehicle and if not immediately able to return any such property, **must notify the councils licensing department, in writing** within 24 hours, unless an alternative arrangement has been made with the owner of the property.

10. Medical Conditions

- 10.1 Licensed Drivers must notify the Council in writing without undue delay of any change in medical condition.
- 10.2 Licensed Drivers must at any time, or at such intervals as the Council may reasonably require, produce a certificate in the form prescribed by the Council signed by a registered medical practitioner who has had full sight of the driver's

medical history to the effect that s/he is or continues to be physically fit to be a driver of a Hackney Carriage/ Private Hire Vehicle.

- 10.3 Under the D.V.L.A. Group 2 Medical standards applicants and licensed drivers suffering from diabetes must have an annual medical report. That report may be completed, and endorsed, by their diabetes care unit, or GP, and submitted to the Council. Failure to evidence your medical fitness may result in the refusal, suspension, or revocation of the license

11. Convictions, Cautions, Arrest etc.

11.1 Throughout the duration of the license, Licensed Drivers must notify the relevant Council **within 3 days** providing full details of any: -

- Arrested or requested to voluntarily attend a police station for interview or formal questioning;
- **Enforcement interactions with official bodies or Authorities;**
- Being administered with a **verbal or written** caution, binding over, reprimand or final warning;
- Being charged with an offence, summonsed to court, **or is under/subject to an official investigation;**
- Being convicted of an offence;
- Being issued with a Fixed Penalty Notice;
- Receiving a DVLA driving licence endorsement;
- Being subject of any civil proceedings, orders, or injunctions.

Failure to notify the Council of the above will result in enforcement action being taken.

12. Disclosure and Barring Service Online Update Service and Online DVLA System

- 12.1 Licensed Drivers must subscribe to the Disclosure and Barring Service (DBS) Online Update Service. Any costs associated with maintaining this subscription must be met by the licensed driver.
- 12.2 Licensed Drivers must give permission for the Council to undertake checks of their DBS and DVLA status should the Council consider it necessary to do so. The Councils will use the DBS Online Update Service to monitor the criminal record of Licensed Drivers.

13. Change of Operator

- 13.1 Licensed Drivers must notify the Council in writing within 5 working days of a change their operator.

14. CCTV Recording Equipment

- 14.1 Drivers are encouraged to install CCTV in Hackney Carriage Private Hire Vehicles. CCTV recording equipment must be previously approved by the Council. Approved CCTV recording equipment will have a hard drive which is only accessible by an Authorised Officer of the Council or a Police Officer. Misuse of any approved installed CCTV or use of unauthorised CCTV systems will result in action being taken against the licensed driver which could ultimately result in the revocation of the driver's license.

All installed CCTV must comply with the Information Commissioners CCTV Code of Practice.

- 14.2 CCTV systems that can record audio as well as visual data must be overt (i.e. all parties should be aware when recordings are being made) and targeted (i.e. only activated when passengers (or drivers) consider it necessary). The recording of audio should be used to provide an objective record of events such as disputes or inappropriate behavior and must not be continuously active by default and should recognise the need for privacy of passengers' private conversations between themselves. Activation of the audio recording capability of a system might be instigated when either the passenger or driver operates a switch or button.
- 14.3 Dash camera's, which only records visual footage (not audio), and records footage outside of the licensed vehicle, is recommended for all licensed vehicles, provided the recordings and equipment comply with the Information Commissioners CCTV Code of Practice
- 14.4 All health and safety duties required by the Health and Safety at Work Act 1974 whether temporary or permanent on the workplace in this case a vehicle being the workplace must be followed at all times.
- 14.5 All License Holders are to comply with current Government Legislation and Guidance applicable, an example is COVID-19 requirements such as wearing a face covering in a Vehicle (health and Safety defined as workplace)'.

Appendix C

Vehicle Application Process and Conditions

Application Process

Any vehicle which is not currently licensed as a Hackney Carriage / Private Hire Vehicle with the Council, no matter how recently the license elapsed or was transferred, will be treated as a new vehicle application.

Applicants for a license for a Hackney Carriage/Private Hire Vehicle please visit <https://forms.cherwell.uat.jadu.net/xfp/form/544?council=cdc> or download an application form. Alternatively email licensing@cherwell-dc.uk to request a copy is emailed to you. Please note that new license applications can only be submitted for vehicles under 6 years old. Once licensed a vehicle will require a MOT test every 6 months. The relevant date will be printed on the vehicle license, **you will not receive a separate reminder**

If you already hold a vehicle license and your license is due for renewal your renewal date will appear on the paper counter part of your license, you will not receive a separate reminder. Please allow sufficient time before expiry when booking your appointment with the Council; leaving it to the latter part of the month may result in your application not being processed in time. It is the license holder's responsibility to apply to renew the license in time.

Any vehicle must be first MOT tested before a request for an appointment is made with the Council. The cost of this test is not included in the license application fee, neither are the costs included for the periodical tests. This does not apply to newly registered vehicles with less than 500 miles on the odometer.

Any vehicle MOT, **or Vehicle assessments** failures at any time will require retesting at the applicant's expense. It is the license holder's responsibility to ensure that your vehicle is safe at all times and therefore a vehicle should not fail when presented to be tested.

Payment for the application must be made at the time of submitting the application and supporting documentation. A receipt will be provided. No application will be progressed until:

- The application is completed in full
- MOT test showing a pass is enclosed with proof that all mechanical/safety advisories have been rectified. **Such a test must have been completed no more than 28 days before the application is received by the Council.**
- Insurance documents are enclosed (your insurance document must specify that it is insured to convey passengers for reward) Hackney Carriages require 'Public Hire' on insurance. Private Hire vehicles require 'For hire and reward'
- V5 registration document is enclosed or New Keeper Supplement along with letter headed sales receipt should the vehicle have been recently acquired
- Any other supporting documentation required must be submitted to the Council with the appropriate fee.

- A vehicle compliance inspection has been completed by the Councils authorised Officers.

Procedure for vehicles leased by a hire company:

- The vehicle(s) in question will be licensed in the driver's name; however, the V5 can show the company name
- Must have a signed hire agreement between company and driver
- The Council will not accept fleet insurances, all insurance certificates must show the relevant drivers name for the vehicle(s) in question.
- Should the driver of a vehicle(s) change, the Council must be informed in writing and have a new hire agreement showing new driver details – this must be done before the new driver has the vehicle
- Should any of the above be breached or not adhered to, the licence will be revoked.

Provided you have evidenced that your vehicle meets the required standards you will be issued a license and plates.

The external plate must be attached securely to the rear exterior of the vehicle and the internal plate must be affixed **to the front top left of the windscreen (passenger side)** with the details facing inwards.

Once the vehicle is licensed only a person holding a driver's license issued by the Council will be permitted to drive the vehicle.

VEHICLE LICENCE CONDITIONS

PRIVATE HIRE VEHICLES

1.1 GENERAL

- A. All vehicles must be less than 6 years old at first licensing.
- B. All new vehicles licensing grants must meet the requirements as per Appendix G
These vehicles must also have functioning start/stop technology unless the vehicle is powered entirely by electric or Hydrogen.
- C. Existing licensed vehicles cannot have their licence transferred to a higher polluting vehicle (for example, a D.V.L.A. Cat 6 electric vehicle cannot be replaced with a D.V.L.A. Cat 5 Hybrid vehicle) and will not have their licences extended past the vehicle being 10 years old (from first being registered at the DVLA).
- D. Vehicles modified to use a different fuel from which they were first manufactured, will not be licensed.
- E. The vehicle must be right hand drive.
- F. The vehicle must have at least **four wheels**, and three body-side doors for passengers with a separate means of access for the driver. Rear doors may be included in this number as long as there is unobstructed access of at least 30cms via these doors to the rear row seats; this relates to minibus type vehicles.
- G. All seats must be fitted with lap and diagonal safety belts as a minimum standard, and may face forwards or backwards, but not sideways.
- H. Backward facing seats over or behind the rear wheels and axle(s) having normal access only through a rear door will not be accepted.
- I. **Minimum access to rear seating will be 300mm**
- J. The Council follows guidelines from the Department for Transport in respect of multi-purpose vehicles (MPVs). Accordingly:
 - i) Vehicles with folding for moving seats which are constructed to provide access to other seats to which there is no direct access are acceptable, will be licensed for the same number of passengers as there are seats.
 - ii) Certain models of Vauxhall Zafira and a number of other models have a rear row of seats which under normal circumstances should only be used by children. In the interests of passenger's comfort and public safety, these vehicles will only be licensed to carry four passengers.
- K. The vehicles must have at least four road wheels, which – unless alloy – must have matching trims.
- L. All tyres must be the same dimensions unless specifically designed otherwise. Tyres **with part worn, remoulded**, embedded nails, etc., are not acceptable; they must be replaced, not repaired. **Evidence of tyres purchase may be required**. The minimum tread depth will be 2mm and wear must be even.
- M. Seats must still be fully 'sprung', free of stains, tears, cigarette burns or repair, and not threadbare. **Additional seat coverings must not cover air bag zones**. Floor coverings must not be unduly worn and present no trip hazards. Household carpeting or similar is unacceptable and must not be used. Upholstery (headlining and side panel coverings) must be free of ingrained grime, fractures and maintained in the manufacturers original style.

1.2 DIMENSIONS

- a) A row of seats provided for three persons shall be at least 1295mm (51") wide.
- b) Seats designed for two persons shall be at least 865 mm (34") wide.
- c) **A single seat should be at least 432mm (17") wide**

- d) Each seat must have a minimum height of 410mm (16") from the floor to the top of the seat, allowing for leg room, when seated.

1.3 WHEELCHAIR ACCESSIBLE LICENSED VEHICLES

- a) The Council adheres to the Equalities Act 2010 in respect of wheelchair accessible vehicles.
- b) Suitably modified 'people mover' type vehicles may be deemed acceptable for licensing. The vehicle will generally have to comply with the requirements relating to vehicles that carry 5 or more passengers. Further advice may be obtained from the Licensing team at the relevant Council.
- c) The vehicle must have a satisfactory arrangement for ramps, steps, handrails, and storage of wheelchairs. Fixing of wheelchairs must also be satisfactory. The vehicle must be capable of taking a passenger in a wheelchair, which in turn must be suitably anchored with a safety belt / harness.
- d) The dimensions for the door aperture giving access for wheelchair-based persons and the interior dimensions of the vehicle must also be acceptable to the Licensing Authority.
- e) Ramp dimensions: Single piece ramp – width 700mm (min), length 1600mm (max)
- f) Ramp gradients: Side entry: Kerb (125mm): 14 degs (max) Ground: 19 degs (max)
- g) Slip resistant surfaces: all surfaces over which a wheelchair user may travel shall have a slip resistant finish applied.
- h) Colour contrasting edge marks: a band contrasting with the remainder of the boarding ramp surface, 45mm to 55mm in width around and abutting the edge of the ramp or lift surface.
- i) Control and failsafe mechanisms or power operated equipment: power operated equipment shall only be capable of operation from a control adjacent to the ramp.
- j) Load sensors and re-cycling mechanisms for power-operated equipment: a device to stop the movement of the boarding ramp when motion is likely to cause injury.
- k) Manual override provisions for power operated equipment: a provision to repeatedly operate the equipment in the event of power failure shall be provided.
- l) Manual/portable ramp: Such ramps must have a designated stowage location which can store the equipment such that it does not present a risk of injury.

Wheelchair assessable Entrances and Exits

- a. Number and position: a minimum of 1 located on the nearside
- b. Minimum doorway width: 740mm
- c. Minimum doorway height: 1230mm

Wheelchair internal area

- a. Wheelchair areas must allow at least 305mm (12") leg room from the wheelchair frame/seat to any structure in front of the seat. There must be enough roof space to allow the wheelchair used to be seated comfortably inside the vehicle.
- b. Wheelchair spaces requirements: 1200mm length, 700mm width, 1350mm height (min).

- c. All such vehicles will be licensed for the number of non-wheelchair customers only.

2. HACKNEY CARRIAGES MUST BE CONSTRUCTED FOR THE CARRIAGE OF PASSENGERS IN WHEELCHAIRS – NEW GRANTS

- a) The Council adheres to the Equalities Act 2010 in respect of wheelchair accessible vehicles.
- b) The vehicle must have satisfactory arrangement for ramps, steps, handrails, and storage of wheelchairs. Fixing of wheelchairs must also be satisfactory.
- c) It must be capable of taking a wheelchair with passenger, suitably anchored with a safety belt / harness.
- d) The dimensions for the door aperture giving access for wheelchair-based persons must also be acceptable to the Licensing Authority.

3. STRETCH LIMOUSINES

The majority of these vehicles are imported from the USA via Belgium. In the interests of passenger safety, the Council will licence stretch limousines as long as the vehicle meets the required specification and are under six years of age from the date of first registration wherever that may have been.

4 REQUIREMENTS FOR ALL VEHICLES

4.1 LUGGAGE SPACE

A separate lockable luggage compartment shall be provided. For non-saloon vehicles, passengers must be protected from items of luggage contained in the loads space being propelled into the passenger compartment by the vehicle movement. In the case of LPG fuelled vehicles, the vehicle will not be licensed if the LPG tank adversely impacts on the load carrying capacity.

4.2 AGE AND CONDITION OF VEHICLES, AND MECHANICAL TESTING

- a) Only vehicles less than six years old, and meets the specifications listed in 1.1 B, will be considered for first-time licensing.
- b) All vehicles must have inspections carried out at an approved MOT testing centre (with the exception of newly registered vehicles with less than 500 miles on the odometer). Once licensed a vehicle will require an MOT test every 6 months. The relevant date will be printed on the vehicle licence.
- c) Vehicles over ten years of age will not be Licensed.

4.3 COLOUR, MARKINGS, SIGNS, ADVERTISEMENTS AND WINDOWS

- a) The vehicle may be any single colour but MUST NOT resemble a Hackney Carriage. Signs showing the words TAXI or CAB must not be displayed on or above roof height. Paintwork must be factory standard – no 'crackle' or 'custom' paint.
- b) The name of the company / owner and telephone number may appear on the vehicle subject to the prior approval of the Council. Third party advertising is not permitted.
- d) Glass should be kept clean to give a clear view both into and out of the vehicle. Tinted windows, and tinted window coverings, which prevent clear vision into vehicle are not permitted. Only factory fitted tinted glass will be acceptable which must meet the requirements of the Road Vehicles (Construction and Use) Regulations 1986. Under no circumstances will stick on style tinting be permitted.

4.4 EQUIPMENT

The following shall be provided: -

- a) Spare wheel and tyre – properly stowed to protect passengers' luggage.
- b) Jack.
- c) Wheel brace.
- d) Any current alternative to the above that allows the vehicle to complete the journey.
- e) Nearside and offside exterior rear-view mirrors.
- f) The standard factory exhaust system

4.5 RADIO AND AUXILLIARY EQUIPMENT

Any equipment fitted to the vehicle for operational requirements, such as two-way radio, or navigation systems must be fixed to the satisfaction of the Council. The microphone must be properly fixed to the vehicle dashboard.

4.6 DISPLAY OF INFORMATION

Every vehicle (except those with a discreet plate exemption) must have: -

- a) The plate issued by the Council displayed securely on the rear outside (and not inside the rear window).
- b) Displayed inside and visible to passengers, the smaller plate issued by the Council.
- c) Signs with the words “**This vehicle must be pre-booked**” and the Council’s name and crest. These must be displayed on both nearside and offside front doors. With the permission of the Licensing Manager the signs may incorporate the Private Hire Vehicle company’s name. **All such signs must be of a minimum dimension of 40cm in length and 20cm in width and should use a large enough lettering font for the words to be easily read from 3 metres distance, or in a font no less than 150mm in height.**
- d) At least one interior sign showing the red ‘no smoking’ **symbol***

*applies to all vehicles

4.7 MODIFICATIONS

No modifications shall be made to the standard factory-built vehicle without prior consent of the Council.

5. EXCEPTIONS

If a vehicle does not meet all of the above requirements, but is: -

- a) built to a higher standard than that which is normally acceptable for licensing, or
- b) as a result of model changes, does not fully comply with the current specification, the Licensing Manager may use discretion in deciding its suitability for use as a Private Hire Vehicle.

6. CCTV Recording Equipment

- a. Drivers are encouraged to install in Hackney Carriage Private Hire Vehicles CCTV recording equipment **for public protection purposes. The Council should be notified about CCTV installed in licensed vehicles.** CCTV recording equipment must have a hard drive which is only

accessible by an Authorised Officer of the Council or a Police Officer. Licensees must allow Authorised Officers of the Council unrestricted access to all recordings. On formal request all footage recorded must be supplied to the Licensing Authority within 72 hours of the request. Misuse of any approved installed CCTV or use of unauthorised CCTV systems will result in action being taken against the licensed driver which could ultimately result in the revocation of the driver's license. All installed CCTV must comply with the Information Commissioners CCTV Code of Practice.

- b. CCTV systems that can record audio as well as visual data must be overt (i.e. all parties should be aware when recordings are being made) and targeted (i.e. only activated when passengers (or drivers) consider it necessary). The recording of audio should be used to provide an objective record of events such as disputes or inappropriate behavior and must not be continuously active by default and should recognise the need for privacy of passengers' private conversations between themselves. Activation of the audio recording capability of a system might be instigated when either the passenger or driver operates a switch or button.
- c. Dash camera's, which only records visual footage (not audio), and records footage outside of the licensed vehicle, is recommended for all licensed vehicles, provided the recordings and equipment comply with the Information Commissioners CCTV Code of Practice

HACKNEY CARRIAGES

1.1 GENERAL

- a) All Hackney Carriages (taxis) must be white unless purpose built "London style" taxis and all new grants must be wheelchair accessible.
 - I. All new vehicles licensing grants must meet the requirements as per Appendix G These vehicles must also have functioning start/stop technology unless the vehicle is powered entirely by electric or Hydrogen.
 - II. Existing licensed vehicles cannot have their licence transferred to a higher polluting vehicle (for example, a D.V.L.A. Cat 6 electric vehicle cannot be replaced with a D.V.L.A. Cat 5 Hybrid vehicle) and will not have their licences extended past the vehicle being 10 years old (from first being registered at the DVLA).
 - III. Vehicles modified to use a different fuel from which they were first manufactured, will not be licensed.
- b) The vehicle must be right-hand drive.
- c) Must have at least 3 body-side doors for passengers with a separate means of access for the driver and excluding any rear door.
- d) All seats must be fitted with lap & diagonal safety belts as a minimum standard, and may face forwards or backwards, but not sideways. Minimum access to rear seating will be 300mms
- e) Backward facing seats over or behind the rear wheels and axle(s) having normal access only through a rear door will not be accepted.
- f) The vehicle must have at least four road wheels, which – unless alloy – must have matching trims.
- g) All tyres must be the same dimensions unless specifically designed otherwise. Tyres with embedded nails, etc, are not acceptable; they must be replaced, not repaired. The minimum tread depth will be 2mm and wear will be even.
- h) A roof sign shall be attached to the roof, which is capable of being illuminated at night. The roof sign must display the word TAXI.
- i) There must be a sign, which is capable of being illuminated at night, to indicate when the vehicle is available FOR HIRE.

1.2 DIMENSIONS

- e) A row of seats provided for three persons shall be at least 1295mm (51") wide.
- f) Seats designed for two persons shall be at least 865 mm (34") wide.
- g) A single seat should be at least 432mm (17") wide
- h) Each seat must have a minimum height of 410mm (16") from the floor to the top of the seat, allowing for leg room, when seated.

1.3 WHEELCHAIR ACCESSIBLE LICENSED VEHICLES

- m) The Council adheres to the Equalities Act 2010 in respect of wheelchair accessible vehicles.
- n) Suitably modified 'people mover' type vehicles may be deemed acceptable for licensing. The vehicle will generally have to comply with the requirements relating to vehicles that carry 5 or more passengers. Further advice may be obtained from the Licensing team at the relevant Council.
- o) The vehicle must have a satisfactory arrangement for ramps, steps, handrails, and storage of wheelchairs. Fixing of wheelchairs must also be satisfactory. The vehicle must be capable of taking a passenger in a wheelchair, which in turn must be suitably anchored with a safety belt / harness.

- p) The dimensions for the door aperture giving access for wheelchair-based persons and the interior dimensions of the vehicle must also be acceptable to the Licensing Authority.
- q) Ramp dimensions: Single piece ramp – width 700mm (min), length 1600mm (max)
- r) Ramp gradients: Side entry: Kerb (125mm): 14 degs (max) Ground: 19 degs (max)
- s) Slip resistant surfaces: all surfaces over which a wheelchair user may travel shall have a slip resistant finish applied.
- t) Colour contrasting edge marks: a band contrasting with the remainder of the boarding ramp surface, 45mm to 55mm in width around and abutting the edge of the ramp or lift surface.
- u) Control and failsafe mechanisms or power operated equipment: power operated equipment shall only be capable of operation from a control adjacent to the ramp.
- v) Load sensors and re-cycling mechanisms for power-operated equipment: a device to stop the movement of the boarding ramp when motion is likely to cause injury.
- w) Manual override provisions for power operated equipment: a provision to repeatedly operate the equipment in the event of power failure shall be provided.
- x) Manual/portable ramp: Such ramps must have a designated stowage location which can store the equipment such that it does not present a risk of injury.

Wheelchair assessable Entrances and Exits

- a) Number and position: a minimum of 1 located on the nearside
- b) Minimum doorway width: 740mm
- c) Minimum doorway height: 1230mm

Wheelchair internal area

- a) Wheelchair areas must allow at least 305mm (12”) leg room from the wheelchair frame/seat to any structure in front of the seat. There must be enough roof space to allow the wheelchair used to be seated comfortably inside the vehicle.
- b) Wheelchair spaces requirements: 1200mm length, 700mm width, 1350mm height (min).
- c) All such vehicles will be licensed for the number of non-wheelchair customers only.

4. HACKNEY CARRIAGES MUST BE CONSTRUCTED FOR THE CARRIAGE OF PASSENGERS IN WHEELCHAIRS – NEW GRANTS

- 5. The Council adheres to the Equalities Act 2010 in respect of wheelchair accessible vehicles.
- 6. The vehicle must have satisfactory arrangement for ramps, steps, handrails, and storage of wheelchairs. Fixing of wheelchairs must also be satisfactory.
- 7. It must be capable of taking a wheelchair with passenger, suitably anchored with a safety belt / harness.

8. The dimensions for the door aperture giving access for wheelchair-based persons must also be acceptable to the Licensing Authority.

3. REQUIREMENTS FOR ALL VEHICLES

3.1 LUGGAGE SPACE (GENERAL)

A separate lockable luggage compartment shall be provided. Passengers must be protected from items of luggage contained in the load space being propelled into the passenger compartment by the vehicle movement. In the case of LPG fuelled vehicles, the vehicle will not be licensed if the LPG tank adversely impacts on the load carrying capacity.

3.2.1 AGE AND CONDITION OF VEHICLES AND MECHANICAL TESTING

- a) Only vehicles less than six years old, and meets the specifications listed in Appendix C, 1.1 a, will be considered for first-time licensing
- b) All vehicles must have a vehicle compliance check carried out at a council approved centre (with the exception of newly registered vehicles with less than 500 miles on the odometer) Once licensed a vehicle will require a six-monthly MOT test.
- c) **Vehicles older than ten years old will not be licensed.**

3.3 COLOUR, MARKINGS, SIGNS, ADVERTISEMENTS AND WINDOWS

- a) The vehicle must be white unless a purpose built 'London style' taxi. All paintwork must be factory standard – no 'crackle' or 'custom' paint.
- b) The word "TAXI" must be shown on both front doors affixed to the vehicle in black block letter, **in a font 150mm high.**
- c) The name of the company / owner and telephone number may appear on the vehicle subject to the prior approval of the Council. Third party advertising is not permitted without prior approval from the Council.
- d) **A windscreen and roof sign, capable of illumination, should be fitted, displaying the words 'FOR HIRE' and 'TAXI' in black lettering against a white background.**
- e) Glass should be kept clean to give a clear view both into and out of the vehicle. Tinted windows, which prevent clear vision into vehicle, are not permitted. Only factory fitted tinted glass will be acceptable which must meet the requirements of the Road Vehicles (Construction and Use) Regulations 1986. Under no circumstances will stick on style tinting be permitted.

3.4 TAXIMETER

- a) a taximeter must be fitted to all vehicles and it must comply with the following requirements: -
 - i) be capable of being locked so that when the meter is not in use no fare is recorded.
 - ii) when in use the fare shall be displayed in clearly legible figures.
 - iii) must be fitted so that all letters and figures on the meter can be clearly visible to any person travelling in the vehicle.
 - iv) the letters and figures must be illuminated at night.
 - v) must be fixed to the vehicle with seals so that no unauthorised person can alter or tamper with the meter without the seal being broken.
 - vi) vehicles with improperly sealed meters will not be licensed. The meter must be used for all journeys including those booked through a Private Hire operator.

- vii) the Measuring Instruments (Taximeters) Regulations 2006 applies to all meters fitted

3.5 EQUIPMENT

The following must be provided: -

- a) a spare wheel and tyre – properly stowed to protect passengers' luggage.
- b) a jack.
- c) Any current alternative to the above that allows the vehicle to complete the journey.
- d) nearside and offside exterior rear-view mirrors.
- e) standard factory exhaust system.
- f) Wheelchair accessible vehicles; ramps, securing straps and other associated items.

3.6 RADIO AND AUXILLIARY EQUIPMENT

Any equipment fitted to the vehicle for operational requirements, such as two-way radio, or navigation systems must be fixed to the satisfaction of the Council. Any microphone must be properly fixed to the vehicle dashboard.

3.7 DISPLAY OF INFORMATION

Every vehicle must have: -

- a) the plate issued by the Council displayed securely on the outside rear (and not inside the rear window).
- b) the smaller plate issued by the Council displayed inside and visible to passengers.
- c) At least one sign showing the red 'no smoking' symbol prominently displayed.
- d) Door signs on nearside and offside front doors displaying the word "TAXI" **in a font no less than 150mm in height.**

3.8 MODIFICATIONS

No modifications shall be made to the standard factory-built vehicle without prior consent of the licensing authority.

4. EXCEPTIONS

If a vehicle does not meet all of the above requirements, but is: -

- a) built to a higher standard than that which is normally acceptable for licensing, or
- b) as a result of model changes, does not fully comply with the current specification, the Licensing Manager may use discretion in deciding its suitability for use as a Hackney Carriage.

5. CCTV Recording Equipment

- a. Drivers are encouraged to install in Hackney Carriage Private Hire Vehicles CCTV recording equipment **for public protection purposes. The Council should be notified about CCTV installed in licensed vehicles.** CCTV recording equipment must have a hard drive which is only accessible by an Authorised Officer of the Council or a Police Officer. Licensees must allow Authorised Officers of the Council unrestricted access to all recordings. On formal request all footage recorded must be supplied to the Licensing Authority within 72 hours of the request. Misuse

of any approved installed CCTV or use of unauthorised CCTV systems will result in action being taken against the licensed driver which could ultimately result in the revocation of the driver's license. All installed CCTV must comply with the Information Commissioners CCTV Code of Practice.

- b. CCTV systems that can record audio as well as visual data must be overt (i.e. all parties should be aware when recordings are being made) and targeted (i.e. only activated when passengers (or drivers) consider it necessary). The recording of audio should be used to provide an objective record of events such as disputes or inappropriate behavior and must not be continuously active by default and should recognise the need for privacy of passengers' private conversations between themselves. Activation of the audio recording capability of a system might be instigated when either the passenger or driver operates a switch or button.
- c. Dash camera's, which only records visual footage (not audio), and records footage outside of the licensed vehicle, is recommended for all licensed vehicles, provided the recordings and equipment comply with the Information Commissioners CCTV Code of Practice

Right of appeal

Nothing in these conditions will remove the right to appeal to a Magistrates' or Crown Court against the Council's refusal to grant or renew a licence, or any decision to suspend or revoke a licence, nor against any conditions which may have been imposed on any such licence by the Council under Section 7 of the Public Health Act 1907.

Appendix D

Operator Application Process and Conditions

The Application Process

Hackney Carriage / Private Hire Vehicle drivers licensed with the Council are not required to undergo an additional Disclosure Barring Service check in order to apply for an operator's licence. Operator licence holders must be subscribed to the DBS Online Update Service and when applying for a new operator licence or the renewal of an existing operator licence. The Council will check the status of DBS records online as part of the application process.

Applicants for an operator licence who do not hold a Hackney Carriage / Private Hire Drivers licence issued by Council will be required to submit a Standard DBS Certificate as part of the application. Applicants should contact the Licensing Authority to apply for a Standard DSB Certificate, a charge will be applicable.

If you already hold an operator licence and your licence is due for renewal the renewal date will appear on the paper counter part of the licence; you will not receive a separate reminder. Please allow sufficient time before expiry when booking your appointment with the Council leaving it to the latter part of the month may result in your application not being processed in time. It is the licence holder's responsibility to apply to renew a licence in time. Failure to renew in time could result in your business ceasing to operate until such time as the new licence is granted.

If you are a new operator wishing to apply for a licence to operate Private Hire vehicles, please visit www.cherwell-dc.gov.uk to download an application form. Alternatively, you can email licensing@cherwell-dc.uk to request a copy be emailed to you.

Applicants for an operator licence must complete in full the relevant application form and make an appointment with the Council.

Payment for the application must be made at the time of submitting the application and supporting documentation. A receipt will be provided. No application will be progressed until:

- The application is completed in full
- Either a Standard Disclosure Barring Certificate is provided or confirmation that the applicant is subscribed to the DBS Update Service
- A full list of all vehicles you intend to operate
- Proof of identity – a passport or driving licence photocard
- Proof of National Insurance number
- Proof of right to work in the UK
- Public liability insurance
- A HM Revenue and Customs (HMRC) tax check code

Please note that as part of the application process the Council's licensing team will consult the Council's planning team. The planning team has 14 days in which to make any comments in respect of the application.

Operator License Conditions

1. Records

Private Hire Vehicle operators must keep records in accordance with the Local Government (Miscellaneous Provision) Act 1976.

The records kept by the operator under Section 56 Local Government (Miscellaneous Provisions) Act 1976 must be kept in a manner, whether written or on a computer, which enables examination and/ or audit. Written records must be kept in a bound book.

In all cases, all records must be kept for at least three years, and made available to an Authorised Licensing Officer or police officer within the time specified.

If an operator uses a computerised record system, hard copies of all records must be printed and kept in accordance with the above at the end of each daily working period.

All computerised systems must be checked regularly for time accuracy (this can easily be done online at <http://www.greenwichmeantime.co.uk/>)

Records to be kept: -

- Vehicle details
- Make and model
- Registration number
- Vehicle owner
- Council plate number
- Fleet number/call-sign (if issued). If a call sign or number is allocated for a temporary period, a record must be kept of the relevant dates and the vehicle and driver concerned
- Copy of the vehicle licence
- Copy of the insurance certificate / cover note
- Copy of the vehicle's most recent MOT certificate.

Driver details

- Name
- Address
- Council Hackney Carriage / Private Hire Vehicle driver licence number
- Copy of the Hackney Carriage / Private Hire Vehicle driver licence.

Employee details:

- Employee register recording the full name and address of all operators/dispatch employees.
- Employee register must record the certificate number and date of issue of a basic DBS report, and any comments from the operator regarding that report (for example no offence/no relevant offences).
- Records of employee Basic DBS report having been checked by the employer/operator at least every three years, by recording the new report certificate number, date and comments.
- Operators must record any offences disclosed by the employee following the receipt of a Basic DBS report/certificate.

2. Bookings

General

Before the commencement of each journey, the operator (or in his/her absence, a responsible member of staff) must enter either in a bound book or on a computer system, the particulars of every booking of a Private Hire Vehicle accepted. The bookings must follow the following format:

- the name of the passenger/hirers full name;
- the time of the request;
- the pick-up point;
- the destination;
- the full name of the driver;
- the driver's licence number;
- the vehicle registration number of the vehicle;
- the name of any individual that responded to the booking request;
- the name of any individual that dispatched the vehicle

Example: -

Passenger/Hirer Full name	Date & Time Requested	Pick-up location	Pick-up date/time	Destination	Drivers full name	Drivers licence number	Vehicle registration	Vehicle licence number	Name of operators booking employee	Name of operators dispatching employee

All such booking should be retained for a minimum period of six months. Private hire vehicle operators have a duty under data protection legislation to protect the information they record. The Information Commissioner's Office provides comprehensive on-line guidance on registering as a data controller and how to meet their obligations.

Computerized systems (e.g. Diplomat, Autocab, Avakia, or others)

When a computerized system with GPS tracking is installed – and where the software allows this function – it must be used to indicate where a vehicle is at any given time. In addition, a printed plot of a vehicle's movements must be made available on request.

3. Insurance

The operator must keep a copy of all cover notes and certificates of insurance issued to the drivers/proprietors. The dates shown on such documents must show continuation of cover throughout the period that the vehicle is working in connection with the operator. When a "block" policy is held by the operator, a full list of all vehicles and drivers covered should be kept for at least one year. The insurance document should show:

- (a) name and address of insurance company (and broker if applicable) insuring the use of the vehicle;
- (b) date of commencement of any policy of insurance and of any cover notes issued with policy and cover note numbers relating to the use of the vehicle;
- (c) date of expiry of the policy and of any cover notes issued;
- (d) persons entitled under the terms of the policy to drive the vehicle and details of any limitations as to use (e.g. private hire or public hire).

4. Standard of Service

The operator must at all reasonable times provide a prompt, efficient and reliable service to members of the public and shall in particular ensure that: -

- a) when a vehicle has been hired to attend at an appointed time and place, the vehicle shall attend punctually unless delayed or prevented by sufficient cause. Where possible, the operator should contact the customer and inform him/ her of any delay;
- b) premises provided by the operator, either for waiting or booking, shall be kept clean, adequately heated, ventilated and well-lit with adequate seating provided;
- c) any telephone facilities and radio equipment are maintained in a sound condition;
- d) any complaints received by the operator shall be referred in writing to the Council, together with any action taken;

The operator shall ensure, without prejudice to any other liabilities imposed under the Local Government (Miscellaneous Provisions) Act 1976 that all vehicles and drivers owned, controlled, or operated in association with the operator shall observe and perform the conditions of their license.

All vehicles operated by the operator shall be maintained in a satisfactory and road worthy condition.

Additionally: -

- the Council will hold the owner and / or operator of a Private Hire Vehicle responsible for the general condition and roadworthiness of the vehicle(s), and for ensuring that drivers are familiar with all conditions, legislation and byelaws regulating the operation of vehicles.

- in certain instances, therefore the owner and / or operator may be subject to enforcement action as a result of an offence committed by the driver of their vehicle.
- the Council will take into account the circumstances of any offence and the compliance of the owner and / or operator with their obligations in deciding the action, if any, which should be taken against the owner and / or operator.

5. Reference to the Council

The operator must inform the Council in writing within 7 days of: -

- a) any convictions, **verbal or written** cautions/reprimands/warnings, civil actions, arrests, **interactions with official bodies or Authorities**, any bail period incurred by him or any partner, director, or company secretary during the period of the licence for any offence.
- b) change of address, both business and personal in writing, within 7 days.
(Note: It is your responsibility to ensure that your address is also changed on your driving licence, insurance documents and V5).
- c) **Any relevant offences which may come to light, with regards to their employees/dispatching operators. Such notification should include details of the actions taken by the licensed operator.**

It is also in the interests of an operator to inform the Council if s/he is stopping work for any length of time, especially if it is likely to affect the date of license renewal.

6. Driver / vehicle licenses

It is the operator's responsibility to ensure licenses for all drivers and vehicles working for and being used by the operator are current.

7. Complaint Book

In relation to condition 4(d) above, each operator must keep in a bound book approved by the Council, a record of all complaints made to him/ her or his/ her agents or managers relative to any aspect of the operator's business or persons at that time working with or employed by that operator. The complaint book shall be available at all times for inspection by an Authorised Licensing Officer.

8. Door Signs/Advertisements

Should an operator wish to provide drivers/proprietors with door advertising panels (other than those issued by the Council) the below procedure must be followed: -

- a) the sign must be approved by an Authorised Licensing Officer before being put into use;
- b) the sign must be displayed on both front doors of the vehicle;
- c) the sign may contain the name of the company and the telephone number but must incorporate the words, **'Cherwell District Council. Private Hire Vehicle. This vehicle must be pre-booked.'**
- d) the sign must not show the word 'TAXI' or nor any other word of similar meaning or appearance which may be taken to indicate that the vehicle is a Hackney Carriage.
- e) **Door signs must meet the requirements specified in Appendix C, 4.6 c.**

9. Planning consent for operating base

The Council's current planning policy allows one car to be operated without planning permission. Any more than one car would require an application for change of use of the premises. Planning consent for each operating base must be maintained during the period of a license.

10. Change of circumstances

Any material change of the circumstances since the license was granted must be reported to the Council immediately. This includes any changes to drivers or vehicles which must be notified to an Authorised Licensing Officer in writing within 48 hours.

11. General Conduct

During the course of business operators must not cause a nuisance to individuals or other businesses. **No licensed vehicles may park on the Highway outside a Licensed Operators Office, unless picking up, or dropping of a paying customer, in such cases a maximum of 2 vehicles can be in attendance at the business address at any one time.**

12. Sub-contracting

Operators may outsource booking and dispatch functions, but they cannot pass on the obligation to protect children and vulnerable adults. Operators are required to evidence, by documentation, that comparable protections are applied by the company to which they outsource these functions. Such documentation must be made available to authorised officers upon request.

- Any private hire operator making provision for the invitation or acceptance of bookings in Cherwell needs to hold a private hire operator's licence with Cherwell. The Council expects Operators licensed by the Council to utilise vehicles and drivers licensed by Cherwell so as to ensure that the licensed trade working in Cherwell conform to the standards set by the Council and can be subject of local compliance.
- In addition, as part of the Council's 'fit and proper' test, it would not expect an operator to obtain a licence in Cherwell to simply make vehicles licensed by another authority available for booking via sub-contracting on a regular basis. As such whilst any licensed vehicle may enter Cherwell to pick up or drop off customers, the Council would not expect vehicles licensed outside of Cherwell to be waiting in Cherwell and be made available for bookings as this diminishes the Council's ability to set local standards and local control. As such, any Operator acting to deliberately reduce the Council's ability for local control would not be meeting the required public safety objectives and standards expected of a professional, licensed, fit and proper private hire operator, and may have their licence to make provision to invite or accept bookings in Cherwell revoked.

By way of guidance, the Council would expect at least 75% of journeys received by a Cherwell licensed operator commencing or finishing in Cherwell in a 3-month period to be completed by Cherwell licensed private hire vehicles (or Cherwell licensed hackney carriage vehicles completing pre-booked work).

FAILURE TO COMPLY WITH THE CONDITIONS SET OUT IN THIS DOCUMENT MAY RESULT IN PENALTY POINTS BEING AWARDED AGAINST YOU, LEGAL ACTION BEING TAKEN, OR YOUR LICENCE BEING SUSPENDED OR REVOKED

13. Right of appeal

Nothing in these conditions will remove the right to appeal to a Magistrates' Court against the Council's refusal to grant or renew a license, or any decision to suspend or revoke a license, nor against any conditions which may have been imposed on any such license by the Council. Any appeal must be made to the relevant Magistrates' Court within 21 days of the refusal or decision.

Hackney Carriage and Private Hire Driver Penalty Points Scheme

Introduction

Points based enforcement is a method by which licensed drivers, operators or owners can be issued with points against their Council issued Hackney Carriage/ Private Hire Drivers or Operator License by authorised licensing officers of the Council. Points would be used for less serious breaches of a license condition or legislative provision. The issuing of points formalises the Council's previous practice of issuing warnings. The aim is to encourage license holders to comply with license conditions and legislation and to behave in an acceptable manner at all times, thereby improving the professionalism and reputation of the licensed vehicle trade. The points system operates in addition to all existing enforcement options and has regard to the principles of the Council's overarching 'Enforcement Policy' and the Regulators Code.

1. The points system aims to provide a fast and efficient way of dealing with lesser breaches of license conditions or primary legislation. License holders who habitually disregard the less serious aspects of the licensing regime will accumulate points. Points will be issued according to a scale developed by the Council as part of the scheme. Points will accumulate on a license until a trigger level is reached, at which time the license holder could be subject to more formal sanctions including the suspension or revocation of his/her license.
2. The points will be administered by an authorised licensing officer and recorded on the Council's licensing database. The points system will be used for less serious offences which would not normally trigger more formal enforcement action in the first instance and which are resolved by the license holder after it is brought to his/her attention. The points system will help provide an open and transparent method of how a license holder will be assessed in terms of the 'fit and proper person' test.
3. Points will remain on a license for between 12 and 36 months from the date of issue depending on the seriousness of the offence. **When a license is issued 12 points or more in a 12-month period that license may be suspended for a period not exceeding 28 consecutive days in the first instance, thereafter that license may be suspended for a period not exceeding 3 months.**
4. Where a license holder accumulates the trigger level of penalty points (**namely 12 point in a 12-month period**) more than once in any three-year period, the Council will decide whether a license should be suspended or revoked if it is considered that the accumulation of points indicates that the license holder is no longer a 'fit and proper person' to hold a license. Each case will be considered on its own merits.
5. Points can be issued at the roadside or at the Council's offices by authorised licensing officers. Points issued to a license holder will be confirmed in writing within ten working days from the contravention or at the conclusion of an investigation into a complaint.
6. The Council may cancel penalty points issued to a license holder and take more

formal enforcement action if additional information becomes available subsequent to the issuing of points which the Council considers increases the severity of the offence to a level beyond that which can be sanctioned by way of penalty points.

7. The penalty points system will operate without prejudice to the Council's ability to take alternative enforcement action as provided for by the Private Hire and Hackney Carriage Licensing Policy and/or legislation.

Penalty points system for Hackney Carriage/Private Hire drivers & Private Hire operators

	Offence/breach of condition	No. of pts	Dvr	Op		Offence/breach of condition	No. of pts	Dvr	Op
1	Driver not holding a current Hackney Carriage/Private Hire driver licence	12*	✓	✓	15	Failure to notify transfer of Private Hire or Hackney Carriage licence within 14 days	4*	✓	✓
2	Failure to notify the Council of change of address within 7 calendar days	3*	✓	✓	16	Failure to provide information on vehicle garaging arrangements	3	✓	✓
4	Touting/illegally plying for hire	12*	✓	✓	17	Using a non-approved taximeter	6	✓	✓
5	Using unlicensed vehicle or vehicle without insurance	12*	✓	✓	18	Unsatisfactory behaviour or conduct of driver	3-12	✓	
6	Failure to produce documents within timescale, when requested to do so	4*	✓	✓	19	Failure to display "taxi" or 'Hire' signs, on a Hackney Carriage roof or windscreen, and/or faults preventing illumination of such signs	4*	✓	
7	Vehicle in unsatisfactory condition inside or out	4	✓	✓	20	Driver not holding a current DVLA licence	12	✓	✓
8	Failure to produce vehicle for a compliance inspection when required	4*	✓	✓	21	Failure to wear driver's badge	4*	✓	
9	Using a vehicle subject to a prohibition/suspension order	12	✓	✓	22	Failing to notify change of medical circumstances	6	✓	
10	Using a vehicle for which the licence has been suspended or revoked	12*	✓	✓	23	Failure to return driver's badge within 7 days of being requested to do so	4*	✓	✓
11	Failure to report within 72 hours an accident or damage to a licensed vehicle	3	✓	✓	24	Failure to return vehicle licence plate within 7 days of being requested to do so	4*	✓	
12	Overloading of licensed vehicle (including exceeding the licensed number of passengers)	6*	✓		25	Failure to notify the Council of any motoring or criminal convictions, interactions with authorities, cautions etc during period of current licence (Appendix A, 4.3.4)	6-12	✓	✓
13	Failure to display external or internal licence plate or door sign as required (including not attaching plate in suitable manner)	4*	✓		26	Providing false/misleading information on application form, or failing to provide relevant information	6-12*	✓	✓
14	Carrying an offensive weapon in the vehicle	4-12	✓		27	Any other offence not outlined above namely	3-12	✓	✓

Notes:

General

- Those items marked with an asterisk (*) are direct contraventions of the Local Government (Miscellaneous Provisions) Act 1976 or other legislation and may result in prosecution in addition to any points penalty imposed.
- Ticks (✓) indicate potential recipients of penalty points for infringements may result in both driver and operator receiving penalty points.
- Where there is a range in points available an Authorised Licensing Officer has the discretion to award the number of points according to the severity of the breach.
- Points generally remain on the driver's file for a period of 12 months from the date of issue.
- Points awarded for more serious offences (in **bold** print) **may** remain on the driver's file for a period of 36 months.
- Any driver or operator awarded points **resulting in a licences suspension or revocation has a right to appeal to the Magistrates Court within 21 days.**

Drivers

- On accumulation of 12 or more points in a rolling 12-month period, a driver will be subject of a recommendation to suspend his/her licence.
- For drivers on the first occasion of an accumulation of 12 points, the recommendation would be suspension for 28 consecutive days.
- For drivers on the second occasion of an accumulation of 12 points, the recommendation would be **for a licences suspension period not exceeding 3 months or the revocation of licence.**

Operators

- On accumulation of 24 or more points in a rolling 12-month period, an operator will be subject to a recommendation to suspend his/her licence.
- For an operator on the first occasion of an accumulation of 24 points, the recommendation would be suspension of the operator's licence for 28 consecutive days.
- For an operator on the second occasion of an accumulation of 24 points, the recommendation would be **for a licence suspension period not exceeding 3 months or the revocation of licence.**

Guidance

- Once a suspension has been served, all points will be removed.
- Any driver or operator subject to suspension or revocation has a right to appeal to the Magistrates' Court within 21 days of the decision.
- Suspensions and revocations will not be implemented until the 21-day appeals period has elapsed; however, suspensions on public safety grounds will take immediate effect.

The National Register of Refusals and Revocations (NR3 Register)

Requests for information, disclosure of information, and use of information as a result of an entry on National Register of Refusals and Revocations (NR3)

In this policy, the 'first authority' refers to a licensing authority which made a specific entry onto the National Register of Refusals and Revocations; the 'second authority' refers to a licensing authority which is seeking more detailed information about the entry.

I. Overarching principles

This policy covers the use that this authority Cherwell District Council will make of the ability to access and use information contained on the National Register of Taxi Licence Revocations and Refusals (NR3). The NR3 contains information relating to any refusal to grant, or revocation of, a taxi drivers' licence¹. This information is important in the context of a subsequent application to another authority for a drivers' licence by a person who has had their licence refused or revoked in the past.

This authority Cherwell District Council has signed up to the NR3. This means that when an application for a taxi drivers' licence is refused, or when an existing taxi drivers' licence is revoked, that information will be placed upon the register.

When an application for a new drivers' licence, or renewal of an existing drivers' licence is received, this authority Cherwell District Council will make a search of the NR3. The search will only be made by an officer who has been trained in the use of the NR3 and who is acting in accordance with this policy. If details are found that appear to relate to the applicant, a request will be made to the authority that entered that information for further details.

Any information that is received from any other authority in relation to an application will only be used in relation to that application, and the determination of it, and will not be used for any other purpose. Any data that is received will only be kept for as long as is necessary in relation to the determination of that application. This will include the period of processing that application, making a decision, notifying the applicant of the outcome of that decision, and the appeal processes.

For the avoidance of doubt, any such data will be kept for a period of no more than 35 days from the date of the service of the written notification of the determination of the application².

¹ Throughout this policy reference is made to 'taxi drivers' licence.' This generic term covers a hackney carriage drivers' licence, a private hire drivers' licence and a combined/dual licence.

² The appeal period is 21 days from the date on which the written notification of the decision was received by the applicant/licensee. An appeal must be lodged within that time period, and no extension of that period is permissible (see *Stockton-on-Tees Borough Council v Latif* [2009] LLR 374). However, to ensure that the information is available if an appeal is lodged and there is a dispute over time periods, a period of 35 days is specified.

Where an appeal to the magistrates' court is made, the data will be retained until that

appeal is determined or abandoned. Where the appeal is determined by the magistrates' court, there is a further right of appeal to the Crown Court. In these circumstances, the data will be retained for a period of no more than 35 days from the date of the decision of the magistrates' court. If an appeal is made to the Crown Court, the data will be retained until that appeal is determined or abandoned. Where the appeal is determined by the magistrates' court or the Crown Court, it is possible to appeal the decision by way of case stated³. Accordingly, the data will be retained for a period of no more than 35 days from the date of the decision of the Crown Court (if the decision was made by the magistrates' court, the retention period has already been addressed). If an appeal by way of case stated is made, the data will be retained until all court proceedings relating to that appeal by way of case stated (which will include potential appeals to the Court of Appeal and Supreme Court) have been determined⁴.

The data will be held securely in accordance with this authority's Cherwell District Council general policy on the secure retention of personal data. At the end of the retention period, the data will be erased and/or destroyed in accordance with this authority's Cherwell District Council general policy on the erasure and destruction of personal data.

II. Making a request for further information regarding an entry on NR3⁵

When an application is made to this authority Cherwell District Council for the grant of a new, or renewal of, a taxi driver's licence, this authority Cherwell District Council will check the NR3.

This authority Cherwell District Council will make and then retain a clear written record⁶ of every search that is made of the register. This will detail:

- the date of the search;
- the name or names searched;
- the reason for the search (new application or renewal);
- the results of the search; and
- the use made of the results of the search (this information will be entered to the register at a later date).

³ Any appeal by way of case stated must be lodged within 21 days of the decision of either the magistrates court or the Crown Court (see The Criminal Procedure Rules R35.2). To ensure that the information is available if an appeal is lodged by way of case stated and there is a dispute over time periods, a period of 35 days is specified.

⁴ Decisions of the local authority, magistrates' Court and Crown Court are also susceptible to judicial review. Generally, any right of appeal should be exercised in preference to judicial review, but there are occasions when leave has been granted for judicial review in the circumstances. Any application for judicial review must be made "promptly; and in any event not later than 3 months after the grounds to make the claim 1st arose" (see The Civil Procedure Rules R54.5). If an application for judicial review is made after any relevant data has been destroyed, this authority will request the information again and then retain that information until all court proceedings relating to that judicial review (which will include potential appeals to the Court of Appeal and Supreme Court) have been determined.

⁵ This section of the template policy relates to the submission of a request by the second authority.

⁶ This can be electronic, rather than "pen and paper" hard copy.

This record will not be combined with any other records (i.e. combined with a register of licenses granted) and will be retained for the retention period of 25 years.

If this authority Cherwell District Council discovers any match (i.e. there is an entry in the register for the same name and identifying details) a request will be made to the authority that entered those details (the first authority) for further information about that entry. That request will also include details of this authority's Cherwell District Council data protection policy in relation to the use of any data that is obtained as a result of this process.

This request will be made in writing in accordance with the form at Appendix F(a) of this policy. It will be posted or emailed to the contact address of the authority that entered those details (the first authority) which will be detailed in the register.

III. Responding to a request made for further information regarding an entry on NR3⁷

When this authority Cherwell District Council receives a request for further information from another authority a clear written record will be made of the request having been received.

This record will not be combined with any other records (i.e. combined with a register of licenses granted) and will be retained for the retention period of 25 years⁸.

This authority Cherwell District Council will then determine how to respond to the request. It is not lawful to simply provide information as a blanket response to every request.

This authority Cherwell District Council will conduct a Data Protection Impact Assessment. This will consider how the other authority (the second authority) will use the data, how it will store that data to prevent unauthorised disclosure, the retention period for that data, and the mechanism for erasure or destruction of the data at the end of that period. It is expected that if the second authority has adopted a policy similar to this, that should be a reasonably straightforward process.

If this authority Cherwell District Council is satisfied that the other authority's (the 2nd authority) data protection procedures are satisfactory, consideration will then be given as to what information will be disclosed⁹. This will be determined by an officer who has been trained to discharge this function.

Any disclosure must be considered and proportionate, taking into account the data subjects' rights and the position and responsibilities of a taxi driver. Data is held on the NR3 register for a period of 25 years, but this authority Cherwell District Council (the 1st authority) will not disclose information relating to every entry. Each application will be considered on its own merits.

⁷ This section of the template policy relates to the handling by the first authority of a request for information by the second authority.

⁸ This record can be combined with the written record of the action taken as a result of the request.

⁹ If the 1st authority is not satisfied that the 2nd authority's data protection policy is satisfactory, no disclosure can be made. In such circumstances it is essential that discussion takes place as a matter of urgency between the data protection officers of the 1st authority and the 2nd authority.

This authority Cherwell District Council will disclose information relating to a revocation or refusal to grant a drivers' licence in accordance with the timescales contained within the 'Cherwell District Council guidance on determining the suitability of applicants and licensees in the hackney and private hire trades'.

Where the reason for a refusal to grant or a revocation relates to a conviction which is within the timescales determined in those guidelines, there is a presumption that the information will be disclosed. Where the reason for a refusal to grant or a revocation relates to a conviction which is outside the timescales determined in those guidelines, there is a presumption against disclosure of the information. However, in every case consideration will be given to the full circumstances of the decision and there may be occasions where information is provided or withheld otherwise than in accordance with the presumptions above.

Any information about convictions will be shared in accordance with this policy under part 2 of scheduled 1 to the Data Protection Act (DPA) 2018; that is, the processing is necessary for reasons of substantial public interest in connection with the exercise of a function conferred on the authority by an enactment or rule of law.

The officer will record what action was taken and why. This authority Cherwell District Council will make and then retain a clear written record¹¹ of every decision that is made as a result of a request from another authority. This will detail:

- the date the request was received
- how the data protection impact assessment was conducted and its conclusions
- the name or names searched
- whether any information was provided
- if information was provided, why it was provided (and details of any further advice obtained before the decision was made)
- if information was not provided, why it was not provided (and details of any further advice obtained before the decision was made) and
- how and when the decision (and any information) was communicated to the requesting authority. This record will not be combined with any other records (i.e. combined with a register of licenses granted) and will be retained for the retention period of 25 years

iv. Using any information obtained as a result of a request to another authority

When this authority Cherwell District Council receives information as a result of a request that has been made to another authority, it will take that information into account when determining the application for the grant or renewal of a taxi drivers' licence. This will be in accordance with the usual process for determining applications contained in 'Cherwell District Council guidance on determining the suitability of applicants and licensees in the hackney and private hire trades'.

¹¹ This can be electronic, rather than "pen and paper" hard copy.

This authority Cherwell District Council will make and then retain a clear written record of the use that is made of the results of the search (this information will be added to the register detailed above).

Information that is received may warrant significant weight being attached to it, but it will not be the sole basis for any decision that this authority Cherwell District Council will make in relation to the application.



Requestor NR3 Information Disclosure Form (Fa)

This form is submitted following a search of the National Register of Refusals and Revocations (NR3).

(For completion by requestor authority)

Name of licensing authority requesting information: Cherwell District Council

Requestor authority reference number:

Name of licensing authority from which information is sought:

..... Name of individual in respect of whom the request is made:

..... Decision in respect of which the request is made: Refusal /

revocation Other details for this record:

Address:

Driving licence #:

..... NI #:

Reference number:

Declaration by requesting authority:

The authority hereby confirms that this information is being sought in connection with the exercising of its statutory function to ensure that holders of taxi / PHV licences are fit and proper persons, and that the processing of this data is therefore necessary in the performance of a task carried out in the public interest.

The information provided below will only be processed, used and saved by the authority in connection with this particular application and in accordance with all relevant data and privacy requirements, as previously advised by the authority to applicants for and existing holders of taxi and PHV licenses, and will be retained in accordance with the Authority's retention policy relating to the provision of such information.

To enable the authority to conduct a data protection impact assessment, details of this authority's policy in relation to the use of information obtained as a result of this request can be obtained at Licensing@Cherwell-DC.gov.uk

All data processing and sharing undertaken by this authority on the NR3, and with individual authorities in regard to entries on the NR3 will be undertaken in accordance with the Data Protection Act (DPA) and the General Data Protection Regulations (GDPR). The legal basis for processing this information is that it is necessary for the performance of a task carried out in the public interest or in the exercise of official authority vested in the licensing authority – that is, assessing whether an individual is a fit and proper person to hold a hackney carriage or PHV licence. It is not intended that any NR3 data will be transferred out of the United Kingdom.

If you wish to raise any issue related to the data protection legislation, including by relying on any of the rights afforded to data subjects under the GDPR, You may contact our data protection and information security officer by emailing informationgovernance@cherwell-dc.gov.uk

or by post.

The Information Governance Team

Cherwell District Council, Bodicote House, Bodicote, Banbury, Oxfordshire. OX15 4AA

Signed:

Name:

Position:

Date:

Requestor NR3 information disclosure form

(For completion by providing authority)

Further information to support the decision recorded on NR3 in respect of the above-named individual

Declaration by providing authority

The authority hereby confirms that it has conducted a data protection impact assessment.

It also confirms that the information above is accurate and has been provided after thorough consideration by the authority as to the proportionality and lawfulness of making this disclosure. The information reflects the basis on which the decision recorded in the National Register of Refusals and Revocations was made. In the event that the authority becomes aware that this information is no longer accurate, we will advise the above-named authority accordingly.

The authority also confirms that, as part of the basis for securing, retaining, or applying for a taxi / PHV licence, the above-named individual has been made aware of to the fact that this information will be shared, in accordance with all relevant data and privacy requirements

Signed:

Name:

Position:

Date:

Vehicle Emission Standards

Cherwell District Council has previously declared a climate emergency and is now working to support the district to become a carbon net zero area. Over the life of this policy, we will work in partnership with neighbouring authorities and other partners to improve the infrastructure for both electric and hydrogen vehicles. The Euro emissions standards aim to reduce the levels of harmful exhaust emissions, these include: Nitrogen oxides (NOx), Carbon monoxide (CO), Hydrocarbons (HC), Particulate matter (PM).

As well as damaging our climate these pollutants can harm our lungs and worsen chronic illnesses, such as asthma, lung and heart disease. Therefore, our proposals are as follows:

	Hackney Carriage and Private Hire Vehicles	
	Renewal	New Grants
Date Policy Adopted	All HCV must meet minimum Euro 4 emission standard	Ultra Low Emission Vehicles including Hydrogen Vehicles Petrol Hybrid Euro 5+
1st March 2024	Ultra Low Emission Vehicles including Hydrogen Vehicles Petrol Hybrid Euro 5+ Petrol Euro 6 (Any vehicle registered from 1st Sept 2014 onwards) Diesel Euro 6 (Any vehicle registered from 1st Sept 2014 onwards) <i>Please note the above category vehicles will only have licenses renewed until the 28th February 2033 without exception.</i>	Petrol Euro 6 (Any vehicle registered from 1st Sept 2014 onwards) Diesel Euro 6 (Any vehicle registered from 1st Sept 2014 onwards) <i>*Any replacement vehicle whether temporary or permanent must meet ULEV standards or meet the same level of vehicle emission standards or better than the vehicle that is being replaced.</i>
1st March 2030	Ultra Low Emission Vehicles including Hydrogen Vehicles Petrol Hybrid Euro 5+ Petrol Euro 6 (Any vehicle registered from 1st Sept 2014 onwards) Diesel Euro 6 (Any vehicle registered from 1st Sept 2014 onwards) <i>Please note the above category vehicles will only have licenses renewed until the 28th February 2033 without exception.</i>	Must meet Ultra-Low Emission (ULEV) standard i.e. Electric Vehicles; Hydrogen vehicles etc <i>*Any replacement vehicle whether temporary or permanent must meet ULEV standards or meet the same level of vehicle emission standards or better than the vehicle that is being replaced.</i>
1st March 2033	Must meet Ultra-Low Emission (ULEV) standard i.e. Electric Vehicles; Hydrogen vehicles etc <i>The three-year extension on renewals is to allow new vehicles licensed now or within the last three year to run their course.</i>	

Standards guidance	
Euro Emission Standards (e.g. EURO 4)	Euro Standards are exhaust pollution limits for new car models, introduced by the European Union in the early 1990s, starting with Euro 1. The current Euro Standard is Euro 6. Euro 4 was introduced in 2006
Euro 6	The Euro 6 standard imposes a further, significant reduction in NOx emissions from diesel engines (a 67% reduction compared to Euro 5) and establishes similar standards for petrol and diesel.
Ultra-Low Emission Vehicles (ULEVs)	ULEV'S, are vehicles meeting the UK government's definition (as of November 2018) These vehicles have CO2 emissions of less than 75 grams of CO2 per kilometre (g/km) Recognising advances in technology from 2021 it is expected to define an ULEV as a car or van that emits less than 50g/km CO2.

The above vehicle emissions standards have been carefully considered and have been phased in taking into account we issue licenses for vehicle up to 10 years old if the licence has continually been renewed and the vehicle maintained in accordance with the taxi Policy. Therefore, this policy on vehicle emissions did not want to unfairly impact financially the Taxi Trade.

From 2030 all vehicles at the time of first licensing must be propelled by either electric or hydrogen. Please note, this clause will be reviewed again at the time of the next 5-year Policy review in 2028 which occurs before the above clause comes into force. That Policy review will consider the availability of sufficient infrastructure to support electric and hydrogen vehicles, the availability of such vehicles and suitability of models available whilst also considering the affordability of those vehicles.

* When a vehicle has been replaced following a vehicle accident or damage, the replacement vehicle may be like for like with regards to emissions and euro categorisations up to the accident vehicle age reaching 10 years old. After the 10-year age threshold has been met, or exceeded, the existing licensed vehicle will not be renewed, and any replacement vehicle must meet the relevant policy euro category.

Appendix 2 - Taxi Licensing Policy (v3.4) – Summary of Changes

Section	Change	Notes/ Rationale
Contents 15.8	Add Whistle-blowers policy to index	
Appendix F	The National Register of Refusals and Revocations (NR3 Register)	To include use of NR3 in policy
Appendix G	ADD Vehicle emission standards appendix	To include vehicle emissions requirements in support of the authority's Climate Change Framework.
1.4	Delete – the Department of Transport 'Taxi and Private Hire Vehicle Licensing: Best Practice Guidance (Currently under review)	Replaced with: General Data Protection Regulations 2018 Police & Crime Act 2017 Department for Transport Statutory Taxi & Private Hire Vehicle Standards The Care Act 2014 The Public Interest Disclosures Act 1998 (PIDA) Safeguarding and Vulnerable Groups Act 2006
1.4	Update references to relevant documents and other relevant legislation	Add DFT use of NR3 and further relevant documents
3.1	Include National Standards issued by Department for Transport (DFT) Add 'To ensure continued Public Safety, and legislative compliance, the Council may update or alter the policy periodically. Such changes would be published on the Cherwell District Council website and affected licence holders would be notified in advance of all such changes'.	To allow for amendment if the legal framework or standards change.
3.2	Add 'The protection of the environment'	To reflect protection of the environment in the objectives of the policy.
3.6	Add 'The protection of the environment' purposes- Reducing harmful car emission into the environment Promoting the use of sustainably fuelled vehicles.	To further define the protection of the environment objective.
5.2	Add: The term 'fit and proper' involves assessing that an application may be 'Safe and Suitable' to hold such a licence	That phrase is necessary to bring fit and proper assessments into modern definitions. Often referred to in court hearings.
5.5	All applications to renew a taxi drivers' licence should be made through the Cherwell District Council website:	To channel all applications online as the preferred application process. Paper applications will still be allowed for persons who are unable to apply on-line.

5.6	Need to add reference to NR3	Outlining when a licence is refused or revoked the information will be shared on the NR3 database.
5.6	Add 'Cherwell District Council has signed up to the National Register of Refusals and Revocations (NR3 register). This means that when an application for a taxi driver's licence is refused, or when an existing taxi driver's licence is revoked, that information will be placed on the register. The details of all new applicants will also be checked against the information held on the register'.	NR3 inclusion in policy
6.2	Changed to include quote from DFT standards	Relates to the 'Fit and Proper' person tests
6.3	Changed to align with DFT standards	Relates to the 'Fit and Proper' person test
6.4	Changed to align with DFT standards	Decisions on suitability of applicant/licensee
6.6	Amended to reflect DFT standards on relevant information sources	Not limited and includes reference to the Multi-Agency Safeguarding Hub
6.7	Delete 'penalty points issued or any other driving offence' to comply with DFT guidance and insert "48 hrs to notify any DVLA offences" Add 'Road traffic offences which are discharged by way of speed awareness training or similar, must be reported to the council. Cherwell District Council will note such offences, and their method of discharge'	To align with DFT guidance Addition to reflect speed awareness as an alternative to point and fine.
6.8	Add: The Data Protection Act 1998, and the General Data Protection Regulations 2018	Clarification and reflects DFT standards
6.9	Add: Applicants and licensees must disclose if they hold or have previously held a licence with another authority. An applicant or licensee is also required to disclose if they have had an application for a licence refused, or a licence revoked or suspended by any other licensing authority. When such licences have been disclosed the council will contact that authority to gather further details. Failure to disclose such information may result in the refusal or revocation of a licence.	To reflect DFT standards
6.10	Add: 'omitted information'	To reflect DFT standards
7.1.1	Delete 'potential'	Clarification wording
7.1.2	Add 'or formal Police interactions taken place during' and 'penalty points being issued to that licence, or the'	Clarification wording
7.1.3	Delete 'ongoing'	Clarification wording
7.1.4	Add 'and licence holders' and	Clarification wording to reflect frequency of further DBS checks carried out on licensees.

	<p>'All applicants and licence holders will be subject to 6 monthly DBS checks throughout their licence period, and at times when the Council consider it necessary and appropriate to do so. The DBS online update service, and subscription to the service is a compulsory requirement for all licence holders. It will be used to monitor the criminal record of the licence holder throughout the term of the licence.'</p>	
7.1.6	Add 'may'	Clarification wording
7.1.8	Add 'Where licence holders fail to maintain the online DBS subscription, or have not provided the council with the necessary information to check their DBS report, when required to do so, that licence will be suspended until such checks have been completed and the 'fit and proper' status of the licence holder has been fully assessed.'	Clarification wording on consequences of not supporting the council to carry out DBS checks.
7.1.9	Add 'In the interests of public safety, the council will not issue a licence to any individual that appears on either barred list on DBS reporting system.'	DFT Standards requirement
7.2.1	Change from 'six months' to 'three months'	Reflects DFT standards
8.1	Add 'Child Sexual Exploitation (CSE/CDE)	Reflects DFT standards requirement
8.3	Add 'CDE and Disability awareness' and 'to completing'	Reflects DFT standards requirement
8.4	<p>Add 'CDE'</p> <p>Add '• Safeguarding certificates issued no more than 3 months prior to the application date will be accepted by the authority.</p> <ul style="list-style-type: none"> • The Safeguarding certificate will be valid for 3 years from the date of issue. • Failure to provide Cherwell District Council with a valid safeguarding certificate will prevent that license being issued, or existing licenses being suspended until the requirements have been met and documented. 	<p>Reflects DFT standards requirement</p> <p>Clarification and additional information</p>

9.4	<p>Add 'Under the D.V.L.A. Group 2 Medical standards applicants and licensed drivers suffering from diabetes and using insulin, glinides, or other prescribed medications suffering from diabetes and using insulin must have an annual diabetes medical report. The diabetes specific medical report must be completed, and endorsed, by their diabetes care unit, or a medically qualified practitioner authorised by the Council. Oxfordshire University Hospitals diabetes specialists' units are authorised by the council to complete all diabetes assessments Failure to evidence a driver's medical fitness may result in the refusal, suspension or revocation of the licence.'</p> <p>'This diabetes specific medical is in addition to all other medical assessment requirements.'</p>	<p>This is already an existing requirement, but not fully adhered to. OUH wish to ensure we take measures to ensure this is applied.</p> <p>Correction</p>
9.6	<p>Add 'Third party medicals - DVLA Group 2 medical assessments will be accepted from approved third party assessors if the licence applicant provides the council with a copy of their full medical records. Once viewed those medical records will not be retained or stored by the Council'</p>	<p>Clarification wording</p>
11.1.1	<p>Add 'As with driver licensing, the objective of vehicle licensing is to protect the public, who trust that the vehicles dispatched are above all else safe. It is important therefore the council are assured that those granted a vehicle licence also pose no threat to the public and have no links to serious criminal activity. Although vehicle proprietors may not have direct contact with passengers, they are still entrusted to ensure that the vehicles and drivers used to carry passengers are appropriately licensed and so maintain the safety benefits of the licensing regime.'</p>	<p>Clarification wording</p>

11.1.2	Add 'All vehicle licence holders will be required to meet the same level of the 'fit and proper' assessment outlined in the Hackney Carriage Private Hire Drivers section of the policy and appendices. For vehicle licence applicants this assessment will be partly based on a DBS Basic disclosures report as a minimum DBS report. All applicants and licence holders must subscribe to and maintain a subscription to the DBS on-line update service, and will be subject to annual DBS checks, or further checks when required by the Council. Failure to maintain this subscription, or provide the information required for such DBS checks may result in that licence being suspended or revoked.	Clarification wording
11.1.3	Add 'Only vehicles less than 6 years old and meet the requirements of Appendix G will receive a new licence'.	New environmental measures
11.1.4	Add 'Existing licensed vehicles cannot have their licence transferred to a higher polluting vehicle (for example, a D.V.L.A. Cat 6 electric vehicle cannot be replaced with a D.V.L.A. Cat 5 Hybrid vehicle).	New environmental measures
11.1.5	Replace 'already' with 'currently'	Clarification wording
11.1.6	Add 'The Council will not licence vehicles which fall with the D.V.L.A categories which indicate that the vehicle has been damaged or written off by insurers.'	Clarification wording
11.1.7	Add 'Applications should be made using the Council website: https://www.cherwellandsouthnorthantsuat.jadu.net/xfp/form/544?council=cdc .	Clarification wording
11.1.8	Add 'Evidence of the vehicle's emissions, no older than 28 days at the time of submitting the licence application.'	Environmental measure
11.1.9	Add 'In addition to the above, incomplete application forms, incorrect fees and or supporting documentation that does not conform will result in the application being rejected. Only when a complete application has been provided will the assessment process begin.'	Clarification wording
11.2.1	Add 'Vehicle licences are for a period of 1 year and will be subject to MOT testing annually every 6 months. All MOT test reports must show that the vehicle has no faults, or advisories, and has passed the MOT test. Where advisories have been reported, the applicant must document the completion of any remedial works required to correct the advisory fault/s.'	Change from requirement for a 6 monthly Cherwell District Council vehicle assessment test to a 6 monthly MOT. Correction

11.2.2	Remove 'On application, and every six months thereafter, a vehicle will be required to pass a Cherwell District Council vehicle assessment test.'	Requirement changed to an MOT
11.2.2	Add 'Vehicles must be less than six years old at the time of first licensing must have working stop/start engine technology, if it is propelled by petrol, diesel or hybrid engines. That stop/start technology must be fully functional throughout the term of the licence.'	Environmental measure
11.2.3	Add 'Vehicles at the time of first licensing must be propelled by electric, hydrogen or be a hybrid engine using a combination of petrol and electric energy. From 2030 all vehicles at first licensing must be solely propelled by electric or hydrogen' Add 'From 2030 all vehicles at the time of first licensing must be propelled by either electric or hydrogen. Please note, this clause will be reviewed again at the time of the next 5-year Policy review in 2028 which occurs before the above clause comes into force. That Policy review will consider the availability of sufficient infrastructure to support electric and hydrogen vehicles, the availability of such vehicles and suitability of models available whilst also considering the affordability of those vehicles'	Environmental measure Added additional qualification following consultation to ensure the policy does not bring unfair or stringent vehicle emission requirements before they are practicable for the trade.
11.2.4	Add 'The council will only licence vehicles less than 10 years old'.	Clarification of age limit for licensed vehicles
11.2.5	Add 'Once a vehicle is licensed, that licence cannot be transferred to another vehicle, whether temporary or otherwise, which has been categorised by the D.V.L.A., as emitting levels of pollution higher than the current licensed vehicle.' Add 'When a vehicle has been replaced following a vehicle accident/damage, the replacement vehicle may be like for like with regards to emissions and euro categorisations up to the accident vehicle age reaching 10 years old. After the 10-year age threshold has been met, or exceeded, the existing licensed vehicle will not be renewed, and any replacement vehicle must meet the relevant policy euro category'	Environmental measure Clarification wording following consultation
11.2.6	Add 'Once a wheelchair accessible vehicle is licensed, that licence cannot be transferred to another vehicle, whether temporary or otherwise, to non-wheelchair accessible vehicle'	Clarification – very few private hire vehicles are wheelchair accessible in Cherwell. We need to maintain and extend this provision this where possible.
11.8.1	Add 'or through the Cherwell District Council website' 'An accident report form must be completed and submitted to the Council along with photographs of the damage within 24 hours of reporting the accident'	Clarification wording

11.8.2	<p>Add 'the Council Licensing vehicle assessment Officer's. Such an inspection requirement would be to ensure the safety of the vehicle, for public use.' And</p> <p>'after which that licence is automatically revoked'</p> <p>Add 'The notice requires that the vehicle is repaired and inspected by an authorised officer within 2 months of the Section 68 notice issue date. Under the Local Government (Miscellaneous Provisions) Act 1976 that license is automatically revoked if those requirements are not met. When a license is subject to revocation under these circumstances, the LA will allow a license grant application for a like for like vehicle with regards to emissions and euro categories, and vehicle type, up to the original accident vehicle age reaching 10 years old. Such a replacement vehicle grant application must be submitted within 6 months of the issue date of the Section 68 notice'</p>	<p>Clarification wording</p> <p>Clarification wording following consultation</p>
11.8.3	<p>Add 'Once the accident damage has been repaired, the vehicle must be assessed by a Cherwell District Council Licensing officer. This vehicle assessment report will ensure the above assessment meets the Councils Tax Licensing Policy and determine if the repaired vehicle meets the requirements of the policy. Any rescinding of notices following the vehicle/policy assessment will be notified in writing to the licence holder.</p>	<p>Clarification wording</p>
11.8.4	<p>Add 'Any vehicles written off by insurers following an accident will have the vehicle licence revoked'</p> <p>Add 'Vehicles written off by insurers will not be licensed or have a suspended license re-instated.</p>	<p>Clarification wording</p> <p>Clarification wording</p>
11.11	<p>Add title 'Additional Provisions for Wheelchair accessible vehicles.</p> <p>Add 'Existing licensed vehicles from the policy implementation date, will continue to have their licenses renewed until vehicle age limits are reached.</p>	<p>Extend accessibility</p> <p>Clarification wording</p>
11.11.1.	<p>Add '2. Wheelchair areas must allow at least 305mm (12") leg room from the wheelchair frame/seat to any structure in front of the seat. There must be enough roof space to allow the wheelchair used to be seated comfortably inside the vehicle'</p>	<p>Extend accessibility and to align with DFT statutory guidance "Access to taxis and private hire vehicles for disabled users".</p>

12.1	Add 'an external' and 'The internal licence details must be displayed in the vehicle at all time, on the top left (passenger side) of the vehicles windscreen'	Clarification wording
12.3	Add 'non-contractual'	Clarification wording
13.1.1	Add 'As with driver licensing, the objective of operator licensing is to protect the public, who trust that the vehicles dispatched are above all else safe. It is important therefore the council are assured that those granted a operator's licence also pose no threat to the public and have no links to serious criminal activity. Although operators may not have direct contact with passengers, they are still entrusted to ensure that the vehicles and drivers used to carry passengers are appropriately licensed and so maintain the safety benefits of the licensing regime'	Clarification wording
13.1.2	Add 'All operators, and each individual/director associated with the licence, will be required to meet the same level of the 'fit and proper' assessment outlined in the Hackney Carriage Private Hire Drivers section of the policy and appendices. For applicants this assessment will be partly based on a DBS Basic disclosures report as a minimum DBS report. All applicants and licence holders must subscribe to and maintain a subscription to the DBS on-line update service, and will be subject to annual DBS checks, or further checks when required by the Council. Failure to maintain this subscription, or provide the information required for such DBS checks may result in that licence being suspended or revoked'	Clarification wording explaining how the 'fit and proper' person test also applies to operators and directors. This is a requirement of the DFT Standards.
13.1.3	Add 'Operators are required to evidence that they have had sight of a Basic DBS check on all individuals listed on their register of booking and dispatch staff and must ensure that Basic DBS checks are conducted on any individuals added to the register and that this is compatible with their policy on employing ex-offenders. DBS certificates provided by the individual must have been issued within two weeks of employment commencing. When individuals start taking bookings and dispatching vehicles for an operator they are required, as part of their employment contract, to advise the operator of any convictions while they are employed in this role. Operators will be required to conduct Basic DBS checks on their register of booking and dispatch staff every three years, as a minimum. All such DBS checks must be documented on an employee's register'	Clarification wording to ensure operators check convictions of driver's they engage. This is a requirement of the DFT Standards.

13.1.4	<p>Add 'The register shall be a 'living document' that maintains records of all those in these roles for the same duration as booking records are required to be kept, this will enable cross-referencing between the two records. Operator must record that they had sight of a basic DBS check certificate, and in doing so must list the DBS certificate number, date of issue, and generalised comments regarding the DBS report. The certificate itself should not be retained. The employee should be retained their DBS report for the duration that the individual remains employed and on the register. All a new basic DBS certificate should be requested and sight of this recorded. The register must be stored in a secure location at the Operators listed address and be available for inspection upon request of authorised officers'</p>	<p>Clarification wording supporting requirement outlined above.</p>
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13.2.2	<p>Add 'Operators may outsource booking and dispatch functions, but they cannot pass on the obligation to protect children and vulnerable adults. Operators are required to evidence, by documentation, that comparable protections are applied by the company to which they outsource these functions. Such documentation must be made available to authorised officers upon request'</p> <p>Add '• Any private hire operator making provision for the invitation or acceptance of bookings in Cherwell needs to hold a private hire operator's licence with Cherwell. The Council expects Operators licensed by the Council to utilise vehicles and drivers licensed by Cherwell so as to ensure that the licensed trade working in Cherwell conform to the standards set by the Council and can be subject of local compliance.</p> <ul style="list-style-type: none"> • In addition, as part of the Council's 'fit and proper' test, it would not expect an operator to obtain a licence in Cherwell to simply make vehicles licensed by another authority available for booking via sub-contracting on a regular basis. As such whilst any licensed vehicle may enter Cherwell to pick up or drop off customers, the Council would not expect vehicles licensed outside of Cherwell to be waiting in Cherwell and be made available for bookings as this diminishes the Council's ability to set local standards and local control. As such, any Operator acting to deliberately reduce the Council's ability for local control would not be meeting the required public safety objectives and standards expected of a professional, licensed, fit and proper private hire operator, and may have their licence to make provision to invite or accept bookings in Cherwell revoked. <p>By way of guidance, the Council would expect at least 75% of journeys received by a Cherwell licensed operator commencing or finishing in Cherwell in a 3 month period to be completed by Cherwell licensed private hire vehicles (or Cherwell licensed hackney carriage vehicles completing pre-booked work).</p>	<p>Clarification wording</p> <p>Added to ensure Cherwell District Council keeps sufficient safety governance over the taxi industry within its area.</p>
13.6.2	<p>Add 'All Operators must ensure that drivers and vehicle working on behalf of their licensed business do not park outside, or within the vicinity, of their licensed premises, unless picking up or dropping off a paying customer. Failure of the operator to adhere to this condition of the licence will lead to enforcement action which may include the issuing of penalty points, suspension or revocation of the licence or prosecution'</p>	<p>New requirement s a result of the council receiving complaints about inappropriate parking (e.g. on double yellow lines or on pavements) by licensed taxis near operator's premises.</p>

13.6.3	*Vicinity may be assessed as parking within 10 metres of the licensed operator's premises.	Clarification wording to support requirement above.
15.1.2	Add 'All complaints and enforcement actions will be recorded on the councils licensing data base, and where patterns of behaviour or traits are outlined by that data, the council will review the suitability of that licence holder against the 'fit and proper' criteria, and the balance of probability'	DFT standards requirement
15.3.3	Add 'and any such actions will be notified to Thames Valley Police'	DFT standards requirement
15.3.5	<p>Add 'In certain circumstances the council will make referrals to the DBS, following enforcement actions such as refusing or revoking a licence, when the applicant/licence holder is thought to present a risk of harm to children or vulnerable individuals.</p> <p>Referrals will be made when:</p> <ul style="list-style-type: none"> i. An individual has harmed or poses a risk of harm to a child or vulnerable adult. ii. An individual has satisfied the 'harm test', as described in the Disclosure and Barring service (DBS) guidance about making referrals. iii. Where an individual has received a caution or conviction for a relevant offence. iv. Where the individual being referred is or may in the future be working in regulated activities. <p>Such referrals may result in that individual being added to the DBS 'barred' list, and would be made in line with the DBS referrals guidance:</p> <p>https://www.gov.uk/guidance/making-barring-referrals-to-the-dbs</p>	DFT standards requirement

15.8	Add Title 'Whistleblowing Policy'	DFT requirements
15.8.1	Add 'The Public Interest Disclosure Act 1998 (PIDA), commonly referred to as whistleblowing legislation, provides protection for those that have a reasonable belief of serious wrongdoing, including failure to comply with professional standards. In the normal course of events, if a licence holder or person, reveals information that his employer, or colleagues do not want revealed it may result in having a negative impact on the 'whistle-blower'. The 'Whistle-blowers' Policy enables licence holders and persons who 'blow the whistle' about wrongdoing to be protected from any such negative impacts'	DFT standards requirements
15.8.2	Add 'The Council is committed to the highest possible standards of openness, probity and accountability. In line with that commitment it expects and encourages licence holders, and others that it deals with, who have serious concerns about any aspect of the Taxi licensing regime and related work, to come forward and voice those concerns. It is recognised that most cases will have to proceed on a confidential basis. Any licence holder/person who wishes to disclose information to the Council will be protected, and the source of this information will not be disclosed to other parties'	Consistent with DFT standards
15.8.3	Add 'This policy document makes it clear that such issues can be raised without fear of victimisation, subsequent discrimination or disadvantage. This Confidential Reporting Policy is intended to encourage and enable licence holders, or persons, to raise serious concerns within the Council rather than overlooking a problem or 'blowing the whistle' outside. When a licence holder wishes to use the 'Whistle-blowers' policy, they should contact a Licensing Enforcement Officer, or the Licensing Manager. Alternatively, dependent upon the nature, seriousness and sensitivity of the issues involved and the person suspected of malpractice, the matter may be raised with the Chief Executive (Monitoring Officer), Solicitor to the Council (Deputy Monitoring Officer), or Head of Corporate Services. When reporting under this policy, the reporter should request the enactment of the 'whistle-blowers' policy before divulging any information'	Reflects DFT standards

15.8.4	Add 'Concerns may be raised verbally or in writing. Persons who wish to raise a concern should provide details of the nature of the concern or allegation and its background including relevant dates. The detail should be enough to demonstrate reasonable grounds for concern, although proof beyond doubt of an allegation is not expected at this stage'	Reflects DFT standards
15.8.5	<p>Add 'This Confidential Reporting Policy is intended to cover major concerns that fall outside the scope of the normal complaints procedures.</p> <p>Areas covered by this Confidential Reporting Policy include:</p> <ul style="list-style-type: none"> ○ criminal or other misconduct ○ breaches of the Council's Policies/code of conduct or conditions of licence ○ contravention of the Council's accepted standards, policies/procedures or conditions ○ disclosures relating to miscarriages of justice ○ health and safety risks ○ damage to the environment ○ Public protection risk ○ fraud or corruption ○ sexual, physical or verbal abuse of any person or group ○ other conduct not in keeping with a licence holders' responsibilities/requirements ○ the concealment of any of the above. 	Reflects DFT standards
15.8.6	Add 'Any serious concerns about any aspect of service provision or the conduct of a licence holder, Members of the Council, or others acting on behalf of the stated, can be reported under the Confidential Reporting Policy'	Reflects DFT standards

15.8.7	Add 'The policy on Personal Harassment is designed to protect licence holders/persons from all forms of harassment. The Council is committed to good practice and high standards and endeavours to be supportive of its licence holders and public. The Council will not tolerate any forms of harassment or victimisation and will take appropriate action to protect licence holders/persons who raise a concern in good faith'	Reflects DFT standards
15.8.8	Add 'All concerns will be treated in confidence and the identity of the person raising the concern will not be revealed without his or her consent (subject to any legal requirements or decisions). At the appropriate time, however, the person may be expected to come forward as a witness'	Reflects DFT standards
15.8.9	Add 'Concerns expressed anonymously are likely to be difficult to deal with effectively. Consequently, persons are encouraged to put their name to any allegation. Any action taken in response to an anonymous allegation will be influenced by factors including the seriousness of the issues raised and the likelihood of confirming the allegation from attributable sources'	Reflects DFT standards
15.8.10	Add 'If an allegation is made in good faith, but it is not confirmed by the investigation, no action will be taken against the person making the allegation. If, however, an allegation is made that is deemed to be frivolous, malicious or for personal gain, action may be taken against the person/licence holder in accordance with the Council's Taxi Licensing Policy'	Reflects DFT standards
15.8.11	Add 'Information received by Officers under the 'whistle-blowers' policy will only be divulged to other authorities when that information refers to, or presents as a risk in the areas of: <ul style="list-style-type: none"> ○ The protection of the public ○ Safeguarding children and the vulnerable ○ The prevention of crime and/or disorder ○ The safety and health of public and others' 	Reflects DFT standards
15.8.12	Add 'The Officer with whom the concern has been raised will initially respond in writing within ten working days, and will: <ul style="list-style-type: none"> ○ acknowledging that the concern has been received 	Reflects DFT standards

	<ul style="list-style-type: none"> ○ indicating how it is proposed to deal with the matter ○ giving an estimate of how long it will take to provide a final response ○ stating whether any initial enquiries have been made ○ supplying information on staff support mechanisms ○ stating whether further investigations will take place and if not, why not ○ Inform the whistle-blower of the results of the investigation, and actions taken against the accused. 	
15.8.13	Add 'This policy does not replace the Council's Service Requests and Complaints Procedure'	Clarification
Section	Summary of Appendix Changes	Comments
Contents	Add 'Appendix F – The National Register of Refusals and Revocations (NR3 Register)'	Insert NR3 details
Contents	Add 'Appendix G – Vehicle Emission Standards'	Insert Vehicle emission standards to ensure clarity and information is not lost within the Policy itself
A	Appendix – Criminal Records Policy	
3.2	Add 'or 'Safe and Suitable' person'	DFT requirement
3.3	Add ('Safe and Suitable')	DFT requirement
3.3	Add 'consecutive' and 'years prior to their application'	Clarification to wording
3.3	Add 'other' and remove 'that the applicant may have previously worked in'	Clarification to wording
4.3.4	Add 'Enforcement interactions with official bodies or Authorities;' and 'Verbal or written' and 'or is under official investigation'	DFT requirement
5.1.3	Add 'Where an applicant or licensee has been convicted of a crime involving, related to, or has any connection with abuse, exploitation, use or treatment of another individual irrespective of whether the victim or victims were adults or children, they will not be licensed. This includes slavery, child sexual abuse, exploitation,	DFT requirement

	grooming, psychological, emotional or financial abuse, but this is not an exhaustive list'	
5.1.4	Add 'Violence against person(s)'	DFT requirement
5.2.1	Add 'least 7 years'	DFT requirement
6.2	Add 'barred list'	DFT requirement
7.2	Add 'of 7 years'	DFT requirement
8.2	Add 'least 7 years'	DFT requirement
8.4	Add 'least 7 years have'	DFT requirement
8.5	Add 'show 7 years free'	DFT requirement
10.2	Add 'Using a hand-held device whilst driving. Where an applicant has a conviction for using a held-hand mobile telephone or a hand- held device whilst driving, a licence will not be granted until at least five years have elapsed since the conviction or completion of any sentence or driving ban imposed, whichever is the later'	DFT requirement
16.4	Add 'NR3 use and clarification on information / disclosure sharing'	DFT requirement and Clarification wording
B	Appendix - Driver Application Process and Conditions	
App Process	Add 'All applications to renew a taxi drivers' licence should be made through the Cherwell District Council website: https://www.cherwellandsouthnorthants.uat.jadu.net/xfp/form/544?council=cdc And- 'Consecutive' 'and disability awareness' 'The council will not issue licenses to cover periods while an applicant is waiting for documentation as part of the application process'	To reflect on-line applications is the preferred process. Clarification wording
Page 2	Add "A HM Revenue and Customs (HMRC) tax check code has been supplied**"	New pre-licence check requirement
Page 2	Replace English Test with 'Spoken English assessment'	Correction
1.5	Add 'Drivers aware of a child or vulnerable person is at risk of harm must immediately contact the police, or licensing team, or otherwise they should: o use the local safeguarding process, the first step of which is usually to contact the safeguarding lead within the local authority;	DFT requirement

	o call Crime Stoppers on 0800 555 111.'	
2.2	Add 'any member of the public' and 'other authority'	Clarification wording
5.1	Add '(available through the council's website)' and 'along with photographs of the vehicle damage'	Clarification wording
6.1	Add 'When fitted to a Hackney Carriage taximeter must be used on every hire journey, and charges cannot exceed the metered fare'	Clarification wording
9	Add 'Councils Licensing Department' Remove 'Local Police Station' Add 'must notify the councils licensing department, in writing'	Police no longer take lost property Reword
10.3	Add 'Under the D.V.L.A. Group 2 Medical standards applicants and licensed drivers suffering from diabetes must have an annual medical report. That report may be completed, and endorsed, by their diabetes care unit, or GP, and submitted to the Council. Failure to evidence your medical fitness may result in the refusal, suspension or revocation of the license'	DVLA requirement
11.1	Add 'Enforcement interactions with official bodies or authorities' and 'verbal or written caution' 'or is under/subject to an official investigation'	Clarification wording
14.2	Add 'CCTV systems that can record audio as well as visual data must be overt (i.e. all parties should be aware when recordings are being made) and targeted (i.e. only activated when passengers (or drivers) consider it necessary). The recording of audio should be used to provide an objective record of events such as disputes or inappropriate behaviour and must not be continuously active by default and should recognise the need for privacy of passengers' private conversations between themselves. Activation of the audio recording capability of a system might be instigated when either the passenger or driver operates a switch or button'	Guidance on CCTV systems
14.3	Add 'Dash camera's, which only records visual footage (not audio), and records footage outside of the licensed	Clarification wording

	vehicle, is recommended for all licensed vehicles, provided the recordings and equipment comply with the Information Commissioners CCTV Code of Practice'	
14.4	Add 'All health and safety duties required by the Health and Safety at Work Act 1974 whether temporary or permanent on the work place in this case a vehicle being the work place must be followed at all times'	Clarification wording
14.5	Add 'All Licence Holders are to comply with current Government Legislation and Guidance applicable, an example is COVID-19 requirements such as wearing a face covering in a Vehicle (health and Safety defined as workplace)'. '	Clarification wording
C	Appendix - Vehicle Application Process and Conditions	
App Process	Add 'you will not receive a separate reminder' and 'or Vehicle assessments' 'Such a test must have been completed no more than 28 days before the application is received by the Council.' 'Provided you have evidenced that your vehicle meets the required standards you will be issued a license and plates' 'to the front top left of the windscreen (passenger side)'	Clarification wording
Page 1	Change maximum mileage for 1st registered vehicles to be exempt from requiring an MOT from 200 to 500 miles to align with policy	
	Private hire Vehicles	
1.1	Add A. All vehicles must be less than 6 years old at first licensing. B. All new vehicles licensing grants must meet the requirements as per Appendix G These vehicles must also have functioning start/stop technology, unless the vehicle is powered entirely by electric or Hydrogen. C. Existing licensed vehicles cannot have their licence transferred to a higher polluting vehicle (for example, a D.V.L.A. Cat 6 electric vehicle cannot be replaced with a D.V.L.A. Cat 5 Hybrid vehicle) and will not have their licences extended past the vehicle being 10 years old (from first being registered at the DVLA).	Environmental changes

	D. Vehicles modified to use a different fuel from which they were first manufactured, will not be licensed.	
1.1 F	Add 'four wheels, and'	Clarification wording
1.1 I	Add 'minimum access to rear seating will be 300mm'	Clarification wording
1.1 L	Add 'with part worn, remould' and 'evidence of tyre purchase may be required'	Clarification wording
1.1M	Add 'additional seat coverings must not cover air bag zones'	Clarification wording
1.2	Add c) A single seat should be at least 432mm (17") wide d) Each seat must have a minimum height of 410mm (16") from the floor to the top of the seat, allowing for leg room, when seated.	Clarification wording
1.3	Add g) Slip resistant surfaces: all surfaces over which a wheelchair user may travel shall have a slip resistant finish applied. h) Colour contrasting edge marks: a band contrasting with the remainder of the boarding ramp surface, 45mm to 55mm in width around and abutting the edge of the ramp or lift surface. i) Control and failsafe mechanisms or power operated equipment: power operated equipment shall only be capable of operation from a control adjacent to the ramp. j) Load sensors and re-cycling mechanisms for power-operated equipment: a device to stop the movement of the boarding ramp when motion is likely to cause injury. k) Manual override provisions for power operated equipment: a provision to repeatedly operate the equipment in the event of power failure shall be provided. l) Manual/portable ramp: Such ramps must have a designated stowage location which can store the equipment such that it does not present a risk of injury. Wheelchair assessable Entrances and Exits	Clarification wording

	<p>a. Number and position: a minimum of 1 located on the nearside</p> <p>b. Minimum doorway width: 740mm</p> <p>c. Minimum doorway height: 1230mm</p> <p>Wheelchair internal area</p> <p>a. Wheelchair areas must allow at least 305mm (12”) leg room from the wheelchair frame/seat to any structure in front of the seat. There must be enough roof space to allow the wheelchair used to be seated comfortably inside the vehicle.</p> <p>b. Wheelchair spaces requirements: 1200mm length, 700mm width, 1350mm height (min).</p> <p>c. All such vehicles will be licensed for the number of non-wheelchair customers only.</p>	<p>Dimensions reflect requirements of DfT “Statutory guidance Access to taxis and private hire vehicles for disabled users” published June 2022</p>
4.2 a	Add ‘and meets the specifications listed in 1.1 B’	
4.2 b	Change maximum mileage for 1st registered vehicles to be exempt from requiring an MOT from 100 to 500 miles to align with policy	To align with policy
4.2 c	Change to Policy - Vehicles will not be licensed past 10 years of age.	Change to clarify and make policy clearer. Previous older vehicles had been considered with a supported full maintenance record and if they met criteria to be assessed as ‘exceptionally well maintained’. This is however open to misuse and therefore the new policy will limit vehicle age.
4.2	<p>Add ‘Applications to licences a vehicle which are over ten years old must be made in writing to the Licensing Department. All such application should include service history documentation and may be subject to Licensing Officers inspections.</p> <p>Such applications will be determined in their own merits, and should the application be refused any associated fee’s will not be refunded.</p> <p>Refused applications have the right to appeal through the Magistrates Court service’</p>	Clarification wording
4.3 c	Add ‘and tinted window coverings’	Clarification wording
4.6 c	Add ‘All such signs must be of a minimum dimension of 40cm in length and 20cm in width and should use a large enough lettering font for the words to be easily read from 3 metres distance, or in a font no less than 150mm in height’	Clarification wording

6a	Add recommendation to install CCTV and requirement to notify Council of any CCTV installed in a licensed vehicle.	Amendments to clarify requirements if CCTV installed.
6b	<p>Add</p> <p>b. CCTV systems that can record audio as well as visual data must be overt (i.e. all parties should be aware when recordings are being made) and targeted (i.e. only activated when passengers (or drivers) consider it necessary). The recording of audio should be used to provide an objective record of events such as disputes or inappropriate behaviour and must not be continuously active by default and should recognise the need for privacy of passengers' private conversations between themselves. Activation of the audio recording capability of a system might be instigated when either the passenger or driver operates a switch or button.</p> <p>c. Dash camera's, which only records visual footage (not audio), and records footage outside of the licensed vehicle, is recommended for all licensed vehicles, provided the recordings and equipment comply with the Information Commissioners CCTV Code of Practice</p>	Clarification wording
	Hackney carriages	
1.1	<p>Add</p> <p>I. All new vehicles licensing grants must meet the requirements as per Appendix G These vehicles must also have functioning start/stop technology, unless the vehicle is powered entirely by Electric or Hydrogen.</p> <p>II. Existing licensed vehicles cannot have their licence transferred to a higher polluting vehicle (for example, a D.V.L.A. Cat 6 electric vehicle cannot be replaced with a D.V.L.A. Cat 5 Hybrid vehicle) and will not have their licences extended past the vehicle being 10 years old (from first being registered at the DVLA).</p> <p>III. Vehicles modified to use a different fuel from which they were first manufactured, will not be licensed.</p>	Environmental wording
1.1	<p>Add</p> <p>h) A roof sign shall be attached to the roof, which is capable of being illuminated at night. The roof sign must display the word TAXI.</p>	Clarification wording

	<p>i) There must be a sign, which is capable of being illuminated at night, to indicate when the vehicle is available FOR HIRE.</p>	
1.2	<p>Add</p> <p>g) A single seat should be at least 432mm (17") wide</p> <p>h) Each seat must have a minimum height of 410mm (16") from the floor to the top of the seat, allowing for leg room, when seated.</p>	Clarification wording
1.3	<p>Add</p> <p>s) Slip resistant surfaces: all surfaces over which a wheelchair user may travel shall have a slip resistant finish applied.</p> <p>t) Colour contrasting edge marks: a band contrasting with the remainder of the boarding ramp surface, 45mm to 55mm in width around and abutting the edge of the ramp or lift surface.</p> <p>u) Control and failsafe mechanisms or power operated equipment: power operated equipment shall only be capable of operation from a control adjacent to the ramp.</p> <p>v) Load sensors and re-cycling mechanisms for power-operated equipment: a device to stop the movement of the boarding ramp when motion is likely to cause injury.</p> <p>w) Manual override provisions for power operated equipment: a provision to repeatedly operate the equipment in the event of power failure shall be provided.</p> <p>x) Manual/portable ramp: Such ramps must have a designated stowage location which can store the equipment such that it does not present a risk of injury.</p> <p>Wheelchair assessable Entrances and Exits</p> <p>d. Number and position: a minimum of 1 located on the nearside</p> <p>e. Minimum doorway width: 740mm</p> <p>f. Minimum doorway height: 1230mm</p> <p>Wheelchair internal area</p> <p>d. Wheelchair areas must allow at least 305mm (12") leg room from the wheelchair frame/seat to any</p>	Clarification wording

	<p>structure in front of the seat. There must be enough roof space to allow the wheelchair used to be seated comfortably inside the vehicle.</p> <p>d. Wheelchair spaces requirements: 1200mm length, 700mm width, 1350mm height (min).</p> <p>e. All such vehicles will be licensed for the number of non-wheelchair customers only.</p>	<p>Dimensions reflect requirements of DfT “Statutory guidance Access to taxis and private hire vehicles for disabled users” published June 2022</p>
3.2 a	Add ‘and meets the specifications listed in Appendix C, 1.1 a’	Clarification wording
3.2.1 b	Change maximum mileage for 1st registered vehicles to be exempt from requiring an MOT from 200 to 500 miles to align with policy	Align to policy
3.2 c	<p>Change to Policy - Vehicles over 10 years old will not be licensed</p> <p>Remove exception criteria for assessment of eligibility of vehicles over 10 years old to be licensed.</p>	Change to clarify and make policy clearer. Previous older vehicles had been considered with a supported full maintenance record. This is however open to misuse.
3.3 b	Add ‘in a font 150mm high’	Clarification wording
3.3 d	Add ‘A windscreen and roof sign, capable of illumination, should be fitted, displaying the words ‘FOR HIRE’ , and ‘TAXI’ in black lettering against a white background.	Clarification wording
3.7 d	Add ‘in a font no less than 150mm in height’	Clarification wording
5a	Add recommendation to install CCTV and requirement to notify Council of any CCTV installed in a licensed vehicle.	Amendments to clarify requirements if CCTV installed.
5b	<p>Add</p> <p>b. CCTV systems that can record audio as well as visual data must be overt (i.e. all parties should be aware when recordings are being made) and targeted (i.e. only activated when passengers (or drivers) consider it necessary). The recording of audio should be used to provide an objective record of events such as disputes or inappropriate behaviour and must not be continuously active by default and should recognise the need for privacy of passengers’ private conversations between themselves. Activation of the audio recording capability of a system might be instigated when either the passenger or driver operates a switch or button.</p> <p>c. Dash camera’s, which only records visual footage (not audio), and records footage outside of the licensed vehicle, is recommended for all licensed vehicles, provided the recordings and equipment comply</p>	Clarification wording

	with the Information Commissioners CCTV Code of Practice	
D	Appendix - Operator Application Process and Conditions	
Page 1	Added HMRC tax code to list of pre-licensing checks	New requirement
1.	<p>Add</p> <p>Employee details:</p> <ul style="list-style-type: none"> Employee register recording the full name and address of all operators/dispatch employees. Employee register must record the certificate number and date of issue of a basic DBS report, and any comments from the operator regarding that report (for example no offence/no relevant offences). Records of employee Basic DBS report having been checked by the employer/operator at least every three years, by recording the new report certificate number, date and comments. Operators must record any offences disclosed by the employee following the receipt of a Basic DBS report/certificate. 	DFT standards requirement
2.	<p>Add</p> <ul style="list-style-type: none"> the name of the passenger/hirers full name; the time of the request; the pick-up point; the destination; the full name of the driver; the driver's licence number; the vehicle registration number of the vehicle; the name of any individual that responded to the booking request; the name of any individual that dispatched the vehicle <p>Insert 'template'</p> <p>Add 'All such booking should be retained for a minimum period of six months. Private hire vehicle operators have a duty under data protection legislation to protect the information they record. The Information</p>	DFT standards requirement

	Commissioner's Office provides comprehensive on-line guidance on registering as a data controller and how to meet their obligations.	
5. a	Add 'verbal or written' 'interactions with official bodies or authorities'	DFT standards requirement
5. c	Add 'Any relevant offences which may come to light, with regards to their employees/dispatching operators. Such notification should include details of the actions taken by the licensed operator'	DFT standards requirement
8	Add 'e) Door signs must meet the requirements specified in Appendix C, 4.6 c.'	Clarification
11	Add 'No licensed vehicles may park on the Highway outside a Licensed Operators Office, unless picking up, or dropping of a paying customer, in such cases a maximum of 2 vehicles can be in attendance at the business address at any one time'	To reflect policy requirements and reduce impact of inappropriate parking at operators' offices.
12	<p>Add Sub-contracting</p> <p>Operators may outsource booking and dispatch functions, but they cannot pass on the obligation to protect children and vulnerable adults. Operators are required to evidence, by documentation, that comparable protections are applied by the company to which they outsource these functions. Such documentation must be made available to authorised officers upon request.</p> <ul style="list-style-type: none"> Any private hire operator making provision for the invitation or acceptance of bookings in Cherwell needs to hold a private hire operator's licence with Cherwell. The Council expects Operators licensed by the Council to utilise vehicles and drivers licensed by Cherwell so as to ensure that the licensed trade working in Cherwell conform to the standards set by the Council and can be subject of local compliance. In addition, as part of the Council's 'fit and proper' test, it would not expect an operator to obtain a licence in Cherwell to simply make vehicles licensed by another authority available for booking via sub-contracting on a regular basis. As such whilst any licensed vehicle may enter Cherwell to pick up or drop off customers, the Council would not expect vehicles licensed outside of Cherwell to be waiting in Cherwell and be made available for bookings as this diminishes the Council's ability to set local standards and local control. As such, any Operator acting to deliberately reduce the Council's ability for local control would not be meeting the required public safety objectives and standards expected of a professional, licensed, fit and proper private hire operator, and may have their licence to make provision to invite or accept bookings in Cherwell revoked. 	Added to ensure Cherwell District Council keeps sufficient safety governance over the taxi industry within its area.

	By way of guidance, the Council would expect at least 75% of journeys received by a Cherwell licensed operator commencing or finishing in Cherwell in a 3-month period to be completed by Cherwell licensed private hire vehicles (or Cherwell licensed hackney carriage vehicles completing pre-booked work).	
E	Appendix - Hackney Carriage and Private Hire Driver Penalty Points Scheme	
3	Add 'When a license is issued 12 points or more in a 12-month period that license may be suspended for a period not exceeding 28 consecutive days in the first instance, thereafter that license may be suspended for a period not exceeding 3 months'	Clarification on operation of penalty points scheme
4	Add '(namely 12 points in a 12month period)	Clarification on operation of penalty points scheme
7	<p>Penalty points</p> <p>Changes</p> <p>18. Unsatisfactory behaviour or conduct of drive - 3-12 points</p> <p>19. Failure to display "taxi" or 'Hire' signs, on a Hackney Carriage roof or windscreen, and/or faults preventing illumination of such signs – 4 points</p> <p>25. Failure to notify the Council of any motoring or criminal convictions, interactions with Authorities, cautions etc during period of current licence (Appendix A, 4.3.4) – 6-12 points</p> <p>26. Providing false/misleading information on application form, or failing to provide relevant information – 6-12 points</p>	Amendments to penalty points scheme
General	Add 'may' and	Clarification on operation of penalty points scheme

	'resulting in a licences suspension or revocation has a right to appeal to the Magistrates Court within 21 days'	
Drivers	Add 'for a licences suspension period not exceeding 3 months or the revocation of licence'	Clarification on operation of penalty points scheme
Operators	Add 'for a licence suspension period not exceeding 3 months or the revocation of licence'	Clarification on operation of penalty points scheme
	Remove 'All suspensions and revocations will be determined by the Licensing Committee'	Clarification wording. This is a delegated function at CDC and should not be in the Policy.
Guidance	Remove 'driver'	Clarification wording This also applies to operators as well.
F	The National Register of Refusals and Revocations (NR3 Register)	DFT requirement
	All information in this section is new detailing NR3 register of refusals and revocations.	
G	Vehicle Emission Standards	
	Section is new setting national and local priority for climate change to bring in lower emissions for licensed Private Hire and Hackney Carriage vehicles	
	<p>Corrected original table of vehicle emission requirements combining into one table for simplicity and understanding.</p> <p>Removed the 2025 requirements for new grants.</p> <p>Clarified that for renewals the latest date for renewing a non-low emission vehicle is 2033. This takes into account the lifespan of vehicles licensed (new) in the last two years.</p> <p>New grants for Hackney Carriage and Private Hire vehicles for Ultra low emission vehicles remain 2030.</p> <p>Added caveats to ensure the 2028 policy review reflects the industry and its needs. - From 2030 all vehicles at the time of first licensing must be propelled by either electric or hydrogen. Please note, this clause will be reviewed again at the time of the next 5-year Policy review in 2028 which occurs before the above clause comes into force. That Policy review will consider the availability of sufficient infrastructure to support electric and hydrogen vehicles, the availability of such vehicles and suitability of models available whilst also considering the affordability of those vehicles'</p> <p>Add 'When a vehicle has been replaced following a vehicle accident or damage, the replacement vehicle may be like for like with regards to emissions and euro categorisations up to the accident vehicle age reaching 10 years old. After the 10-year age threshold has been met, or exceeded, the existing licensed vehicle will not be renewed, and any replacement vehicle must meet the</p>	<p>Re-examined parts and rewritten to reflect feedback and suitable adjustment.</p> <p>This is to reflect caveats included in the policy on matters to be considered at the next policy review in 2028 to ensure the policy is practicable for licensees, such as the need for greater UK an local electric and hydrogen vehicle infrastructure, the need for greater availability and affordable vehicles and how fast the UK is developing its drive to become more emission friendly.</p> <p>Clarification wording following consultation</p>

	relevant policy euro category'	
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Appendix 3

**Cherwell District Council and Oxfordshire County Council
Equality and Climate Impact Assessment**

January 2023

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Section 1: Summary details

Directorate and Service Area	Regulatory Services and Community Safety; Licensing
What is being assessed (e.g. name of policy, procedure, project, service or proposed service change).	Cherwell District Council Taxi and Private Hire Licensing Policy
Is this a new or existing function or policy?	Existing policy – proposals for revision.
Summary of assessment 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>The policy sets out how the Council will ensure that licensed vehicles are fit for purpose and that licensed drivers are 'fit and proper' in accordance with the Town Police Clauses Act 1847 and Local Government (Miscellaneous Provisions) Act 1976.</p> <p>The review of the policy has taken in to account the guidance issued by central government (Department for Transport) and other regulatory bodies to ensure it is consistent with those nationally and within Oxfordshire.</p> <p>The revised policy will ensure that the Council achieves its aim to carry out its Taxi and Private Hire licensing function to protect and promote public safety, along with ensuring it complies with associated legislation and guidance. The revisions also ensure that the council meets its obligations and duties under the Equality Act 2010.</p> <p>The Equality and Climate Impact assessment on the proposed policy revisions identifies no negative impacts that need to be mitigated. It identifies positive impacts on the environment and in relation to accessibility of taxis and private hire vehicles.</p>
Completed By	Richard Rockall
Authorised By	Richard Webb
Date of Assessment	January 2023

Section 2: Detail of proposal

<p>Context / Background</p> <p>Briefly summarise the background to the policy or proposed service change, including reasons for any changes from previous versions.</p>	<p>The Department for Transport recommends all licensing authorities make publicly available a cohesive policy document that brings together all their procedures on taxi and private hire vehicle licensing. This should include but not be limited to policies on convictions, a ‘fit and proper’ person test, licence conditions and vehicle standards. When formulating a taxi and private hire vehicle policy, the primary and overriding objective must be to protect the public. The importance of ensuring that the licensing regime protects the vulnerable cannot be overestimated. This was highlighted in Serious Case Review published in 2015 following the investigation into Child Sexual Exploitation in Oxfordshire (Operation Bullfinch).</p> <p>The Council’s primary aim in carrying out its taxi and private hire licensing function is to protect and promote public safety. The Council must ensure that licensed vehicles are fit for purpose and that licensed drivers are ‘fit and proper’ in accordance with the Town Police Clauses Act 1847 and Local Government (Miscellaneous Provisions) Act 1976.</p> <p>The legislation above provides a broad framework for the licensing of drivers, vehicles and operators, but the detail of how this is done, including standards and conditions, is the responsibility of individual district and unitary councils (‘licensing authorities’). There are a number of other Acts which also have an impact; for example the Equalities Act 2010, which places a duty on councils to take steps to meet the needs of disabled people where these are different from the needs of other people, and enables regulations to improve disabled access to taxis.</p> <p>Under the guidance we should review our policy every five years and make such revisions as it considers appropriate at other times.</p>
<p>Proposals</p> <p>Explain the detail of the proposals, including why this has been decided as the best course of action.</p>	<p>It is a statutory requirement that the Council has a Taxi licensing policy. The current policy needs updating to reflect new national standards and to reflect the use of the National Register of Taxi Licence Revocations and Refusals (‘the NR3 Policy’). Further amendments are also being proposed to improve the clarity of the policy and address issues of interpretation identified by the Licensing Team.</p> <p>New taxi vehicle emission standards will be included within the new policy to support carbon emissions reduction at district/county level and in recognition of the Council’s Climate Action Plan.</p>

<p>Evidence / Intelligence</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>The proposed policy revisions mainly reflect the requirements of the new national standards which the council is expected to implement in full unless there is clear justification not to.</p> <p>In addition, the proposed policy revisions reflect the ambitions of the Council's Climate Action Framework. In 2020 the Council introduced a Climate Action Framework following the declaration of a climate emergency. In doing so the Council committed to “do its part to achieve a net zero carbon district by 2030”. Emissions from taxis and private hire vehicles contribute to vehicle emissions in the district and therefore the Climate Action Framework included a commitment to facilitate and encourage electric taxis. Research has been carried out to understand how other local authorities have included emissions standards in their licensing policies. Whilst most local authorities appear to have some emissions requirements in their policies, there is no consistent approach or consistency in standards being applied.</p> <p>Consultation is being carried out on the proposed policy revisions. Consultees include the trade and key stakeholders such as the Police and County Council. In particular, two licensing forum meetings were held to allow the trade to meet with Licensing Team members to discuss the proposals so that they could provide formal responses in the consultation process. The outcomes of the consultation will be reflected in the final policy proposals presented to the Executive and Full Council.</p>
<p>Alternatives considered / rejected</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>It is considered necessary to update the council's existing policy in consideration of the new national standards and to improve clarity of the policy. It is a requirement to have a Taxi and Private Hire Vehicle Licensing Policy which reflects the DfT standards unless there is clear justification for variation from those standards. The Licensing Team are not aware of any justification for not following the DfT standards in full but it is recognised that the consultation process on the proposed policy revisions may identify whether there is justification not to follow any aspect of the DfT standards.</p> <p>The Council could choose not to implement emissions standards in the new policy. However, the proposed policy revisions reflect the ambitions of the Climate Action Framework that has been adopted by the Council and it would be inconsistent with that framework not to seek to reduce the carbon emissions of the licensed taxi fleet.</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"/>				
Disability	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	The policy includes provisions to ensure taxis are accessible for people with disabilities.			
Gender Reassignment	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Marriage & Civil Partnership	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Pregnancy & Maternity	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Race	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Sex	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Sexual Orientation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Religion or Belief	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				

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"/>				
Armed Forces	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Carers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Areas of deprivation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				

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
Staff	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Other Council Services	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Providers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Social Value ¹	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<p>Positive impact on Climate change and positive impact on public health within our communities due to reduced carbon emissions.</p> <p>More effective and more thorough processes in place with the new policy therefore there will be a positive impact on public safety.</p>			

¹ 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 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"/>				
Our fleet	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Staff travel	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Purchased services and products (including construction)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Maintained schools	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				

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 type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Proposed policy includes changes which are consistent with local and national climate priorities and objectives.			

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.

Review Date	N/A
Person Responsible for Review	N/A
Authorised By	N/A

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