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County Hall  
Rhadyr  
Usk  
NP15 1GA

Monday, 3 October 2022

## Notice of Meeting

# Joint Select Committee Performance and Overview and People Scrutiny Committees

**Tuesday, 11th October, 2022 at 9.30 am**  
**The Council Chamber, County Hall, Rhadyr, Usk, NP15 1GA and remote attendance**

## AGENDA

Item No.	Item	Pages
1.	Election of Chair.	
2.	Appointment of Vice-Chair.	
3.	Apologies for Absence.	
4.	Declarations of Interest.	
5.	Public Open Forum.  <b>Select Committee Public Open Forum ~ Guidance</b>  Our Select Committee meetings are live streamed and a link to the live stream will be available on the meeting page of the Monmouthshire County Council <a href="#">website</a>  If you would like to share your thoughts on any proposals being discussed by Select Committees, you can submit your representation in advance <a href="#">via this form</a>  Please share your views by uploading a video or audio file (maximum of 4 minutes) or; Please submit a written representation (via Microsoft Word, maximum	

	<p>of 500 words)</p> <p>You will need to register for a <a href="#">My Monmouthshire account</a> in order to submit the representation or use your log in, if you have registered previously.</p> <p>The deadline for submitting representations to the Council is 5pm three clear working days in advance of the meeting.</p> <p>If representations received exceed 30 minutes, a selection of these based on theme will be shared at the Select Committee meeting. All representations received will be made available to councillors prior to the meeting.</p> <p>If you would like to attend one of our meetings to speak under the Public Open Forum at the meeting, you will need to give three working days' notice by contacting <a href="mailto:Scrutiny@monmouthshire.gov.uk">Scrutiny@monmouthshire.gov.uk</a> .</p> <p>The amount of time afforded to each member of the public to speak is at the chair's discretion, but to enable us to accommodate multiple speakers, we ask that contributions be no longer than 3 minutes.</p> <p>If you would like to suggest future topics for scrutiny by one of our Select Committees, please do so by emailing <a href="mailto:Scrutiny@monmouthshire.gov.uk">Scrutiny@monmouthshire.gov.uk</a></p>	
<b>6.</b>	<b>To confirm the following minutes:</b>	
<b>6.1.</b>	<b>Performance and Overview Scrutiny Committee dated 7th July 2022.</b>	1 - 12
<b>6.2.</b>	<b>People Scrutiny Committee dated 20th July 2022.</b>	13 - 16
<b>7.</b>	<b>Safeguarding and Performance Report - To Scrutinise the performance of the service area.</b>	17 - 54
<b>8.</b>	<b>Chief Officer for Social Care and Health: Annual Report - To conduct pre-decision scrutiny on the report and scrutinise the performance of the service area.</b>	55 - 68
<b>9.</b>	<b>Chief Officer for Education: Annual Report - To conduct pre-decision scrutiny of the report and scrutinise the performance of the service area (report to follow).</b>	
<b>10.</b>	<b>Local Development Plan (LDP) annual monitoring report - To scrutinise the annual monitoring report for the current adopted LDP prior to submitting to Welsh Government.</b>	69 - 232
<b>11.</b>	<b>Month 4 Budget Monitoring report - Scrutiny of the Council's budgetary position (revenue and capital).</b>	233 - 268
<b>12.</b>	<b>Performance and Overview Scrutiny Committee Forward Work Programme.</b>	269 - 272
<b>13.</b>	<b>Cabinet and Council Work Plan.</b>	273 - 282

**14.**

**Next meetings:**

People Scrutiny Committee – 15<sup>th</sup> November 2022 at 10.00am.

Special Meeting – Performance and Overview Scrutiny Committee - 21<sup>st</sup> November 2022 at 10.00am

**Paul Matthews**

**Chief Executive**

MONMOUTHSHIRE COUNTY COUNCIL  
CYNGOR SIR FYNWY

MONMOUTHSHIRE COUNTY COUNCIL  
CYNGOR SIR FYNWY

THE CONSTITUTION OF THE COMMITTEE IS AS FOLLOWS:

County Councillor Jill Bond	West End;	Welsh Labour/Llafur Cymru
County Councillor Fay Bromfield	Llangybi Fawr;	Welsh Conservative Party
County Councillor Ian Chandler	Llantilio	Green Party
	Crossenny;	
County Councillor John Crook	Magor East with	Welsh Labour/Llafur Cymru
	Undy;	
County Councillor Christopher Edwards	St. Kingsmark;	Welsh Conservative Party
County Councillor David Jones	Crucorney;	Independent Group
County Councillor Tony Kear	Llanbadoc &	Welsh Conservative Party
	Usk;	
County Councillor Jayne McKenna	Mitchel Troy	Welsh Conservative Party
	and Trellech	
	United;	
County Councillor Alistair Neill	Gobion Fawr;	Welsh Conservative Party
County Councillor Paul Pavia	Mount Pleasant;	Welsh Conservative Party
County Councillor Maureen Powell	Pen Y Fal;	Welsh Conservative Party
County Councillor Sue Riley	Bulwark and	Welsh Labour/Llafur Cymru
	Thornwell;	
County Councillor Angela Sandles	Magor East with	Welsh Labour/Llafur Cymru
	Undy;	
County Councillor Maria Stevens	Severn;	Welsh Labour/Llafur Cymru
County Councillor Jackie Strong	Caldicot Cross;	Welsh Labour/Llafur Cymru
County Councillor Peter Strong	Rogiet;	Welsh Labour/Llafur Cymru
County Councillor Ann Webb	St Arvans;	Welsh Conservative Party
County Councillor Laura Wright	Grofield;	Welsh Labour/Llafur Cymru

## Public Information

### Access to paper copies of agendas and reports

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**Watch this meeting online** This meeting can be viewed online either live or following the meeting by visiting [www.monmouthshire.gov.uk](http://www.monmouthshire.gov.uk) or by visiting our Youtube page by searching MonmouthshireCC.

### Welsh Language

The Council welcomes contributions from members of the public through the medium of Welsh or English. We respectfully ask that you provide us with adequate notice to accommodate your needs.

# Aims and Values of Monmouthshire County Council

## Our purpose

Building Sustainable and Resilient Communities

## Objectives we are working towards

- Giving people the best possible start in life
- A thriving and connected county
- Maximise the Potential of the natural and built environment
- Lifelong well-being
- A future focused council

## Our Values

**Openness.** We are open and honest. People have the chance to get involved in decisions that affect them, tell us what matters and do things for themselves/their communities. If we cannot do something to help, we'll say so; if it will take a while to get the answer we'll explain why; if we can't answer immediately we'll try to connect you to the people who can help – building trust and engagement is a key foundation.

**Fairness.** We provide fair chances, to help people and communities thrive. If something does not seem fair, we will listen and help explain why. We will always try to treat everyone fairly and consistently. We cannot always make everyone happy, but will commit to listening and explaining why we did what we did.

**Flexibility.** We will continue to change and be flexible to enable delivery of the most effective and efficient services. This means a genuine commitment to working with everyone to embrace new ways of working.

**Teamwork.** We will work with you and our partners to support and inspire everyone to get involved so we can achieve great things together. We don't see ourselves as the 'fixers' or problem-solvers, but we will make the best of the ideas, assets and resources available to make sure we do the things that most positively impact our people and places.

**Kindness:** We will show kindness to all those we work with putting the importance of relationships and the connections we have with one another at the heart of all interactions.

## Monmouthshire Scrutiny Committee Guide

### Role of the Pre-meeting

1. Why is the Committee scrutinising this? (background, key issues)
2. What is the Committee's role and what outcome do Members want to achieve?
3. Is there sufficient information to achieve this? If not, who could provide this?
  - Agree the order of questioning and which Members will lead
  - Agree questions for officers and questions for the Cabinet Member

### Questions for the Meeting

#### Scrutinising Performance

1. How does performance compare with previous years? Is it better/worse? Why?
2. How does performance compare with other councils/other service providers? Is it better/worse? Why?
3. How does performance compare with set targets? Is it better/worse? Why?
4. How were performance targets set? Are they challenging enough/realistic?
5. How do service users/the public/partners view the performance of the service?
6. Have there been any recent audit and inspections? What were the findings?
7. How does the service contribute to the achievement of corporate objectives?
8. Is improvement/decline in performance linked to an increase/reduction in resource? What capacity is there to improve?

#### Scrutinising Policy

1. Who does the policy affect ~ directly and indirectly? Who will benefit most/least?
2. What is the view of service users/stakeholders? Do they believe it will achieve the desired outcome?
3. What is the view of the community as a whole - the 'taxpayer' perspective?
4. What methods were used to consult with stakeholders? Did the process enable all those with a stake to have their say?
5. What practice and options have been considered in developing/reviewing this policy? What evidence is there to inform what works?
6. Does this policy align to our corporate objectives, as defined in our corporate plan?
7. Have all relevant sustainable development, equalities and safeguarding implications been taken into consideration? For example, what are *the procedures that need to be in place to protect children*?
8. How much will this cost to implement and what funding source has been identified?
9. How will performance of the policy be measured and the impact evaluated.

### Questions for the Committee to conclude...

Do we have the necessary information to form conclusions/make recommendations to the executive, council, other partners? If not, do we need to:

- (i) Investigate the issue in more detail?
- (ii) Obtain further information from other witnesses – Executive Member, independent expert, members of the local community, service users, regulatory bodies...
- (iii) Agree further actions to be undertaken within a timescale/future monitoring report...

### General Questions....

#### Empowering Communities

- How are we involving local communities and empowering them to design and deliver services to suit local need?
- Do we have regular discussions with communities about service priorities and what level of service the council can afford to provide in the future?

### *Service Demands*

- How will policy and legislative change affect how the council operates?
- Have we considered the demographics of our council and how this will impact on service delivery and funding in the future?

### *Financial Planning*

- Do we have robust medium and long-term financial plans in place?
- Are we linking budgets to plans and outcomes and reporting effectively on these?

### *Making savings and generating income*

- Do we have the right structures in place to ensure that our efficiency, improvement and transformational approaches are working together to maximise savings?
- How are we maximising income? Have we compared other council's policies to maximise income and fully considered the implications on service users?
- Do we have a workforce plan that takes into account capacity, costs, and skills of the actual versus desired workforce?

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## Monmouthshire Select Committee Minutes

**Meeting of Performance and Overview Scrutiny Committee held in the Council Chamber, County Hall, The Rhadyr USK on Thursday, 7th July, 2022 at 10.00 am**

### **Councillors Present**

County Councillor Alistair Neill (Chairman)  
County Councillor Tony Kear (Vice Chairman)

County Councillors: Jill Bond, Ian Chandler,  
Paul Pavia, Peter Strong, Ann Webb and  
Laura Wright

### **Officers in Attendance**

Paul Matthews, Chief Executive  
Peter Davies, Deputy Chief Executive and Chief  
Officer, Resources  
Matt Phillips, Chief Officer People and Governance  
and Monitoring Officer  
Jonathan Davies, Acting Assistant Head of Finance  
Matthew Gatehouse, Head of Policy and  
Governance  
Hazel Ilett, Scrutiny Manager  
Robert McGowan, Policy and Scrutiny Officer  
Richard Jones, Performance Manager  
Emma Davies, Performance Officer  
Nia Roberts, Welsh Language Officer  
Dave Loder, Finance Manager  
Nikki Wellington, Finance Manager

**APOLOGIES:** County Councillor Angela Sandles

#### **1. Election of Chair**

Councillor Alistair Neill was appointed as Chair.

#### **2. Chair's welcome**

The Chair welcomed committee members. In his remarks he stressed the importance of the committee's work, noting that effective scrutiny is important for a good council. He reminded members that the committee's role is to make recommendations, not decisions, and that their work should be impartial and non-partisan, to improve services and – ideally – avoid problems before they happen. The most effective scrutiny is in pre-decision making, to help the Executive in shaping good policy. The committee can amplify the public's voice in its work, and their concerns, as well as those of partners and stakeholders.

The committee will hold members to account for service delivery and risk management. Robust financial monitoring and holding the council to account on the corporate objectives outlined in its corporate plan will be fundamental. It will be important for the Chair and committee members to work effectively outside the meetings with officers, executive members, community groups and partners. The Chair will try to liaise with Cabinet members and supervise the work programme. The committee should ensure that the recommendations it reaches are balanced and accurate. Scrutiny needs to be

focussed and consistent – it is better if fewer areas done well, which needs to be considered when shaping the Forward Work Programme.

### **3. Appointment of Vice-Chair**

Nominations were received for Councillor Wright, Councillor Kear and Councillor Chandler.

Councillor Kear was appointed as Vice-Chair, following a vote.

### **4. Declarations of Interest**

There were no declarations of interest.

### **5. Public Open Forum**

No public submissions were received.

### **6. Welsh Language Annual Monitoring Report 2021-22 - To scrutinise the Council's performance in complying with Welsh Language Standards**

Matthew Gatehouse presented the report and answered the members' questions.

#### **Challenge:**

*Is staff training open to Councillors? Are there plans to return to in-person training?*

Yes, it is open to members – we want to help as many people as possible, things like lunchtime conversation classes. In September, we will probably introduce in-person opportunities, and are happy to fund courses elsewhere as well – the key thing is to get as many people speaking as possible.

*What will be put in place to deal with the overspend now and for future years?*

We have a legal duty to translate things, so we can't cut corners. There is the responsibility to operate within the budget set by Council for this area, so some effort has been made to make up for the overspend. For example, our Welsh Language Officer retired in an election year, leading to a gap in salary being paid for a period of time. Overall, the budget area will come in under budget, as demonstrated in the next agenda item.

*How is the tendering commission for translation services done? Is it up for review? Is Cardiff helping us, given our partnership arrangement? Do we do any in-house translation ourselves? Do other authorities share any translation services i.e., collaborating with those with greater provision?*

We looked at the overall commission 2.5-3 years ago – we do so regularly to ensure that our arrangements are cost-effective. We don't have in-house translation but use a stable of 6-7 translators around Wales. Our intelligence is that the rates that we are charged are very competitive, compared to the alternatives. We looked at another authority providing our translation service, but it would have been £30-40k more

expensive per year. We also asked Procurement colleagues whether there was value in going out to the market; given the size of the contract and the amount of potential savings, they felt that the contracts were not going to yield sufficient value to go out to the market. But we will keep it under constant review.

We considered bringing the service in-house partly because of the technology now available, but many of the individual businesses use software/learning tools, which enable them to keep their costs down. We don't do much in-house but there are occasional things like proofreading. For the most part though, translators can turn things around within the hour when it's urgent.

*What's the total number of staff in each service area – does it include those who haven't started learning?*

We don't have those numbers to hand, but they can be given later, and included in future reports to make them more useful to members.

*How much of the stated improvement in the last year is staff moving up in their fluency, and how much is recruitment of new staff?*

Existing staff have gained new qualifications, but a big improvement has been in the recruitment of external staff. The way technology allows us to work means that we are recruiting people from north and west Wales – people don't necessarily need to live locally. Another aspect is trying to target recruitment; for example, with home care vacancies, the Welsh Language Officer went on Radio Cymru to encourage Welsh speakers to apply. But that remains a challenge, and we are not yet where we want to be with recruitment. Because not as many have taken up courses in recent years we haven't seen the gains we would like. Key to this is advertising more jobs as 'Welsh Essential', particularly in frontline positions.

*Has anything been explored further to understand the difficulty in recruitment and retention? Is it just geographical, or is there a perception of us not taking the language seriously? Is salary a factor?*

It's not a unique challenge to Monmouthshire, which we have fed back to the Commissioner, with whom we have a very good relationship. We simply don't have huge numbers of Welsh speakers in this part of Wales. Many of the speakers come into higher level professional positions – many are high achievers and not necessarily then in frontline services. There are huge challenges in Home Care anyway, and many workers commute in from outside areas – particularly in Monmouthshire, given the house prices. Something we haven't done yet is go into Welsh language schools, to things like Careers evenings, to try to develop people from a much earlier stage. Also, growing our Welsh activity on LinkedIn and Careers websites to show that the language is encouraged here and that we have aspirations to grow its use. We are determined to try a range of tactics to make us a more attractive employer to Welsh speakers.

*If there is a request for care provision in the medium of Welsh, can we deliver it?*

Yes. We have Welsh Language Care Assistants, but don't have the numbers to hand. In a worst-case scenario where we were struggling, we would pay a market premium to bring someone in to meet a specific care need.

*Are we speaking to other authorities regarding best practices?*

We are part of the Welsh Language Officer's network, and we engage through the Welsh Local Government Association. We seek to learn from best practice. We are a smaller organisation than some others, which means we need to use resources effectively. But there are areas where organisations look to us e.g., about our translation services because our approach is very good. We do so for organisations like Citizen's Advice, too, as we can do so much more cost-effectively for them than anyone else could.

*What in-house promotion is there for staff training?*

There is, through things like Sharepoint (our Intranet site): we have a Welsh language page there, with courses published on Talent Lab. The fact that we don't have enough people doing those courses suggests that we would benefit from doing more and continuing to push them through things like the Digital Cwtch and Schmae Day. The ideas and enthusiasm that our new Welsh Language Officer has mean that there will be a big step up in promotion and activities over the coming months.

*Can the importance of attracting people to the authority be linked with the wider problem of recruiting staff to certain areas? To what extent is the requirement expressed in recruitment a deterrent to some excellent potential employees coming and working in these key roles, given the shared border with England?*

There is no easy answer to the general problem of recruiting staff. We can benefit in many ways as the gateway to Wales because we might find that Welsh speakers with jobs in Bristol and the West of England choose to stay living here and commute out. We have some really active conversation groups, and we work to support them to try to ensure that people who want to use Welsh, and are considering moving here for work, recognise that it is a healthy place for the language. We have tried to capitalise on the legacy of the Eisteddfod held in 2016 in Abergavenny, which gave the language a considerable boost in the county. But there are significant recruitment challenges that are not unique to our Welsh speakers.

*Can we be more proactive with staff and councillors by potentially having a word or phrase of the day in Welsh when they first log on to their system each morning?*

There might be limitations on popups etc. as we've tried things like that in other areas, but we will check with the digital team about what is feasible. There will be other things we can do, such as promoting apps that remind users each day to complete a learning task e.g. Duolingo.

## Chair's Summary:

Thank you for this comprehensive report. The committee concluded that the council needs to continue its efforts to recruit more Welsh speaking staff in frontline services, such as social care, acknowledging that recruitment in this sector is proving challenging nationally. The committee requested that further information on the numbers of Welsh speaking staff in individual service areas be emailed to the committee following the meeting.

## **7. Revenue Capital Outturn 2021- 2022 Budget Monitoring Report - To scrutinise the draft report and identify any areas of for future scrutiny**

Jonathan Davies presented the report and answered the members' questions with Dave Loder, Peter Davies and Nicola Wellington.

### Challenge:

*Future challenges in service delivery are highlighted. Is there a more detailed set of assessments of likely risks? What about inflationary pressures and related issues?*

Many of the risks will have been known at our budget-setting stage, when we did a full analysis of them. Some of the inflationary pressures might not have been apparent at that time; we have to respond to them quickly as they develop. Financial reporting for the following financial year will follow, with a formal Month 4 report coming to committee in September which will address some of the risks now presenting themselves. The main risks are highlighted in 3.28 and are those expected: we still see structural budget deficits related to demands on Social Care, Care Homes capacity is approaching 100%, so we are funding those placements, which we didn't have to do during the pandemic. Staffing issues in Domiciliary Care are a key feature of the service, and the external help that is being brought in to support it. Homelessness is a key area of legacy impacts – there's been a policy change from Welsh Government and there is a lot of detail still for us to work through in how to support that service.

*Underspends are as much of a concern as overspends, as it suggests that services aren't being delivered as hoped. Does 'savings' mean that we set out to save that money or are they underspends that we didn't mean to incur e.g., staff cost savings in the School Psychology Service?*

'Savings' or 'mitigations' primarily mean those that have been brought forward prior to the start of the financial year and which services have come forward with efficiencies or mitigations that can be made, shown in Table 2. The specific saving in the SPS was due to a staff vacancy. Underspends refer to what has happened during the year to the budget that was set, rather than savings or mitigations agreed at the start of the year, but the two are indeed sometimes conflated.

*What is the explanation for the large Highways underspend?*

It is comprised of two parts. The first is savings on staffing, as this area had a large number of vacancies. They are actively looking to fill those posts now. The second is the high levels of income last year, itself made up of two parts: we were able to

recharge more staff costs to capital budgets and grants, and we had an increased road closure income, not communicated to Finance until later in the year. That income doubled from what it usually is, creating a large spike in our income. It is highly unlikely that there will be a similar underspend this year.

*What does the surplus in Strategic Initiatives entail?*

Strategic Initiatives is a corporate budget that we hold; the £1m underspend is a late grant that we received from Welsh Government to support our difficulty in council tax collection during the year. It's in Strategic Initiatives to keep it separate from council tax, in order to report it transparently.

*Where we see significant variances from budgets it would be useful to have a commentary as to the resultant impact on services. Vacancies are 'why', but what has it meant and what actions were taken to mitigate the drop in service level during that period, e.g., in Highways and Flooding?*

In Appendix 1 the Director of the service looks to provide a wider commentary on the impact over the year, though not perhaps in the detail specifically asked about. The head of a service or those responsible would have a better indication of the ongoing effect that their underspend would have. Underlining features should be in the Performance reports.

For overall context, as we went through the last financial year we faced a significant overspend in the earlier months – we didn't have sight of the significant windfall grants from Welsh government that we subsequently received. We ensured that we weren't spending needlessly, sometimes holding vacancies where the impact has been assessed of doing so. Those judgements were made during the year, then the wave of grants came in. Regarding the current year 22-23, we expect a challenging position at Month 4. But when we set the budget for the current year we knew of the significant risks already mentioned and put aside reserve cover to offset some of the known risks. The issue will be the unknown risks, i.e., those emerging from the cost-of-living crisis and inflation manifesting in different ways, which might take a while to work their way through the system.

*How far advanced are schools' investment plans and how are they being enabled to realise them?*

Schools received a number of grants towards the end of the year that they have been allowed to move over into the current financial year. We have worked with the schools to produce 3-year budgets which are effectively the investment plans, ensuring that the money is spent appropriately, in line with grants and T&Cs. With all of our schools we have the current financial 22-23 budget in place, signed off by the governing body. Where a school is in deficit, we have a recovery plan in place. We monitor schools on a monthly/bi-monthly basis to ensure the plans are met.

*Do we capture the end of year data for vacancies per department across the organisation?*

The data in terms of specific vacancies is within the portfolio of our Chief Officer for People & Governance and colleagues in HR, so can be captured and made available.  
*Do you foresee maintenance support being a challenge in the next few years? Will that capacity issue hinder the realisation of those plans?*

There is a concern that capacity is an issue, in our own workforce and in contractors. It's a case of working very closely with schools to programme in when the works can be done. The Maintenance grant doesn't have to be spent by 31<sup>st</sup> March 2023 so there is time for us to work with schools to ensure that the money is spent.

*Are there plans or forecasts to cover any ongoing risk of reduced use of Spyttly Park and Castle Gate?*

Those assets were affected during Covid. Welsh Government extending the use of the Covid Hardship Fund to offset those losses was laudable. Occupancy levels in Castle Gate Business Park remained very strong through the pandemic, though. Newport Leisure Park was naturally affected more, given the nature of the tenancies, but we were able to keep those tenants secure through the Hardship fund. The tenants are operating well, and we will continue to assess that through the investment committee. During the early stages of budget-setting for 22-23 there was an identified risk in CG Business Park with one of the tenants giving notice; we have expanded an existing tenant into much of that space. It is often misunderstood but these tenants contribute significant net income to the council, allowing us to sustain and deliver services.

*Is there an update on the Weighted Unexpired Lease Terms?*

That information isn't to hand, we will need to provide it later.

*What would the pandemic impacts have been if additional funding hadn't been introduced? Do we have better sight of pressure points moving forward?*

If the Hardship Fund money hadn't been forthcoming in 2020, we didn't have the reserve cover to withstand the pressures. We would have had to react with very significant changes. Wales has benefitted much more from funding into local government and the Hardship Fund than counterparts in England. We've been able to restore and replenish reserves. Without such a level from the Hardship Fund, finances would have been beyond fragile.

*There will be further waves of Covid, and future pandemics. Would it be advisable to draw together what worked, what we shouldn't have done etc. in order to be prepared for future problems?*

The emergency support structures from the Civil Contingencies Act came into play very successfully in March 2020. Matt Phillips, Chief Officer for People & Governance, holds the portfolio responsibility for Emergency Planning, which will have undertaken its own debrief, which will also have been done at Gwent and Welsh Government level. There are inquiries into Care Homes during the pandemic, which will lead to a body of

evidence of what has been learned at a local and national level. Perhaps a summary of the lessons learned could be sought from Matt Phillips.

### **Chair's Summary:**

The recommendations were moved and agreed by members. The committee requested that a breakdown of the inflationary pressures be emailed to members to assist them in gaining an understanding of the impact of inflation on the Council's budgetary position. It will be important to draw together the learning from the pandemic, particularly financial impacts that led to service impacts, to ensure we are resilient as possible for whatever lies in store.

### **8. Monmouthshire County Council Self-Assessment 2021-2022 - To scrutinise the Council's performance during 2021-2022 against the goals outlined in the Corporate Plan 2017-2022, agreeing any areas for future scrutiny**

Richard Jones presented the report and answered the members' questions with Matthew Gatehouse and Emma Davies.

### **Challenge:**

*In the work to reduce our carbon footprint and waste, is there scope for looking towards new behaviours, e.g., soaps instead of gels, emphasis on non-use rather than recycling, the understanding that plastics ultimately come from oil? Has that been considered?*

We declared a Climate Emergency and put together a related Action Plan, but the report recognises that there is more to do; we are looking towards how to achieve more with our resources. The member has given some excellent suggestions for us to follow.

*How are Area Committees doing, and what is their setup? Is there feedback from communities about how MCC is doing?*

The key thing to recognise is that they haven't been meeting recently. There have been a number of evaluations of them in recent years. Cabinet Member Fookes will commence a piece of work on public participation soon that will incorporate work with the area committees.

*Is there a difference between this version 1.0 and the 2.0 circulated for G&A committee next week?*

There haven't been major changes between 1.0 and 2.0, it is more about reflecting that this report looks back on 21-22. Finalisation of some data and evidence has continued, and some performance indicators have been updated. One significant change is the addition of timescales to action plans. The vast majority of conclusions and detail are unchanged. We can set out the changes subsequently e.g., in the report that will go to council in September. For clarity, a '.0' is used when something is in the public domain, and even a minor change can see something updated from Version 1.0 to 2.0.



*Do we capture staff feedback to understand the nuances of the collaboration between local authority, Social Care departments and Health?*

We are very proud of our record of joint working between Health and Social Care, which goes back to 2005-6. There are clearly huge challenges in this interface. Feedback is captured in the professional supervision that social workers and others have with their immediate managers, which then informs the conclusions that the Chief Officer for Social Care puts together in their annual report. There are sometimes sensitivities, and this is how we would see that information coming through. The Care Inspectorate Wales report, produced at the end of 2021, might be useful: a lot of work was done with staff and there was a lot of feedback from them noted in it.

*Do we review the questions in the Social Services user questionnaire before it is issued to ensure that we're asking the right things?*

These are national questions. The design has been informed by involvement from service areas themselves, our performance team and customer relations team. It is a long-standing survey of Adult Social Care users, giving us a rich picture of trends and changes – in suggesting any changes we have to be mindful of how that would affect our ability to monitor trends over time. There is an emphasis on how we use qualitative information to inform our performance framework as well as metrics and performance measures. All of the evidence comes together in the Chief Officer for Social Care's report, which might come to this committee in due course.

*The focus includes agreed outcomes but there is little explicitly assessing the impacts on residents and communities. Would it be a stronger assessment if this was included?*

The self-assessment is ultimately about the effect on communities. As we develop the report further, we will look at how we strengthen when we assess the delivery of a service or policy priority, specifically demonstrating the ultimate impact that it will have on the service user – and throughout the report, not just separately at the end. The second aspect is involvement i.e., the views of residents and service users via engagement etc., especially with the duty in the act to strengthen that involvement.

*Under Goal A, the rise in the percentage of Year 11 NEETs is a concern, having gone up from 0.4% to 2%. Can you comment on that?*

Yes, the rise is important, albeit a relatively small number. The Employment & Skills team has more granular detail about the children's experiences and outcomes, and are working with them to support them into education and training opportunities. They would be best placed to comment further.

*The 20mph scheme seems like the single measure in Goal C for keeping roads and areas safe? What other options might there be e.g., speed ramps, cameras, a greater enforcement of measures?*

20mph is one measure but there is a range of issues to ensure road safety. We need to consider a range of factors as to whether we've been successful. There was a lot of work previously in a task and finish group under another scrutiny committee, and a policy is going to come to the Place Committee. So, there will be the opportunity to

scrutinise some of the detail before the policy is adopted but there isn't detail to hand today.

### **Chair's Summary:**

The committee welcomes the report in terms of providing valuable context for new members and assisting the committee in the development of its forward work programme. The committee acknowledges a rise in the number of young people not in employment or education and are advised that there is a strategy in place which may be of further interest to the committee. Members advocate the need for the council to have demonstrable climate reduction plans across all services. The committee will await the development of the new Corporate Plan which will be brought to the committee for pre-decision scrutiny in due course and suggests that consideration be made as to how resident feedback and response could be built more strongly into the outcomes. The recommendations were moved and agreed.

### **9. Forward Work Programme - To consider the Forward Work Programme Report and identify areas for future scrutiny, and in doing so, to agree a draft Forward Work Programme**

The following topics were suggested by members:

- Council and Community resilience, specifically in view of the next phase of Covid or the next pandemic.
- How the new administration uses Council reserves.
- Procurement: gaining an understanding of how well the relationship with Cardiff Council is working, and its benefits (Pre-decision scrutiny of the Procurement Strategy will be undertaken at the next meeting.)
- Recruitment and retention: the effect of Covid, the challenge of vacancies, and questions of salary differentials.
- The Asset Management strategy, and ways to strengthen it.

### **Chair's Summary:**

The report is moved, and the Forward Work Programme is agreed in outline; it will be circulated following the meeting to enable members to add further suggestions. The committee agrees the agenda for its next meeting on 29<sup>th</sup> September will include Pre-decision Scrutiny of the Procurement Strategy, Scrutiny of the Chief Officer's Social Care and Health Annual Report, Budget Monitoring Month 4 and the Strategic Risk Register. The committee recognises that this may not be achieved in a single meeting and therefore agrees that the Strategic Risk Register will be received at this meeting but tabled to a future scrutiny workshop to agree future areas they wish to scrutinise in greater detail.

### **10. Next Meeting**

Thursday 29th September 2022 at 10.00am.

The meeting ended at 12.27 pm.

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## Monmouthshire Select Committee Minutes

Meeting of People Scrutiny Committee held at The Council Chamber, County Hall, Usk, NP15 1GA and remote attendance on Wednesday, 20th July, 2022 at 10.00 am

### Councillors Present

County Councillor Sue Riley (Chairman)  
County Councillor Angela Sandles (Vice Chairman)

County Councillors: Fay Bromfield, Jayne McKenna, Maureen Powell, Maria Stevens, Jackie Strong and Penny Jones

### Officers in Attendance

Hazel Ilett, Scrutiny Manager  
Robert McGowan, Policy and Scrutiny Officer  
Frances O'Brien, Chief Officer, Communities and Place  
Ian Bakewell, Housing & Regeneration Manager  
Mark Hand, Head of Place-making, Housing, Highways and Flood  
Craig O'Connor, Head of Planning

**APOLOGIES:** County Councillors Christopher Edwards and David Jones

#### 1. Election of Chair

Councillor Sue Riley, nominated by Councillor Stevens and seconded by Councillor Strong. The Chair delivered some welcoming remarks, emphasising the opportunity of the committee to shape services to enhance people's lives, and represent everyone.

#### 2. Appointment of Vice-Chair

Councillor Christopher Edwards was nominated by Councillor Powell, seconded by Councillor Bromfield. Councillor Angela Sandles was nominated by Councillor Strong, seconded by Councillor Stevens. Councillor Sandles was appointed as Vice Chair, following a vote.

#### 3. Apologies for Absence

Councillor Christopher Edwards, with Councillor Penny Jones substituting, and Councillor David Hughes-Jones.

#### 4. Declarations of Interest

Councillors Powell, Bromfield, Riley and McKenna declared a non-prejudicial interest as members of the Planning committee.

#### 5. Public Open Forum

No public submissions were received.

**6. Gypsy and Traveller Site Selection - To consider a proposal for assessing the suitability of Council owned land for the potential purpose of addressing the Council's statutory obligation, to meet the identified need for Gypsy and Traveller sites**

Ian Bakewell presented the report, with additional comments from Mark Hand. Ian Bakewell and Mark Hand answered the members' questions.

**Challenge:**

*The Planning committee approved a Travellers' site last month – has that been deducted off the 13? Is there any public consultation prior to the planning stage?*

The site mentioned in relation to the Planning committee concerns a family that was not identified via the process of the Gypsy & Traveller Accommodation Assessment, in which the need for 13 sites was identified. Therefore, the number of families can change, and there will be a review in 2025. The number is also based on predictions about how families will grow by 2033. So, there's some fluidity but it is the accepted and best process.

There will be a consultation as part of the process of site sifting, led by the Housing team, looking at which sites are shortlisted and how they might fit in with the LDP. The second stage is that they are included in the LDP, as a statutory process. There will be public consultation on that along with all the other aspects of the plan. The third stage is at planning application level. Once things are allocated in the plan it is an agreed council document so it would only be a case of finalising site specifics in more detail at that last stage.

*13 pitches have been proposed, for 13 needed. Has there been any element of choice from the community itself?*

As much flexibility is built in as possible – we don't want a situation where we arbitrarily choose a site and tell the family. There is a relatively small number of families, so we know them and their needs well. It's about trying to take in as much of that as we go along, so that when we get to the end of the process there are no surprises or disappointment. As we're starting from scratch, there is the opportunity to involve the families in the development of sites.

*The community will be involved, and Trudy Aspinall, the Lead for Travelling Ahead, will speak on their behalf?*

Yes. Trudy asked that we state today that she's happy to be involved and advocate, facilitating community engagement, but isn't a direct representative.

*What is the current situation of the families – how are they supported at the moment?*

We can't answer directly at this time. The families are independent, but we know they need access to particular health facilities, some of the children attend comprehensive school in Pontypool, one is working in the Usk area, etc. We would expect the families to feed back to us their situation and needs, for us to take into account. The important thing for us is to listen and respond accordingly.

In terms of the families' physical situation, we have all of that information and can go through it in the first workshop e.g., if a family is currently overcrowded, they could be catered for by an extra caravan on the area that they already own, subject to planning. One particular issue is the area in Llancayo, which is unauthorised in terms of planning: planning was refused, the appeal was rejected, and it has gone through a court process. So those families have somewhere to live at the moment but it's unauthorised; they need to stay there for now, but the purpose of this exercise is to find them somewhere that's a suitable alternative. The Planning issue concerned

flood risk; they are currently in safe accommodation, there is no immediate risk to anyone at present.

**Chair's Summary:**

The committee agreed that this be added to the Forward Work Programme.

**7. Forward Work Programme - To consider the Forward Work Programme Report and identify areas for future scrutiny, and in doing so, to agree a draft Forward Work Programme**

Hazel Ilett presented the report. Members proposed the following subjects:

- Home to school transport
- Waiting times for NHS patients
- Workforce development: the policy concerning the gap for discharge from hospital and social care
- Child Protection: how many children are on child protection from neglect, and what preventative services could be added to reduce that number

**Chair's Summary:**

Waiting times for NHS patients is more relevant to the Public Services committee. Members agreed for a discussion with PS over a joint workshop on the matter. Regarding Social Care, the Chief Officer's report will be scrutinised by the Performance & Overview committee, with a special meeting proposed in October to cover it; members of this committee would be welcome, and many of their questions would hopefully be answered there.

School transport and Child Protection were agreed for 27<sup>th</sup> September.

**8. To confirm the following minutes:**

- 8a. Adults Select Committee dated 2<sup>nd</sup> March 2022.
- 8b. Children and Young People Select Committee dated 3<sup>rd</sup> March 2022.

The minutes were noted, as none of the members were present for either, except Councillor Powell.

**Adults Select Committee dated 2nd March 2022**

**Children and Young People Select Committee dated 3rd March 2022**

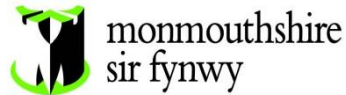
**9. Next Meeting: Tuesday 27th September 2022 at 10.00am.**

Members preferred that the time be changed to 10.00am.

The meeting ended at **11.05 am**

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**SUBJECT: SAFEGUARDING EVALUATION REPORT April 2021 – March 2022**

**MEETING: Joint Committee, People and Performance**

**DATE: 11<sup>th</sup> October 2022**

**DIVISION/WARDS AFFECTED: ALL**

## **1. PURPOSE:**

The purpose of this report is:

- To evaluate the progress of Monmouthshire County Council's key safeguarding priorities during 2021 / 2022, highlighting progress, identifying risks and setting out actions and priorities for 2022 - 2023.
- To inform Members about the effectiveness of safeguarding in Monmouthshire and the work that is in progress to support the Council's aims in protecting children and adults at risk from harm and abuse.
- To inform Members about the progress made towards meeting the standards in the Council's Corporate Safeguarding Policy approved by Council in July 2017, amended July 2022.

## **2. RECOMMENDATIONS:**

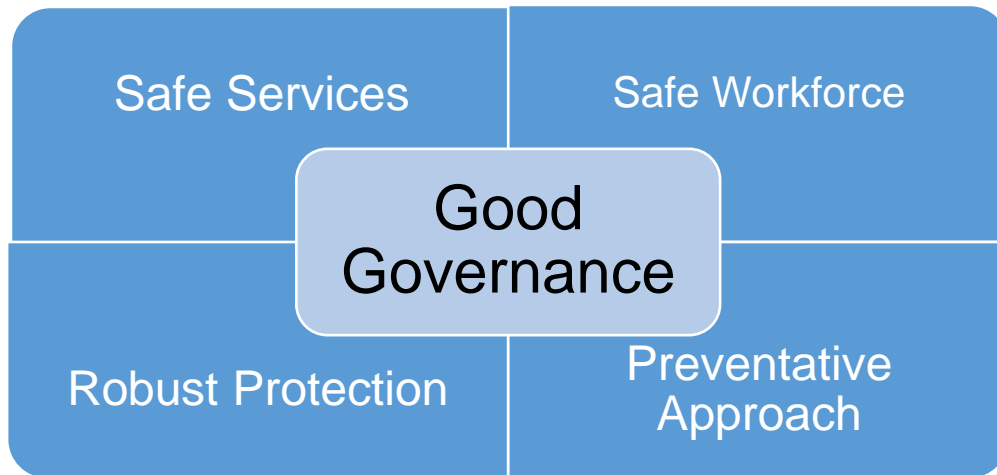
For members to scrutinise the Annual Safeguarding Evaluation Report and Activity prior to its presentation at Council on 27<sup>th</sup> October 2022.

## **3. KEY ISSUES:**

- 3.1** Appendix 2 is based on safeguarding activity and information from April 2021 to March 2022. During the majority of this period COVID restrictions have remained in place, which had an impact on operational safeguarding activity and where relevant, this is referenced within the evaluation and informs the safeguarding risk assessment, which remained in place during this period. (Appendix 5)
- 3.2** Monmouthshire County Council's Corporate Safeguarding Policy, which covers duties for both children and adults at risk in line with the Social Services and Well Being (Wales) Act (2014) and Wales Safeguarding Procedures, has helped to inform this evaluation report. The analysis reflects progress against priority areas set out within the policy and draws on data and information regarding both children and adults at risk.

**3.3** The 5 cornerstones of Safeguarding within the Corporate Safeguarding Policy are set out below.

**The Cornerstones of Safeguarding in Monmouthshire**



**3.4** This evaluation report forms an integral part of the continual development of safeguarding practice across the Council and drives the work of the Whole Authority Safeguarding Group. The evaluation report seeks to balance qualitative and quantitative data as well as drawing in other sources of information to support the evaluation. The evaluation report is at Appendix 2.

**3.5** Relevant sources of external information were used to inform this evaluation including the Internal Audit Report on Safeguarding Training issued March 2021.

**3.6** The self-assessment score has been agreed by the Whole Authority Safeguarding Group (WASG) through critical challenge on the basis of evidence reviewed to date. It uses the corporate scoring framework (Appendix 1) to provide an overall judgement of effectiveness between 1 (major weaknesses) and 6 (excellent / outstanding). The current self-assessment is set out below.

**Self-assessment scores as at March 2022**

<u>Cornerstone of Safeguarding</u>	<u>April 17 - Sept 17</u>	<u>Oct 17- March 18</u>	<u>April 2018 – March 2019</u>	<u>April 2019 – March 2020</u>	<u>April 2020 – March 2021</u>	<u>April 2021 – March 2022</u>
Good Governance	4	5	5	5	5	5
Safe Workforce	3	4	3	3	4	4
Preventative Approach	3	4	4	4	5	4
Robust Protection	4	4	4	3	3	4
Safe Services	2	3	3	3	4	4

**3.7** Priority improvement actions arising from the evaluation form the basis of the action plan which is implemented and monitored through the WASG (see Appendix 3). The review of the previous year's action plan is at Appendix 4.

#### **4 OPTIONS APPRAISAL:**

Not applicable to this report

#### **5 EVALUATION CRITERIA:**

Each 'cornerstone' section of the report opens with descriptors of 'what good looks like'. These descriptors provide the basis of how we measure the standard over time using both qualitative and quantitative sources.

Safeguarding progress is reported on an annual basis to full Council.

#### **6 REASONS:**

**6.1** Safeguarding vulnerable people is central to the Council and requires strong leadership and governance. An evaluation of safeguarding within Monmouthshire County Council is therefore reported to the Council on an annual basis.

#### **7 RESOURCE IMPLICATIONS:**

There are no resource implications to this report.

#### **8 WELLBEING OF FUTURE GENERATIONS IMPLICATIONS (INCORPORATING EQUALITIES, SUSTAINABILITY, SAFEGUARDING AND CORPORATE PARENTING):**

This report is critically concerned with the effectiveness of safeguarding in Monmouthshire County Council.

**9      CONSULTEES:**

Members of the Whole Authority Safeguarding Group  
Chief Officer for Social Care, Safeguarding and Health

**10     BACKGROUND PAPERS:**

Corporate Safeguarding Policy

**11     AUTHORS:**

Head of Children’s Services – Diane Corrister  
Safeguarding Service Manger – Kelly Turner

**12     CONTACT DETAILS:**

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## **APPENDIX 1**

### **THE CORPORATE EVALUATION FRAMEWORK:**

<b>The evaluation score from 1-6</b>	<b>The evaluative context</b>
<b>Level 6 Excellent</b>	<b>Excellent or outstanding</b>
<b>Level 5 Very Good</b>	<b>Good Major strengths</b>
<b>Level 4 Good</b>	<b>Important strengths with some areas for improvement</b>
<b>Level 3 Adequate</b>	<b>Strengths just outweigh weaknesses</b>
<b>Level 2 Weak</b>	<b>Important weaknesses</b>
<b>Level 1 Unsatisfactory</b>	<b>Major weakness</b>

## **APPENDIX 2**

### **THE EVALUATION:**

#### **1. GOOD GOVERNANCE**

**SELF-ASSESSED SCORE = 5**

##### **WHAT DOES GOOD LOOK LIKE?**

In Monmouthshire County Council we ensure that safeguarding for children and adults at risk is understood as “everyone’s responsibility”. With strong leadership there is a continuous focus on embedding safeguarding culturally across all parts of the Council at a “hearts and minds” level. Safeguarding is supported by robust policies and operating procedures which are embedded within all settings and services. We work effectively with the Gwent Safeguarding Board to ensure good alignment and maximise our resources.

##### **PROGRESS AND EVIDENCE:**

###### **SAFEGUARDING AND RISK ASSESSMENT DURING COVID:**

April 2021 – March 2022 has been a period predominantly impacted upon by Covid restrictions, based on Government guidelines and in line with Chief Executive direction. There has been continuous risk assessment on Safeguarding practice, with weekly emails from Paul Matthews, Chief Executive and Matthew Phillips, Chief Officer People and Governance providing information to the whole authority which influenced safe practices across the council. Monmouthshire Local Authority was also provided an opportunity to come together through the “cwtch” allowing issues to be discussed on a digital platform.

###### **SAFEGUARDING AUDIT FRAMEWORK EVALUATION [SAFE]:**

SAFE roll out 2021-2023 has commenced with a decision for a staged approach so each Directorate is given dedicated time to ensure effective Quality Assurance for each area with a personal review meeting by a member of the Safeguarding Unit. This approach has utilised the Safeguarding Business Support Manager role to co-ordinate the dissemination of the SAFE and track progress and completion.

The first SAFE roll out was given to People and Governance, which has been fully completed. Policy, Performance and Scrutiny and Health and Social Care are the next cohort, with most of the SAFE’s in progress. The final Directorate for consideration will be Enterprise and Mon Life.

Once a SAFE has been received by the Safeguarding Unit, they are reviewed and returned with suggestions prior to arranging a quality assurance review with the Designated Safeguarding Lead [DSL] / Owner of the SAFE. All SAFE’s completed, with oversight from the Safeguarding Unit have been completed to a good standard, with appropriate action plans in place to mitigate risk.

101 SAFE requests are sent out across the council per rolling programme, this included 35 schools, 1 PRS, and 26 early learning settings.

###### **SAFEGUARDING CORPORATE POLICY:**

Safeguarding Corporate Policy was reviewed throughout this period, to include recognition of new legislation with the Wales Safeguarding Policy and inclusion of current contact details for the Safeguarding Unit. The formatting of the document was made more user friendly to signpost to guidance / policies via hyperlinks.

###### **DUTY TO REPORT FORMS:**

The new Duty to Report [DTR] form was reviewed by the regional Gwent Safeguarding Board in order for the content to align and be compliant not only with the Social Services and Wellbeing [Wales] Act 2014 [SSWB 2014] but also the Wales Safeguarding Procedures 2020. It was hoped that the revised

Report would result in stronger multi-agency collaboration and an improved information sharing process between the report maker and Adult and Children's Services to effectively safeguard and support children, vulnerable adults and their families within Monmouthshire. The DTR was launched by in July 2021 and adopted in Monmouthshire across our locality teams and third sector providers. The new DTR is held on the Monmouthshire Hub and Gwent Safeguarding Board website for easy access.

**GWENT SAFEGUARDING BOARD [GSB]:**

There remains strong links with the Gwent Safeguarding Board (GSB). Jane Rogers, Chief Officer Social Care & Health, is co-chair of the Board and Diane Corriester Head of Childrens Services, and Eve Parkinson, Head of Adults Services represent Monmouthshire. The GSB is supported in their work by a number of sub groups that manage the core business and other more specific pieces of work, which deliver on the strategic priorities set by the Board each year. Members of the Safeguarding Unit continue to be represented on all groups / sub groups to deliver the specified outcomes and in addition maintain good links into the Violence Against Women, Domestic Abuse and Sexual Violence (VAWDASV) Board.

The Whole Authority Safeguarding Group (WASG) continued to meet on a digital platform through the pandemic. The group continues to ensure that corporate safeguarding has oversight at a senior level, so that risks can be identified and managed throughout the council.

**ANALYSIS:**

The links between the Safeguarding Unit and other Directorates demonstrates good communication and how Safeguarding is everyone's responsibility, which reflects our self-assessment score of 5.

**KEY STRENGTHS:**

- Safeguarding and risk assessment during Covid
- Safeguarding Audit Framework Evaluation
- DTR being fully adopted
- Continuous positive relationships between Safeguarding Unit and Gwent Safeguarding Board

**NEXT STEPS:**

- Completion of SAFEs
- Data set for WASG to be updated
- Corporate Safeguarding Policy to be ratified and disseminated

**2. SAFE WORKFORCE**

**SELF-ASSESSED SCORE = 4**

**WHAT DOES GOOD LOOK LIKE?**

We ensure that safe recruitment and human resource practices operate effectively and are embedded across the Council for the whole workforce (paid and unpaid). We ensure that individuals working with children and adults at risk are suitable for the role they are employed to do and are focused on outcomes for people. The whole workforce is clear about their duty to report concerns and to keep children and adults at risk safe.

**PROGRESS AND EVIDENCE:**

## **TRAINING:**

There remains a high priority within the Council for safe recruitment practices; training is central to this. A system has been devised for this information to be centrally stored within the Corporate Training Unit, however, there remains a commitment to further develop this into a “resource link”. MCC are working on implementing a system “Thinqi” across the organisation, which would automatically record training attendance via TEAMS/Outlook/Booking system and is being overseen by HR and the Data Systems Team.

The Safeguarding Policy shows the levels of current training required; however, this has not been revised as the National Training Standards are being drawn up after a regional multi agency period of consultation. MCC will align to the Safeguarding Training Standards once the consultation period is completed and standards agreed. We were advised in March 2022 that the consultation phase in relation to the draft Standards and Framework is due to begin in April 2022 and members of the Safeguarding Unit have been identified to participate to ensure representation from Monmouthshire.

Mon Life and individual schools undertake their own Level 1 Safeguarding Training. The plan was to build other Directorates into this training pool, however this was disrupted by the pandemic. As Level One has successfully developed on a digital platform there has been less need to expand the training pool. Current SWAY E learning arrangements have provided a robust platform to implement this training council wide, and this is well received, meaning less face to face sessions are needed. In the region of 500 have received Level one training during this period

Safeguarding Level 2 is delivered by a representative from the Safeguarding Unit alongside a co-trainer from other Directorates. This has been delivered on a digital platform, however plans to move this back face to face when possible. 61 people completed Level 2 training in this time period

In November 2020 an internal training audit was undertaken, which concluded that ‘Considerable Assurance’ can be gained from the control environment. There was, nevertheless, some areas for action in particular around the clarification of roles under the Corporate Safeguarding Policy and the identification of the relevant officers, which was achieved upon policy review. There were also improvements required in the evidencing of training undertaken, which was assisted by the planned improvements to the People Services’ ResourceLink system and will further be strengthened by the implementation of system “Thinqi”.

## **DISCLOSURE BARRING SERVICE [DBS]:**

The current DBS digital system encourages staff to set up an account that sends an automatic reminder to renew. This provides a more streamline and robust mechanism for regular updates in staff DBS checks.

People Services have reported a fast turnover of DBS checks and there are no longer gaps where a person’s DBS has lapsed, requiring additional risk assessments. This also means that new staff are able to enter their posts more quickly, all of which supports a more efficient workforce ensuring appropriate services are continually offered.

When risk assessments are required due to a lapse in DBS check or concern raised, these are undertaken by Kelly Turner in the safeguarding unit, with further consideration and sign off by the Head of Service.

## **PRACTITIONER CONCERNS ALLEGATIONS:**

The Local Authority has overall responsibility for the management of the Practitioner Concerns / People in a Position of Trust process. When a case relates to a practitioner within the Health Board setting, Corporate Health Safeguarding will take responsibility for enquiries being undertaken and the completion of actions identified. However, the overall accountability for the process remains with the Lead Officer within the Local Authority.



The Safeguarding Unit has developed a tracker to manage both children and adults Practitioner Concerns Allegations; this identifies the status of each case, including what investigation is required, prevents drift and details the outcome of each process. This is reviewed on a monthly basis by the Safeguarding Unit. In the cases linked to Practitioner Concerns with adults at risk, the database enables the monitoring of the allegation when the Lead Co-ordinator is outside the Local Authority, eg Health.

A contact log has also been developed to record when a DTR is received, when threshold decision is made and the date a Strategy discussion is requested and held. This provides a clear chronology for Practitioner Concern cases. All correspondence between the Safeguarding Unit and partner agencies are detailed within the contact log, as well as the conclusion of the process.

There are ongoing regional discussions and Task and Finish groups taking place to explore and review the effectiveness of the Practitioner Concerns meetings, with an attempt to streamline them nationally. Within the Gwent Child Protection Co-ordinator bi-monthly meetings and the regional Safeguarding Board meetings, this is being explored and reviewed regularly.

During 01/04/21 – 31/03/22 the Unit held Professional Strategy Meetings about **63** professionals, relating to **78** children following professional allegations.

During the same period **49** Professional Strategy Meetings were concluded, of which:

**33** x Substantiated

**9** x Unsubstantiated

**6** x Unfounded

1 x case transferred responsibility to another Local Authority

Professional allegation referrals come from a range of referral sources.

Data capture has been developed during this period to evidence the number of professional allegations in relation to adult safeguarding:

During 01/04/21 – 31/03/22 the Unit held Professional Strategy Meetings about 43 professionals

During the same period, 33 Professional Strategy Meetings were concluded, of which:

14 x Substantiated

13 x Unsubstantiated

6 x Unfounded

### **ANALYSIS:**

Safe recruitment under the Corporate Safeguarding Policy continues to be a priority and there are good processes and systems in place, which are continually reviewed and monitored to ensure that safe recruitment practice is followed. As digital approaches continue to develop (as part of the legacy of COVID-19) safe recruitment practice will need to remain at forefront.

The score remains at 4 as we continue to strengthen arrangements around our safe recruitment practice and in line with the ongoing development of "Thingy" to automatically record training attendance.

During this period, the responsibility for managing and chairing both Children and Adult Practitioners Concerns meetings has been under the remit of the Child Protection Co-ordinator; the Child Protection Coordinator has significant experience in adult services, and therefore able to provide some resilience during a period of staff shortage. This has supported consistency in respect of threshold and monitoring

of the process being followed and within appropriate timescales. It has been noted that as a result better dialogue is taking place at an earlier point to ensure the Practitioner Concern element is being identified. There has been an important development in the recognition of the Practitioner Concern element of the policies and procedures; the Safeguarding Unit appear much more confident in identifying if there is a concern around a Practitioner / Person in a Position of Trust and the safeguarding in this arena is now running parallel and in conjunction rather than afterwards.

**KEY STRENGTHS:**

- Continuous priority given to safe recruitment practice within the Council
- The develop of SWAY E-learning has promoted a strong Level 1 training forum across Directorates with continued quality assurance and support from the Safeguarding Unit.
- The Practitioner Concerns guidance has been fully adopted within Monmouthshire and tracking data is now in place to ensure recording and processes are followed in a timely manner.

**NEXT STEPS:**

- Ongoing development of “Thingj” to ensure training records are centrally managed
- Training Policy needs to look at mandatory training and consider other areas that need to be recorded, including VAWDSV, Prevent and GDPR
- Undertake an audit of the adapted arrangements for digital recruitment to ensure safeguarding is at the forefront
- To further aid the efficiency and management of Practitioner Concerns, a model is being developed on Flo / Plant to ensure appropriate safeguards are put in place. This will be GDPR compliant
- Regional Safeguarding Leads will continue to meet to review the Practitioner Concerns process and review the effectiveness of the “outcomes” of the process
- Training to be developed around understanding of Practitioner Concerns, for those who are employers and those who are at greater risk of being discussed in the arena, eg Education, Foster Carers and Health professionals

**3. PREVENTATIVE APPROACH**

**SELF-ASSESSED SCORE = 4**

**WHAT DOES GOOD LOOK LIKE?**

We work with partners to identify emerging issues, risks and challenges to our communities. We demonstrate clear multiagency approaches to developing protocols, processes and practice in how we respond to these issues therefore reducing risks through early intervention and preventative approaches.

**PROGRESS AND EVIDENCE:**

**VAWDASV and PREVENT:**

VAWDASV Training continues to be mandatory for all Council employees, with Group 1 now being completed on an external E-Learning platform. During this period a total of 49 people undertook this training. This can be accessed through the Hub via an external link. Staff are regularly reminded to complete this mandatory training and this is also part of the induction process for new starters, to ensure compliance.

The Multi Agency Risk Assessment Conference [MARAC] has continued throughout this period, being held on a fortnightly basis, via Microsoft Teams with the aim of risk assessing on a multi-agency basis, victims who are at high risk of domestic abuse. There continues to be a good representation from all agencies at these meetings to ensure effective Safeguarding planning. This has included new agencies, such as the Phoenix Project who are supporting perpetrators of domestic violence to recognise their behaviours. Cases discussed at MARAC have risen to 130 [from 120 last year]. This increase mirrors an increase in National demand for MARAC, and regionally there are aims to develop a MARAC Demand Management Plan.

There have been no Domestic Abuse Homicide Reviews for Monmouthshire during this period.

### **MODERN DAY SLAVERY:**

There remains a consistent drive towards developing approaches regarding Modern Day Slavery. The Quality Assurance Officer within the Safeguarding Unit has driven the protocol, which has been rolled out to Children's Services and introduced within Adult Teams. Covid has delayed the full rollout of this protocol, in particular for Adults and Housing, however, external training is being provided by the Police, which covers Exploitation, Modern Slavery and the National Referral Mechanism [NRM] process. This training is promoted by the Workforce development Team in Monmouthshire, and has been well received.

### **NATIONAL REFERRAL MECHANISM [NRM]:**

The National Referral Mechanism is the UK system for officially recognising victims of trafficking and the decisions about whether or not they are a victim made by the Home Office. Due to the national delay for NRM Referrals from the Home Office, Gwent has been part of a pilot scheme around responding to the NRM, which commenced in May 2021. This means that decisions about whether or not a child is a victim will be made by local Safeguarding partners, including Children's Services, Police and Health so that decisions and outcomes can be made on a multi-agency Safeguarding basis in each child's best interest. Alongside the pilot scheme there is an ongoing steering group, which will continue to review and evaluate the effectiveness of the pilot scheme, which has already been extended for a six month period. From June 2021 up until February 2022, 36 NRM referrals had been submitted throughout Gwent, 10 of which were regarding children from Monmouthshire. All referrals have been processed within the 90 day limit.

**There has been 2 types of exploitation identified;**

#### **Child Sexual Exploitation**

The abuse of a position of vulnerability, differential power, or trust for sexual purposes; this includes profiting monetarily, socially or politically from the exploitation of another as well as personal sexual gratification.

Examples: Use of children in sex work, trafficking of children for sexual abuse and exploitation, child pornography, sexual slavery.

#### **Child Criminal Exploitation**

The use of the child in work or other activities for the benefit of others. This includes, but is not limited to, child labour. Economic exploitation implies the idea of a certain gain or profit through the production, distribution and consumption of goods and services. This material interest has an impact on the economy of a certain unit, be it the State, the community or the family.

Examples: Child domestic work, child soldiers and the recruitment and involvement of children in armed conflict, child bondage, the use of children from criminal activities include the sale and distribution of narcotics, the involvement of children in any harmful or hazardous work.

Criminal exploitation is also known as 'county lines' and is when gangs and organised crime networks exploit children to sell drugs. Often these children are made to travel across counties and they use dedicated mobile 'phone 'lines' to supply drugs.

The Council strives to create an environment where child exploitation is identified and addresses. The Authority is committed to actively working with partners to identify children at risk and prevent this form of abuse.

During **01/04/21 – 31/03/22**, **61** children (up from 47 children last year) were subject to Child Exploitation Meetings, where consideration is given for children to become part of a Gwent Police Operation named Quartz.

Regionally Monmouthshire have the second highest number of children on Operation Quartz. This is due to the high level of training multi agency professionals have, which increases recognition and reporting to the safeguarding arena.

Child Exploitation remains a main focus for Children's Services and partner agencies. Over the latter part of this review period, we are starting to see a noticeable increase in criminal exploitation, however, the figures overall for the year stand at:

**Criminal x 29**

**Sexual x 32**

In addition to this, 2 MCC children were discussed as part of a Complex Strategy Meeting considering 5 children.

Bi-monthly MASE Meetings (Multi Agency Sexual Exploitation meetings) continue between Police, Social Care and partner agencies to identify any patterns, locations and perpetrator identification. MASE is a strategic meeting which looks at disruption, perpetrators, places of interest and themes.

There is good liaison in place between Safeguarding, the Safer Monmouthshire Group and the council's Public Protection Unit including licensing.

In November 2021, the Monmouthshire Exploitation Group [MEG] recommenced following a period of absence as a result of the Covid pandemic. MEG is responsible for identifying and analysing criminal or sexual exploitation across the county, working with partners to explore any emerging themes whereby further investigation, disruption or protection can be addressed through either the Crime & Disorder Group (CAD), Serious Organised Crime group (SOC) or the Multi-Agency Sexual Exploitation group (MASE). The Monmouthshire Exploitation Group reports directly to the Public Service Board's Safer Monmouthshire Group and Whole Authority Safeguarding Group, meeting on a quarterly basis. MEG is chaired by the Safeguarding Service Manager, and is attended by Head of Public Protection, Community & Partnerships Manager, Crime & Disorder Officer, Community Cohesion Manager, YOS and Saint Giles.

A key area of focus for the MEG partnership will be the 'transitional' period of young people moving into adulthood.

### **SAFEGUARDING IN SCHOOLS:**

Monmouthshire has adopted a proactive approach to responding to issues of sexual harassment in schools and has worked with colleagues from other agencies, coordinated by the VAWDASV team, to promote a Whole School Approach. The Safeguarding Lead in Education, Heather Heaney represented

Monmouthshire on the Welsh Government task group that is developing the **Peer on peer sexual harassment in education settings multi-agency action plan**. Schools continue to support this area of work. We continue to scope what issues are being raised within the school settings and use the information to provide targeted support where this is required.

There is a bullying prevention group established in MCC.

Resources continue to be coordinated in order to respond to pupil wellbeing issues across schools. The increase in wellbeing concerns being raised by pupils may be related to the last couple of years – we work collaboratively with our partner agencies in order to provide the most appropriate support when concerns are identified.

The SHRN (School Health Research Network) report is being evaluated by a task and finish group in the Autumn term to identify areas of concern and to inform how we support learners. The report includes areas such as Emotions and Behaviour, School connectedness, Sleep, Friendship and bullying, Sexting, Body image etc so this will be a valuable exercise.

Multi Agency Meetings [MAMs] are school based that are attended by Building Stronger Families Team [BSFT], Young Carers, School Based Counselling and other partners across the pre statutory system; they operate in three of the four secondary schools in Monmouthshire and are used to consider what support can be offered to pupils identified as vulnerable.

### **PROVIDING EFFECTIVE EARLY HELP:**

The Early Help Panel (now known as Space Wellbeing) Neuro Development Pathway Panel and Space Wellbeing Steering Group remains in place. SPACE Well-being (Single Point of Access for Children's Emotional Well-being) is a panel that receives referrals from agencies and families for a range of support for children's emotional well-being. PCHMSS (Primary Care Mental Health Support Services) and CAMHS (Children Adolescent Mental Health Services) both take referrals from this panel, as well as FIT, Platform, BSFT, Flying Start, Acorn, SHIFT and others. The Neuro Developmental Panel takes referrals for ASD/ADHD and other ND issues, rather than general wellbeing concerns.

There has been significant increases with referrals being received by these Panels; during January to March 2022, the highest number of referrals have been received to date, standing at 303. During this period the waiting list from referrals have also drastically increased as a result, with a two to three week time to process referrals before getting to Panel stage. Consideration is being given to the processing of referrals and whether or not this is due to a system issue or whether it is attributed to the significant increase of referrals.

**Early Help Panel** is supported by the advice line, which is staffed every day; calls to the advice line are steady, with an average of 134 calls per quarter over the last 12 months. The advice line supports in enquiries for both Panels; the advice line remains under development with huge potential.

Interface is a weekly meeting between service areas that consider families at a 'step down' level, which includes Family Intervention Team [FIT], Dads Can, Building Stronger Families Team [BFST], Family Group Conference / Mediation. This meeting manages moves between pre and post statutory services.

### **PREVENTATIVE APPROACHES DURING THE COVID-19 PANDEMIC:**

We continued to analyse and monitor the impact of Covid-19 on families and communities to ensure that services are in place to respond to increased risk and vulnerability. As a result, there has been the development of the Wellbeing Team that has created a central point of contact to signpost, advise and support members of the public during Covid. The Wellbeing Team has been Covid focussed, adapting to the changing needs as the pandemic was evolving. The future of this team will remain community focussed and need-led.

## **HOUSING:**

Monmouthshire continues to utilise approaches towards Homelessness through strengthened homeless prevention, increasing homeless accommodation and enhancing specialist service provision for young people and offenders.

As part of the homeless prevention approach, Housing and Communities undertook a staff restructure to create additional staffing capacity, with regards to prevention. The staffing restructure also facilitated dedicated staff to acquiring homeless accommodation; as a result there has been an increase in the number of properties provided through Monmouthshire Lettings and in this year there has been more social housing available to let for homeless applicants than the previous year. There has been the introduction of Housing First to support housing. Self-contained emergency family accommodation has now been established, which Monmouthshire are now looking to purchase. In relation to young people, with the highest needs and who are at risk of homelessness, there has been a remodelling of Pobl young person's accommodation, which includes four units of self-contained move-on accommodation. Young people with lower identified needs are being considered as part of a proposal for a dedicated, shared housing in Chepstow being established with MoYo floating support.

## **LOCAL SAFEGUARDING NETWORKS**

The Local Safeguarding Network (LSN) meetings and Safeguarding Practitioner Forums have continued and are a multi-agency mechanism for professional leads to share information regarding safeguarding matters and extend knowledge of safeguarding activity and services across the Council.

LSNs were held in July 21, September 21, January 22, and March 22. Presentations included in these sessions were;

Young People's Gambling Harm Prevention Programme

N-Gage Services

DBS Presentation

Exploitation and Vulnerability Presentation

Horizons Sexual Violence Presentation

Older Persons Awareness Raising Cyfannol Women's Aid

Cyfle Cymru Presentation

Safer Wales Presentation

Phoenix DAS Presentation

In May 2021 a Practitioner Event was held on line, and this included the topics of;

Wellbeing

Moral Distress

Children and Young People's rights

Professional Curiosity

Suicide and Self Harm

Why Language Matters

Assessing child neglect and its social nature

**ANALYSIS:**

As the Covid pandemic has continued the identification and establishment of additional services have been provided across the Council, such as the Wellbeing Team, the NRM pilot, Homeless prevention and the continuation of the **Early Help Panel**, however, due to the significant increase of referrals, this has meant a delay in services being offered and as a result impacting on services and families. As a result the score has decreased from 5 to 4.

Prevention and partnership working remains a key focus for the Council and there remains a consistent drive for developing these approaches; there continues to be a strong multi agency approach in supporting families and the community to ensure the issues that impact on the vulnerable individuals and communities are addressed.

**KEY STRENGTHS:**

- Prevention and partnership working remains a key focus for the Council
- There remains a consistent drive for developing these approaches
- Continued strong multi-agency approach in supporting families and the community to ensure the issues that impact on the vulnerable individuals and communities are addressed

**NEXT STEPS:**

- Development of VAWDASV refresher course for all staff and to be rolled out across the Council
- There will continue to be promotion of all mandatory training across the Local Authority to be completed by staff members
- Further exploration around the waiting time for the **Early Help Panel**
- Remainder of Directorates to be included in Modern Day Slavery training
- Wellbeing Team to continue to develop to support the community in ensuring robust support and effective links with services are provided based on the changing needs of the community
- Wellbeing Team to evaluate the effectiveness of their support to inform future decisions about the Team

**4. ROBUST PROTECTION**

**SELF-ASSESSED SCORE = 4**

**WHAT DOES GOOD LOOK LIKE?**

We operate best practice in protecting children and adults at risk and ensure that all concerns about possible abuse or neglect are recognised and responded to appropriately. Multi-agency plans and interventions reduce risks and needs for children and vulnerable adults including those at risk of significant harm.

**PROGRESS AND EVIDENCE:**

**SAFEGUARDING CHILDREN AND ADULTS AT RISK:**

Partnership working has been further strengthened following the launch of the multi-agency Hub [January 2021]. This period has seen the Hub develop, with additional agencies becoming part of the

model to improve communication and make collaborative decisions to safeguard children and adults at risk.

Monthly delivery group meetings are held to discuss progress of the Hub, which then feeds into the Partnership Board attended by Heads of Service.

Gwent Police are commissioning an external review of the Hub which is out for tender in Summer 2022. As part of this evaluation, the Missing Children's Protocol will also be considered; the establishment of the safeguarding Hubs has provided an opportunity to integrate the resources and processes of the Gwent Missing Children Team to make a new resource model for missing children. The protocol has been continually reviewed every six weeks with plans for it to be relaunched in April 2022. This evaluation is being overseen by the Gwent Safeguarding Board.

There have been no adult or child practice reviews held in regards to Monmouthshire cases during this period.

### **CHILDREN'S SERVICES:**

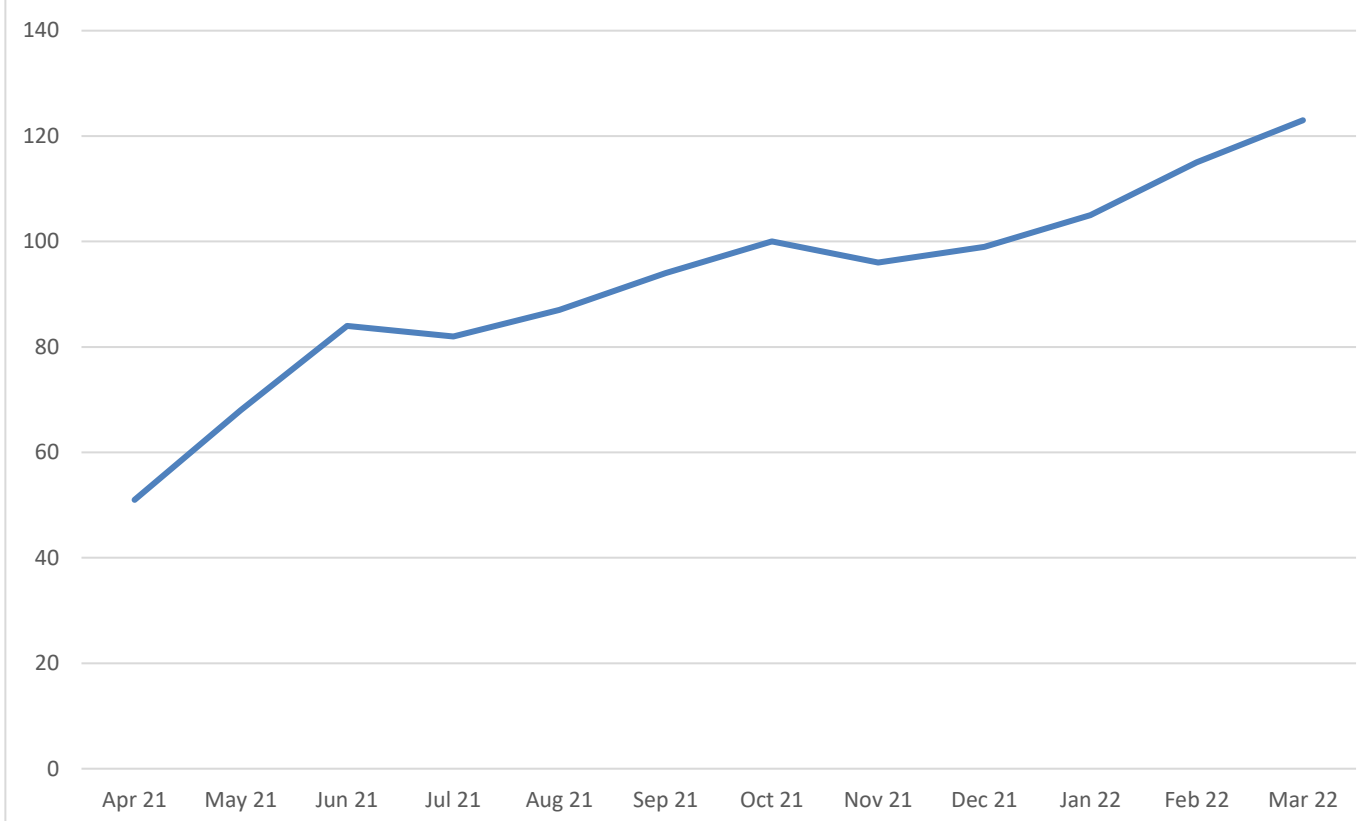
The Care and Support Plan [CASP] agenda is deeply rooted into the Early Help and Assessment Team, with evidence of 300 children and families being supported during this time-period. Though an evaluation of this process there is evidence that these cases receive support in a timely manner and the cases are transferred to the Family Support and Protection Team after a period of three months for continued support and monitoring.

During this period there has been a rise in the number of children on Monmouthshire's Child Protection Register, with data informing us that the children are remaining on the Child Protection Register longer to ensure the Child Protection Plan is completed in its entirety and the risks to the children have significantly reduced. A Quality Assurance Report undertaken by the Child protection Coordinator, every 6 months, showed there has been an increase in meaningful child protection work, which has reduced the need to issue Court proceedings.

At year end the number of children on the child protection register was **123** (a significant increase from previous year end of 60), however, the following graph will demonstrate the movement of the child protection registration:



CP Monthly Figures April 21 to March 22



We continue to strive to improve the performance in Child protection Core groups and statutory visits.

This period has seen the introduction of a new Child Protection Co-ordinator, with the role having been covered by an independent agency for nearly 12 month.

Within the service there was a slight reduction in the numbers of children who are looked after this year, although the overall trend remains upward trend. At 31/03/22 the number of children looked after was **208** (from 213).

**ADULT SAFEGUARDING:**

The introduction of the statutory duty to report under the SSWB Act, as well as the low threshold for reporting concerns (which can be based on reasonable cause to suspect) continues to create an upward trend in the number of safeguarding concerns reported via safeguarding referrals. Over the year, safeguarding reports were made concerning 528 adults.

The service is committed to the improvement of completion of the Section 126 adult protection enquiries within the statutory timeframe of 7 days. Work has been ongoing with all professionals involved in the adult safeguarding process to understand the importance of undertaking these enquiries in a timely manner. This has been evidenced in 65.5% of cases (compared to 51.1% last year). This will continue to be a focus in the forthcoming year.

An Adult Safeguarding dashboard continues to be in development to help monitor and analyse adult safeguarding activity. This will now also include management oversight development to ensure the quality assurance for adult safeguarding cases, in particular for case closures.

Regional adult co-ordinators group is attended on a bi-monthly basis to ensure streamline responses across Gwent.

The Adult Safeguarding Unit has been impacted by staffing issues, in pivotal positions of Team Manager, Adult Safeguarding Co-ordinator and Business Support Office; this has resulted in increased workloads and the need for re-prioritisation with cases. However, the Safeguarding Unit has continued

to maintain the day to day functions of Adult Safeguarding through the overall oversight and support from the Safeguarding Service Manager and the assistance of the Child Protection Co-ordinator. As the Child protection Coordinator has significant experience in Adult Safeguarding, this was utilised with case discussions and supervision in a time of staff shortage.

**ANALYSIS:**

The Council continues to ensure we provide the most robust protection for children and adults at risk of harm.

**KEY STRENGTHS:**

- Continued multi-agency working, which has strengthened communication across partner agencies
- Ongoing commitment to improving the quality of practice with key focus on development and training for practitioners
- Continue to monitor and evaluate all processes and protocols to ensure effective safeguarding that is streamlined regionally
- Continued development and partnership working within the Hub; with commitment to introducing further agencies, including YOS, IDVA and preventative services

The longer term impact of Covid has resulted in a greater volume and complexities of Duty to Reports in both children and adult services, however, there remains ongoing commitment to improving the quality of practice and the development of robust safeguarding plans, through practitioner training, multi-agency working and the continued evaluation of processes / models, such as the Hub and is the reason for the increase of score from 3 to 4.

**NEXT STEPS:**

- The Hub will be evaluated following successful tender at the end of Summer 2022, which is being commissioned by Gwent Police
- Continue to expand the Hub to include further agencies
- Continued improvement of the Section 126 enquiries being held within time-scale through further discussion with other professionals and agencies, such as Health
- Review of chair's checklist to consider timeliness of core group meetings and statutory visits for children on the Child Protection Register; to ensure effective quality assurance
- Bi-annual workshops to be held to review the effectiveness of practice and processes, which will include all Children's Services teams and the Safeguarding Unit

**5. SAFE SERVICES – delivered through commissioning arrangements, grants, partnerships and volunteering**

**SELF-ASSESSED SCORE = 4**

**WHAT DOES GOOD LOOK LIKE?**

We use our influence to ensure that services operating in Monmouthshire, including commissioned and those outside the direct control of the Council, do so in ways which promote the welfare and safety of children and adults at risk.

**PROGRESS AND EVIDENCE:**

Social Care and Health have clear operating processes in place, which ensures a robust approach for all Social Care commission for Children and Adults. This is evidenced by progress with completion of the rolling SAFE programme. The SAFE roll-out 2021-23 is very much in progress and has been co-

ordinated by a Business Support Manager, where we have taken a staged approach offering focussed time to service areas in order to provide robust quality assurance.

There has been strong multi agency working between Safeguarding and Commissioning in the Escalating Concerns process, which has been actioned for one care home during this period. The Escalating Concerns process provides a clear action plan to provide safety for all residents and identifies areas of improvement.

Schools and other parts of the Council working with children / adults at risk indicate there are robust arrangements in place, which includes individual school contracts, transport and leisure services. Service areas within the Council are able to identify their links within the Safeguarding Unit; there is evidence of regular communication, advice and guidance. There is open communication with the Quality Assurance and Safeguarding Officer from Corporate service areas, which quickly highlights any issues or concerns to ensure they are addressed immediately and appropriately. Monthly risk assessment meetings are also held between Safeguarding and the Passenger Transport Unit to discuss any Safeguarding issues and ensure there is a collective and prompt approach to DBS risk assessments.

There is evidence of Safeguarding embedded in Licensing services and the Public Protection Unit; Good partnership working is shown within the Responsible Authority meetings, which were re-launched in January 2022 following suspension during Covid. A significant development for licencing within this period has resulted in DBS checks now being required every six months for drivers, rather than every 3 years. This will also include Operators who have access to book records or despatch vehicles; this was implemented on October 2021.

A Service Level Agreement was finalised in March 2022 for MonLife, to look at commissioning services for activities with children and young people. The SLA was put together to ensure consistency across MonLife services whilst ensuring compliancy with audit and MCC financial procedures; H&S processes and of course Safeguarding processes. The SLA is robust and transparent, and the service commissioned must present all paperwork and copies of certificates prior to starting any work or engaging with children/young people. The SLA can be used for a day provision or a regular provision.

The review process enables any concerns to be raised by both parties and to ensure they are worked through and resolved. It also ensures we are compliant with MCC regulations and processes. Service leads assisted in the formulation of the document so co-own and understand its importance.

### **COMMISSIONING:**

During the April 21-March 22 period Commissioning restarted their quality assurance processes following standard monitoring being suspended in the early stages of the pandemic. Outside of the pandemic, Local Authority providers receive an annual monitoring visit, and in the case of larger providers, 1-2 relationship visits are undertaken per year. For children's services much of the monitoring is done at desktop level due to services being individual and out of county, however, in person visits are completed where necessary and where placements are in county.

When visits restarted resources were prioritised based on services of concern, with other providers receiving informal visits initially. Commissioning are now back to normal capacity and working with most providers having received their annual monitoring visits if relevant or visits were scheduled.

During the April 21-March 22 period there was one Older Adult Care Home in Escalating Concerns due to concerns around leadership and management, staffing and quality of care. This provider has, subsequent to this period, improved significantly and is now being supported through Provider Performance. One other nursing home received support via the commissioning Provider Performance process due to concerns around leadership and clinical skills at the home; this provider is now out of this process.

In terms of other adult provision, there were no other services in formal processes, however, there is an ongoing theme across the sector related to staff recruitment and retention which at times has and is

impacting care quality. Providers continue to work with Commissioning and other partners, as well as internally to mitigate this risk as far as possible.

During the early part of the April 21 period there was one children's placement in Provider Performance; this was an out of county bespoke placement. The individual entered adulthood in April 21 and moved to a different placement.

### **VOLUNTEERING:**

The Corporate Safeguarding Policy and Volunteering Policy sets out clear guidelines and expectations for volunteers in commissioned services; this is reflected in the Wellbeing Team. There are two strands to the Wellbeing service; the first is preventative, which was created to provide pandemic support but since the end of March 2022 has moved its focus to Ukraine support

Volunteers working for the Council, including within schools, will be subject to the same recruitment processes as the paid workforce and according to the nature of the activity being undertaken.

Safeguarding will be covered within the initial induction. Volunteers must subsequently attend the level of safeguarding training relevant to the nature of the voluntary activity being undertaken.

In addition, Training records will be held centrally with the Talent Lab. It is the responsibility of the individual employee to inform their Manager, who should update the Talent Lab.

### **ANALYSIS:**

Social Care and Health have clear operating processes in place to ensure a robust approach for all social care commissioning for children and adults.

Schools, and other parts of the Council working with children / adults at risk, indicate there are robust arrangements in place for contracted services (including individual school contracts, transport, leisure services).

There is good evidence of safeguarding being embedded within licensing services and other areas of PPU.

The evaluative score has increased from a 3 to a 4:

- The SAFE process is now fully co-ordinated and has a more robust and effective quality assurance oversight
- Relationships between Safeguarding and Commissioning have strengthened
- Monthly risk assessment meetings with Passenger Transport Unit have proved invaluable
- Responsible Authority meetings have been re-established, following a period of absence due to Covid and are being held on a monthly basis
- Any Licensing issues or themes within the community are being discussed at the Responsible Authority meeting
- Licensing have also changed their process for DBS renewals to every six months and will also include vehicle proprietors and operators

### **KEY NEXT STEPS FOR 2022 – 2023:**

- To further strengthen the working relationship between Safeguarding and Commissioning for both Children and Adults and also include better attendance at meetings.
- Commissioning to review services on provider list and provider feedback.
- Further promotion and understanding of SAFE process across the whole Local Authority.
- Continued support to Directorates to ensure the SAFE process is completed to a high standard and considers Safeguarding aspects until the end of roll out in 2023.

- Continued learning and improvement with Directorates to further embed good Safeguarding practice.

## APPENDIX 3

### SAFEGUARDING CURRENT ACTIVITY PLAN (2022 – 2023):

Action	Responsibility	Timeframe
<b>GOOD GOVERNANCE</b>		
Complete SAFE process (2021 – 2023)	Safeguarding Unit	March 2023
Development / implementation of core data set for WASG including comparative data	Safeguarding Unit WASG	March 2023
Review Corporate Safeguarding Policy to be ratified and disseminated	Safeguarding Unit	Dec 2022
<b>SAFE WORKFORCE</b>		
Ongoing development of 'Thinqi' to ensure training records are centrally managed	Systems and Data Team	March 2023
Training Policy needs to look at mandatory training and consider other areas that need to be recorded, including VAWDSV, Prevent and GDPR	Safeguarding Unit	March 2023
Continued development for the delivery of Level 1 training	Safeguarding Unit	March 2023
Undertake an audit of the adapted arrangements for digital recruitment to ensure safeguarding is at the forefront	Systems and Data Team	March 2023
To further aid the efficiency and management of Practitioner Concerns, a model is being developed on Flo / Plant to ensure appropriate safeguards are put in place. This will be GDPR compliant	Safeguarding Unit Performance Team	December 2022
Regional Safeguarding Leads will continue to meet to review the Practitioner Concerns process and review the effectiveness of the "outcomes" of the process	Safeguarding Unit Gwent Safeguarding Board	March 2023
Training to be developed around understanding of Practitioner Concerns, for those who are employers and those who are at greater risk of being discussed in the arena, eg Education, Foster Carers and Health professionals	Safeguarding Unit Gwent Safeguarding Board	March 2023
<b>PREVENTATIVE APPROACH</b>		
Development of VAWDASV refresher course for all staff and to be rolled out across the Council	Training Unit	March 2023
There will continue to be promotion of all mandatory training across the Local Authority to be completed by staff members	Training Unit Workforce Development Team	March 2023
Further exploration around the waiting time for the Early Help Panel	Service Manager, Wellbeing and Family Support	March 2023
Remainder of Directorates to be included in Modern Day Slavery training	Safeguarding Unit	March 2023

Wellbeing Team to continue to develop to support the community in ensuring robust support and effective links with services are provided based on the changing needs of the community	Wellbeing Team	March 2023
Wellbeing Team to evaluate the effectiveness of their support to inform future decisions about the Team	Wellbeing Team	March 2023
<b>ROBUST PROTECTION</b>		
The Hub will be evaluated following successful tender at the end of Summer 2022, which is being commissioned by Gwent Police	Safeguarding Unit Gwent Police	March 2023
Continue to expand the Hub to include further agencies	Safeguarding Unit	March 2023
Continued improvement of the Section 126 enquiries being held within time-scale through further discussion with other professionals and agencies, such as Health	Safeguarding Unit [Adult] Health Safeguarding	March 2023
Review of chair's checklist to consider timeliness of core group meetings and statutory visits for children on the Child Protection Register; to ensure effective quality assurance	Safeguarding Unit	December 2022
Bi-annual workshops to be held to review the effectiveness of practice and processes, which will include all Children's Services teams and the Safeguarding Unit	Safeguarding Unit	March 2023
<b>SAFE SERVICES</b>		
To further strengthen the working relationship between Safeguarding and Commissioning for both Children and Adults and also include better attendance at meetings.	Safeguarding Unit Commissioning	March 2023
Commissioning to review services on provider list and provider feedback.	Commissioning	March 2023
Further promotion and understanding of SAFE process across the whole Local Authority.	Safeguarding Unit	March 2023
Continued support to Directorates to ensure the SAFE process is completed to a high standard and considers Safeguarding aspects until the end of roll out in 2023.	Safeguarding Unit	March 2023
Continued learning and improvement with Directorates to further embed good Safeguarding practice.	Safeguarding Unit All Directorates	March 2023

**APPENDIX 4**

**REVIEW OF PREVIOUS ACTION PLAN 2021 - 2022 ACTION PLAN:**

GREEN – Completed

AMBER – In Progress, continuing

RED – Delayed, not started,

BLUE no longer required / changed

Page 40

<b>Action</b>	<b>Responsibility</b>	<b>Timeframe</b>	<b>RAG</b>	<b>Comment</b>
<b>GOOD GOVERNANCE</b>				
Implement next SAFE process (2021 – 2023)	Safeguarding Unit	March 2023	Amber	Ongoing rolling process
Evaluate learning and outcomes process and ensure this informs future planning	Safeguarding Unit and WASG	March 2023	Amber	Ongoing rolling process
Development / implementation of core data set for WASG including comparative data	Safeguarding Unit WASG	Sept 2021	Red	Priorities and competing demands operationally was the reason for delay
Review Corporate Policy to integrate and update in light of COVID	Safeguarding Unit	March 2022	Green	
Ensure new duty to report forms are implemented and embedded across the council	Safeguarding Unit / WASG	Sept 2021	Green	
<b>SAFE WORKFORCE</b>				
Continue to monitor progress in how the council centrally records mandatory training data	People’s Services	March 2022	Amber	Ongoing with plans to further develop
Revise the safeguarding training strategy so that it reflects developments in digital training options	Safeguarding Unit	March 2022	Red	Delayed due to National Training Framework being implemented
Further develop directorate sufficiency for the delivery of Level 1 training	Safeguarding Unit	March 2022	Amber	Ongoing



Undertake an audit of the adapted arrangements for digital recruitment to ensure safeguarding is at the forefront	People's Services	March 2022		?
Develop data to enable reporting on professional concerns relating to adult safeguarding	Safeguarding Unit	March 2022		Successfully achieved
Continue to monitor progress in how the council centrally records mandatory training data	People's Services	March 2022		Ongoing
Revise the safeguarding training strategy so that it reflects developments in digital training options	Safeguarding Unit	March 2022		Ongoing
<b>PREVENTATIVE APPROACH</b>				
Work to resolve the issues around being able to report and monitor VAWDASV training across the council.	Partnership People's Services	March 2022		Ongoing
Ensure full roll-out of the Modern Day Slavery protocol across the council	MEG / Safeguarding Unit	Jan 2022		Ongoing; delays due to Covid
Further analyse and monitor the impact of COVID-19 on families and communities and ensure that services are in place to respond to increased risk and vulnerability	SCH / WASG	March 2022		Ongoing due to implementation of the Wellbeing Team, who will continue to review this
Continue to support the Council's approach to prevention of homelessness through strengthening homeless prevention, increasing homeless accommodation, and enhancing specialist service provision for young people and offenders.	Enterprise	September 2022		This continues to be an ongoing consideration
Continue to develop the Community Support Network approach with communities.	Partnerships	September 2022		Ongoing
<b>ROBUST PROTECTION</b>				
Evaluate the outcomes and impact of the Safeguarding Hub	Safeguarding Unit	Sept 2022		External commissioned service to review
Continue to assess and respond to the risks related to the immediate and longer-term impacts of COVID-19	SCH	March 2022		Ongoing; delayed due to Covid

Develop data so that adult safeguarding can be accurately monitored and reported on	Safeguarding Unit	March 2022		
Improve performance in the completion of adult safeguarding enquiries within 7 days	Adult Services	March 2022		Ongoing; part of Adult Safeguarding action plan
Improve performance in child protection core groups and statutory visits	Children's Services	March 2022		Ongoing
Implement the new safeguarding referral form across the council and partner agencies	Safeguarding Unit	December 2021		
<b>SAFE SERVICES</b>				
Ensure that the next SAFE process supports directorates to review the Minimum Standards Self-Assessment Matrix, and evaluate outcomes	Safeguarding Unit WASG	March 2023		Ongoing; rolling programme

**APPENDIX 5**

**SAFEGUARDING RISK ASSESSMENT:**



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# Integrated Impact Assessment document

(incorporating Equalities, Future Generations, Welsh Language and Socio Economic Duty)

<p><b>Name of the Officer</b> completing the evaluation</p> <p>Kelly Turner  <b>Phone no:</b>  <b>E-mail:</b> KellyTurner@monmouthshire.gov.uk</p>	<p><b>Please give a brief description of the aims of the proposal</b></p> <p>To provide members with an annual evaluation of safeguarding within the Council</p>
<p><b>Name of Service area</b></p> <p>Safeguarding</p>	<p><b>Date</b> Sept 2022</p>

1. **Are your proposals going to affect any people or groups of people with protected characteristics?** Please explain the impact, the evidence you have used and any action you are taking below.

Page 45

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Age	Effective safeguarding arrangements within the council provides protection for children – who by virtue of their age are vulnerable.	None	
Disability	Safeguarding applies to children and to all adults who have care and support needs. It is known that children and adults with disabilities are at increased risk of abuse and neglect	None	Safeguarding training includes responding to safeguarding concerns for people with disability.  Ensure people with disability know their rights and have access to information

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Gender reassignment	None		
Marriage or civil partnership	None		
Pregnancy or maternity	None		
Race	.Safeguarding and protection services should take into the account the impact of race and culture within family situations.		Safeguarding training includes responding to people from a diverse range of racial and cultural backgrounds. Safeguarding arrangements are in place for unaccompanied assylum seeking children
Religion or Belief	<i>Responding to safeguarding concerns should take account of the individual beliefs, values and religion of people and families. Some of these may interface with safeguarding issues such as HBV or radicalization. It is important that practitioners respect individual beliefs whilst still being able to address safeguarding issues.</i>		Safeguarding training takes account of working within diverse cultures and beliefs. Safegaruding services are in place to support families and individuals affected by HBV and radicalization.

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Sex	none		
Sexual Orientation	.None		

## 2. The Socio-economic Duty and Social Justice

The Socio-economic Duty requires public bodies to have due regard to the need to reduce inequalities of outcome which result from socio-economic disadvantage when taking key decisions This duty aligns with our commitment as an authority to Social Justice.

	Describe any positive impacts your proposal has in respect of people suffering socio economic disadvantage	Describe any negative impacts your proposal has in respect of people suffering socio economic disadvantage.	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
<b>Socio-economic Duty and Social Justice</b>	<i>Effective safeguarding arrangements and responding to concerns considers family and individual needs on a holistic basis and plans will often include tackling aspects of socio economic disadvantage e.g. within parent / carer populations</i>	None	





### 3. Policy making and the Welsh language.



How does your proposal impact on the following aspects of the Council's Welsh Language Standards:	Describe the positive impacts of this proposal	Describe the negative impacts of this proposal	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts
<p><b>Policy Making</b></p> <p>Effects on the use of the Welsh language,</p> <p>Promoting Welsh language</p> <p>Treating the Welsh language no less favourably</p>	<p>None</p>	<p>Safeguarding training within the council is not routinely delivered in Welsh</p>	<p>A welsh medium option for safeguarding should be provided</p>
<p><b>Operational</b></p> <p>Recruitment &amp; Training of workforce</p>	<p>None</p>	<p>It is desirable to have welsh speakers within the council so that people with safeguarding concerns can communicate their concerns in their first language</p>	<p>Have a better understanding of welsh speakers within the council</p>
<p><b>Service delivery</b></p> <p>Use of Welsh language in service delivery</p> <p>Promoting use of the language</p>	<p>None</p>		




**4. Does your proposal deliver any of the well-being goals below?** Please explain the impact (positive and negative) you expect, together with suggestions of how to mitigate negative impacts or better contribute to the goal. There's no need to put something in every box if it is not relevant!

Well Being Goal	Does the proposal contribute to this goal? Describe the positive and negative impacts.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
<b>A prosperous Wales</b> Efficient use of resources, skilled, educated people, generates wealth, provides jobs	Neutral	
<b>A resilient Wales</b> Maintain and enhance biodiversity and ecosystems that support resilience and can adapt to change (e.g. climate change)	Neutral	
<b>A healthier Wales</b> People's physical and mental wellbeing is maximized and health impacts are understood	Ensuring that vulnerable children and adults are safeguarded and protected from harm / abuse / neglect supports people's health and wellbeing.	
<b>A Wales of cohesive communities</b> Communities are attractive, viable, safe and well connected	Good safeguarding is central to cohesive communities, and helps to ensure that there are the right processes in place to safeguard and protect more vulnerable groups and communities.	
<b>A globally responsible Wales</b> Taking account of impact on global well-being when considering local social, economic and environmental wellbeing	Ensuring that people live free from harm, abuse and neglect is recognised regionally and nationally as a key component to wellbeing.	
<b>A Wales of vibrant culture and thriving Welsh language</b> Culture, heritage and Welsh language are promoted and protected. People are encouraged to do sport, art and recreation	Safeguarding is essential to ensure that any vulnerable group or individual using leisure services, or who are engaged in cultural, artistic or sporting activities are protected from potential harm or abuse.	
<b>A more equal Wales</b>	Safeguarding is a key part of ensuring that people can fulfil their potential no matter what their background.	

Well Being Goal	Does the proposal contribute to this goal? Describe the positive and negative impacts.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
People can fulfil their potential no matter what their background or circumstances	Equality is at the centre of the services the Authority provide and commission.	

**5. How has your proposal embedded and prioritised the sustainable governance principles in its development?**

Sustainable Development Principle	Does your proposal demonstrate you have met this principle? If yes, describe how. If not explain why.	Are there any additional actions to be taken to mitigate any negative impacts or better contribute to positive impacts?
 <p>Long Term</p> <p>Balancing short term need with long term and planning for the future</p>	<p>It deals with immediate safeguarding and protection as well has how preventative steps are utilised to ensure safeguarding is sustainable in the future.</p>	
 <p>Collaboration</p> <p>Working together with other partners to deliver objectives</p>	<p>The report details how services work in partnership with agencies from different sectors, considers involvement and collaboration with communities and details the progress made in relation to Safeguarding in Monmouthshire.</p>	

Sustainable Development Principle	Does your proposal demonstrate you have met this principle? If yes, describe how. If not explain why.	Are there any additional actions to be taken to mitigate any negative impacts or better contribute to positive impacts?
 <p data-bbox="141 480 297 507"><b>Involvement</b></p> <p data-bbox="349 256 517 443">Involving those with an interest and seeking their views</p>	<p data-bbox="544 256 1328 363">The report includes information from all parts of the council and was a collaborative approach with all the directorates. The SAFEs take account of the needs of individual service areas.</p>	
 <p data-bbox="152 756 297 783"><b>Prevention</b></p> <p data-bbox="349 517 506 815">Putting resources into preventing problems occurring or getting worse</p>	<p data-bbox="544 517 1283 676">The report details the importance of prevention within safeguarding and some of the mechanisms and services that are in place to support prevention and early intervention.</p>	
 <p data-bbox="159 1094 297 1121"><b>Integration</b></p> <p data-bbox="349 855 517 1121">Considering impact on all wellbeing goals together and on other bodies</p>	<p data-bbox="544 855 1261 922">.Good safeguarding and protection supports the wellbeing of vulnerable citizens, groups and communities within the LA.</p>	

**6. Council has agreed the need to consider the impact its decisions has on the following important responsibilities: Corporate Parenting and Safeguarding. Are your proposals going to affect any of these responsibilities?**

	<b>Describe any positive impacts your proposal has</b>	<b>Describe any negative impacts your proposal has</b>	<b>What will you do/ have you done to mitigate any negative impacts or better contribute to positive impacts?</b>
Safeguarding	This report identifies where we can further improve safeguarding and protection for children and for adults who are at risk.	<i>.Safeguarding is about ensuring that everything is in place to promote the well-being of children and vulnerable adults, preventing them from being harmed and protecting those who are at risk of abuse and neglect</i>	
Corporate Parenting	Children who are looked after have been impacted by harm and abuse and have often experienced many adverse experiences. The report identifies how the impact of adverse experiences can be minimised by ensuring good quality placements and care.		

Page 53

**What evidence and data has informed the development of your proposal?**

Both qualitative and quantitative data is presented within the report.

- Equalities dashboard link. [Equality data dashboard for EQIA's 2020.xlsx](#)

**8. SUMMARY: As a result of completing this form, what are the main positive and negative impacts of your proposal, how have they informed/changed the development of the proposal so far and what will you be doing in future?**

*.This section should summarise the key issues arising from the evaluation. This summary must be included in the Committee report template*

**Having effective safeguarding arrangements in place across the council is critical to meeting the health and wellbeing needs of children, adults at risk and their wider families and communities. It is equally important in ensuring that safeguarding runs through all services that are provided to vulnerable people.**

**9. ACTIONS: As a result of completing this form are there any further actions you will be undertaking? Please detail them below, if applicable.**

<b>What are you going to do</b>	<b>When are you going to do it?</b>	<b>Who is responsible</b>
Implement the WASG activity plan	September 2022	Chief Officer Social Care and Health

Page 54

**10. VERSION CONTROL: The Equality and Future Generations Evaluation should be used at the earliest stage, such as informally within your service, and then further developed throughout the decision making process. It is important to keep a record of this process to demonstrate how you have considered and built in equality and future generations considerations wherever possible.**

<b>Version No.</b>	<b>Decision making stage</b>	<b>Date considered</b>	<b>Brief description of any amendments made following consideration</b>
	<i>e.g. budget mandate, DMT, SLT, Scrutiny, Cabinetetc</i>		

**SUBJECT: SOCIAL CARE, SAFEGUARDING & HEALTH ANNUAL DIRECTOR'S REPORT 2021/22**

**MEETING: Joint Scrutiny Committee**

**DATE: 11<sup>th</sup> October 2022**

**DIVISION/WARDS AFFECTED: All**

## **1. PURPOSE:**

To present to the Committee the Annual Report 2021 / 2022 of the Chief Officer of Social Care, Safeguarding and Health.

## **2. RECOMMENDATIONS**

That the Committee scrutinises the report prior to it being presented to Council.

## **3. KEY ISSUES**

- 3.1 Preparing and publishing an annual report of the Statutory Director of Social Services is a requirement under the Social Services and Wellbeing (Wales) Act (2014). The purpose of the report is to show how effectively we are meeting the requirements of the Social Services and Wellbeing (Wales) Act 2014 and the Regulation and Inspection of Social Care (Wales) Act 2016.
- 3.2 There is currently no prescribed format for the report.
- 3.3 This is the first Director's Report I have written since taking up the role of Chief Officer for Social Care, Safeguarding and Health in October 2021. I have opted to use the SWAY format, as did my predecessor, so that a wide range of information can be shared from a variety of sources. I have taken an inclusive approach in developing the report. Evidence of performance and analysis of service data is combined with evidence from the lived experience of both the people we support and the workforce. The report aims to be accessible to a range of audiences, including our workforce and the people we support. The link to the report is <https://sway.office.com/FOky4X8gOv1QkDUE?ref=Link>
- 3.4 Of note, the Welsh Government have currently commissioned a review of the Annual Director's Report format and intends to issue guidelines in readiness for the 2022 – 2023 report.
- 3.5 My aims within the report are:
  - To evaluate progress against our social care priorities

- To inform Members and residents about the effectiveness of social care and health in Monmouthshire and identify key risks and challenges.
- To inform Members and residents about the progress made towards meeting the standards set out in SSWBA
- To set out actions and priorities for 2022 – 2023

#### **4. WELLBEING OF FUTURE GENERATIONS IMPLICATIONS (INCORPORATING EQUALITIES, SUSTAINABILITY, SAFEGUARDING AND CORPORATE PARENTING)**

- 4.1 Supporting the rights, voice and inclusion of people, some of whom are the most vulnerable citizens within the county by virtue of age, disability, socio-economic status, gender or ethnic / cultural background, runs through our approach to social care and health in Monmouthshire.
- 4.2 Working primarily within the legal framework of the SSWBA, this in turn supports the promotion of the Well-Being of Future Generations (Wales) Act 2015. By promoting an environment that maximises people’s physical and mental well-being and by supporting children, young people, adults and their carers and families to fulfil their potential no matter what their circumstances, the well-being goals of a Healthier and More Equal Wales are supported.
- 4.3 It is considered that there will be no significant or unacceptable equality impacts as a result of this report.

#### **5. OPTION APPRAISAL**

There were no alternative options considered.

#### **6. EVALUATION CRITERIA**

- 6.1 The annual report contains a raft of data both qualitative and quantitative which reflects the revised performance and improvement framework for social services within the Code of Practice. This contains three component parts; measuring activity and performance, understanding experience and outcomes and using evidence to inform improvement.
- 6.2 There are over a hundred metrics as part of the framework, the most relevant metrics collated in 2021/22 have been included to support this analysis within the report.

#### **7. REASONS:**

It is a statutory requirement to prepare and publish a Director’s Annual Report.

#### **8. RESOURCE IMPLICATIONS:**

Whilst there are no direct financial implications from this report, the sustainability of social services, well-being and prevention represents a significant pressure to Council budgets.



It is important to note that the Directorate has identified significant in-year budget pressures as well as pressures within the 2023/24 budget setting process.

**9. CONSULTEES:**

Directorate Leadership Team  
SLT

**10. Background Papers**

**11. AUTHOR:**

Jane Rodgers Chief Officer Social Care, Safeguarding and Health.

**12. CONTACT DETAILS:**

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# Integrated Impact Assessment document

(incorporating Equalities, Future Generations, Welsh Language and Socio Economic Duty)

<p><b>Name of the Officer</b> completing the evaluation</p> <p>Jane Rodgers  <b>Phone no:</b>  <b>E-mail:</b> JaneRodgers@monmouthshire.gov.uk</p>	<p><b>Please give a brief description of the aims of the proposal</b></p> <p>To provide members with an annual evaluation of safeguarding within the Council</p>
<p><b>Name of Service area</b></p> <p>Social Care and Health Directorate</p>	<p><b>Date</b> Sept 2022</p>

1. **Are your proposals going to affect any people or groups of people with protected characteristics?** Please explain the impact, the evidence you have used and any action you are taking below.

Page 59

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Age	Social care and health has a positive impact on older people through the provision of care and support.	None	
Disability	Social care and health has a positive impact on people with disabilities through the provision of services and care and support	None	We are seeking to make health and social care services more accessible and local
Gender reassignment	Assessments and care plans take account of gender reassignment and how that might affect the experiences, wishes and feelings of individuals.	None	

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Marriage or civil partnership	There are examples where care and support plans have been implemented in accordance with people's needs and rights as married couples or couples in civil partnerships	None	Care homes need to have facilities where married couples / partners can have time together
Pregnancy or maternity	The workforce supports maternity and paternity leave	None	
Race	Thought is being given as to how we mitigate any barriers into the service in regards to race and culture. Within assessments and care plans people's individuality is recognized including culture and race, for example in working with Unaccompanied Assylum Seeking Children. The workforce is representative of the population but we would seek to encourage a more ethnically diverse workforce	None	We need to understand more what barriers there might be to accessing services  We are seeking to increase diversity within the workforce
Religion or Belief	<i>Assessments, care and support plans take account of the individual beliefs, values and religion of people and families. Some of these may interface with safeguarding issues such as HBV or radicalization. It is important that practitioners respect individual beliefs whilst still being able to address safeguarding issues.</i>	None	Safeguarding training takes account of working within diverse cultures and beliefs. Safeguarding services are in place to support families and individuals affected by HBV and radicalization.

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Sex	None	None	Understanding how men and women experience services differently is important so that we can address any barriers or inequalities. For example men / fathers can often be absent from child protection processes.
Sexual Orientation	.Individual needs regarding sexuality and sexual orientation are addressed within assessments, care and support plans	None	None

## 2. The Socio-economic Duty and Social Justice

The Socio-economic Duty requires public bodies to have due regard to the need to reduce inequalities of outcome which result from socio-economic disadvantage when taking key decisions This duty aligns with our commitment as an authority to Social Justice.

	Describe any positive impacts your proposal has in respect of people suffering socio economic disadvantage	Describe any negative impacts your proposal has in respect of people suffering socio economic disadvantage.	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?

**Socio-economic  
Duty and Social  
Justice**

*Social Care and Health supports many families who are economically disadvantaged or living in poverty. We recognized that carers and people with disabilities for example, are often excluded from the workforce, and equally that children can be unfairly disadvantaged by poverty. We recognize that poverty can seriously disadvantage longer term health and wellbeing outcomes. We work with partners to try and tackle these issues on an individual and community basis. We recognize that many people within the social care and health workforce, which is predominantly female, are on low wages and have supported increases to the NMW and RLW*

None

Further work to understand local populations and the impact of social inequalities

### 3. Policy making and the Welsh language.

How does your proposal impact on the following aspects of the Council's Welsh Language Standards:	Describe the positive impacts of this proposal	Describe the negative impacts of this proposal	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts
<p><b>Policy Making</b></p> <p>Effects on the use of the Welsh language,</p> <p>Promoting Welsh language</p> <p>Treating the Welsh language no less favourably</p>	<p><i>We implement the Welsh active offer and have a local 'more than just words strategy' in place.</i></p>	<p>None</p>	<p>More attention needs to be paid to ensure that that Welsh active offer is made,</p> <p>More could be done to support Welsh learners</p>
<p><b>Operational</b></p> <p>Recruitment &amp; Training of workforce</p>	<p>Welsh speaking candidates are encouraged</p>	<p>None</p>	<p>It is desirable to have increased welsh speakers within the service so that people can communicate in their first language</p> <p>Some core training should be offered in Welsh</p>
<p><b>Service delivery</b></p> <p>Use of Welsh language in service delivery</p> <p>Promoting use of the language</p>	<p>We have a good knowledge of who is able to communicate in Welsh within the directorate . council to support the Welsh active offer</p>	<p>None</p>	<p>It is desirable to have increased welsh speakers within the service so that people can communicate in their first language</p>



**4. Does your proposal deliver any of the well-being goals below?** Please explain the impact (positive and negative) you expect, together with suggestions of how to mitigate negative impacts or better contribute to the goal. There's no need to put something in every box if it is not relevant!




Well Being Goal	Does the proposal contribute to this goal? Describe the positive and negative impacts.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
<b>A prosperous Wales</b> Efficient use of resources, skilled, educated people, generates wealth, provides jobs	Neutral	
<b>A resilient Wales</b> Maintain and enhance biodiversity and ecosystems that support resilience and can adapt to change (e.g. climate change)	Neutral	
<b>A healthier Wales</b> People's physical and mental wellbeing is maximized and health impacts are understood	Ensuring that the care and support needs of vulnerable children and adults are met and that people are support to achieve personal wellbeing outcomes supports a healthier Wales.	
<b>A Wales of cohesive communities</b> Communities are attractive, viable, safe and well connected	Good quality and accessible social and health care is is central to cohesive communities, and helps to ensure that there are the right processes in place to promote the rights and welfare of more vulnerable groups and communities.	
<b>A globally responsible Wales</b> Taking account of impact on global well-being when considering local social, economic and environmental wellbeing	Ensuring that people have their voices heard, their needs met and live free from harm, abuse and neglect is recognised regionally and nationally as a key component to wellbeing. These elements are promoted within social care	
<b>A Wales of vibrant culture and thriving Welsh language</b> Culture, heritage and Welsh language are promoted and protected. People	Social care supports vulnerable people to live the lives they to lead and part of this is ensuring	



Well Being Goal	Does the proposal contribute to this goal? Describe the positive and negative impacts.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
are encouraged to do sport, art and recreation	and promoting access to leisure , cultural, artistic or sporting activities.	
<b>A more equal Wales</b> People can fulfil their potential no matter what their background or circumstances	High quality social care is critical in ensuring that people can fulfil their potential no matter what their background. Equality is at the centre of the services the Authority provide and commission.	

**5. How has your proposal embedded and prioritised the sustainable governance principles in its development?**

Sustainable Development Principle	Does your proposal demonstrate you have met this principle? If yes, describe how. If not explain why.	Are there any additional actions to be taken to mitigate any negative impacts or better contribute to positive impacts?
 <p><b>Long Term</b></p> <p>Balancing short term need with long term and planning for the future</p>	<p>Social care and health is arranged so that immediate needs are met alongside of preventative and early help services to help with reducing need over the longer term</p>	
 <p><b>Collaboration</b></p> <p>Working together with other partners to deliver objectives</p>	<p>The report details how services work in partnership with agencies from different sectors, and supports partnership working with local communities, groups and individuals.</p>	

Sustainable Development Principle	Does your proposal demonstrate you have met this principle? If yes, describe how. If not explain why.	Are there any additional actions to be taken to mitigate any negative impacts or better contribute to positive impacts?
 <p><b>Involvement</b></p> <p>Involving those with an interest and seeking their views</p>	<p>The report includes information about how the directorate involves people in making decisions on an individual basis and in a wider service context.</p>	
 <p><b>Prevention</b></p> <p>Putting resources into preventing problems occurring or getting worse</p>	<p>The report details the importance of prevention within social care and health and some of the mechanisms and services that are in place to support prevention and early intervention.</p>	
 <p><b>Integration</b></p> <p>Considering impact on all wellbeing goals together and on other bodies</p>	<p>The purpose of social care and health services are to support individual's achieve their individual holistic wellbeing goals</p>	

**6. Council has agreed the need to consider the impact its decisions has on the following important responsibilities: Corporate Parenting and Safeguarding. Are your proposals going to affect any of these responsibilities?**

	<b>Describe any positive impacts your proposal has</b>	<b>Describe any negative impacts your proposal has</b>	<b>What will you do/ have you done to mitigate any negative impacts or better contribute to positive impacts?</b>
Safeguarding	The report includes how social care and health addresses immediate safeguarding needs and the the services that are in place to prevent or reduce abuse, neglect of harm of vulnerable pepole		
Corporate Parenting	The report identifies the services that are in place to support the immediate and longer term needs of children who are looked.		

**7. What evidence and data has informed the development of your proposal?**

Both qualitative and quantitative date is presented within the report.

The report contains performance metrics, case material, direct feedback from service users, and internal and external quality assurance information.

**8. SUMMARY: As a result of completing this form, what are the main positive and negative impacts of your proposal, how have they informed/changed the development of the proposal so far and what will you be doing in future?**

*.This section should summarise the key issues arising from the evaluation. This summary must be included in the Committee report template*

Social care and health works with some of the most vulnerable and potentially marginalized indivudals and families within the County. It is important that we continue to review services and orientate practice so that it takes accounts of the needs of indivudals from diverse groups

and to critically examine any barriers there are to accessing services. Encouraging diversity within the workforce is important so that we are able to provide a responsive service to different groups of people, as is encouraging Welsh speakers. We need to ensure that practitioners work from an anti-oppressive value based, using a strengths based and a rights based perspective particularly with the most vulnerable people or in situations where statutory interventions into family life are required.

**9. ACTIONS: As a result of completing this form are there any further actions you will be undertaking? Please detail them below, if applicable.**

What are you going to do	When are you going to do it?	Who is responsible
Work in partnership with others to reduce issues that impact on the wellbeing of vulnerable individuals, and work with others to promote community and individual wellbeing.		<b>Chief Officer Social Care and Health</b>

Page 68

**10. VERSION CONTROL: The Equality and Future Generations Evaluation should be used at the earliest stage, such as informally within your service, and then further developed throughout the decision making process. It is important to keep a record of this process to demonstrate how you have considered and built in equality and future generations considerations wherever possible.**

Version No.	Decision making stage	Date considered	Brief description of any amendments made following consideration

**SUBJECT: MONMOUTHSHIRE LOCAL DEVELOPMENT PLAN ANNUAL MONITORING REPORT**  
**MEETING: PERFORMANCE AND OVERVIEW SCRUTINY COMMITTEE**  
**DATE: 11<sup>th</sup> OCTOBER 2022**  
**DIVISION/WARDS AFFECTED: ALL**

## 1 PURPOSE

- 1.1 The purpose of this report is to consider the extent to which the current Local Development Plan (LDP) is delivering against its objectives and monitoring indicators, as set out in the eighth Annual Monitoring Report (AMR), attached at **Appendix 1**. Although the decision has already been taken to commence work on a new LDP, there is a statutory requirement to continue to monitor the current LDP's performance. In addition, this monitoring report will help inform and shape the Replacement LDP (RLDP) by reflecting on what is working and what is not.

## 2. RECOMMENDATION

- 2.1 That the Performance and Overview Scrutiny Committee scrutinises the eighth Local Development Plan Annual Monitoring Report and comments accordingly.
- 2.2 That the Performance and Overview Scrutiny Committee recommends that the Cabinet Member for Sustainable Economy, Deputy Leader, endorses the eighth Local Development Plan Annual Monitoring Report for submission to the Welsh Government by 31<sup>st</sup> October 2022.

## 3. KEY ISSUES

### Background – Adopted Monmouthshire LDP

- 3.1 The Monmouthshire LDP 2011-2021 was formally adopted by the Council on 27<sup>th</sup> February 2014. As part of the statutory development plan process the Council is required to prepare an Annual Monitoring Report.

### The Annual Monitoring Report

- 3.2 The AMR provides the basis for monitoring the effectiveness of the LDP and ultimately determines whether any revisions to the Plan are necessary. It aims to demonstrate the extent to which the LDP strategy and objectives are being achieved and whether the Plan's policies are functioning effectively. It also allows the Council to assess the impact the LDP is having on the social, economic and environmental well-being of the County and identifies any significant contextual changes that may influence plan implementation or review/revision.
- 3.3 This is the eighth AMR to be prepared since the adoption of the Monmouthshire LDP and is based on the period 1<sup>st</sup> April 2021 – 31<sup>st</sup> March 2022. The Adopted LDP covers the period 2011 – 2021, with 10 years' worth of housing delivery monitoring reached in March 2021 and reported in the previous AMR. However, as set out in the Minister for Housing and Local Government's letter of September 2020 which clarified the provisions in the Planning Wales Act 2015 relating to Local Plan expiry dates, plans

adopted prior to 4th January 2016 will remain the LDP for determining planning applications until replaced by a further LDP.

- 3.4 Although the Council has already made the decision to commence work on a new LDP, this monitoring report will help inform and shape the Replacement LDP by reflecting on what is working and what is not.

#### LDP Monitoring Framework

- 3.5 The LDP policy and sustainability appraisal (SA) monitoring frameworks form the basis for the AMR, assessing how the Plan's strategic policies, and associated supporting policies, are performing against the identified key monitoring targets and outcomes and whether the LDP strategy and objectives are being delivered. This has enabled the Council to make an informed judgement of the Plan's progress in delivering the targets/monitoring outcomes and policies during this monitoring period.

#### Key Findings

- 3.6 Section 5 of the AMR provides a detailed assessment of Plan's performance. The results of the monitoring process demonstrate that the majority of the indicator targets and monitoring outcomes are being achieved (green traffic light rating). Some of the most significant findings in relation to these are:

- Progress continues to be made towards the implementation of the spatial strategy, with 361 dwelling completions recorded during the monitoring period, 236 (65%) of which were on LDP allocated sites.
- Six of the seven LDP allocated strategic housing sites have planning permission, of which four are under construction (Deri Farm, Abergavenny; Fairfield Mabey, Chepstow; Rockfield Farm, Undy; and Sudbrook Paper Mill). One site is partially complete (Wonastow Road, Monmouth), with the remaining phase at Drewen Farm awaiting a phosphate solution before it can be progressed. An application for the seventh LDP allocated strategic site at Vinegar Hill, Undy was approved in June 2022 and will therefore be recorded in the next monitoring period. All of the allocated LDP sites within the Rural Secondary settlements have planning permission, two of which are complete (Land south of School Lane, Penperlleni and Cwrt Burrium, Usk).
- The County has a total of 40.16 hectares of employment land available, indicating that sufficient employment land is maintained to meet the identified take up rate. The County has a total of 40.16 hectares of employment land available, indicating that sufficient employment land is maintained to meet the identified take up rate.
- There has been good progress in terms of employment permissions within the County, with a further 19 permissions granted for a range of B use class employment uses on protected employment sites (SAE2) and elsewhere in the County, for example as rural diversification and rural enterprise schemes providing employment opportunities in a range of sectors.
- The Council approved proposals for 17 tourism related applications, relating to 10 holiday let proposals and seven glamping facilities. Comparison with previous AMRs demonstrates that the number of tourism schemes approved during the current monitoring period remains at a positive level. The Sustainable Tourism Accommodation Supplementary Planning Guidance [SPG] (November 2017) has helped clarify our general support for this important sector of our economy.

- Vacancy rates in the Central Shopping Areas of Abergavenny, Caldicot, Chepstow and Usk have decreased since the previous monitoring period, and two centres saw no change, Raglan and Magor, with Magor having no vacant units for the second consecutive year. Vacancy rates recorded in all of the County's central shopping areas, with the exception of Monmouth, were below the GB High Street vacancy rate (14.5% June 2021, Local Data Company). It is recognised that high street vitality plays a key role in the character and attractiveness of our market towns. WG Transforming Towns funding seeks to support town centres, and Monmouthshire has submitted a comprehensive bid for this grant funding. The cost of living and energy costs crises pose additional threats to businesses as costs increase and customer spending decreases and this challenge will require careful consideration going forwards in terms of regeneration projects and future policy.
- No applications were granted planning permission contrary to TAN15 requirements in either Zone C1 or C2 floodplain over the monitoring period.
- Ample land remains available for potential waste management sites and there has been no reduction in the minerals land bank.
- There were no applications that resulted in the loss of listed buildings or historic sites and no development permitted which would have an adverse impact on the historic environment.

3.7 The monitoring process also indicates that there are various policy indicators which are not being achieved but there are no fundamental issues with the implementation of the LDP policy framework or strategy at this time (amber traffic light rating). A key finding is:

- Dwelling permissions during 2021/22 were lower than recorded in any of the previous monitoring periods at 39 dwellings<sup>1</sup>, all of which were for general market homes. This decrease is due to a combination of factors including the majority of LDP allocated sites already having planning permission with the LDP having reached the end of the Plan period, hence the importance of progressing the RLDP at pace. In addition, the introduction of the measures in January 2021 to control phosphate levels in the River Usk and River Wye Catchment areas, which cover a large proportion of the County, has impacted on our ability to grant planning permissions in a significant proportion of the County. Officers and Cabinet Members are working hard to secure a solution to this challenge.

3.8 There are, however, three policy monitoring outcomes that are not progressing as intended (red traffic light rating):

- Housing delivery records covering the 10-year plan period 2011 - 2021 set out that the Plan had delivered a shortfall of 1,500 homes (33.3%) when compared to the 10-year Plan requirement of 4,500 dwellings. However, in more recent AMRs the % under delivery has steadily declined as the strategic sites have come forward. This shortfall is largely attributable to the lead in period of the strategic housing sites, many of which continue to deliver homes now which contributes to the RLDP housing delivery: it is worth noting that 1,263<sup>2</sup> homes have planning permission and due to be built in the near future. The impact of phosphates restrictions is also now affecting site commencements and therefore completions. During this monitoring period, 361 dwellings were completed.

<sup>1</sup> Dwelling permissions: 1,238 in 2017-2018, 598 in 2018-2019, 251 in 2019-2020, 86 in 2020-21.

<sup>2</sup> This figure excludes sites in the upper Wye catchment which are unlikely to come forward in the near future until a phosphates solution is identified and implemented.

- 35 affordable homes were completed during the monitoring period accounting for 9.7% of total completions recorded (361). This is well below the LDP target of 96 affordable homes per annum. Housing delivery records covering the 10-year plan period 2011 - 2021 set out that the Plan has delivered 658 affordable homes compared to a target of 960 affordable homes (a shortfall of 302 affordable homes). Proportionately, this shortfall is almost identical to the shortfall in total housing delivery. Furthermore, there were no new planning permissions for 5 or more dwellings during the monitoring period that triggered the delivery of on-site affordable housing. This shortfall is largely attributable to the lead in period of the strategic housing sites, many of which continue to deliver homes now which contributes to the RLDP housing delivery: it is worth noting that there are 280 affordable homes with planning permission and due to be built in the near future<sup>3</sup>. The impact of phosphates restrictions is also now affecting site commencements and therefore completions in large parts of the County. This reduced trend of affordable housing delivery is therefore anticipated to continue in the short-term awaiting progress on the RLDP.
- Vacancy rates in the Central Shopping Area of Monmouth have risen for the third consecutive years. While Monmouth only saw a marginal increase in vacancy rates from 15.4% to 15.5% in this monitoring period, this is an overall increase from 10.1% in the 2018 monitoring period.

### Contextual Information

- 3.9 Section Three of the AMR provides an analysis of the relevant contextual material that has been published during the current monitoring period at a national, regional and local level, along with general economic trends. This included the publication of Technical Advice Note (TAN) 15 Development, Flooding and Coastal Erosion in September 2021, in advance of its coming into effect and formal publication on 1<sup>st</sup> December 2021. However, on 23<sup>rd</sup> November 2021 Julie James, the Minister for Climate Change, wrote to local authorities to advise that in order for LPAs to consider fully the impact of climate change projections on their respective areas, the Welsh Government were suspending the coming into force of the new TAN 15 and the Flood Map for planning until 1<sup>st</sup> June 2023. The existing TAN 15 (2004) and the Development Advice Map are to continue in the meantime as the framework for assessing flood risk. With regard to the Replacement LDP the minister, in a further letter on 15<sup>th</sup> December 2021, clarified that when plans are reviewed, the flood risk considerations that feed into the settlement strategy and site allocations must be in accordance with the new TAN 15 and the Flood Map for Planning. Officers across Wales are working with WG to help address the concerns raised with the suspended TAN15.

### Supplementary Planning Guidance (SPG)

- 3.10 SPG preparation and adoption will be limited over coming years as resources will be focused on the preparation of the Replacement Plan.

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<sup>3</sup> This figure excludes sites in the upper Wye catchment which are unlikely to come forward in the near future until as phosphates solution is identified and implemented.



## Sustainability Appraisal (SA) Monitoring

- 3.11 Section Six of the AMR expands on the assessment of LDP performance against the SA Monitoring Objectives, setting out the performance of the Plan against a number of sustainability indicators. There is an overlap between some of the LDP and SA indicators helping to demonstrate how the two monitoring processes are interlinked.

## Conclusions and Recommendations

- 3.12 Section Seven sets out the conclusions and recommendations of the eighth AMR. Overall, the 2021-22 AMR indicates that good progress continues to be made in implementing many of the Plan's policies and that overall, the strategy remains sound. However, three key policy indicator targets are not progressing as intended. While progress has been made in relation to the Plan's Strategic Housing Sites, cumulative housing completions and affordable housing delivery rates for the Plan period are significantly lower than the Plan requirement and remain a matter of concern if Monmouthshire's housing needs are to be met. However, this is due to a time-lag in site delivery rather than an issue with the sites not happening at all: it is worth noting that 1,263 homes (including 280 affordable homes) have planning permission and due to be built in the near future<sup>4</sup>. In addition, the vacancy rates in Monmouth's Central Shopping Area have increased for three consecutive years and are above the GB High Street vacancy rate of 14.5% (June 2021, Local Data Company).
- 3.13 While the LDP strategic housing sites will continue to play an important role in housing delivery and completion rates in the short term as the sites build out, the reduction in dwellings permitted (39 permissions for market homes) during the current monitoring period is cause for concern. Similar concerns are shared with the level of affordable housing secured and completed during the monitoring period. These issues are considered to be reflective of a combination of the LDP strategic sites already having permission and the restrictions on development as a result of phosphates constraints. Officers and Cabinet Members are working with stakeholders to identify and delivery solutions to water quality issues affecting the upper Wye and upper Usk river catchments.
- 3.14 Given the importance attached to delivering and maintaining a constant supply of housing land to support sustainable and resilient communities, the Council resolved in May 2018 to commence work on a Replacement Local Development Plan (RLDP) for the County (excluding the area within the BBNP) which will cover the period 2018-2033. The progression of the RLDP to provide a continued and up-to-date policy framework and mechanism for addressing the County's key demographic and affordability issues is a key priority of the Council. Progress on the RLDP has been delayed for a number of reasons, but on 27<sup>th</sup> September 2022 Council endorsed a new way forward to progress the RLDP: this will be taken forwards as quickly as possible.
- 3.15 The announcement during the last monitoring period regarding phosphate water quality issues in the River Usk and Wye Catchments continues to have implications for the ongoing delivery of development in the County. The Council is committed to seeking solutions to the phosphate issue and is in proactive discussions with the key

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<sup>4</sup> This figure excludes sites in the upper Wye catchment which are unlikely to come forward in the near future until as phosphates solution is identified and implemented.

organisation, including NRW, Welsh Government, DCWW and the development industry, to seek viable and timely solutions in the affected settlements. Of note DCWW recently announced an investment programme to seek to address strategic phosphate mitigation to enable development in the future. Nevertheless, the short-term implications on the delivery of new homes raises concerns. This situation will be kept under review in collaboration with DCWW, NRW and other stakeholders.

- 3.16 With regard to the increased vacancy rates in the central shopping area of Monmouth, it is notable that the rise in vacancy rates has been experienced in the primary frontage only, with a decrease in rates across the secondary frontages. This may, in part reflect the continued impact of the Covid-19 pandemic on high streets across the UK, particularly given the loss of some national chains from the town centre. WG funding is being sought for a Placemaking Plan for Monmouth this financial year, which will help set out a masterplan and identify priorities for bids for WG grant funding under the Transforming Towns programme. The RLDP provides an opportunity to review high street planning policies to fit the needs of the future. The cost of living and energy costs crisis presents a new risk to town centre businesses both in terms of their own outgoings and retail spend by residents and visitors.
- 3.17 WG guidance published in response to the Covid-19 pandemic recognises that whilst retail development should continue to be focussed in town centres, retail and commercial centres should be enabled to operate as flexibly as possible. This will ensure that going forward retail and commercial centres are hubs of social and economic activity and the focal point for a diverse range of services and cultural activities/functions, which support the needs of local communities. This approach should enable the planning system to be responsive, flexible and pragmatic to assist with the recovery from Covid-19. Locally, the Council put in place a number of interim measures during the height of the Covid-19 pandemic, such as street café licences and prioritising pedestrian movements throughout the town centres, many of which have remained in place as ongoing trials since the Covid restrictions have been lifted. In addition, the Council through its Regeneration team has submitted a funding bid to secure a share of Central Government's 'Levelling Up Fund' to make improvements to Market Hall and Shire Hall, two key buildings in the town centre as well as improvements to Monnow Street and Blestium Street. A 'Levelling Up Fund' bid was also submitted for the acquisition of 7-43 Newport Road, Caldicot, public realm improvements to Caldicot town centre and refurbishment of Caldicot Wellbeing Centre.

### Next Steps

- 3.18 These concerns reinforce the need to progress with the RLDP at pace to provide a continued policy framework and mechanism for addressing the County's key housing and affordability issues. The Council reached the Preferred Strategy stage of the RLDP process in Summer 2021, with stakeholder consultation in July and August 2021, alongside the second call for candidate sites. Following this, a number of challenges have arisen which have impacted on the progression of the RLDP and require further consideration, namely the Welsh Government Planning Division's objection to the Sustainable and Resilient Communities Preferred Strategy and phosphate water quality issues in the Rivers Wye and Usk.
- 3.19 On 27<sup>th</sup> September 2022 Council endorsed the proposal to progress the RLDP with a new growth and spatial strategy that delivers on the Council's objectives and addresses the core issues of delivering much needed affordable housing at pace and scale, responding to the climate and nature emergencies by delivering zero carbon

ready new homes for our communities, and ensuring our communities are socially and economically sustainable by attracting and retaining younger people to rebalance our ageing demographic. A revised Preferred Strategy will be reported to Council in December 2022 for endorsement to be issued for statutory consultation/engagement in December 2022 - January 2023. This meeting will also seek Council's agreement of the RLDP Revised Delivery Agreement, which will amend the project timetable for Plan preparation, for submission to the Welsh Government for Ministerial approval.

#### **4 SUSTAINABLE DEVELOPMENT AND EQUALITY IMPLICATIONS**

- 4.1 The Council must comply with European Directives and Regulations to monitor the state of the environment and this forms an integral part of the AMR. The adopted LDP and completion of the AMR accord with these requirements.

##### Sustainable Development

- 4.2 Under the 2004 Act the LDP is required to be subject to a Sustainability Appraisal (SA). The role of the SA is to assess the extent to which planning policies would help to achieve the wider environmental, economic and social objectives of the LDP. In addition, the European Strategic Environmental Assessment (SEA) Directive requires the 'environmental assessment' of certain plans and programmes prepared by local authorities, including LDP's. All stages of the LDP were subject to a SA, whose findings were used to inform the development of LDP policies and site allocations in order to ensure that the LDP would be promoting sustainable development. The SEA Directive also requires that the Council monitor the state of the environment through monitoring the sustainability objectives set out in the SA Report. This forms an integral part of the AMR.
- 4.3 A Future Generations Evaluation (including equalities and sustainability impact assessment) is attached to this report at **Appendix 2**.

##### Safeguarding and Corporate Parenting

- 4.4 There are no safeguarding or corporate parenting implications arising directly from this report.

#### **5. OPTIONS APPRAISAL**

- 5.1 It is a requirement of the Regulations to monitor the LDP and to submit an AMR to the Welsh Government, so no other options were considered.

#### **6. RESOURCE IMPLICATIONS**

- 6.1 Officer time and costs associated with the data collection and analysis of the monitoring indicators and preparation of the AMR. These costs will be met from the Planning Policy budget and carried out by existing staff.

#### **7. CONSULTEES**

- Performance and Overview Scrutiny Committee, via meeting on 15<sup>th</sup> September 2022.

#### **8. BACKGROUND PAPERS**

European Legislation:

- European Strategic Environment Assessment Directive 2001/42/EC.
  - Strategic Environmental Assessment Regulations 2004.
  - The Conservation of Habitats and Species Regulations 2010 (as amended 2011).
- National Legislation and Guidance:
- Planning (Wales) Act 2015
  - Planning and Compulsory Purchase Act 2004.
  - Town and Country Planning (Local Development Plan) (Wales) Regulations 2005
  - Town and Country Planning (Local Development Plan) (Wales) (Amendment) Regulations 2015
  - Development Plans Manual Edition 3, Welsh Government, March 2020
  - Planning Policy Wales (Edition 11), Welsh Government, February 2021
  - Future Wales: The National Plan 2040, Welsh Government, February 2021
  - Building Better Places - Placemaking and the Covid-19 Recovery, Welsh Government, July 2020
- Monmouthshire LDP:
- Monmouthshire Adopted LDP, Monmouthshire County Council, February 2014.
  - Monmouthshire LDP 'Sustainability Appraisal/Strategic Environmental Assessment Report Addendum', February 2014.
  - Monmouthshire Local Development Plan Annual Monitoring Reports, 2014-15, 2015-16, 2016-17, 2017-18, 2018-19, 2019-20 & 2020-21.
- Monmouthshire County Council publications:
- Monmouthshire LDP 'Retail Background Paper', August 2022.
  - Monmouthshire LDP 'Employment Background Paper', May 2022.

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## 11. **APPENDICES**

Appendix 1: Annual Monitoring Report 2021-22

Appendix 2: Wellbeing of Future Generations equality impact assessment



**Monmouthshire County Council**



**monmouthshire  
sir fynwy**

**Adopted Local Development Plan 2011-2021**

**Annual Monitoring Report**

**Monitoring Period 1st April 2021-31st March 2022**

Page 77



**Monmouthshire County Council  
Adopted Local Development Plan  
2011 - 2021**

**Annual Monitoring Report**

**Monitoring Period 1<sup>st</sup> April 2021 – 31<sup>st</sup> March 2022**

**Planning Policy Service  
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## Contents Page

	<b>Page</b>
1. Executive Summary	1
2. Introduction	9
3. Contextual Information	13
4. LDP Monitoring Process	21
5. LDP Monitoring – Policy Analysis	24
6. Sustainability Appraisal Monitoring	103
7. Conclusions and Recommendations	124
Appendix 1	135





## 1 Executive Summary

- 1.1 The Monmouthshire Local Development Plan (LDP) was adopted on 27 February 2014. As part of the statutory development plan process the Council is required to prepare an Annual Monitoring Report (AMR).
- 1.2 The AMR provides the basis for monitoring the effectiveness of the LDP and ultimately determines whether any revisions to the Plan are necessary. It aims to demonstrate the extent to which the LDP strategy and objectives are being achieved and whether the Plan's policies are functioning effectively. It also allows the Council to assess the impact the LDP is having on the social, economic, cultural and environmental well-being of the County and identifies any significant contextual changes that may influence Plan implementation or review.
- 1.3 This is the eighth AMR to be prepared since the adoption of the Monmouthshire LDP and is based on the period 1 April 2021 – 31 March 2022. The Adopted LDP covers the 10-year plan period 2011 – 2021, with 10 years' worth of completions monitoring reached in March 2021. However, as set out in the Minister for Housing and Local Government's letter of September 2020, clarifying the provisions in the Planning Wales Act 2015 relating to Local Plan expiry dates, plans adopted prior to 4<sup>th</sup> January 2016 will remain the LDP for determining planning applications until replaced by a further LDP.

### **Key Findings of the Eighth Annual Monitoring Process 2020-2021**

#### **Contextual Information**

- 1.4 Section 3 provides a summary of the relevant contextual material that has been published during the current monitoring period. This includes national legislation and relevant plans, policies and strategies at the national, regional and local level, along with general economic trends which have occurred since the LDP's adoption. In the main, the implications of the contextual changes will take place over the longer term and as part of the Replacement Local Development Plan (RLDP). Of note during this monitoring period was the publication of an updated Technical Advice Note (TAN) 15 Development, Flooding and Coastal Erosion on 28<sup>th</sup> September 2021, in advance of its coming into effect and formal publication on 1<sup>st</sup> December 2021. However, on 23<sup>rd</sup> November 2021 Julie James, the Minister for Climate Change, wrote to local authorities to advise that in order for LPAs to consider fully the impact of climate change projections on their respective areas, the Welsh Government were suspending the coming into force of the new TAN15 and the Flood Map for Planning until 1<sup>st</sup> June 2023 for Development Management decisions. In the meantime, however, the updated TAN15 remains the policy basis for the preparation of the RLDP as advised in a further letter issued on 15<sup>th</sup> December 2021<sup>1</sup>.

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<sup>1</sup> <https://gov.wales/sites/default/files/publications/2021-12/letter-local-authorities-on-the-pause-of-tan-15-15-december-2021.pdf>

### Local Development Plan Monitoring – Policy Analysis

- 1.5 Section 5 of the AMR provides a detailed assessment of how the Plan’s strategic policies and associated supporting policies are performing against the identified key monitoring targets and outcomes and whether the LDP strategy and objectives are being delivered. This has enabled the Council to make an informed judgement of the Plan’s progress in delivering the targets/monitoring outcomes and policies during this monitoring period. The table below provides a visual overview of the effectiveness of policies during the current monitoring period based on the traffic light rating used in the assessment.
- 1.6 Overall, the plan is working effectively with the majority of the monitoring targets being achieved, a slight increase to 57 from last year’s 54 green rating. There has been a slight decrease in the number of indicators that have not achieved the target this year, but there is an appropriate justification, and no concerns are raised (26 compared to last year’s 29). Red ratings recorded during the current monitoring period remained at 3 for the second consecutive year. Further commentary is provided below.

Targets / monitoring outcomes* are being achieved	57
Targets / monitoring outcomes* are not currently being achieved but there are no concerns over the implementation of the policy	26
Targets / monitoring outcomes* are not being achieved with subsequent concerns over the implementation of policy	3
No conclusion can be drawn due to limited data availability or no applicable data during the monitoring period	7

\*For those indicators with no target/trigger the monitoring outcomes are assessed and rated accordingly

### Key AMR Findings

- 1.7 The results of the monitoring process demonstrate that many of the indicator targets and monitoring outcomes are being achieved (green traffic light rating), indicating that the relevant Plan policies are performing as intended. The analysis also indicates that various policy indicators are not being achieved but with no corresponding concerns over policy implementation, as detailed in Section 5 (amber traffic light rating). Further investigation has determined that there are justified reasons for the performance recorded and this is not representative of any fundamental issue with the implementation of the policy framework or strategy at this time. Of particular note over this monitoring period:
- Six of the seven LDP allocated strategic housing sites have planning permission, of which four are under construction (Deri Farm, Abergavenny; Fairfield Mabey, Chepstow; Rockfield Farm, Undy; and Sudbrook Paper Mill). One site is partially complete (Wonastow Road, Monmouth), with the remaining phase at Drewen Farm

awaiting a phosphate solution before it can be progressed. Permission was granted on the seventh at SAH6 Vinegar Hill, Undy in June 2022 and will therefore be recorded as a permission during the next monitoring period.

- Progress continues to be made towards the implementation of the LDP allocations, with 65% of completions coming forward on allocated sites (236 units). Large windfall sites accounted for 22% of completions (80 units) and small sites accounted for the remaining 13% (45 units).
- Dwelling permissions during 2021/22 were lower than recorded in any of the previous monitoring periods at 39 dwellings, all of which were general market. This decrease is due to a combination of factors including the majority of LDP allocated sites already having planning permission with the LDP having reached the end of the Plan period, hence the importance of progressing the RLDP at pace. In addition, the introduction of the measures in January 2021 to control phosphate levels in the River Usk and River Wye Catchment areas, which cover a large proportion of the County, has impacted on our ability to grant planning permissions in a significant proportion of the County. Officers and Cabinet Members are working hard to secure a solution to this challenge.
- The number of dwellings permitted in the main towns is significantly lower than previous monitoring periods and is the lowest recorded since the adoption of the LDP, accounting for 23.1% of residential permissions. Again, this reflects LDP Strategic Sites already having planning permissions and the impact of the phosphate restrictions on development.
- The County has a total of 40.16 hectares of employment land available, indicating that sufficient employment land is maintained to meet the identified take up rate. Work on the RLDP is exploring why the remaining employment sites have not yet come forward and will consider whether or not they should be de-allocated or if alternative interventions would secure their delivery.
- There has been progress in terms of employment permissions within the County, with 19 permissions granted for a range of B use class employment uses throughout the County including several rural diversification and rural enterprise schemes (7 applications).
- The Council approved proposals for a total of 17 tourism facilities, ranging from a hotel, holiday lets to glamping accommodation. The Sustainable Tourism Accommodation Supplementary Planning Guidance [SPG] (November 2017) has helped clarify our general support for this important sector of our economy.
- Four Central Shopping Areas have seen a fall in vacancy rates, Abergavenny, Caldicot, Chepstow and Usk and two centres saw no change, Raglan and Magor, with Magor having no vacant units for the second consecutive year.
- The proportion of A1 retail uses within the towns' Primary Shopping Frontages generally accord with the thresholds identified in the Primary Shopping Frontages SPG.
- Thirteen planning applications were approved for community and recreation uses during the monitoring period. These involved an extension to Usk Primary School, a new 100 and 50 seated stands at Chepstow Town AFC. Also of note, although not a gain, the enhancement to the existing burial facility at Usk Natural Burial Ground.

- Five applications have been approved incorporating on-site renewable energy, including two solar car ports at Chepstow Comprehensive School and Innovation House, Wales 1, Magor and solar panels and air source heat pumps for the 15 new houses (SAH11(ii) at Well Lane, Devauden.

1.8 There are, however, three policy monitoring outcomes that are not progressing as intended relating to housing delivery and retail vacancy rates in Monmouth's Central Shopping Area (red traffic light rating):

### **Strategy and Housing**

- Housing delivery records covering the 10-year plan period 2011 - 2021 set out that the Plan had delivered a shortfall of 1,500 homes (33.3%) when compared to the 10-year Plan requirement of 4,500 dwellings. However, in more recent AMRs the % under delivery has steadily declined as the strategic sites have come forward. This shortfall is largely attributable to the lead in period of the strategic housing sites, many of which continue to deliver homes now which contributes to the RLDP housing delivery: it is worth noting that 1,263<sup>2</sup> homes have planning permission and due to be built in the near future. The impacts of phosphates restrictions is also now affecting site commencements and therefore completions. During this monitoring period, 361 dwellings were completed. Given the importance attached to the supply of housing land, a full review of the LDP commenced in 2017 and culminated with the publication of the Final Review Report in March 2018. The latest position on the RLDP is discussed below in the recommendations section.

### **Affordable Housing**

- 35 affordable homes were completed during the monitoring period accounting for 9.7% of total completions recorded (361). This is well below the LDP target of 96 affordable homes per annum. Housing delivery records covering the 10-year plan period 2011 - 2021 set out that the Plan has delivered 658 affordable homes compared to a target of 960 affordable homes (a shortfall of 302 affordable homes). Proportionately, this shortfall is almost identical to the shortfall in total housing delivery. Furthermore, there were no new planning permissions for 5 or more dwellings during the monitoring period that triggered the delivery of on-site affordable housing. This shortfall is largely attributable to the lead in period of the strategic housing sites, many of which continue to deliver homes now which contributes to the RLDP housing delivery: it is worth noting that there are 280 affordable homes with consent and due to be built in the near future<sup>3</sup>. The impact

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<sup>2</sup> This figure excludes sites in the upper Wye catchment which are unlikely to come forward in the near future until as phosphates solution is identified and implemented.

<sup>3</sup> This figure excludes sites in the upper Wye catchment which are unlikely to come forward in the near future until as phosphates solution is identified and implemented.

of phosphates restrictions is also now affecting site commencements and therefore completions. This reduced trend of affordable housing delivery is therefore anticipated to continue in the short-term awaiting progress on the RLDP.

### **Retail and Community Facilities**

- As increased vacancy rates have occurred for three consecutive years in the Monmouth Central Shopping Area, the trigger for this indicator has been met. While Monmouth only saw a marginal increase in vacancy rates from 15.4% to 15.5% in this monitoring period, this is an overall increase from 10.1% in the 2018 monitoring period.

### **Sustainability Appraisal (SA) Monitoring**

1.9 Section 6 expands the assessment of the performance of the LDP against the Sustainability Appraisal (SA) monitoring objectives. There is an overlap between some of the LDP and SA indicators helping to demonstrate how the LDP monitoring and SA monitoring are interlinked.

1.10 Some of the most notable findings specific to the SA during the current monitoring period include:

- The annual objective level of nitrogen dioxide was not exceeded in in 2021/22. For the fifth year running there was no exceedance in Usk.
- Monmouthshire sits within three groundwater bodies, the Usk Devonian Old Red Sandstone (ORS), Wye Secondary Devonian ORS and Usk and Wye southern Carboniferous Limestone. All three groundwater bodies had good status for quantity as per the Water Watch Wales for the Cycle 3 (2021) data.
- Water flow levels fell below the summer flow level at two of the three monitoring stations. The River Wye for 38 days and River Usk for 38 days, over two periods. The River Monnow remained above the summer flow level.
- The latest waste data published for 2020-2021 suggests that 62% of Monmouthshire's total household waste was recycled or composted. This has decreased since the previous AMR which indicated 64.6% was recycled or composted.
- No agricultural land at Grade 3a and above has been lost to major development over the monitoring period.
- The Monmouthshire STEAM report (2021) identified the total annual tourism expenditure as £182.79 Million over the 2021 period. This compared to £81.16 Million over the 2020 period, equating to a 122.2% increase. This is a significant increase since the previous period and reflects the recovery since the impact of the Covid-19 pandemic on the tourism and hospitality industries.

## Conclusions and Recommendations

- 1.11 Overall, the 2021-22 AMR indicates that good progress continues to be made in implementing many of the Plan's policies and that overall, the strategy remains sound. However, while progress has been made in relation to the Plan's Strategic Housing Sites, cumulative dwelling completion rates for the Plan period are lower than the Plan requirement and remain a matter of concern if Monmouthshire's housing needs are to be met. However, this is due to a time-lag in site delivery rather than an issue with the sites not happening at all.
- 1.12 While all seven LDP strategic housing allocations now have planning permission<sup>4</sup> and will continue to play an important role in housing delivery and completion rates in the short term, the reduction in dwellings permitted during the AMR period is cause for concern. Analysis of anticipated completions, in consultation with the house building industry indicates that completion rates are estimated to remain stable for a couple of years and then forecast to reduce the lower levels (253 units – 2025/26 and 166 units in 2026/27), with only strategic sites and small sites contributing to the forecast in 2026/27. These forecasts do not however, include any contribution from the emerging RLDP which will improve housing land supply as the plan progresses to adoption. In the meantime, however, the time lag between the two plans is an area of concern for its implications on housing delivery in the County.
- 1.13 The number of dwellings approved during the monitoring period has also been lower than any previous monitoring periods and whilst this is partially due to the Strategic Sites having permissions, the restriction on phosphates is considered to be a contributing factor.
- 1.14 Similar concerns are shared with the level of affordable housing secured and completed during the monitoring period. This again is considered to be reflective of a combination of the strategic sites gaining planning permission and being built out and restrictions on development due to phosphates constraints. No new planning permissions were approved during the monitoring period that triggered delivery of on-site affordable housing. Some progress has, however, been made on a couple of Main Village sites with 9 affordable dwellings under construction at SAH11(ii) Well Lane, Devauden and 4 affordable dwellings at SAH11(ix)(a) Land rear of Carpenters Arms, Llanishen.
- 1.15 As can be seen from the analysis throughout Section 5, the announcement during the last monitoring period regarding phosphate water quality issues in the River Usk and Wye Catchments continues to have implications for the ongoing delivery of development in the County. The Council is committed to seeking solutions to the phosphate issue and is in proactive discussions with the key organisation, including

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<sup>4</sup> SAH6 Vinegar Hill, Undy gained permission in June 2022 and will therefore be recorded in the next monitoring period. SAH4 Wonastow Road, Monmouth site is partially complete, with the remaining phase at Drewen Farm awaiting a phosphate solution before it can be progressed.

NRW, Welsh Government, DCWW and the development industry, to seek viable and timely solutions in the affected settlements. Of note, DCWW recently announced an investment programme to seek to address strategic phosphate mitigation to enable development in the future. Nevertheless, the short-term implications on the delivery of new homes raises concerns. This situation will be kept under review in collaboration with DCWW, NRW and other stakeholders.

- 1.16 These issues reinforce the need to progress with the RLDP to provide a continued policy framework and mechanism for addressing the County's housing and affordability issues. The Council reached the Preferred Strategy stage of the RLDP process in Summer 2021, with stakeholder consultation in July and August 2021, alongside the second call for candidate sites. Following this, a number of challenges have arisen which have impacted on the progression of the RLDP and require further consideration, namely the Welsh Government objection to the Sustainable and Resilient Communities Preferred Strategy<sup>5</sup> and phosphate water quality issues in the Rivers Wye and Usk.
- 1.17 In light of the concerns with housing delivery and associated outcomes, the progression of the RLDP remains a key priority of the Council. On 27th September 2022 Council endorsed the proposal to progress the RLDP with a new growth and spatial strategy. A revised Preferred Strategy will be reported to Council in December 2022 for endorsement to be issued for statutory consultation/engagement in December 2022 - January 2023. This meeting will also seek Council's agreement of the RLDP Revised Delivery Agreement, which will amend the project timetable for Plan preparation, for submission to the Welsh Government for Ministerial approval.
- 1.18 With regard to the consecutive increased vacancy rates in the central shopping area of Monmouth, it is worthy of note that the rise in vacancy rates has been experienced in the primary shopping frontage only, with a decrease in rates across the secondary frontages. This may, in part reflect the continued impact of the Covid-19 pandemic on high streets across the UK, particularly given the loss of some national chains from the town centre, such as Peacocks.
- 1.19 WG guidance<sup>6</sup> published in response to the Covid-19 pandemic recognises that whilst retail development should continue to be focussed in town centres, retail and

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<sup>5</sup> Welsh Government's Planning Division raised significant concerns regarding the Strategy's proposed level of growth and 'general conformity' with policies 1 and 33 of the FW2040, suggesting that growth in Monmouthshire would undermine growth in the national growth area of Cardiff, Newport and the Valleys. Welsh Government's letter unusually prescribes a maximum growth of 4,275 dwellings over the Plan period (285 dwellings per annum) which is below the Adopted LDP's annual dwelling requirement of 450 dwellings per annum and Preferred Strategy's consultation dwelling requirement figure of 507 dwellings per annum.

<sup>6</sup> Building Better Places - The Planning System Delivering Resilient and Brighter Futures: Placemaking and the Covid-19 recovery (WG, July 2020) - <https://gov.wales/planning-policy-covid-19-recovery> ; Welsh Government letter regarding temporary permitted development rights in town centres, 30 March 2021 - <https://gov.wales/coronavirus-covid-19-new-temporary-permitted-development-rights-support-economic-recovery-html>



commercial centres should be enabled to operate as flexibly as possible. This will ensure that going forward retail and commercial centres are hubs of social and economic activity and the focal point for a diverse range of services and cultural activities/functions, which support the needs of local communities. This approach should enable the planning system to be responsive, flexible and pragmatic to assist with the recovery from Covid-19. Any impacts from this on the County's town centres will be recorded in the next monitoring period.

1.20 Locally, the Council put in place a number of interim measures during the height of the Covid-19 pandemic, such as street café licences and prioritising pedestrian movements throughout the town centres, many of which have remained in place since the Covid restrictions have been lifted. In addition, the Council through its Regeneration team has submitted a funding bid to secure a share of Central Government's 'Levelling Up Fund' to make improvements to Market Hall and Shire Hall, two key buildings in the town centre as well as improvements to Monnow Street and Blestium Street. A 'Levelling Up Fund' bid was also submitted for the acquisition of 7-43 Newport Road, Caldicot, public realm improvements to Caldicot town centre and refurbishment of Caldicot Wellbeing Centre.

1.21 Although, with the exception of Monmouth, high street vacancy rates are stable and below the GB average (14.5% June 2021, Local Data Company), it is recognised that high street vitality plays a key role in the character and attractiveness of our market towns. WG Transforming Towns funding seeks to support town centres, and Monmouthshire has submitted a comprehensive bid for this grant funding. The cost of living and energy costs crises pose additional threats to businesses as costs increase and customer spending decreases. The situation will be continued to be monitored as part of the AMR and the annual retail surveys.

1.22 Accordingly, the AMR recommends the following:

1. Continue to progress work on the RLDP and seek Council endorsement to consult on a revised Preferred Strategy at the end of 2022/early 2023.
2. Continue to work with the relevant organisations to seek solution to the phosphate water quality issues in the Usk and Wye Riverine SACs.
3. Continue to work with other Council departments and other stakeholders to explore options for increasing affordable housing delivery.
4. Submit the eighth AMR to the Welsh Government by 31 October 2022 in accordance with statutory requirements. Publish the AMR on the Council's website.
5. Continue to monitor the Plan through the preparation of successive AMRs.

## 2 Introduction

### 2 Introduction

- 2.1 The Annual Monitoring Report (AMR) provides the basis for monitoring the effectiveness of the Local Development Plan (LDP) and ultimately determines whether any revisions to the Plan are necessary. It aims to demonstrate the extent to which the LDP strategy and objectives are being achieved and whether the Plan's policies are functioning effectively. It also allows the Council to assess the impact the LDP is having on the social, economic, cultural and environmental well-being of the County and identifies any significant contextual changes that might influence the Plan's implementation or review.
- 2.2 Monitoring is a continuous part of the plan making process. It provides the connection between evidence gathering, plan strategy and policy formulation, policy implementation, evaluation and plan review.

### **Adoption of the Monmouthshire Local Development Plan**

- 2.3 Under the Planning and Compulsory Purchase Act (2004) and associated Regulations, local planning authorities (LPAs) are required to produce a LDP. The Monmouthshire Local Development Plan was formally adopted by Monmouthshire County Council on 27 February 2014. The LDP provides the land use framework which forms the basis on which decisions about future development in the County, including planning applications, are based.
- 2.4 This is the eighth AMR to be prepared since the adoption of the Monmouthshire LDP and is based on the period 1 April 2021 – 31 March 2022.

### **Status of Adopted LDP**

- 2.5 A Welsh Government letter dated 24th September 2020 clarified that the provisions in the Planning Wales Act 2015 regarding the period to which a plan has effect do not apply to LDPs adopted prior to 2016. Plans adopted prior to 4th January 2016, including the adopted Monmouthshire LDP, will remain the LDP for determining planning applications until replaced by a further LDP. This is welcomed clarification and ensures a policy framework remains in place while the RLDP progresses and the existing LDP allocations that have yet to gain planning permission can progress through the policies of the Adopted Plan, providing a policy framework for continued economic development and windfall opportunities.

## **The Requirement for Monitoring**

### **Planning and Compulsory Purchase Act 2004**

- 2.6 The Council has a statutory obligation, under section 61 of the 2004 Act, to keep all matters under review that are expected to affect the development of its area. In addition, under section 76 of the Act, the Council has a duty to produce information on these matters in the form of an Annual Monitoring Report for submission to the Welsh Government at the end of October each year following plan adoption. The preparation of an AMR is therefore an integral part of the statutory development plan process.
- 2.7 In order to monitor LDP performance consistently, plans should be considered against a standard set of monitoring indicators and targets. The Welsh Government has issued regulations and guidance on the required content of AMRs.

### **Town and Country Planning (Local Development Plan) (Wales) (Amendment) Regulations 2015**

- 2.8 The Town and Country Planning (Local Development Plan) (Wales) Regulations have been amended to simplify certain aspects of the local development plan procedures; however, these do not affect the LDP monitoring process. Under Regulation 37 the AMR is required to:
- Identify policies that are not being implemented;  
And for each policy:
  - Identify the reasons why the policy is not being implemented;
  - Identify the steps (if any) that are intended to be taken to enable the policy to be implemented;
  - Explore whether a revision to the plan to replace or amend the policy is required.
  - Monitor the delivery of housing against the LDPs proposed housing trajectory.

### **Local Development Plan Manual (Edition 3, March 2020)**

- 2.9 The LDP Manual notes that the monitoring framework should focus on those key policies fundamental to delivering the plan and sets out a number of indicators required in all monitoring frameworks, which predominantly relate to the affordable and market housing delivery and the spatial distribution of housing compared to a Plan's growth strategy and settlement hierarchy. The most recent edition of the manual (March 2020) replaced the requirement to monitor a five-year housing land supply with a housing trajectory monitoring method. The AMR also incorporates locally specific indicators.

### **Monmouthshire LDP Monitoring Framework**

- 2.10 A Monitoring Framework is provided in Chapter Eight of the LDP comprising a series of 51 indicators, with corresponding targets and triggers for further action, in relation to

the Plan's strategic policies. It also indicates the linkages between the Plan themes, objectives, strategic policies and other Plan policies. The indicators were developed in accordance with the above Welsh Government Regulations and guidance on monitoring. The Monitoring Framework forms the basis of the AMR.

### **Strategic Environmental Assessment Regulations (2004) and The Conservation of Habitats and Species Regulations 2010 (as amended 2011)**

- 2.11 In addition, the LDP and AMR must comply with European Directives and Regulations. The Sustainability Appraisal Report Addendum (2014) identifies a further set of indicators (61) that are used to monitor progress on sustainability issues. Whilst interlinked, these are set out separately from the LDP Policy Monitoring Framework and have been used in the AMR to measure the environmental, economic and social impacts of the LDP.
- 2.12 The completion of the AMR accords with the requirements for monitoring the sustainability performance of the Plan through the Strategic Environmental Assessment Regulations (2004) and The Conservation of Habitats and Species Regulations 2010 (as amended).

### **AMR Format and Content**

- 2.13 The AMR has been designed to be a succinct and easily accessible document that can be used as a convenient point of reference for all strategic policy areas.

- 2.14 The structure of the AMR is as follows:

**Section 1 Executive Summary** - Provides a succinct written summary of the key monitoring findings.

**Section 2 Introduction** - Outlines the requirement for, the purpose and structure of the AMR.

**Section 3 Contextual Information** - Provides a brief overview of the relevant contextual information which, although outside the remit of the Plan, could affect the performance of the LDP policy framework. Policy specific contextual information is provided in the relevant policy analysis section.

**Section 4 LDP Monitoring Process** - Explains the monitoring process undertaken.

**Section 5 LDP Monitoring - Policy Analysis** - Provides a detailed analysis of the effectiveness of the LDP policy framework in delivering the identified aims/outcomes and targets, together with recommendations for further action.

**Section 6 Sustainability Appraisal Monitoring** - Provides an assessment of the LDP's performance against the SA monitoring indicators.

**Section 7 Conclusions and Recommendations** – Gives an overview of the AMR findings with reference to the analysis made in the preceding sections and, where relevant, provides recommendations on issues that require further consideration.

**Publication** – The AMR will be published on the Council’s website.

### **Future Monitoring**

- 2.15 The broad structure of the AMR should remain the same from year to year in order to provide ease of analysis between successive reports. However, given that the monitoring process is dependent upon a wide range of statistical information that is sourced from both the Council and external sources, any changes to these sources could make certain indicators ineffective or out-dated. Accordingly, the monitoring framework may evolve over the Plan period and AMRs will be used as a means of identifying any such inevitable changes to the framework.

### **LDP Review**

- 2.16 The 2016 Monmouthshire AMR recommended an early review of the LDP as a result of the need to address the shortfall in the housing land supply and to facilitate the identification and allocation of additional housing land. The preparation of the RLDP has remained a recommendation in subsequent AMRs, which commenced in May 2018.

### **Replacement Local Development Plan**

- 2.17 The Preferred Strategy stage of the plan process was reached in summer 2021. This sets out how the Preferred Strategy will address key issues and challenges facing the County and also takes account of Covid-19 impacts and the publication of updated Welsh Government population projections. Consultation on the Preferred Strategy took place in July and August 2021. Since that time, the Council has been considering the consultation responses received, in particular the Welsh Government’s Planning Division response which raised significant concerns regarding the proposed level of growth and the Strategy’s ‘general conformity’ with policies 1 and 33 of Future Wales 2040. The water quality phosphate issues affecting the River Wye and River Usk has also continued to raise implications for proposed growth in the affected parts of the County. It is proposed that a report to Council in September 2022 will seek Council endorsement of the proposal for progressing the RLDP.

## 3 Contextual Information

### 3 Contextual Information

- 3.1 This section provides a brief summary of the relevant contextual material that has been published during the current monitoring period. This includes national legislation and relevant plans, policies and strategies at the national, regional and local level. Any potential overall implications for the LDP as a whole are outlined where appropriate. General economic trends which have occurred since the LDP's adoption are also set out, together with progress on key supplementary planning guidance.
- 3.2 Contextual information which is specific to a particular LDP policy area is provided in the relevant policy analysis section for ease of reference and is therefore not repeated in detail here.
- 3.3 At the time of this AMR it is still unknown what the full impact of the Covid-19 pandemic will be for the Adopted LDP. Any implications will be reported in future AMRs.

### **National Planning Policy**

#### **Technical Advice Note (TAN) 15: development, flooding and coastal erosion**

- 3.4 A new version of Technical Advice Note (TAN) 15 Development, Flooding and Coastal Erosion was published on 28 September 2021, in advance of its coming into effect and formal publication on 1 December 2021. However, on 23<sup>rd</sup> November 2021 Julie James, the Minister for Climate Change, wrote to local authorities to advise that in order for LPAs to consider fully the impact of climate change projections on their respective areas, the Welsh Government were suspending the coming into force of the new TAN 15 and the Flood Map for planning until 1<sup>st</sup> June 2023. The existing TAN 15 (2004) and the Development Advice Map are to continue in the meantime as the framework for assessing flood risk. With regard to the RLDP the minister, in a further letter on 15<sup>th</sup> December 2021, states that when plans are reviewed, the flood risk considerations that feed into the settlement strategy and site allocations must be in accordance with the new TAN 15 and the Flood Map for Planning. An SFCA will be the principal source of evidence to inform those elements of the plan and locally specific flood risk policies.

### **Place Making Wales Charter**

- 3.5 The Placemaking Wales Charter was launched by the Minister at the RTPi Cymru Welsh Planner Conference on 23<sup>rd</sup> September 2020. The Placemaking Wales Charter has been developed by Welsh Government and the Design Commission for Wales in collaboration with the Placemaking Wales Partnership. The Charter builds on the strengthening focus on Placemaking in policy and practice in Wales and aims to provide a common

understanding of the range of considerations that go into placemaking. Following the launch of the charter a work programme was established. This is either existing activity that covers the placemaking theme, or new work where Welsh Government funding can be used to help support the activity. Monmouthshire County Council signed up to the Charter in the current monitoring period.

## **Regional Context**

### **Strategic Development Plans (SDP)**

- 3.6 The Planning (Wales) Act provides a legal framework for the preparation of Strategic Development Plans. This will allow larger than local issues such as housing demand, search areas for strategic employment sites and supporting transport infrastructure, which cut across a number of local planning authorities, to be considered and planned for in an integrated way. SDPs will address cross-boundary issues at a regional level and must be in general conformity with Future Wales.
- 3.7 On 29th January 2018 the Cardiff Capital Region Cabinet agreed that work should commence on a Strategic Development Plan (SDP) for the region which includes Monmouthshire. An SDP Project Group<sup>7</sup> was established tasked with progressing key options for the SDP, including SDP boundary, governance, timescale and scope. Subsequently, The Local Government and Elections (Wales) Act (2021) mandated the preparation of a Strategic Development Plan (SDP) in each of the four regions in Wales through a Corporate Joint Committee (CJC). The Act received Royal Assent on 20 January 2021. The regulations setting out the procedure to prepare an SDP are being progressed and will mirror the CJC regulations. Future progress on the SDP and any subsequent implications for the RLDP will be reported in future AMRs.

### **Cardiff Capital Region and City Deal**

- 3.8 The Cardiff Capital Region (CCR) is made up of an area of South East Wales, consisting of the ten local authorities, including Monmouthshire. These local authorities are working collaboratively to seek to tackle issues that affect the whole of the region, such as worklessness and poor transportation links, with the aim of working together and collaborating on projects and plans for the area. The Authorities forming the Capital Region are progressing the City Deal to fund projects aimed at boosting the competitiveness of the region over the next 20 years. The CCR City Deal will help boost economic growth by improving transport links, increasing skills, helping people into work and giving businesses the support, they need to grow. It will also establish strong governance across the region through the Cardiff Capital Region Joint Cabinet. A five-year Strategic Business Plan to leverage maximum economic and social benefits was

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<sup>7</sup> SDP Project Group comprised heads of planning and planning policy managers from the 10 local planning authorities in South East Wales.

agreed in May 2018 by all 10 local authority partners. This investment represents a significant opportunity for Monmouthshire and for the region.

- 3.9 There are currently a number of approved projects within Monmouthshire and whilst some are region-wide there are two specific to the County:
- CCR investment money is to support the development of cool plasma sterilisation and decontamination technology at Creo Medical.
  - Severn Tunnel Junction Park and Ride - creation of an additional 150-200 space car park on the south side of Severn Tunnel Junction station and reconfiguration of the existing station car park to include additional bike & ride spaces, safer walking & cycling access, a revamped bus-rail interchange.
- 3.10 MCC successfully bid during the current monitoring period for CCR funding to support the delivery of the LDP strategic housing site SAH6 Vinegar Hill, Undy. This will enable a fully planning policy compliant scheme to be delivered despite viability pressures which had resulted in the site not coming forward. The progress of the Cardiff Capital Region agenda, City Deal Bids and any subsequent implications for the LDP will be given further consideration in subsequent AMRs where appropriate.

#### **M4 Relief Road**

- 3.11 The decision was announced in June 2019 that the M4 Relief Road would not proceed, following the conclusion of a public inquiry into the project and the publication of the Inspector's Report. The route within Monmouthshire is safeguarded in the Adopted LDP. A Written Statement from the Welsh Minister for Economy and Infrastructure, stated that the Welsh Government had appointed an expert Commission (the South East Wales Transport Commission) tasked with making recommendations about alternative solutions to improve the transport network in South East Wales. The Commission reported in November 2020, making 58 recommendations, the Burns Delivery Board was created in Spring 2021 to bring together Welsh Government, Transport for Wales and local authorities, including Monmouthshire County Council, to deliver the recommendations. Further details with regard to progress on the recommendations are included in the policy analysis for transport.
- 3.12 In June 2021 the Deputy Minister for Climate Change released a written statement to the effect that the TR111 route corridor protection for the M4 relief road was to be removed. This decision relieves local authorities of the need to consult Welsh Government on proposed planning developments in the area. This will be taken account of in the development of the Replacement Local Development Plan



## **Local Context**

### **Monmouthshire Well-being Assessment and Plan**

- 3.13 Under the provisions of the Well-being of Future Generations Act, every Public Service Board (PSB) in Wales was required to publish a Well-being Plan by May 2018. Replacing the Single Integrated Plan (SIP), the plans were to look at the economic, social, environmental and cultural well-being of each county and have clear links with the LDP. The Monmouthshire Public Service Board Well-Being Plan was published in February 2018 and sets the objectives for partnership working for the Public Service Board up until 2023.
- 3.14 In 2021, the five local authorities in Gwent moved from having five separate Public Service Boards to having one overall Gwent Public Service Board, with the first Gwent wide Public Service Board meeting in September 2021. In January 2022 an update to the Monmouthshire Well-being Assessment was published for public consultation with the consultation closing on 18<sup>th</sup> February 2022. The final report was published on 5<sup>th</sup> May 2022 and is being used to develop the Gwent Well-being plan which will be published by May 2023 to cover the period up to 2028. The Well-being Plan has informed the preparation of the RLDP.

### **Monmouthshire 21<sup>st</sup> Century Schools**

- 3.15 Of note, work on two 21<sup>st</sup> Century Schools in the County has been completed, Monmouth Comprehensive School and Caldicot Comprehensive School. The Council is working with Aecom and Morgan Sindall to deliver the 21<sup>st</sup> Century Schools Band B project, Abergavenny 3-19 School. The project commenced on site on 25<sup>th</sup> July 2022, the school building is scheduled for completion in the summer of 2024 with the demolition of the existing school and sports pitches scheduled to be completed by May 2025. Our final school, Chepstow School, is in Band C and work will not commence on this project for at least another 3 years. Progress on schools in the County reflects a key corporate priority of children having the best possible start in life and no-one being left behind.

### **Climate Emergency**

- 3.16 In May 2019 Monmouthshire County Council declared a Climate Emergency. The Council is looking to reduce its carbon emissions, including by reducing its energy use, generating solar power and encouraging electric cars. The target is to reduce council carbon emissions to zero by 2030. During summer 2019, the Council developed an action plan and strategy to set out how this would be achieved. The action plan was adopted by the Council in October 2019 and has ten broad objectives focusing on energy, transport, green spaces, waste and procurement. An update on progress against

each of the actions in the plan was published in June 2021 with the majority of actions progressing as planned or showing some progress.

- 3.17 In November 2021 an amended Climate Emergency Strategy and Action Plan was published. This document aims to bring the strategy up to date but does not change the substance. Continued progress on the action plan will be reported in future AMRs and will inform the preparation of the RLDP.

### **Monmouthshire 2040: Our Economic Growth and Ambition Statement**

- 3.18 In November 2019 the Council published an economic ambition statement. This sets the Council's direction of travel and the combination of measures required for sustainable economic growth/prosperity, including an investment prospectus, close engagement with the business sector, demonstrating a pro-business culture and land assembly interventions to ensure employment sites come forward. An update of the economic ambition statement and investment prospectus was under consideration to take account of the COVID pandemic. Businesses were consulted on these in Autumn 2021 with the closing date for comments the 8<sup>th</sup> November 2021. The majority of correspondents believe that the documents identify the key challenges facing the economy of Monmouthshire and so it is not intended to make any changes to the documents in light of the consultation. The AMR will consider how the LDP is performing against the existing employment indicators, whilst the RLDP will play a key role in supporting the Council's vision for economic growth going forward and will be one of the main enablers in delivering sustainable economic growth.

## **General Economic Trends**

### **Economic Activity**

- 3.19 Key economic activity data for Monmouthshire and Wales from the LDP base date of 2011 to the current monitoring period is shown in the tables below. The data demonstrates that during the current monitoring period the percentage of the economically active who are in employment has decreased to 77.8%, at the same time the percentage of the economically active who are unemployed has remained at 2.9%. The proportion of those economically active who are unemployed in the County remains lower than the Wales figure. The Gross pay for full-time workers resident in the County remains at a higher level in Monmouthshire than in Wales as a whole (+20.7%). Such changes are not considered to be so significant as to have any implications for the LDP. These economic indicators will be considered in subsequent AMRs and any potential implications recorded.

### Economically Active – In Employment

	Monmouthshire	Wales
April 2011-March 2012	73.8%	66.7%
April 2012-March 2013	74.2%	67.6%
April 2013-March 2014	73.0%	69.5%
April 2014-March 2015	74.5%	69.3%
April 2015-March 2016	78.8%	71.1%
April 2016-March 2017	76.5%	71.4%
April 2017-March 2018	78.0%	72.7%
April 2018-March 2019	77.7%	73.1%
April 2019-March 2020	79.5%	73.7%
April 2020-March 2021	78.3%	72.2%
April 2021-March 2022	77.8%	73.6%

Source: Nomis (Annual Population Survey, August 2022)

### Economically Active – Unemployed

	Monmouthshire	Wales
April 2011-March 2012	5.1%	8.4%
April 2012-March 2013	5.6%	8.3%
April 2013-March 2014	5.1%	7.4%
April 2014-March 2015	4.9%	6.8%
April 2015-March 2016	3.3%	5.4%
April 2016-March 2017	2.9%	4.4%
April 2017-March 2018	3.5%	4.9%
April 2018-March 2019	3.0%	4.5%
April 2019-March 2020	2.7%	3.7%
April 2020-March 2021	2.9%	4.0%
April 2021-March 2022	2.9%	3.8%

Source: Nomis (Annual Population Survey, August 2022)

### Gross Weekly Pay Full-Time Workers (Earnings by Residence)

	Monmouthshire	Wales
2011	£560.3	£455.1
2012	£530.7	£454.9
2013	£579.5	£475.3
2014	£582.1	£480.0
2015	£610.5	£487.6
2016	£619.4	£499.2
2017	£619.6	£505.9
2018	£638.5	£518.6
2019	£649.6	£540.7
2020	£642.90	£541.70
2021	£688.80	£570.60

Source: Nomis (Annual Survey of Hours and Earnings, July 2022)

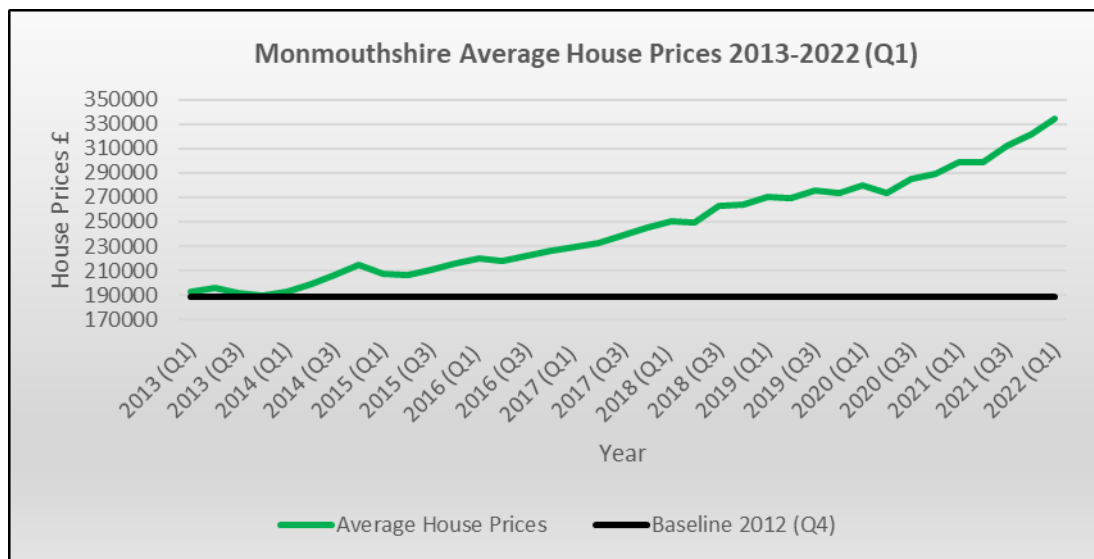
3.20 There appears to have been a recovery in earnings during the monitoring period, following a marginal decline in Monmouthshire during the last monitoring period. With average earnings in Monmouthshire increasing by 7.1% compared to 5.3% for Wales as

a whole. This decline may well have been as a result of the lockdowns associated with the Covid-19 pandemic. Evidence continues to suggest that the income for economically active women who are resident within the County is significantly lower than that of men within the same category. It is unlikely that this is something that the land use planning system can directly influence, however, further consideration will be given to this, if relevant, via Plan revision.

### House Prices

3.21 As demonstrated in the graph below, Land Registry data indicates that average house prices in Monmouthshire have increased over the current monitoring period. Subsequently, average prices in quarter 1 2022 (January to March) at £334,148 were higher than the 2012 quarter 4 baseline price (£188,720). If the average house price trend data recorded exceeds the identified trigger for further investigation set out in relation to Policy S4, the Council will consider re-assessing the viability evidence which informed the affordable housing policy targets. This is given further consideration in the policy analysis section relating to Policy S4.

3.22 A number of recent events and proposals, including the abolition of the Severn Bridge tolls in December 2018, plans for the South East Wales Metro together with wider opportunities associated with the Cardiff Capital Region City Deal agenda, the rising cost of living as well as the Covid-19 pandemic could have potential impacts on house prices in Monmouthshire. It is notable in the graph that there is a dip in house prices in the second quarter of 2020. This follows the instigation of the lockdown due to Covid-19 during the first quarter of that year. Since then, house prices have recovered and have continued to climb steadily over the remaining quarters of the monitoring period. Any such impacts will continue to be considered in subsequent AMRs and through the RLDP process.



Source: Land Registry UK House Price Index (July 2022)

## **Summary**

- 3.23 As detailed above, revised/new national, regional and local plans, policies and strategies have emerged during the current monitoring period, some of which may have implications for the future implementation of the LDP and for the RLDP. Subsequent AMRs will continue to provide updates on relevant contextual material which could affect the Plan's future implementation.

## 4 LDP Monitoring Process

### 4 LDP Monitoring Process

#### How is the LDP Monitored?

- 4.1 Section 5 provides a detailed analysis of the effectiveness of the LDP policy framework in delivering the identified policy aims/outcomes and targets, together with appropriate recommendations for further action. Consideration is also given to any significant policy specific contextual issues that have arisen over the monitoring period which could affect policy implementation. Aligned with the LDP monitoring framework, the analysis is grouped according to the Plan's strategic policies and is structured as follows:

<b>Monitoring Aims / Outcomes</b>	The monitoring aim / outcome identifies what each strategic policy is seeking to achieve. Supporting objectives, development management and site allocation policies are also set out to demonstrate the interlinkages between the policies.
<b>Contextual information</b>	Significant contextual information that has been published over the monitoring period is outlined where relevant to a particular strategic policy. This will enable the AMR to determine whether the performance of a policy has been affected by contextual changes. These can include new or amended legislation, national, regional and local plans, policies or strategies as well as external social and economic trends which could affect the delivery of the LDP such as economic conditions. Any such changes lie outside the remit of the LDP.
<b>Indicators, targets and triggers</b>	<p>Policy performance recorded during the monitoring period in relation to the indicators and relevant targets /triggers for further investigation is set out for each strategic policy.</p> <p>The targets and triggers for certain indicators have been subdivided to enable the effective monitoring of these indicators. This includes indicators relating to the following strategic policies:</p> <ul style="list-style-type: none"> <li>• S1 Spatial Strategy</li> <li>• S3 Strategic Housing Sites</li> <li>• S4 Affordable Housing</li> <li>• S6 Retail</li> <li>• S8/S9 Enterprise and Economy/ Employment Sites Provision</li> </ul> <p>The total number of targets and triggers in the monitoring framework has subsequently increased.</p>

	Where relevant, indicator data recorded in previous AMRs is provided in the tables. Such data is colour coded (i.e. red, amber, green) to enable trends to be readily identified.
<b>Analysis</b>	<p>Having regard to the indicators, relevant targets, triggers and monitoring outcomes, the AMR assesses whether the Plan's strategic policies are being implemented as intended and whether the LDP objectives and strategy are being achieved. This includes the identification and further investigation of any policy that fails to meet its target and/or has reached its trigger point. However, the fact that a policy reaches its trigger level does not automatically imply that the policy is failing. The analysis will consider whether such performance may be due to extraneous circumstances or could be justified in the context of the overall policy framework.</p> <p>The analysis excludes those indicator targets with no applicable planning applications or completions to assess during the monitoring period. These totalled 2 during the current monitoring period.</p>
<b>Recommendations</b>	<p>Taking account of the policy analysis, appropriate recommendations are provided including a statement of any necessary actions required. If policies are found to be failing the AMR will set out clear recommendations on what, if anything, needs to be done to address this.</p> <p>Consideration of the LDP against all of the information gathered over the monitoring period will allow the Council to determine whether a review of the Plan is required.</p>

#### **Policy Performance Traffic Light Rating**

- 4.2 As a visual aid in monitoring the effectiveness of the Plan's strategic policies and to provide a quick reference overview of policy performance a 'traffic light' rating is included for relevant indicators as follows:

	Policy targets/monitoring outcomes* are being achieved
	Policy targets/monitoring outcomes* are not currently being achieved but there are no concerns over the implementation of the policy
	Policy targets/monitoring outcomes* are not currently being achieved with subsequent concerns over the implementation of the policy

	No conclusion can be drawn due to limited data or no applicable data during the monitoring period
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\*For those indicators with no target/trigger the monitoring outcomes are assessed and rated accordingly.

### **Replacement Indicators**

- 4.3 In instances where the Council has been unable to monitor an indicator or where an indicator has been superseded, an explanation will be provided in the relevant policy analysis section and, where appropriate, an alternative indicator will be identified. There may also be instances where it is necessary to amend an indicator, for example, to improve the clarity of the indicator or realign it with relevant data sets. In such cases an explanation will be provided in the relevant policy analysis section and the indicator amended as appropriate.

### **Triggers for Plan Review**

- 4.4 The Council is required to commence a full review of the LDP every four years. It is, however, recognised that the following exceptional circumstances could elicit an early review of the Plan:
- A significant change in external conditions
  - A significant change in national policy or legislation
  - A significant change in local circumstances e.g. closure of a significant employment site that weakens the local economy
  - A significant change in development pressures or needs and investment strategies of major public and private investors
  - Significant concerns from the results of the AMR in terms of policy effectiveness/implementation and site delivery.
- 4.5 All of these issues will be taken into consideration in determining whether a full or partial review of the Plan is necessary.
- 4.6 As detailed in paragraphs 2.16-2.17, a full review of the Monmouthshire LDP commenced in 2017 and culminated with the publication of the Final Review Report in March 2018. The report concluded that the LDP should be revised and that this should take the form of a full revision procedure, i.e. a new LDP.

### **Sustainability Appraisal Monitoring Framework**

- 4.7 The Sustainability Appraisal Monitoring expands the assessment of the performance of the LDP against the Sustainability Appraisal (SA) monitoring objectives. The SA identifies 17 objectives and 62 indicators to measure the environmental, economic and social impacts of the LDP. This is set out in Section 6 of the AMR.



## 5 LDP Monitoring – Policy Analysis

### 5 LDP Monitoring – Policy Analysis

- 5.1 This section provides a detailed assessment of whether the Plan’s strategic policies, and associated supporting policies, are being implemented as intended and whether the LDP objectives and strategy are being achieved. Appropriate recommendations are subsequently provided, together with necessary actions to address any policy implementation issues identified through the monitoring process. Aligned with the LDP, the analysis is set out in strategic policy order.

## Spatial Strategy

**Monitoring Aim/Outcome:** New housing development to be distributed in accordance with the LDP Spatial Strategy

**Strategic Policy:** S1/S2 Spatial Distribution of New Housing Provision

**LDP Objectives Supported:** 1, 3 & 4

### Contextual Changes

There are no contextual changes for this period.

Indicator	Target <i>(Previous AMR Performance)</i>	Trigger for Further Investigation	Performance 1 April 2020 – 31 March 2021
Proportion of new housing development provided in accordance with the spatial strategy Policy S1 / settlement hierarchy set out in Policy S2*	Location of new residential development should correspond to the requirements set out in the Tables to Policy S2:	Housing completions are +/- 10% of the requirements set out in the tables to Policy S2 in any 1 year	<b>Dwelling Completions</b>
	<b>a) Main towns 41%</b>  <i>(2014-15: 27%)</i> <i>(2015-16: 40.2%)</i> <i>(2016-17: 38.2%)</i> <i>(2017-18: 71.3%)</i> <i>(2018-19: 60.3%)</i> <i>(2019-20: 60.11%)</i> <i>(2020-21: 54.2%)</i>		<b>43.5%</b>
	<b>b) Severnside Settlements 33%</b>  <i>(2014-15: 43%)</i> <i>(2015-16: 8.1%)</i> <i>(2016-17: 19.3%)</i> <i>(2017-18: 5.4%)</i> <i>(2018-19: 16.9%)</i> <i>(2019-20: 24.43%)</i> <i>(2020-2021: 32.7%)</i>		<b>45.98%</b>

	<b>c) Rural Secondary Settlements 10%</b>  <i>(2014-15: 6%)</i> <i>(2015-16: 37.2%)</i> <i>(2016-17: 21.4%)</i> <i>(2017-18: 12.2%)</i> <i>(2018-19: 16.7%)</i> <i>(2019-20: 3.65%)</i> <i>(2020-21: 2.6%)</i>	<b>5.26%</b>
	<b>d) Rural General 16%</b>  <i>(2014-15: 24%)</i> <i>(2015-16: 14.5%)</i> <i>(2016-17: 21%)</i> <i>(2017-18: 11.1%)</i> <i>(2018-19: 6.1%)</i> <i>(2019-20: 11.79%)</i> <i>(2020-21: 10.5%)</i>	<b>5.26%</b>

### Analysis – Dwelling Completions

A total of 361 dwelling completions were recorded for this monitoring period, of which 326 were market homes and 35 were affordable homes. This compares to a total of 419 completions in the 2020-2021 monitoring period and 356 completions in the 2019-2020 monitoring period. Further analysis on the overall completion rate is set out in relation to Policy S3.

There was a clear correlation of the impact of Covid-19 on the rate of completions and new sites coming forward in the previous monitoring period due to lockdowns and closure of many building sites. While it is appreciated it will take some time for the development industry to recover from the effects of Covid-19. Water quality issues in relation to Phosphates are affecting the River Wye and River Usk, with developments required to demonstrate betterment or neutrality. Solutions are being investigated but there is no strategic solution for phosphates at this time. This is having a significant impact on the number of housing sites being brought through the planning system. There are also numerous wider economic factors that influence housing delivery above and beyond the planning system.

#### a) Main Towns

Of the 361 completions recorded during the monitoring period, 43.5% (157 dwellings) were in the County's main towns. This is slightly higher than the identified target of 41% but within the 10% acceptability range. Chepstow accounted for the highest number of completions at 96 units or 61% of main town completions. Abergavenny accounted for 37% with 58 completions and Monmouth only 2% with 3 completions.

Of the completions in Chepstow, the majority related to the allocated LDP site at Fairfield Mabey (SAH3) where 88 dwellings were completed, there were an additional 4 completions at the major windfall site at Osborn International. The remainder of completions related to small sites\*\*\*. In Abergavenny 51 dwellings were completed on the LDP allocated Deri Farm site (SAH1), with a further 6 completions through the conversion of the Former Pen-y-Fal Chapel. The final completion related to a small site\*\*\*. Of the completions in Monmouth, one related to a small site\*\*\* with the remaining 2 both conversions. The impact on the phosphate issue on development in Monmouth is of concern.

All of the completions in the main towns related to market homes.

The percentage of dwelling completions recorded in the main towns during this monitoring period of 43.5% is lower than the previous four monitoring periods (2020 – 21, 54.2%, 2019 – 20, 60.11%, 2018-19, 60.3% and 2017-18, 71.3%). It nevertheless remains higher than in the first three monitoring periods (2016 – 2017, 38.2%, 2015 – 2016, 40.2% and 2014 – 2015, 27%). These trends are considered to reflect the time taken for the LDP allocations to progress to delivering dwellings. This is also reflected by the contribution LDP allocations made to the main towns' completion figures. Two allocated LDP sites accounted for 88.5% of the main town completions, delivering 139 dwellings between them (Fairfield Mabey and Deri Farm). Further details on the progress of these and other LDP allocations is set out in the analysis of strategic housing sites (Policy S3).

In view of the above, there is not considered to be any significant issue with the implementation of the Plan's spatial strategy in relation to delivery of new housing in the Main Towns. The Council will continue to monitor this issue in order to determine the effectiveness of the spatial strategy and continued alignment with the target set out in Policy S2.

Over the longer term as the LDP Strategic Site allocations are built out the number of completions in the Main Towns will decline. The Fairfield Mabey, Chepstow site however looks set to provide a steady supply of housing in the Main Towns over the next few years, although there are concerns of further development in Abergavenny and Monmouth due to the ongoing phosphate issue.

#### **b) Severnside Settlements**

The Severnside Settlements accounted for 46% (166 units) of dwelling completions recorded during the monitoring period, of which 133 related to general market homes and 33 related to affordable homes. This is higher than the identified target of 33% and exceeds the 10% acceptability range. The trigger for this indicator has consequently been met. Phase 1 of the LDP allocation at Rockfield Farm, Undy (SAH5) recorded 49 dwellings accounting for the majority of these completions (29.5%), of which 12 were affordable. Sudbrook Paper Mill (SAH7) accounted for a further 24.7% of these completions and recorded 41 completions. The Church Road, Caldicot site (approved through the unallocated sites policy) accounted for a further 44 completions (26.5%), of which 21 dwellings were affordable. The Old Shipyard, Sudbrook windfall site\*\*\* (24 completions,

14%) also recorded a reasonable number of completions. The remaining 8 completions were made up of 6 dwellings on small sites\*\* and 2 single change of use schemes.

Phase 1 of the Rockfield Farm, Undy (SAH5) site, the Former Sudbrook Paper Mill (SAH7) site and 'unallocated' Church Road, Caldicot site are scheduled to progress further in the next monitoring period and will continue to be a significant contributor to completions in this part of the County. A Reserved Matters application was approved in the previous monitoring period on the Crick Road, Portskewett site (SAH2) but is yet to progress, it is anticipated the first completions are to be expected in 2023/24. Similarly, while progress has been slower than anticipated on Strategic Housing allocation SAH6 – Land at Vinegar Hill, a planning application for 155 units was submitted in the last monitoring period and received planning permission subject to the signing of a S106 Agreement on 16 June 2022 and will be recorded as a permission during the next monitoring period. The first completions are anticipated on site in 2023/24. Further details on the progress of these and other LDP allocations is set out in the analysis of strategic housing sites (Policy S3).

The exceedance of the target within this indicator is considered to reflect a timing/phasing issue with the delivery of the Plan's spatial strategy, rather than an issue with the effectiveness of the strategy itself. While there is a higher proportion of overall completions than the earlier monitoring periods, where it fell below the target of 33%, the exceedance of the target in the current monitoring period is reflective of a number of large LDP allocations delivering homes. As such, there is not considered to be any significant issue with the implementation of the Plan's spatial strategy in relation to dwelling completions in the Severnside area. It is recognised that the sites at Rockfield Farm, Undy, Sudbrook Paper Mill, Church Road, Caldicot and the Old Shipyard site in Sudbrook accounted for the majority of completions, all of which are in accordance with the spatial strategy. The Council will nevertheless continue to monitor this issue closely in order to determine the effectiveness of the spatial strategy over the remaining Plan period

### **c) Rural Secondary Settlements**

A total of 19 completions (17 market homes, 2 affordable homes) were recorded during the monitoring period within the Rural Secondary Settlements, accounting for 5.26% of all completions in the County. This is below the identified target of 10%, but within the +/- 10% flexibility range. Accordingly, the trigger for further investigation has not been reached.

The allocated site at Cwrt Burrium, Usk (SAH10(i)) accounted for the majority of completions and is now complete with 7 dwellings (37%) being delivered in the monitoring period, 2 of which related to affordable homes. A further 5 dwellings were completed in Usk on a small site\*\*\* at the Three Salmons Hotel. A non-material amendment to a major windfall scheme\*\* in Llanfoist resulted in an additional 6 dwellings being completed. The remaining single dwelling relating to a barn conversion.

The completion rate is higher than the previous two monitoring periods (2020/21, 2.6% & 2019/20 3.65%). This is considered to be a reflection of the completion of the Usk SAH10 – Rural Secondary Settlements site allocation over the monitoring period. The SAH10(iii) site – Land at Chepstow Road, Raglan is yet to commence, a Reserved Matters application

was nevertheless submitted over the monitoring period. Progress has, therefore, been made on this allocation.

Given the progress made on the remaining allocations in the Rural Secondary Settlements, there is not considered to be any significant issues with the implementation of the Plan's spatial strategy in relation to dwelling completions delivered from this tier of the settlement hierarchy. The Council will continue to monitor this issue closely to determine the effectiveness of the spatial strategy over the remaining Plan period.

**d) Rural General**

A total of 19 completions were recorded during the monitoring period in the County's Rural General areas, which includes the Main Villages and Minor Villages listed in Policy S1, as well as homes in the open countryside. These completions account for 5.26% of the overall completions in the County compared to the identified target of 16%. This is just outside the +/- 10% flexibility allowance and accordingly, the trigger for further investigation has been reached.

All of the completions in the Rural General areas related to market homes.

Main Villages accounted for four dwellings (21%) with two single dwellings, one change of use and a rehabilitation.

Minor Villages also contributed with four dwellings (21%), one single dwelling and three barn conversions.

The remaining 11 (58%) related to dwellings delivered in the open countryside. The majority of which (10 of the units) involved the conversion or change of use of an existing building, the additional unit related to a rural workers dwelling.

There were no further completions recorded on the SAH11 – Main Villages sites during this monitoring period. However, both SA11(ii) – Land off Well Lane, Devauden (15 dwellings) and the Carpenter's Arms, Llanishen site (SAH11(ix)(a) (8 dwellings) are under construction and progressing well and are expected to contribute to completions in this tier of the settlement hierarchy over the next monitoring period.

The completion rate is slightly lower than those achieved over previous monitoring periods, with rates ranging previously from 6.1% to 24%, all of which have nevertheless been within the +/-10% flexibility allowance. While this year's figure at 5.26% is below the 10% flexibility allowance, there is not considered to be any issue with the implementation of the Plan's spatial strategy in relation to dwelling completions in the Rural General areas as set out in Policy S1 particularly as the delivery of the allocated sites in Devauden and Llanishen will deliver completions in the next monitoring period. Through the delivery of these sites, together with continued opportunities for small site conversions and infill development it is anticipated that the proportion of completions in these settlements will align more closely with the target figure of 16% in the next monitoring period. While the trigger for further investigation has been reached the Council will continue to monitor this issue closely in order to determine the effectiveness of the spatial strategy over the Plan period.

Recommendation
a) No action is currently required. Continue to monitor, however, see comments in relation to allocated strategic housing sites (Policy S3).
b) No action is currently required. Continue to monitor.
c) No action is currently required. Continue to monitor.
d) No action is currently required. Continue to monitor.

\*Dwelling completions and permissions are monitored in order to gain a comprehensive picture of the spatial strategy's implementation

\*\* Large site windfall >10 dwellings

\*\*\* Small site windfall <10 dwellings

Indicator	Target <i>(Previous AMR Performance)</i>	Trigger for Further Investigation	Performance 1 April 2020 - 31 March 2021	
Proportion of new housing development permitted in accordance with the spatial strategy Policy S1 / settlement hierarchy set out in Policy S2*	Location of new residential development should correspond to the requirements set out in the Tables to Policy S2:	Housing permissions are +/- 10% of the requirements set out in the tables to Policy S2 in any 1 year	<b>Dwelling Permissions</b>	
	<b>e) Main towns 41%</b>  <i>(2014-15: 81%)</i> <i>(2015-16: 31%)</i> <i>(2016-17: 30.2%)</i> <i>(2017-18: 59.61%)</i> <i>(2018-19: 29.6%)</i> <i>(2019-20: 13.5%)</i> <i>(2020-21: 54.2%)</i>			<b>23.1%</b>
	<b>f) Severnside Settlements 33%</b>  <i>(2014-15: 11%)</i> <i>(2015-16: 10%)</i> <i>(2016-17: 54.1%)</i> <i>(2017-18: 24.15%)</i> <i>(2018 - 19: 53.2%)</i>			<b>23.1%</b>

	(2019 - 20: 61.8%) (2020-21: 32.7%)		
	<b>g) Rural Secondary Settlements 10%</b>  (2014-15: 1%) (2015-16: 37%) (2016-17: 5.2%) (2017-18: 10.26%) (2018-19: 8.0%) (2019-20: 2.4%) (2020-21: 2.6%)		5.1%
	<b>h) Rural General 16%</b>  (2014-15: 7%) (2015-16: 22%) (2016-17: 10.5%) (2017-18: 5.98%) (2018-19: 9.2%) (2019-20: 22.3%) (2020-21: 10.5%)		48.7%

#### Analysis – Dwelling Permissions

Dwelling permissions in Monmouthshire during 2021-22 were lower than recorded in any of the previous monitoring periods at 39 dwellings. The lowest of which previously related to 86 dwellings in the 2020-21 monitoring period and 212 dwellings in 2015-16. This compares to the highest where it reached 1,238 in 2017-2018. This decrease is due to a combination of factors, one of which being that the majority of allocated LDP Strategic Sites already having planning permission. The reduction in dwelling permissions in the current monitoring period is also likely linked to the significant impact of riverine phosphate levels in the River Usk and Wye Catchment Areas on the ongoing delivery of development. Water quality issues in relation to Phosphates are affecting the River Wye and River Usk, with developments required to demonstrate betterment or neutrality. Solutions are being investigated but there is no strategic solution for phosphates at this time. This is having a significant impact on the number of new homes being brought through the planning system. Other factors may have also resulted in a reduction of permissions for new dwellings, including the on-going impact of the recent Covid-19 pandemic on the development industry.

All of the dwellings permitted in the 2021-22 monitoring period related to market homes.

#### e) Main Towns



Of the 39 dwellings granted planning permission during the monitoring period, 23.1% (9 units) were in the County's Main Towns of Abergavenny, Monmouth and Chepstow. This falls below the +/- 10% flexibility allowance of the identified LDP target (41%) and accordingly, the trigger for further investigation has been reached.

The permissions were made up of 7 applications, all of which are classified as small sites, contributing to the Plan's small site allowance. Of these, 4 applications related to change of use and conversions accounting for 6 units. The remaining 3 applications related to new build dwellings, providing a total of 3 units. New build development therefore related to a total of 33% and conversions/change of use 67% of permissions in Main Towns.

Chepstow accounted for the majority of dwelling permissions recorded at 44% (4 homes), with Abergavenny accounting for 33% (3 homes) and Monmouth 22% (2 homes).

The number of dwellings permitted in the main towns during the current monitoring period is significantly lower than previous monitoring periods and is the lowest recorded since the adoption of the LDP. The percentage of overall permissions in the Main Towns across the County has also decreased to 23.1% compared to the previous monitoring period (54.2%).

As anticipated in earlier AMRs, the proportion of permissions in the main towns has decreased due to the allocated Strategic Housing Sites in Abergavenny, Monmouth and Chepstow gaining planning permission in previous monitoring periods. Phosphate water quality issues in the River Usk and Wye catchments are also impacting on the delivery of homes in the main towns of Abergavenny and Monmouth.

In view of this there is not considered to be any significant issue with the implementation of the Plan's spatial strategy in relation to dwelling permissions granted in the Main Towns. The Council will continue to monitor this issue closely in order to determine the effectiveness of the spatial strategy over the remaining Plan period.

An update on the progression of allocated sites in the Main Towns is provided in the strategic sites policy analysis (Policy S3).

#### **f) Severnside Settlements**

9 of the 39 dwellings granted planning permission during the monitoring period were in Severnside settlements equating to 23.1%. This is below the identified target for this area (33%), but just within the +/- 10% flexibility range. All of the 9 units granted permission were in Caldicot. None of the other Severnside Settlements had any residential units permitted during the monitoring period.

Small sites accounted for all of the permissions in Severnside. 3 permissions related to new build dwellings totalling 4 units and 3 permissions related to change of use to residential accounting for 5 dwellings.

The proportion of development permitted in Severnside settlements is higher than the previous monitoring period (15.1%).

There is one further strategic housing allocation in Severnside that is yet to be recorded – Land at Vinegar Hill, Undy. The site received planning permission on 16 June 2022 so will be recorded as a permission during the next monitoring period and will likely result in a higher proportion of permissions in the Severnside region in 2022-23 due to all other strategic housing sites already having benefit of planning permission. An update on the progression of allocated sites in Severnside and the County is provided in the Strategic Sites policy analysis (Policy S3).

The Council will continue to monitor this issue closely in order to determine the effectiveness of the spatial strategy over the remaining Plan period.

**g) Rural Secondary Settlements**

2 units (5.1%) of all dwellings permitted during the monitoring period were in the County's Rural Secondary Settlements. This is within the 10% indicator range of the LDP target of 10%; therefore, the trigger for further investigation has not been reached.

Both of the dwellings related to conversions, one in Raglan and one in Usk.

The proportion of permissions within the Rural Secondary Settlements broadly aligns with the target figure of 10%. All of the allocated LDP sites in the Rural Secondary Settlements have now been granted permission, SAH10(ii) Land south of School Lane, Penperlleni and SAH10(i) Cwrt Burrium, Usk are both complete and outline permission is granted on the SAH10(iii) Land at Chepstow Road, Raglan site. While the proportion of all dwellings permitted broadly aligns with the target figure, it should be noted that phosphate water quality issues in the River Usk catchment are also impacting on the delivery of homes in the Rural Secondary Settlements.

In view of the above, there is not considered to be any significant issue with the implementation of the Plan's spatial strategy in relation to dwelling permissions granted in the Rural Secondary Settlements. The Council will continue to monitor this issue closely in order to determine the effectiveness of the spatial strategy over the remaining plan period.

**h) Rural General**

19 (48.7%) of all dwellings permitted during the monitoring period were in the County's rural areas. This is considerably higher than the identified LDP target of 16%. Accordingly, the trigger for further investigation has been reached.

The overall increase in proportion is more a reflection of a decrease in permissions in the Main Towns than any real increase in the Rural General settlements. Other factors such as the on-going impact of Covid-19 and riverine phosphate levels, combined with the majority of allocated LDP Strategic Sites already having the benefit of planning permission, are most likely the causes in of an increase in the proportion of permissions in the rural areas.

The majority of the permissions in rural areas related to conversions/change of use applications (15 dwellings) in a range of rural settlements throughout Monmouthshire. Of the remaining permissions two related to new build (one in a Main Village and the other as

a net gain from demolition of one dwelling into two new dwellings) and two related to properties that had been subdivided.

While the trigger has been met, in view of the above, there is not considered to be any issue with the implementation of the Plan's spatial strategy in relation to dwelling permissions granted in the County's rural settlements. The Council will continue to monitor this issue closely in order to determine the effectiveness of the spatial strategy over the remaining plan period.

**Recommendation**

e) No action is currently required. Continue to monitor.

f) No action is currently required. Continue to monitor.

g) No action is currently required. Continue to monitor.

h) No action is currently required. Continue to monitor.

\*Dwelling completions and permissions are monitored in order to gain a comprehensive picture of the spatial strategy's implementation

## Housing Provision

<b>Monitoring Aim/Outcome:</b>	To provide 4,500 dwelling units (including 960 affordable dwelling units) in the County over the plan period.
<b>Strategic Policy:</b>	S2 Housing Provision
<b>LDP Objectives Supported:</b>	1, 3 & 4
<b>Other LDP Policies Supported:</b>	H1-H9, SAH1-SAH11

### Contextual Changes

The Adopted LDP covers the 10-year plan period 2011 – 2021, with 10 years’ worth of housing delivery monitoring against the 10 year housing requirement of 4,500 units reached in March 2021. However, as set out in the Minister for Housing and Local Government’s letter of September 2020, clarifying the provisions in the Planning Wales Act 2015 relating to Local Plan expiry dates, plans adopted prior to 4<sup>th</sup> January 2016 will remain the LDP for determining planning applications until replaced by a further LDP.

As a result of the introduction of water quality targets associated with the River Usk and River Wye catchments, planning applications submitted in these catchment areas need to demonstrate phosphate neutrality or betterment in its design and/or its contribution to the water body. This continues to have significant implications on development proposals within the affected river catchment areas. However, good progress is being made with addressing the phosphate issue and solutions explored to facilitate the continued delivery of the LDP and the preparation of the RLDP.

Indicator	Target <i>(Previous AMR Performance)</i>	Trigger for Further Investigation	Performance 1 April 2021 – 31 March 2022
1. The number of additional general market and affordable dwellings built over the plan period*	Up to 488 dwellings to be built per annum 2013-2021  <i>(2014-15: 205)</i> <i>(2015-16: 234)</i> <i>(2016-17: 238)</i> <i>(2017-18: 279)</i> <i>(2018-19: 443)</i> <i>(2019-20: 356)</i> <i>(2020-21: 419)</i>	10% less or greater than the LDP strategy build rate for 2 consecutive years	<b>361</b>

<p>2. The annual level of housing completions monitored against the Average Annual Requirement (AAR)**</p>	<p>Difference between actual annual completions and the AAR</p> <p><i>(2014-15: -245 units (-54.4%))</i>  <i>(2015-16: -216 units (-48%))</i>  <i>(2016-17: -212 (-47.1%))</i>  <i>(2017-18: -171 units (-38%))</i>  <i>(2018-19: -7 units (-1.6%))</i>  <i>(2019-20: -94 units (-20.9%))</i>  <i>(2020-21: -31 units (-6.9%))</i></p>	<p>Under delivery of annual completions on two consecutive years</p>	<p><b>-89 units (-19.8%)</b></p>
<p>3. Total cumulative completions monitored against the cumulative requirement (Cumulative AAR)**</p>	<p>Difference between the cumulative completions and the cumulative AAR</p> <p><i>(2014-15: -769 units (-42.7%))</i>  <i>(2015-16: -985 units (-43.8%))</i>  <i>(2016-17: -1197 (-44.3%))</i>  <i>(2017-18: -1368 units (-43.4%))</i>  <i>(2018-19: -1375 units (-38.2%))</i>  <i>(2019-20: -1469 (-36.3%))</i>  <i>(2020-21: -1500 (-33.3%))</i></p>	<p>Under delivery of completions on two consecutive years</p>	<p><b>-1,500 (33.3%) recorded for 10 years of monitoring in the previous AMR</b></p> <p><b>A further 361 units were delivered during this monitoring period.</b></p>
<p>4. Density of housing permitted on allocated sites♦</p>	<p>Meet the target densities set out in site allocation policies SAH1 to SAH10</p>	<p>Planning permissions granted that do not meet these densities</p>	<p><b>No applications determined in monitoring period</b></p>

5. Review of Gypsy/ Traveller Accommodation Needs and Sites Study to be completed within two years of the LDP's adoption	If a need for additional site(s) is identified seek to allocate a suitable site by Spring 2017	Identified need not met by Spring 2017	<b>Gypsy Traveller Accommodation Assessment approved by WG January 2017. Progress on meeting need discussed below.</b>
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**Analysis**

1. Whilst the method by which the monitoring of housing delivery changed during the 2019-20 monitoring period this indicator is still included as it measures completions against the completion target (488) from Plan adoption in 2014 rather than from 2011, the beginning of the Plan period. This indicator thus takes account of any under / over delivery in the first three years of the Plan period prior to adoption.

361 dwellings were built during the monitoring period (326 general market and 35 affordable).

65% of all completions were on allocated sites (236 units), including Deri Farm, Abergavenny (51), Fairfield Mabey, Chepstow (88), Sudbrook Paper Mill (41), Rockfield Farm, Undy (49) and Cwrt Burrium, Usk (7). Large windfall sites accounted for a further 80 units (22%) and small sites accounted for the remaining 45 units (13%). The Church Road site in Caldicot which was permitted through the unallocated sites policy, accounted for just over half of the windfall completions with 44 units (55%) and The Old Shipyard site in Sudbrook accounted for 24 completions (30%).

The trigger for this indicator has been met for a second consecutive year as completions have been 10% less than the LDP strategy build rate for three consecutive years. However, the completions recorded over the second half of the plan monitoring period have been significantly higher than those achieved during the first half of the plan monitoring period (1,529 completions 2018-2022 compared to 956 completions 2014-2018) which reflects the delivery of the LDP strategic sites.

The current completion figure, coupled with the completion rate of 2,174 dwellings recorded during the seven monitoring periods since adoption (205 completions in 2014-2015; 234 completions in 2015 – 2016; 238 completions in 2016 – 2017; 279 completions in 2017 – 2018; 443 completions in 2018 – 2019; and 356 completions in 2019 – 2020; 419 completions in 2020 - 2021), means that a total of 2,535 completions have been recorded since the Plan's adoption.

The progression of LDP allocated sites continue to account for the higher level of completions recorded during this period compared to earlier monitoring periods. This is set to continue over the next few years as the sites are built out and the windfall completion rate is forecast to decline. The restrictions on development related to the phosphate water quality issues in the River Wye and River Usk catchments also have implications for the ongoing delivery of development in the County. Delivery rates will continue to be monitored closely, particularly given that the LDP has reached the end of its Plan period and as an evidence base for the preparation of the RLDP.

2. & 3. In March 2020, Welsh Government announced changes to the way in which housing delivery is to be monitored. The changes removed the five-year housing land supply policy and replaced it with a policy statement making it explicit that the housing trajectory, as set out in the adopted LDP and agreed with the Housing Stakeholder Group, will be the basis for monitoring the delivery of development plan housing requirements as part of LDP Annual Monitoring Reports. The way in which this should be undertaken is set out in the Development Plans Manual (DPM) (Edition 3) (March 2020).

Those LPAs, including Monmouthshire, who adopted their LDP prior to the publication of the DPM and so have not prepared a housing trajectory, are required to use the Average Annual Requirement (AAR) method as the primary indicator to measure housing delivery, and to include the trajectory approach within the AMR. The AAR for the adopted LDP equates to 450 dwellings per annum, the LDP requirement of 4,500 dwellings divided by the 10-year Plan period. This is the figure against which LDP dwelling delivery is monitored. The Plan period ended at the end of 2021, however in line with the Minister for Housing and Local Government's letter of September 2020, clarifying the provisions in the Planning Wales Act 2015 relating to Local Plan expiry dates, plans adopted prior to 4th January 2016 will remain the LDP for determining planning applications until replaced by a further LDP. Continuing with the monitoring of housing delivery in the County is therefore considered to be a useful exercise and provides helpful data for the RLDP preparation.

The first of the Development Plans Manual indicators measures the annual level of housing completions monitored against the AAR. The DPM states that this must be presented clearly in the AMR both in numerical and percentage terms (plus/minus x %) and that the trigger for further investigation should be under delivery of annual completions on two consecutive years. As indicated in the table below, whilst the Plan under delivered in the early years of the Plan period, in the most recent monitoring periods housing completions have been much closer to the AAR, -7 units (-1.6%) in 2018/19, -94 units (-20.9%) in 2019/20, -31 (-6.9%) in 2020/21 and -89 (-19.8%). This is due in main to the speed with which the strategic sites have come forward. However, completion rates have reduced further in this monitoring period with 361 completions recorded. LDP allocations continue to make the largest contribution to completion rates with all Strategic Sites now having planning permission<sup>8</sup>. However, a notable reduction has occurred in the small sites' contribution falling to 45 units this year compared to an average of 85 units in the previous 5 years. This may be linked to the phosphate issue in the River Wye and Usk Catchments and the associated restrictions on development.

However, the trigger for Plan review has been met in previous AMRs and work on the RLDP is progressing.

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<sup>8</sup> SAH6 Vinegar Hill gained permission in June 2022 and will therefore be recorded in the next monitoring period.

### Annual Completions Compared against the AAR

LDP Year	Monitoring contributing to 10-year housing requirement of 4,500 units										2021 /22 AMR period	5 - year Trajectory 2022/23 – 2026/27				
	1	2	3	4	5	6	7	8	9	10*						
Year	2011 -12	2012 -13	2013 -14	2014 -15	2015 -16	2016 -17	2017 -18	2018 -19	2019 -20	2020 -21	2021 -22	2022 -23	2023 -24	2024 -25	2025 -26	2026 -27
Actual completions landbank sites <sup>9</sup>	90	193	118	73	0	0	0	0	0	0	0					
Actual completions allocated sites	0	0	0	0	0	36	89	279	252	217	236					
Actual completions windfall sites	74	55	53	33	135	128	107	80	0	121	80					
Actual completions small sites	90	94	59	99	99	74	83	84	104	81	45					
Anticipated completions allocated sites												204	250	261	171	87
Anticipated completions windfall sites												111	127	8	5	0
Anticipated completions small sites												79	79	79	79	79
<b>Total Actual Completions</b>	<b>254</b>	<b>342</b>	<b>230</b>	<b>205</b>	<b>234</b>	<b>238</b>	<b>279</b>	<b>443</b>	<b>356</b>	<b>419</b>	<b>361</b>	<b>394</b>	<b>428</b>	<b>468</b>	<b>255</b>	<b>166</b>
Average Annual Req. (Based on straight line AAR)	450	450	450	450	450	450	450	450	450	450	N/A	N/A	N/A	N/A	N/A	N/A
Completions against the AAR	-196	-108	-220	-245	-216	-212	-171	-7	-94	-31	N/A	N/A	N/A	N/A	N/A	N/A
Completions % +/-against the AAR	-43.6	-24.0	-48.9	-54.4	-48.0	-47.1	-38.0	-1.6	-20.9	-6.9	N/A	N/A	N/A	N/A	N/A	N/A

\* LDP Plan Period ended 2020-21 – monitoring continued for information.

The second of the Development Plans Manual (DPM) indicators measures the total cumulative completions monitored against the cumulative requirement (Cumulative AAR). Again, the DPM states that this must be presented clearly in the AMR both in numerical and percentage terms (plus/minus x %) and that the trigger for further investigation should be under delivery of completions on two consecutive years. There has been under delivery of cumulative completions since the beginning of the Plan period and so the trigger has been

<sup>9</sup> Landbank sites are those sites which were allocated for development in previous Plans



met. However, in more recent AMRs the % of under delivery has steadily declined as the strategic sites have come forward. More detailed analysis of progress on strategic sites can be found in the section on Strategic Housing Sites (Policy S3).

Ten years' worth of completions were recorded during the 2020-21 monitoring period, with the Plan delivering a shortfall of -1,500 units (33.3%) at that point when compared to the 10-year Plan requirement of 4,500 units. However, as noted above a further 361 units were completed during this monitoring period and are included in the table below for information.

### Cumulative Completions Compared against the Cumulative AAR

LDP Year	Monitoring contributing to 10-year housing requirement of 4,500 units										
	1	2	3	4	5	6	7	8	9	10*	
Year	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22
Actual cumulative completions landbank sites <sup>10</sup>	90	283	401	474	474	474	474	474	474	474	474
Actual cumulative completions allocated sites	0	0	0	0	0	36	125	404	656	873	1109
Actual cumulative completions windfall sites	74	129	182	215	350	478	585	665	665	786	866
Actual cumulative completions small sites	90	184	243	342	441	515	598	682	786	867	912
<b>Total Cumulative Completions</b>	254	596	826	1031	1265	1503	1782	2225	2581	3000	3361
Average Annual Cumulative Reqt.	450	900	1350	1800	2250	2700	3150	3600	4050	4500	N/A
Completions against the Cumulative AAR	-196	-304	-524	-769	-985	-1197	-1368	-1375	-1469	-1500	N/A
Cumulative completions % +/-against the Cumulative AAR	-43.6	-33.8	-38.8	-42.7	-43.8	-44.3	-43.4	-38.2	-36.3	-33.3	N/A

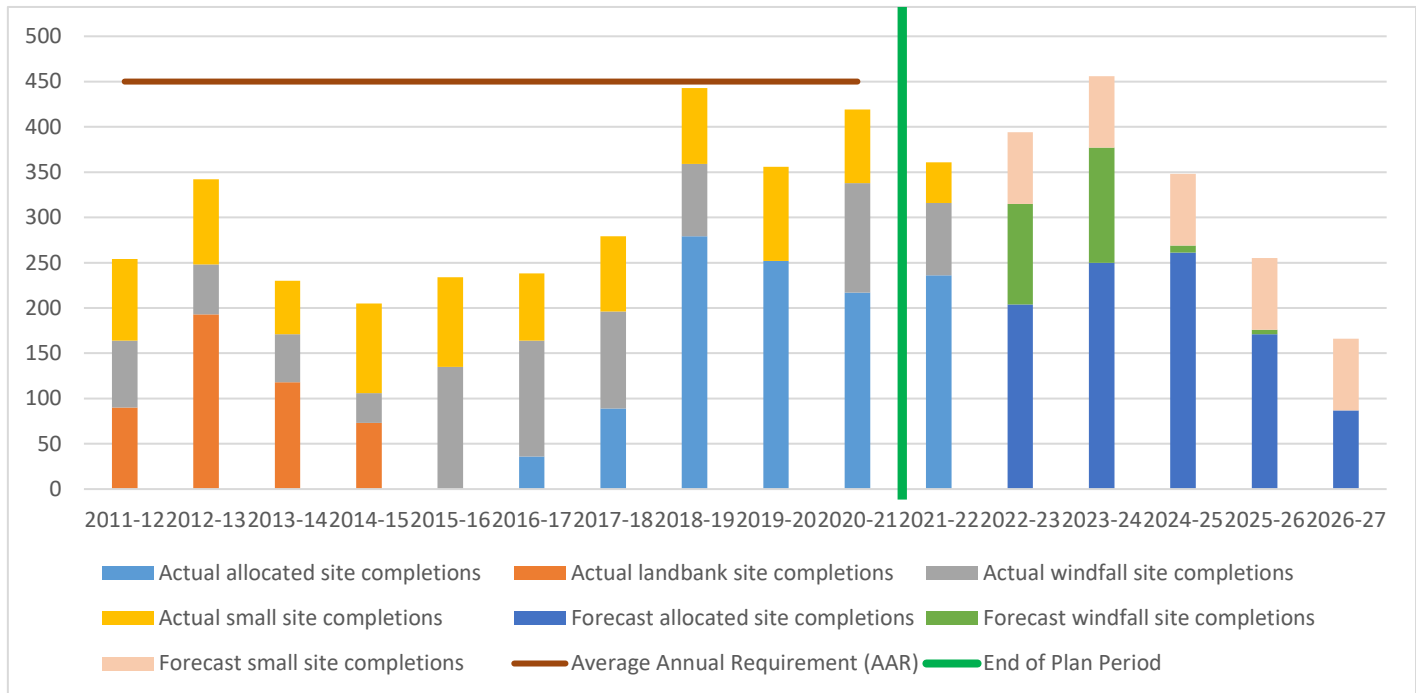
\*10 years of LDP monitoring recorded in the 2020-21 AMR period – monitoring continued for information.

The DPM also requires that the components of housing supply, including site allocations, large and small windfalls should be monitored separately and included on a graph to be included in the AMR. A housing

<sup>10</sup> Landbank sites are those sites which were allocated for development in previous Plans

trajectory has been prepared in consultation with the Housing Stakeholder Group and is shown in the table and graph below. Detailed information with regard to the timing and phasing of sites included in the trajectory are included at Appendix 1. As the end of the Plan period has been reached this exercise takes the trajectory into the RLDP Plan period and covers the five-year period 2022-2027.

### Housing Development Trajectory 2011-2027



This information clearly shows that in the early years of the LDP the majority of completions were coming from the landbank of sites from the previous Plan. In recent years, however, as the Strategic Sites have gained permission they have contributed significantly to total completions, with this trend continuing for the next few years. However, as these sites are built out and limited windfall opportunities emerging, potentially due to limited brownfield sites in the County and phosphate issues restricting development, completion rates are forecast to reduce further. These forecasts do not however, include any contribution from the emerging RLDP which will improve housing land supply as the plan progresses to adoption. In the meantime, however, the timescale between the two plans is an area of concern for its implications on housing delivery in the County.

4. No planning applications were determined during the monitoring period on allocated housing sites.

5. The Council is committed to monitoring the accommodation needs of Gypsies and Travellers and prepared a Gypsy Traveller Accommodation Assessment (GTAA) which was submitted to the Welsh Minster in the 2016 - 2017 monitoring period. The aim of the assessment was to provide data which would identify Gypsy and Traveller pitch needs separately from wider residential demand and aspiration. A key finding of the assessment was that there was an estimated unmet need for eight pitches to 2021, based on overcrowding, unauthorised occupation and the likelihood of cultural aversion to conventional housing.

In view of this the Council's intention is to make provision for an appropriate site(s) to meet identified unmet need by working proactively with the Gypsy and Traveller households to establish their preference for site

provision (private or Council). The findings of the GTAA process suggest that there is an aspiration within much of the Gypsy Traveller community for private site provision in Monmouthshire. Where necessary, the Council will work with and support Gypsy Traveller households to identify and develop suitable private sites to address the identified unmet need in accordance with the LDP policy framework. It is considered that the provision of such sites would be best dealt with through the existing LDP policy framework (Policy H8). If a private site(s) cannot be achieved there may be a need to identify a public gypsy/traveller site in accordance with the LDP policy framework.

There has been progress in terms of progressing the recommendations of the GTAA, including the preparation and adoption of a Gypsy Traveller Pitch Accommodation Policy, which was approved and adopted by Single Member Cabinet Decision on 28<sup>th</sup> February 2018. The adoption of this policy was required before consideration could be given to the identification of suitable Gypsy Traveller sites.

The Approved 2016 Gypsy and Traveller Accommodation Assessment was agreed in May 2016 and covers the five-year period 2016-2021. This concluded that Monmouthshire has an estimated unmet need for eight permanent residential pitches to 2021. In accordance with the monitoring framework, the identified need had not been met by Spring 2017 so the trigger for further investigation has been reached. However, since 2017 a number of planning applications have been determined that address the unmet need identified in the GTAA. Further details are given below.

As reported in previous AMRs, 2 planning applications for Gypsy/Traveller accommodation were refused over the 2016-17 period. The applications related to a private gypsy site comprising of an additional 5 pitches and associated development at land in Llangeview and a 4-pitch private Gypsy site in Llancayo. Both proposals were considered to be contrary to LDP policies in relation to development in the open countryside and it was considered that the applicants had failed to demonstrate that there were overriding exceptional circumstances that would outweigh the LDP policy framework.

The Llangeview application (DC/2015/01424) was subsequently allowed at appeal in October 2017 for a permanent site for 7 pitches and associated development resulting in an additional 5 pitches.

The 4-pitch private Gypsy site in Llancayo (DC/2016/00297) was dismissed at appeal in December 2017 primarily on flood risk grounds. The inspector allowed in respect of ground (g) only, relating to the period of compliance with the Enforcement Notice, extending the period from 2 months to 12 months. This decision was challenged at the High Court by the appellant which failed in early 2021.

A planning application for a one family traveller site with 1 pitch at land northeast of Llanvetherine (DM/2018/00205) was refused on grounds of highway safety during the 2018-19 monitoring period. The applicant subsequently appealed the decision with an appeal hearing in February 2019. The appeal was dismissed on the grounds of highway safety.

During the last monitoring period a planning application for a change of use of land to accommodate two park homes and up to 4 touring caravans (private family site) was approved at land adjacent Sunnybank, Crick (DM/2019/01480). Although condition 3 of the permission stated that no part of the site shall be used by touring caravans and condition 4 limited the site to personal use. Application DM/2020/00883 sought to vary condition 3 and 4 to allow 4 touring pitches on the site and remove the restriction on personal use. This received a split decision with condition 3 relating to the touring caravans being approved and the removal of the personal restriction being refused (13/10/2020). This was the subject of a further modification of

condition application in the last monitoring period to amend the named people that can reside on the site (DM/2021/00311), which was approved during this monitoring period (26/05/2021).

LDP criteria-based policy H8 will be used to consider any applications for Gypsy/Traveller accommodation that arise in Monmouthshire. An updated Gypsy and Traveller Accommodation Assessment has been prepared to inform the RLDP and is currently with Welsh Government awaiting approval.

**Recommendation**

1. Continue to progress the RLDP.
2. Continue to progress the RLDP.
3. Continue to progress the RLDP.
4. No action required at present. Continue to monitor.
5. Continue to progress with the identification of sites for inclusion in the RLDP to address the need identified in the Updated GTAA (subject to Welsh Government approval)

\*Core Indicators

\*\* Following the revocation of Technical Advice Note (TAN) 1: Joint Housing Land Availability Studies (January 2015) in its entirety this indicator has been changed to reflect the requirements of the Development Plans Manual (March 2020)

\*\*\*Indicator relates to SAH1 – SAH10 allocated sites only. Therefore excludes allocated Main Village sites (SAH11).

◆ Amended to delete reference to 'average' for clarification. The indicator seeks to monitor the density achieved on allocated sites, rather than average density.

## Strategic Housing Sites

**Monitoring Aim/Outcome:** To deliver the strategic housing sites in accordance with strategic policy S3 and site allocation policies SAH1-SAH7.

**Strategic Policy:** S3 Strategic Housing Sites

**LDP Objectives Supported:** 1, 3 & 4

**Other LDP Policies Supported:** SAH1-SAH7

### Contextual Changes

There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger for Further Investigation	Performance 1 April 2021– 31 March 2022
1. The number of dwellings permitted on strategic sites as identified in Policy S3 and site allocation policies SAH1 to SAH7	Secure /deliver housing need on the key strategic sites identified in Policy S3 and site allocation policies SAH1-SAH7 during the plan period:	Planning permission is not granted by the end of 2014 for each of the strategic sites	
	a) Deri Farm, Abergavenny		(250*)
	b) Crick Road, Portskewett		(269*)
	c) Fairfield Mabey, Chepstow		(373*)
	d) Wonastow Road, Monmouth		(340*)
	e) Rockfield Farm, Undy		(266*)
	f) Land at Vinegar Hill, Undy		0
	g) Former Paper Mill, Sudbrook		(210*)

2. The number of dwellings completed on strategic sites as identified in Policy S3 and site allocation policies SAH1 to SAH7	Dwelling completions in accordance with the housing trajectory for each of the strategic sites**	Dwelling completions fall below 10% of housing trajectory target for each of the strategic sites	
	a) Deri Farm, Abergavenny (2020-21 trajectory = 67 completions for 2021-22)		51
	b) Crick Road, Portskewett (2020-21 trajectory = 0 completions for 2021-22)		0
	c) Fairfield Mabey, Chepstow (2020-21 trajectory = 70 completions for 2021-22)		88
	d) Wonastow Road, Monmouth (2020-21 trajectory = 0 completions for 2021-22)		0***
	e) Rockfield Farm, Undy (2020-21 trajectory = 44 completions for 2021-22)		49
	f) Land at Vinegar Hill, Undy (2020-21 trajectory = 0 completions for 2021-22)		N/A
	g) Former Paper Mill, Sudbrook (2020-21 trajectory = 40)		41

	<i>completions for 2021-22)</i>		
<b>Analysis</b>			
<p><b>1. Dwelling Permissions</b></p> <p>In terms of allocated strategic sites, no additional sites were granted planning permission over the current monitoring period. However, to date the following strategic sites have gained permission, 373 dwellings on the Fairfield Mabey site, Chepstow*, 340 dwellings at the Wonastow Road site, Monmouth*, 210 dwellings at the Former Paper Mill, Sudbrook*, 269 dwellings at Crick Road, Portskewett*, 266 dwellings at Rockfield Farm, Undy* and 250 dwellings at Deri Farm, Abergavenny*. This means that six of the Plan’s strategic site allocations have achieved consent since LDP adoption. As the remaining strategic site at Vinegar Hill, Undy has not yet gained planning permission the trigger for further investigation has been met. However, an application is under consideration for the Vinegar Hill, Undy site and will be determined in the next monitoring period.</p> <p>Given the constraints associated with some of the sites, including Deri Farm and Fairfield Mabey, the trigger date of gaining permission for all sites by the end of 2014 was unrealistic. The failure to have obtained planning permission on the remaining strategic site at Vinegar Hill by the end of the current monitoring period is of concern, albeit that progress is being made on bringing this site forward as outlined in brief below.</p> <p><b>Deri Farm, Abergavenny (SAH1):</b>  Persimmon Homes submitted a full application (DC/2014/01360) for 250 residential units (201 market and 49 affordable dwellings) in November 2014. The progress of the application was slower than anticipated due to significant issues relating to site viability, particularly affordable housing provision and the undergrounding of overhead power lines. However, these issues were subsequently resolved, the application was approved in the 2017 - 2018 monitoring period and 234 dwellings have been completed to date.</p> <p>The housing trajectory prepared in consultation with the Housing Stakeholder Group shows that the site delivered 234 dwellings within the Plan period with all dwellings expected to be completed by the end of the next monitoring period.</p> <p><b>Crick Road, Portskewett (SAH2):</b>  In the 2018/19 monitoring period Monmouthshire County Council and Melin Homes submitted a joint outline application (DM/2018/00696) for 291 residential units (218 market and 73 affordable units), this was granted permission in March 2019. During the 2019/20 monitoring period a reserved matters application (DM/2019/01041) for 269 residential units was approved (201 market and 68 affordable units). This is below the target number of units for the site (285) in the LDP. The drop in density of the site has been driven by changes to the proposed house types and by positive improvements to the design of the site. These improvements include Green Infrastructure that forms the north-south axis of the site, the ecological implications of a badger sett on the site which has led to greater protected open space, whilst the highway requirements have resulted in safer, more accessible links. Policy SAH2 allocates 1 hectare of B1, which has been replaced with a care home which will provide up to 32 beds on the area outlined for employment use.</p>			

This is subject to a separate planning application, DM/2019/01629, which was granted permission on 26 February 2020. The acceptance of this loss has previously been justified in relation to the outline permission which was approved in an earlier monitoring period. Whilst not strictly B1 employment a care home represents a form of employment and would result in job creation on the site.

The housing trajectory prepared in consultation with the Housing Stakeholder Group shows that the site has not delivered any dwellings within the Plan period. The first completions on site are expected in 2023/24.

**Fairfield Mabey, Chepstow (SAH3):**

The landowner submitted an outline application (DC/2014/01290) in October 2014 for up to 600 residential units (350 to be delivered within the Plan period), commercial space including offices and workshops (Use Class B1), small scale retail/food and drink floorspace (Use Classes A1 and A3) and multi-functional green and blue open space. Progress with the application has been slower than anticipated due to various matters, including highways issues (Welsh Government Highways Division had a holding objection on the application for 18 months). However, the outstanding issues have since been resolved and the site gained outline planning permission for 450 units (432 market and approximately 18 affordable units on 1.5 acres of the site) in November 2017. The outline application at the Fairfield Mabey site reduced the employment provision from 2.8ha to 0.65ha of B1 land. A Reserved Matters Application (DM/2019/00001) was approved during the 2019/20 monitoring period for 347 units. The application was for the market housing element of the site and did not include the land identified for affordable housing or employment land; the affordable housing element of the site (26 units) was the subject of a separate application for which Reserved Matters was permitted during the last monitoring period (DM/2019/01960(RM)). Work on the site began during the last monitoring period with 106 completions during the Plan period.

The housing trajectory prepared in consultation with the Housing Stakeholder Group expects the site to deliver the remaining dwellings on the site by 2024/25.

**Wonastow Road, Monmouth (SAH4):**

Outline permission was granted for up to 370 dwellings and 6.5ha of employment land in December 2014. The site developers (Barratt/David Wilson and Taylor Wimpey) submitted a Reserved Matters application (DC/2015/00392) for 340 units (238 market and 102 affordable units) which was granted permission in November 2015. The site was completed during the last monitoring period.

The overall LDP site allocation is for a total of 450 units. The additional units relating to this allocation are to be delivered as an extension to the site at Drewen Farm. An application for this element of the site has not yet been submitted and any such application will need to consider the issue of phosphates in the River Wye. A planning application would need to demonstrate phosphate neutrality or betterment in its design and/or its contribution to the water body. The guidance issued by NRW has significant implications on any development proposal for the site. The Council continue to liaise with both Welsh Water



and NRW with regard to addressing the phosphate issue and are exploring solutions to facilitate the continued delivery of the LDP.

**Rockfield Farm, Undy (SAH5):**

This site is allocated for 270 residential units and 2ha of serviced land for business and industrial use in the adopted LDP. An outline planning application was submitted in July 2016 (DC/2016/00883) for 266 units and 5,575 sq m of employment land (B1 use). For the purposes of the AMR, 265 units (198 market and 67 affordable units) are recorded as a net gain, the existing farmhouse has a residential use and is being demolished so has been taken off the overall figure. Progress with the site has been slower than anticipated due to various issues, including archaeology. These issues have, however, been resolved and the outline application was approved in March 2018. A Reserved Matters application (DM/2018/01606) was granted planning permission for phase 1 of the site in February 2019 for 144 residential units. The site is currently under construction with 106 dwellings completed to date.

The housing trajectory prepared in consultation with the Housing Stakeholder Group shows the site to have delivered 106 dwellings within the Plan period. The remaining dwellings for phase 1 of the site are expected to be completed by 2022/23. Phase 2 is expected to be completed by 2026/27.

**Land at Vinegar Hill, Undy (SAH6):**

This site for 225 residential units is linked to the adjacent Rockfield Farm site and was expected to progress in tandem. Whilst initial progress on the site has been slow, MCC successfully bid during the current monitoring period for CCR funding to support the delivery of the site. This will enable a fully planning policy compliant scheme to be delivered despite viability pressures which had resulted in the site not coming forward. A hybrid application has been submitted on this site (DM/2019/01937 – November 2019) for two parcels of land for up to 155 dwellings with associated open space and infrastructure. A full planning consent is being sought for 72 dwellings on parcel A with an outline planning consent being sought for parcel B with all matters reserved except for access. Whilst allocated for 225 dwellings in the Adopted LDP the site is only proposed to come forward for up to 155 dwellings as the landowner doesn't wish for a parcel of land to be brought forward. The site received planning permission on 16 June 2022 for 155 dwellings of which 39 are affordable, so will be recorded as a permission during the next monitoring period.

The housing trajectory prepared in consultation with the Housing Stakeholder Group does not expect the site to deliver any dwellings within the Plan period. The first completions on site are expected in 2023/24.

**Former Paper Mill, Sudbrook (SAH7):**

A full planning application (DC/2015/01184) was submitted by Harrow Estates (Redrow confirmed as the developer) in October 2015 for 212 residential units (192 market and 20 affordable units). There had been a number of site viability issues associated with this application meaning that progress with the application was slower than anticipated. However, these issues were subsequently resolved, and the application was approved in the 2016/17 monitoring period (November 2016). Following a re-plan of part of the site

the number of residential units on the site has decreased to 210 of which 20 are affordable. The site is currently under construction, with 165 dwellings completed during the Plan period.

The housing trajectory prepared in consultation with the Housing Stakeholder Group shows that the site delivered 165 dwellings within the Plan period. The remaining dwellings are expected to be completed by 2023/24.

It is recognised that, with the exception of Wonastow Road, allocated strategic sites have not progressed in accordance with the identified target of obtaining planning permission by the end of 2014. However, given the constraints associated with some of the sites, including Deri Farm and Fairfield Mabey, the trigger date of gaining permission for all sites by the end of 2014 was unrealistic. The strategic allocation at Sudbrook Paper Mill gained consent in the 2016/17 monitoring period. Full planning permission was granted at the Deri Farm site along with outline permissions at Mabey Bridge, Chepstow and Rockfield Farm, Undy in the 2017/18 monitoring period, with Crick Road, Portskewett gaining permission during the 2019/20 monitoring period. It is expected that the final strategic site, Vinegar Hill, Undy will gain permission during the next monitoring period.

The agreed housing trajectory figures demonstrate a Plan period shortfall (i.e. up to the end of 2021) of 1,092 dwellings from strategic sites. While there continues to be progress with strategic sites there is a significant shortfall on the delivery of dwellings on strategic sites during the Plan period. This is primarily due to addressing constraints associated with bringing forward some of the strategic sites and the development plan process at the time did not require site viability and deliverability to be frontloaded in relation to site allocations in the Adopted LDP. The trigger has been met for the seventh consecutive year. As stated above, it is likely that the remaining strategic site at Vinegar Hill, Undy will be progressed during the next monitoring period as it has received permission and so will be reported accordingly. The delays in sites coming forward, however, have implications for other monitoring targets and triggers and the need for any further action is being considered in connection with those particular indicators. In particular the delivery of strategic sites has obvious implications for the spatial strategy and housing delivery (general market and affordable). For further information with regard to this see the policy analysis for Policy S1, S2 and S4.

Given the importance of delivering the strategic sites the Council will continue to monitor their progress closely.

## **2. Dwelling Completions**

Completions were recorded on the following allocated strategic sites during the monitoring period: Deri Farm, Abergavenny (51 completions), Fairfield Mabey, Chepstow (88 completions), Rockfield Farm, Undy (49 completions) and Sudbrook Paper Mill (41 completions). This is expected as all of these sites gained planning permission prior to this monitoring period. With the exception of Deri Farm, all of the completions recorded were in line with or exceeded the 2020-21 JHLAS trajectory. With regard to Deri Farm there was a shortfall of completions; the 2020-21 trajectory predicted 67 completions on this site in

2021-22, actual completions were 51. However, as the site is nearing completion with only 16 dwellings outstanding, the shortfall is not considered a cause for concern.

As evidenced above, given that considerable progress is being made on the remaining strategic site, it is anticipated that dwelling completions will align with the identified Housing Stakeholder Group agreed trajectory targets as the sites progress during the next monitoring period.

In light of guidance as set out in the Development Plans Manual (Ed 3) Monmouthshire County Council, in consultation with the Housing Stakeholder Group, has produced a housing trajectory. A meeting was held with the Housing Stakeholder Group on 30th June 2022 to ensure that the trajectory is as robust as possible and based on the latest information available. Further analysis of the housing trajectory is included in the section on Policy S2 Housing Provision. Whilst the requirement to evidence a 5-year housing supply no longer applies it is useful to consider those units which are projected to be completed outside of the next 5 years.

#### Housing Stakeholder Group Trajectory

	2020 – 21		2021-22		Change in Number of Units Outside next 5 years
	Within next 5 years	Outside next 5 Years	Within next 5 years	Outside next 5 years	
<b>Deri Farm</b>	67	0	16	0	=
<b>Fairfield Mabey</b>	355	0	267	0	=
<b>Rockfield Farm</b>	209	0	160	0	=
<b>Vinegar Hill</b>	135	90	155	70	-20
<b>Wonastow Road (Taylor Wimpey) *</b>	-	-	-	-	-
<b>Wonastow Road (Barratt) *</b>	-	-	-	-	-
<b>Wonastow Road (Drewen Farm)</b>	70	40	0	110	+70
<b>Crick Road</b>	200	69	200	69	=
<b>Sudbrook Paper Mill</b>	86	0	45	0	=

One strategic site has seen an increase in the number of units outside of the next 5-year period, Wonastow Road (Drewen Farm), Monmouth now falls wholly outside the five year period for the reasons explained above. However, completions on Vinegar Hill, Undy have come forward in the trajectory owing to the progress made during the monitoring period. Accordingly, there are 249 units which fall outside of the next 5 years (i.e. 2022 – 2027) in the 2022 housing trajectory, compared to 199 in the previous AMR.

The Council will continue to monitor this issue closely in order to determine whether the Plan's strategic residential allocations are being delivered in accordance with the housing trajectory targets.

<b>Recommendation</b>
1. No action required at present. Continue to monitor.
2. No action required at present. Continue to monitor.

\*Site permitted prior to this AMR monitoring period.

\*\*2021-21 Trajectory as this forecasts completions for 2021-22 period i.e. current monitoring period.

\*\*\*Site is complete.

## Affordable Housing

**Monitoring Aim/Outcome:** To provide 960 affordable dwelling units over the plan period

**Strategic Policy:** S4 Affordable Housing

**LDP Objectives Supported:** 1, 3 & 4

**Other LDP Policies Supported:** H7, SAH1-SAH11

### Contextual Changes

#### House Prices

The recorded fluctuations in the County's average house prices since 2012 are set out in Section 3 - Contextual Information. The potential implications of average house price trends recorded over the monitoring period are assessed in relation to indicator 5 below.

Indicator	Target <i>(Previous AMR Performance)</i>	Trigger for Further Investigation	Performance 1 April 2021– 31 March 2022
1. The number of additional affordable dwellings <b>built</b> over the plan period* <sup>1</sup>	Deliver 96 affordable dwellings per annum 2011-2021 (total of 960 over the plan period)  <i>(2014-15: 17)</i> <i>(2015-16: 63)</i> <i>(2016-17: 47)</i> <i>(2017-18: 84)</i> <i>(2018-19:131)</i> <i>(2019-20: 82)</i> <i>(2020-21: 71)</i>	10% less or greater than the LDP strategy build rate for 2 consecutive years	<b>35</b>
2. Number of affordable dwellings <b>secured</b> on new housing sites	a) 35% of the total number of dwellings to be affordable on sites of 5 or more dwellings in the Main Towns and Rural Secondary Settlements identified in Policy S1  <i>(2014-15: 35%)</i> <i>(2015-16: 34%)</i> <i>(2016-17: 43%)</i> <i>(2017-18: 16.5%)</i>	Proportion of affordable housing achieved on development sites in each area falls below the requirement set out in Policy S4	<b>N/A (No applicable applications)</b>

	<p>(2018-19: 32%)  (2019-20: 100%)  (2020-21: 23.35%)</p>		
	<p>b) 25% of the total number of dwellings to be affordable on sites of 5 or more dwellings in the Severnside Settlements identified in Policy S1</p> <p>(2014-15: 100%)  (2015-16: N/A)  (2016-17: 9.7%)  (2017-18: 31.7%)  (2018-19: 26%)  (2019-20: 32%)  (2020-21: N/A)</p>		<p><b>N/A  (No applicable applications)</b></p>
	<p>c) 60% of the total number of dwellings to be affordable on sites of 3 or more dwellings in the Main Villages identified in Policy S1</p> <p>(2014-15: 0%)  (2015-16: 60%)  (2016-17: 60%/20%)  (2017-18: 62.5%)  (2018-19: 60.0%)  (2019-20: 67.5%)  (2020-21: 60%/16%)</p>		<p><b>N/A  (No applicable applications)</b></p>
	<p>d) Minor villages: sites with capacity for 4 dwellings make provision for 3 to be affordable; and sites with capacity for 3 dwellings make provision for 2 to be affordable.</p> <p>(2014-15: N/A)</p>		<p><b>N/A  (No applicable applications)</b></p>

	<p>(2015-16: N/A)  (2016-17: N/A)  (2017-18: N/A)  (2018-19: N/A)  (2019-20: N/A)  (2020-21: N/A)</p>		
<p>3. Number of affordable dwellings permitted/built on Main Village Sites as identified in Policy SAH11</p>	<p>Main Village sites to collectively deliver 20 affordable dwellings per annum 2014-2021</p> <p>(2014-15: 0)  (2015-16: 9 permitted)  (2016-17: 9 permitted/9 built)  (2017-18: 5 permitted/0 built)  (2018-19: 12 permitted/3 built)  (2019-20: 9 permitted/0 built)  (2020-21: 3 permitted/0 built)</p>	<p>10% less or greater than the target build rate for 2 consecutive years</p>	<p><b>0 permitted/ 0 built</b></p>
<p>4. Number of affordable dwellings <b>built</b> through rural exception schemes</p>	<p>No target</p> <p>(2014-15: 0)  (2015-16: 0)  (2016-17: 0)  (2017-18: 0 built/3 permitted)  2018-19: 4 (1 permitted)  2019-20: 4 (0 permitted)  (2020-21: 0 permitted/0 built)</p>	<p>None</p>	<p><b>0 built/ 0 permitted</b></p>
<p>5. Affordable housing percentage target in Policy S4</p>	<p>Target to reflect economic circumstances</p>	<p>Average house prices increase by 5% above the base price of 2012 levels sustained over 2 quarters</p>	<p><b>Refer to analysis below (5)</b></p>

## Analysis

1. A total of 35 affordable dwellings were completed during the monitoring period accounting for 9.7% of the total dwelling completions recorded. Allocated LDP sites accounted for 40% of these, with the remaining 60% on the Church Road Caldicot site (approved through the unallocated sites policy). The allocated site at Rockfield Farm, Undy (SAH5) accounted for 12 of the 35 affordable housing completions recorded, representing 34%. The only other allocation that contributed to the supply of affordable homes related to a Rural Secondary Settlement allocation at Cwrt Burrium, Usk (SAH10(i)) where 2 affordable homes were completed during 2020/21.

In addition to completions on allocated sites, the 'unallocated' site at Church Road, Caldicot contributed by providing 21 affordable homes, accounting for 60% of the total.

The overall figure of 35 units is considerably lower than the 71 affordable housing completions recorded in last year's AMR. The delivery rate has fluctuated over previous monitoring periods ranging from 17 in 2014/15, 63 in 2015/16, 47 in 2016/17, 84 2017/18, 131 2018/19, 82 2019/20 and 71 2020/21. It has, however, maintained a consistently higher rate in recent years reflecting the delivery of the LDP allocations, supplemented by a number of 100% affordable housing sites (of which there were none over this monitoring period).

As the number of affordable dwelling completions is lower than the identified target (96 per annum) in the latest monitoring period and was also below the identified target in the 2019/20 and 2020/21 monitoring periods, it has triggered the need for further investigation.

Cumulatively, ten years' worth of affordable housing completions were recorded during the 2020-21 monitoring period, with the Plan delivering 658 affordable homes compared to a target of 960 affordable homes for the plan period of 2011 – 2021 (shortfall of 302 affordable homes). As noted above a further 35 affordable units were completed during this monitoring period, which remains below the Adopted LDPs annual target of 96 affordable homes per annum.

Slow progress on the implementation of a number of LDP allocated sites, as considered in the sections relating to Policies S2 and S3, resulted in limited delivery of both market and affordable housing at the start of the Plan period. As allocated sites, including main village sites, have achieved consent, affordable housing completions have increased in line with the target. There is no specific evidence to date that demonstrates that Policy S4 itself is not operating effectively, albeit that there have been delays in the determination of some strategic site planning applications, including Deri Farm (now resolved and development commenced on site with all affordable dwellings completed), because of negotiations over viability issues arising from the requirements of Policy S4. These viability issues themselves directly impact on levels of affordable housing secured, robust assessments are nevertheless being undertaken to ensure the maximum potential contribution is achieved.



There was a clear correlation of the impact of Covid-19 on the rate of completions and new sites coming forward in the previous monitoring period due to lockdowns and closure of many building sites. While it is appreciated it will take some time for the development industry to fully recover from the effects of Covid-19, the reduction in affordable housing completions in the current monitoring period is more likely linked to the significant impact of riverine phosphate levels in the River Usk and Wye Catchment Areas. Water quality issues in relation to Phosphates are affecting the River Wye and River Usk, with developments required to demonstrate betterment or neutrality. Solutions are being investigated but there is no strategic solution for phosphates at this time. This is having a significant impact on the number of homes being delivered through the planning system.

As the trigger has been met, the Council will continue to monitor completion rates closely in future AMRs to determine its effectiveness in delivering affordable dwellings.

## **2. Main Towns and Rural Secondary Settlements**

No permissions were granted during the monitoring period for sites of 5 or more homes that triggered the delivery of on-site affordable housing in the County's Main Towns or Rural Secondary Settlements (see policy analysis for Policies S1 and S2). The Council will continue to monitor Main Towns and Rural Secondary Settlements in order to determine the effectiveness of the affordable housing target identified in Policy S4.

### **Sevenside Settlements**

No permissions were granted during the monitoring period for sites of 5 or more homes that triggered the delivery of on-site affordable housing in Sevenside (see policy analysis for Policies S1 and S2). The Council will continue to monitor Sevenside Settlements in order to determine the effectiveness of the affordable housing target identified in Policy S4.

### **Main Villages**

No permissions were granted during the monitoring period for sites of 3 or more homes that triggered the delivery of on-site affordable housing in the Main Villages (see policy analysis for Policies S1 and S2). The Council will continue to monitor Main Villages in order to determine the effectiveness of the affordable housing target identified in Policy S4.

### **Minor Villages**

No permissions were granted during the monitoring period for small sites in Minor Villages. The Council will continue to monitor Minor Village sites in order to determine the effectiveness of the affordable housing target identified in Policy S4.

3. No applications were permitted or built over the monitoring period on the allocated Main Village sites identified in Policy SAH11. Some progress has however been made over the monitoring period with 9 affordable dwellings under construction at SAH11(ii) Well Lane, Devauden and 4 affordable dwellings at SAH11(ix)(a) Land Rear of Carpenters Arms, Llanishen\*\*. The impact of riverine phosphate levels in the River Usk and Wye Catchment Areas is also having an impact on sites coming forward with sites at Little Mill and Werngifford, Pandy unable to progress through the planning application system.

The target for the Main Village sites to collectively deliver 20 affordable dwellings per annum nevertheless has not been achieved.

The Main Village sites have delivered 21 affordable homes since the LDP's adoption which is significantly short of the LDP target of 20 affordable units per annum. The delivery of these sites will be given further consideration as part of the RLDP process. The reasons for the lack of progress on Main Village sites will be investigated further, including for example unrealistic land owner expectations in relation to land values. This will enable the Council to de-allocate those sites that are not progressing as intended. Letters have been sent to the land owners/ agents of all remaining undelivered Main Village Sites requesting evidence to demonstrate that the sites are deliverable and viable and whether they intend to progress them by the end of 2021, noting they will not be rolled forward into the RLDP as allocations.

#### **4. Rural Exceptions Completions.**

No rural exception schemes were permitted or completed over this monitoring period. While there is no target in relation to the number of completions for rural exception schemes the Council will continue to monitor this issue closely in future AMRs to determine the effectiveness of the policy framework relating to rural exception schemes.

5. The trigger for conducting additional viability testing in relation to the affordable housing targets set out in Policy S4 is an increase in average house prices of 5% or more above the 2012 base price sustained over 2 quarters.

As set out in Section 3, Land Registry data indicates that average house prices in Monmouthshire have increased over the current monitoring period with average prices in quarter 1 2022 (January to March) standing at £334,148, significantly higher than the 2012 quarter 4 baseline price (£188,720). A 5% increase in the 2012 quarter 4 baseline price figure would equate to an increase of £9,436. In both quarter 4 2021 and quarter 1 2022 the increase in house prices exceeded this figure, although at £9,988 in Q4 2021 the increase is only marginally above the level to trigger additional viability testing. Looking at the figures more closely it would appear that the overall volume of house sales within the County, whilst recovering have yet to reach the levels seen in the two years prior to the Covid-19 pandemic. The type of property being sold will also impact on the average property price. Whilst the trigger for further investigation has been met this indicator has been given an amber rating for this AMR. The Council will continue to monitor average house price trends in future AMRs in order to determine any potential implications for the effective implementation of Policy S4. Updated high level viability evidence will be prepared to inform the RLDP policy framework.

It should also be recognised, however, that house prices are just one factor that could impact on development viability. Build costs, for instance, are documented to have risen over the monitoring period. Whilst build costs are not specified as a LDP monitoring indicator, general viability issues will be kept under review as information comes forward on a case-by-case basis and in connection with strategic viability work in relation to the RLDP process. This will enable the Council to consider any further potential implications for the effective implementation of Policy S4.

#### **Recommendation**

1. No action is required at present. Continue to monitor.

2. No action is required at present. Continue to monitor.
3. Consider progress of Main Village sites as part of the RLDP process.
4. No action is required at present. Continue to monitor.
5. No action is required at present. Continue to monitor.

\*Core Indicators

<sup>1</sup> Indicator and Target based on the Monmouthshire planning area and Monmouthshire LDP only.

\*\*Social Housing Grant has been used to change the three market dwellings to affordable dwellings, as a consequence the site is now 100% affordable housing.

## Community and Recreation Facilities

**Monitoring Aim/Outcome:** To retain existing community and recreation facilities and seek to develop additional facilities

**Strategic Policy:** S5 Community and Recreation Facilities

**LDP Objectives Supported:** 1 & 5

**Other LDP Policies Supported:** CRF1, CRF3

### Contextual Changes

There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target <i>(Previous AMR Performance)</i>	Trigger for Further Investigation	Performance 1 April 2021 – 31 March 2022
1. Number of community and recreation facilities granted planning permission	No target*  <i>(2014-15: 9)</i> <i>(2015-16: 5)</i> <i>(2016-17: 4)</i> <i>(2017-18: 10)</i> <i>(2018-19: 8)</i> <i>(2019-20:12)</i> <i>(2020-21:3)</i>	None*	<b>13</b>
2. Number of community/ recreation facilities lost	Minimise the loss of community and recreation facilities  <i>(2014-15: 3)</i> <i>(2015-16: 0)</i> <i>(2016-17: 6)</i> <i>(2017-18: 2)</i> <i>(2018-19:2)</i> <i>(2019-20:4)</i> <i>(2020-21:1)</i>	Loss of any 1 community/ recreation facility in any 1 year	<b>1</b>

<b>Analysis</b>
<p>1. Thirteen planning applications were approved for community and recreation uses during the current monitoring period. Eight of the applications related to community uses and five to recreation.</p> <p>Applications in relation to the community uses included: a new pre-school educational facility as Whitecastle Monmouth; extension to Usk Primary school; change of use to nursery from A3 use at unit 103 Wales 1, Magor; change of use from C3 (dwelling) to children’s care home at Dobson’s Farm Abergavenny; change of use from dwelling to dentist at Lidstone Abergavenny; carpark extension to Caldicot Castle Country Park; and a new green bin store in Chepstow High Street.</p> <p>Of note, although not a gain, an application was also approved for enhancement to the existing burial facility at Usk Natural Burial Ground.</p> <p>Recreational uses approved include: a change of use from B8 to Café at The Cedars, Goytre; a new 100 and 50 seated stands at Chepstow Town AFC; and enhancements to Chepstow Athletic Club, Abergavenny Cricket Club and Linda Vista Gardens Abergavenny.</p> <p>Overall, the number of community facilities permitted is one of the highest levels recorded since plan adoption and indicates that the LDP community &amp; recreational policy framework is operating effectively to enable such development in the County.</p>
<p>2. There has been one loss of a community facility over the period monitored. This is in relation to the loss of Kingdom Hall Raglan, a dis-used meeting hall which was granted a change of use to residential. Although not explicitly referred to in the planning application report the local community is adequately served by alternative facilities, there being a well-established village hall and other venues suitable for public meetings within Raglan. The principle of losing the meeting hall was therefore considered to be acceptable having regard to Policies S5 and CRF1 and its loss is justified within the context and requirements of the LDP policy framework.</p> <p>The Council will continue to monitor such proposals in future AMRs to determine the effectiveness of the policy framework relating to this issue.</p>
<b>Recommendation</b>
<p>1. No action is required at present. Continue to monitor.</p>
<p>2. No action is required at present. Continue to monitor.</p>

\*Not considered appropriate to include a target/trigger for this indicator given that in some instances the Council is looking to reduce the amount of community facilities or to focus investment on existing facilities

## Retail

**Monitoring Aim/Outcome:** Direct new food and non-bulky retail development to the County's town and local centres and seek to enhance their vitality, attractiveness and viability.

**Strategic Policy:** S6 Retail

**LDP Objectives Supported:** 1 & 2

**Other LDP Policies Supported:** RET1-RET4

### Contextual Changes

There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target <i>(Previous AMR Performance)</i>	Trigger for Further Investigation	Performance 1 April 2021– 31 March 2022
1. Amount of new food and non-bulky retail development permitted in town/local centres as a proportion of all retail development permitted	90% of new food and non-bulky retail floorspace to be located in town/local centres  <i>(2014-15: 0%)</i> <i>(2015-16: 53.2%)</i> <i>(2016-17: 33%)</i> <i>(2017-18 – 35.7%)</i> <i>(2018-19 – 0%)</i> <i>(2019-20 – 70.5%)</i> <i>(2020-21 – 0%)</i>	More than 10% of new food and non-bulky retail floorspace is developed outside town/local centres in any 1 year	35% retail development permitted in town/local centres.  736.5 sq m permitted outside town/ local centres*
2. Percentage of vacant units within the CSA of each town and local centre**	No increase in the number of vacant units:	Vacancy rate in a town/local centre increases for 2 consecutive years	
	<b>a) Abergavenny</b> <i>(2014: 5.1%)</i> <i>(2015: 5.8%)</i> <i>(2016: 8.7%)</i> <i>(2017: 6.3%)</i> <i>(2018: 4.7%)</i> <i>(2019: 6.6%)</i> <i>(2020: 7.6%)</i>		<b>3.6%</b>

	<b>b) Caldicot</b> (2014: 9.2%) (2015: 7.6%) (2016: 10.1%) (2017: 8.8%) (2018: 10.6%) (2019: 7.6%) (2020: 13.4%)		6.1%
	<b>c) Chepstow</b> (2014: 9.0%) (2015: 10%) (2016: 7.1%) (2017: 5.9%) (2018: 11.8%) (2019: 11.2%) (2020: 13.5%)		11.2%
	<b>d) Monmouth</b> (2014: 8.3%) (2015: 7.9%) (2016: 4.9%) (2017: 10.1%) (2018: 10.1%) (2019: 14.4%) (2020: 15.4%)		15.5%
	<b>e) Magor</b> (2014: 9.1%) (2015: 0%) (2016: 0%) (2017: 9.1%) (2018: 4.5%) (2019: 13.6%) (2020: 0%)		0%
	<b>f) Raglan</b> (2014: 0%) (2015: 0%) (2016: 0%) (2017: 0%) (2018: 9%) (2019: 9%) (2020: 9%)		9%
	<b>g) Usk</b> (2014: 7.8%) (2015: 11.1%) (2016: 13.1%) (2017: 9.7%) (2018: 15.8%) (2019: 15.3%)		8.5%

	(2020: 9.8%)		
3. Percentage of A1 uses in the primary shopping frontages of Abergavenny, Caldicot, Chepstow and Monmouth***	% of A1 uses no less than the thresholds identified for the towns' primary shopping frontages as defined in the Primary Shopping Frontages SPG**	% figures for a primary shopping frontage fall below the threshold set out in the SPG	
	<b>a) Abergavenny</b> <ul style="list-style-type: none"> <li>PSF1 Cross St, High St, Frogmore St &amp; 1 Nevill St <b>(Target 75%)</b> (2014: 76%) (2015: 77%) (2016: 76%) (2017: 75%) (2018: 75%) (2019: 74%) (2020: 73%)</li> </ul>		<ul style="list-style-type: none"> <li>72%</li> </ul>
	<ul style="list-style-type: none"> <li>PSF2 Cibi Walk <b>(Target 100%)</b> (2014: 100%) (2015: 100%) (2016: 100%) (2017: 100%) (2018: 94%) (2019: 100%) (2020: 100%)</li> </ul>		<ul style="list-style-type: none"> <li>100%</li> </ul>
	<ul style="list-style-type: none"> <li>PSF3 Cross St (51-60 &amp; Town Hall) <b>(Target 55%)</b> (2014: 36%) (2015: 36%) (2016: 36%) (2017: 36%) (2018: 36%) (2019: 36%) (2020: 36%)</li> </ul>		<ul style="list-style-type: none"> <li>36%</li> </ul>
<b>b) Caldicot</b> <ul style="list-style-type: none"> <li>PSF4 Newport Rd <b>(Target 65%)</b> (2014: 65%) (2015: 65%)</li> </ul>	<ul style="list-style-type: none"> <li>63%</li> </ul>		



	<p>(2016: 65%)  (2017: 65%)  (2018: 63%)  (2019: 63%)  (2020: 63%)</p>		
	<p><b>c) Chepstow</b></p> <ul style="list-style-type: none"> <li>PSF5 High St  <b>(Target 75%)</b>  (2014: 80%)  (2015: 80%)  (2016: 80%)  (2017: 80%)  (2018: 76%)  (2019: 80%)  (2020: 80%)</li> </ul>		<ul style="list-style-type: none"> <li><b>76%</b></li> </ul>
	<ul style="list-style-type: none"> <li>PSF6 St Mary St  <b>(Target 65%)</b>  (2014: 65%)  (2015: 65%)  (2016: 65%)  (2017: 69%)  (2018: 69%)  (2019: 73%)  (2020: 73%)</li> </ul>		<ul style="list-style-type: none"> <li><b>73%</b></li> </ul>
	<p><b>d) Monmouth</b></p> <ul style="list-style-type: none"> <li>PSF7 Monnow St  <b>(Target 75%)</b>  (2014: 77%)  (2015: 76%)  (2016: 72%)  (2017: 74%)  (2018: 73%)  (2019: 73%)  (2020: 73%)</li> </ul>		<ul style="list-style-type: none"> <li><b>73%</b></li> </ul>
	<ul style="list-style-type: none"> <li>PSF8 Church St, Agincourt Sq &amp; Priory St (1-4)  <b>(Target 65%)</b>  (2014: 57%)  (2015: 57%)  (2016: 62%)  (2017: 65%)  (2018: 67%)  (2019: 67%)  (2020: 69%)</li> </ul>		<ul style="list-style-type: none"> <li><b>69%</b></li> </ul>

## Analysis

1. Two applications were permitted for new A1 food and non-bulky retail developments in the County's town/local centres during the period monitored:

- DM/2021/01532 – this relates to a conversion of an old storeroom into a small hair studio in Abergavenny, the storeroom was previously used in support of an A3 use.
- DM/2019/01793 – this relates to an extension to the Aldi foodstore in Abergavenny. Whilst not within the CSA it's edge of centre location warrants its inclusion here. The extension will add an additional 380m<sup>3</sup> of retail floorspace to the store. The existing Aldi store was granted consent in 2008 and has been successfully operating for around 7 years. The principle of the retail use is therefore well established. The extension will provide extra space for both the shop floor and the warehouse. This is required to enable the store to be better laid out in order to provide an enhanced customer experience. The application states that there is no intention to expand the number of products (currently approximately 1500) available and so the store will continue to complement rather than compete with the other shops within the town centre.

However, as three applications (65% of applications for new retail uses) were permitted outside of the centres, the trigger for this indicator has been met. Of note, one of the applications related to an extension to an existing retail unit, the second is ancillary to the existing use and it was considered that the third application would help meet both the quantitative and qualitative need for additional convenience goods shopping in Magor. While the trigger has been met, given the justification for the permissions an amber rating has been given rather than a red rating as there are no concerns over the implementation of the relevant policy. Full details are set out below.

- DM/2021/01023 – this relates to an extension to the existing retail space at Usk Garden Centre.
- DM/2021/01021 – this relates to the establishment of a small scale tap room and seating area to sample and sell the beer made on the site at Severn Bridge Industrial Estate. It is considered that the use will be ancillary to the existing microbrewery on the site to showcase their range of products and increase brand awareness. The proposal will help to maintain the viability of the existing business and to help maintain and create new jobs.
- DC/2011/00083 – this relates to a new convenience store on the old Magor Motors site in Newport Road Magor. It was considered that the proposed store would help meet both a quantitative and qualitative need for additional convenience goods shopping in Magor. Although outside the CSA, it is considered that the provision of additional dedicated parking has the potential to increase footfall in the CSA to the benefit of the retail units there such as the post office and pharmacy, as well as other businesses. There are no available alternative sites in or better related to the CSA and thus the proposal meets the sequential test. Although the likely loss of some trade to an existing trader (principally the Co-op) is regrettable the issue for consideration was impact on the vitality and viability of the CSA as a whole and not competition in terms of impact on an individual trader. On balance, it was considered that the proposal met relevant local and national retail planning policies and guidance.

The developments are considered appropriate given the particular circumstances of the applications. In view of this, there are not considered to be any concerns with the implementation of LDP retail policies and therefore no further investigation is required at present. However, the Council will continue to monitor this issue in future AMRs to determine the effectiveness of the Plan's retail policy framework.

2. Vacancy rates recorded during the monitoring period\*\* in all of the County's central shopping areas (CSA), with the exception of Monmouth, were below the GB High Street vacancy rate (14.5% June 2021, Local Data Company). Retail vacancy rates in the County's town centres ranged from 3.6% in Abergavenny to 15.5% in Monmouth.

Comparison with last year's vacancy rates indicates that 4 centres have seen a fall in vacancy rates, Abergavenny, Caldicot, Chepstow and Usk. Abergavenny saw a decline from 7.6% in 2020 to 3.6% this year, Caldicot 13.4% to 6.1%, Chepstow 13.5% to 11.2% and Usk 9.8% to 8.5%. Two centres saw no change, Raglan and Magor, with Magor having no vacant units for the second consecutive year. The only centre to see a rise in the vacancy rate is Monmouth, and whilst this rise is marginal 15.4% to 15.5% the trigger for further investigation has been reached. The vacancy rate in Monmouth is much higher when compared to the other centres and is also higher than the level recorded at a GB level for the first 6 months of 2021.

In Monmouth the rise in total vacancy rates has been solely across the primary frontages, with an actual decrease in vacancy rates across the secondary frontages in the latest survey, down from 21.1% in 2020 to 16.1% in 2021. This may, in part reflect the impact of the Covid-19 pandemic on the high street, particularly with the loss of some national chains from Monmouth in recent years, such as Peacocks. However, as this is higher than the GB High Street vacancy rate and the highest recorded over any monitoring period this will need to be looked at carefully in the next AMR.

Although, with the exception of Monmouth, high street vacancy rates are stable and below the GB average, it is recognised that high street vitality plays a key role in the character and attractiveness of our market towns. WG Transforming Towns funding seeks to support town centres, and Monmouthshire has submitted a comprehensive bid for this grant funding. The cost of living and energy costs crises pose additional threats to businesses as costs increase and customer spending decreases. The evidence suggests that the impacts of the recent pandemic saw an increase in home working with residents using their local centres to access retail/ services and facilities, rather than commuting into larger towns /cities. So while Covid-19 has impacted upon Monmouthshire's town centres it is perhaps to a lesser extent than on major towns and cities, with the Local Data Company Report in particular showing that vacancy rates in city centres have increased at a much greater rate since 2019 than in smaller centres. The long-term impacts of the Covid-19 pandemic on the High Street and on future shopping patterns are still emerging and will need to be monitored in future AMRs and considered in the RLDP. The Council will continue to monitor vacancy levels in future AMRs to determine trends.

3. The percentage of A1 retail uses within the towns' primary shopping frontages (PSF) recorded during the monitoring period\*\*\* generally accord with the thresholds identified in the Primary Shopping Frontages SPG.

The identified thresholds in two of the PSFs were set at higher levels than the existing level of non-A1 retail uses at the time as there is an aspiration to improve their retail offer i.e. PSF3 Cross Street (51-60 & Town Hall) Abergavenny and PSF8 Church Street, Agincourt Square & Priory Street (1-4) Monmouth. While there has been no change in the proportion of retail uses within PSF3 since monitoring began, there has been an increase in the proportion of A1 retail uses within PSF8 over the past monitoring periods, from 57% in 2015 to 69% in 2021. Despite achieving the identified threshold within PSF8, it remains important that a strong policy stance on proposals for change of use to non-retail uses in both of these frontages is maintained in order to improve and protect their retail offer.

Comparison with last year's figures indicate that the proportion of A1 uses within the towns' primary shopping frontages remained unchanged with the exception of the following:

- PSF1 Cross St, High St, Frogmore St & 1 Nevill St, Abergavenny recorded a marginal decline, down from 73% to 72%. This is due to a change of use of one unit from an A1 use to an A3 use. The unit was previously a dress shop and is now Bar24. Whilst it was deemed that the change of use would be contrary to Policy RET1 criterion (c) as a COU on this frontage (PSF1) would mean that the % of non-A1 units would increase, the unit had been vacant for nearly 2 years and taking into account Building Better Places the covid-19 recovery document, which recognised the impact Covid-19 has had on town centres and the need to respond flexibly, it was considered that the proposed change of use would add to the vitality of the town centre by attracting customers and creating additional footfall which would benefit the neighbouring retail uses and was therefore acceptable in principle.
- PS5 High Street, Chepstow recorded a decline in A1 uses down from 80% to 76%. This is due to a change of use of one unit from an A1 use to an A3 use. The unit was previously a dress shop and is now a tea-room. Whilst a change of use at this location resulted in the loss of an A1 unit with a long double frontage, this part of Chepstow is dominated by A1 and A3 uses on the ground floor. It was considered that the change of use of this shop to an A3 use would not create an over concentration of uses detracting from its retail character. A tea-room is the type of use that would contribute to the retail offer of a town centre location and is considered to be an appropriate use. It was considered that the proposal accords with the objectives of policy RET1 as it will help to attract footfall into the town centre especially as it is intended that the tea rooms be open during the day. The proposal would also provide job opportunities for local people.

Overall, it is considered that the towns' primary shopping frontages are functioning well in terms of the proportion of A1 uses, and no further investigation is required at present. The long-term impacts of the Covid-19 pandemic on the High Street and on future shopping patterns, however, will need to be monitored in future AMRs. The Council will continue to

monitor this issue in future AMRs to determine the effectiveness of the Plan's retail policy framework.

**Recommendation**

1. No action is required at present. Continue to monitor.

2. No action is required at present. Continue to monitor.

3. No action is required at present. Continue to monitor.

\*Two planning permission granted for retail development over the monitoring period in out of town locations.

\*\*Monmouthshire Retail Background Paper (August 2022). Base date October 2021.

\*\*\*Monmouthshire Primary Shopping Frontages SPG, April 2016

## Economy and Enterprise

**Monitoring Aim/Outcome:** To ensure a sufficient supply of employment land and to protect the County’s employment land

**Strategic Policy:** S8 Enterprise and Economy, S9 Employment Sites Provision

**LDP Objectives Supported:** 7

**Other LDP Policies Supported:** E1-E3, RE1, SAE1-SAE2

### Contextual Changes

There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target <i>(Previous AMR Performance)</i>	Trigger for Further Investigation	Performance 1 April 2021 – 31 March 2022
1. Net employment land supply/development♦	Maintain sufficient employment land to meet identified take-up rate of 1.9 ha per annum  <i>(2014-15: 46.8ha) (2015-16: 41.18ha) (2016-17: 40.76ha) (2017-18: 40.16ha) (2018-19: 40.16ha) (2019-20: 40.16ha) (2020-21: 40.16ha)</i>	Insufficient employment land available to meet the identified take-up rate of 1.9ha per annum	<b>40.16ha</b>
2. Take-up of employment land♦	Maintain sufficient employment land to meet identified take-up rate of 1.9 ha per annum  <i>(2014-15: 0.38ha) (2015-16: 1.131ha) (2016-17: 3.21ha) (2017-18: 5.002ha) (2018-19: 0.873ha) (2019-20: 3.74ha) (2020-21: 0.38ha)</i>	Insufficient employment land available to meet the identified take-up rate of 1.9ha per annum	<b>0.055ha</b>

3. Planning permission granted for new development (by type) on allocated employment sites as identified in Policy SAE1♦	No specific target <i>(2014-15: 0)</i> <i>(2015-16: 3)</i> <i>(2016-17: 2)</i> <i>(2017-18: 1)</i> <i>(2018-19: 2)</i> <i>(2019-20: 0)</i> <i>(2020-21: 2)</i>	Lack of development on strategic employment sites identified in Policy SAE1 by the end of 2017	<b>1 planning permission granted</b>
4. Planning permissions granted for employment use (B use classes) by settlement♦♦	No specific target	None	
	<b>Main Towns</b> <i>(2014-15: 9. ha)</i> <i>(2015-16: 0.95ha)</i> <i>(2016-17: 0.52ha)</i> <i>(2017-18: 0.784ha)</i> <i>(2018-19: 4.37ha)</i> <i>(2019-20: 0.11ha)</i> <i>(2020-21: 0.30ha)</i>		<b>0.3 ha</b>
	<b>Severnside Settlements</b> <i>(2014-15: 0.39ha)</i> <i>(2015-16: 2.83ha)</i> <i>(2016-17: 0.17ha)</i> <i>(2017-18: 2.124ha)</i> <i>(2018-19: 0.04ha)</i> <i>2019-20: 0.92ha)</i> <i>(2020-21: 3:47ha)</i>		<b>1.69 ha</b>
	<b>Rural Secondary Settlements</b> <i>(2014-15: 0.3ha)</i> <i>(2015-16: 0.48ha)</i> <i>(2016-17: 0.01ha)</i> <i>(2017-18: 0ha)</i> <i>(2018-19: 0.005ha)</i> <i>(2019-20: 0.01ha)</i> <i>(2020-21: 0ha)</i>		<b>0.05 ha</b>
	<b>Rural General</b> <i>(2014-15: 0.25ha)</i> <i>(2015-16: 0.22ha)</i> <i>(2016-17: 1.14ha)</i> <i>(2017-18: 0.575ha)</i> <i>(2018-19: 0.454ha)</i> <i>(2019-20: 0.096ha)</i> <i>(2020-21: 1.27ha)</i>		<b>1.55 ha</b>

5. Planning permissions granted for employment use (B use classes♦♦) by sector*	No specific target	None	
	Manufacturing		1.48ha
	Wholesale & retail trade; repair of motor vehicles and motorcycles		0.42ha
	Transport & storage; information and communication		0.87ha
	Real estate activities; Professional, scientific and technical activities; Administrative and support service activities		0.49ha
	Agriculture, forestry & fishing		0.14ha
	Construction		0.20ha
6. Amount of employment land lost to non-employment uses (i.e. non-B1, B2, B8 uses)	<p>Minimise the loss of employment land to non-B1, B2, B8 uses</p> <p><i>(2014-15: 0.08ha)</i>  <i>(2015-16: 0.56ha)</i>  <i>(2016-17: 0.65ha)</i>  <i>(2017-18: 0.12ha)</i>  <i>(2018-19: 0.105ha)</i>  <i>(2019-20: 0ha)</i>  <i>(2020-21: 1.21ha)</i></p>	Loss of any B1, B2 or B8 employment land in any 1 year	0.03ha
7. Proportion of resident workforce working within Monmouthshire***	<p>Increase the proportion of resident workforce working within Monmouthshire</p> <p><i>(2014: 54.5%)</i>  <i>(2015: 58.3%)</i>  <i>(2016: 57.9%)</i>  <i>(2017: 58.1%)</i>  <i>(2018: 60.4%)</i>  <i>(2019: 60.1%)</i>  <i>(2020: 56.9%)</i></p>	None	61.3%



8. Number of people in-commuting to Monmouthshire♦♦♦	Reduce the level of in-commuting over the plan period <i>(2014: 19,200)</i> <i>(2015: 17,800)</i> <i>(2016: 20,400)</i> <i>(2017: 17,100)</i> <i>(2018: 24,600)</i> <i>(2019: 18,900)</i> <i>(2020: 19,000)</i>	None	<b>14,300</b>
Number of people out-commuting from Monmouthshire♦♦♦	Reduce the level of out-commuting over the plan period <i>(2014: 19,600)</i> <i>(2015: 18,700)</i> <i>(2016: 18,700)</i> <i>(2017: 18,500)</i> <i>(2018: 17,400)</i> <i>(2019: 17,700)</i> <i>(2020: 19,600)</i>	None	<b>17,100</b>
<b>Analysis</b>			
<p>1. There is currently 40.16ha of employment land available across the County allocated under policy SAE1 of the Adopted LDP. The employment land availability has not changed since the previous four AMR figures, which reflects the fact that there has been no new land take up on the County's strategic SAE1 employment sites during this current monitoring period.</p> <p>Sufficient employment land has therefore been maintained over the monitoring period providing the opportunity to meet the identified take-up rate of 1.9ha per annum. Policies S8 and S9 are functioning effectively in this respect. However, the Council will continue its efforts through its Enterprise Team to promote economic initiatives that seek to support economic activity in the County.</p>			
<p>2. The take-up rate (i.e. completed developments) of employment land on either allocated (SAE1 or SAE2 sites) equated to 0.055ha over the monitoring period. This was delivered over three protected employment sites: Wonastow Road (SAE2I) involving a storage silo and first floor extension, a small extension to a dental surgery in Mayhill/Hadnock Road (SAE2m) and Magor Brewery (SAE2o) where the extension at an existing yeast propagation building has been completed.</p> <p>The trigger for further investigation relates to the total amount of land supply of Strategic SAE1 Employment Sites rather than take-up rates, this indicator will nevertheless be closely monitored in future AMRs to determine the effectiveness of the policy framework relating to employment land.</p>			
<p>3. There was one planning application approved on allocated employment sites as identified in SAE1 during the monitoring period. This related to the allocated SAE1</p>			

employment site at Beaufort Park in Chepstow (SAE1i) and related to the change of use from a retail warehouse to B1 light industrial including the expansion of the unit to include a mezzanine floor. The unit would increase by approximately 300m<sup>2</sup> of additional employment floorspace.

The trigger for this indicator is the lack of development on the SAE1 employment allocations by the end of 2017. A total of six planning permissions had been granted in SAE1 sites by the end of 2017 and a further five since 2017, giving a total of 11 applications since adoption of the LDP (albeit three relate to change of use applications not relating to B Use Classes).

It is recognised, however, that overall, there has been limited progress on the delivery of strategic employment sites over the monitoring period. The Council will continue to monitor this issue closely in future AMRs to determine the effectiveness of the policy framework relating to the delivery of strategic employment sites. A full review of the SAE1 allocations has been undertaken as part of the evidence base to inform the Replacement Local Development Plan (RLDP) through the preparation of an Employment Land Review (June 2021). Detailed assessments of the strategic employment sites are ongoing and will continued to be reviewed as the RLDP progresses.

4. This indicator seeks to monitor the amount of land approved to facilitate the delivery of additional employment floorspace for B use classes permitted by settlement in Monmouthshire. Nineteen applications were approved for such employment uses during the monitoring period, totalling 3.59ha of land. Of these, one permission related to allocated SAE1 employment site at Beaufort Park in Chepstow with the details discussed in relation to indicator 3 above.

A further 1.70ha of land was approved for additional B use class related development on SAE2 protected employment sites. This included two applications on the Severn Bridge SAE2p site involving a 300sqm warehouse extension (DM/2021/00781) and a temporary concrete manufacturing facility accounting for 0.2ha (DM/2020/00691). Two further planning permissions related to the protected Magor Brewery site (SAE2o) accounting for approximately 1.47ha of land. These involved the erection of a new building comprising 10,015 sqm of manufacturing, laboratory and office accommodation (DM/2021/01717) and a second application for the extension to the existing yeast propagation building (DM/2021/01001).

The remaining 14 applications were on non-allocated employment sites totalling 1.6ha of land. These included the erection of a small starter unit for B2/B8 on Magor Pill Farm (DM/2021/01489) and the change of use of agricultural land to form an extension to an existing caravan storage facility as Chapel Farm in Undy.

The main towns accounted for 0.3ha of the approved B use class employment floorspace. This related to the change of use and extension to B1 on SAE1i Beaufort Park, Chesptow as discussed above.

The Severnside area accounted for the greatest proportion of approved B use class employment, accounting for 1.70ha of the overall 3.59ha. This related to the four planning applications noted above – two in relation to the Magor Brewery SAE2o site and two in relation to the Severn Bridge Industrial Estate (SAE2p).

One planning permission related to the Rural Secondary Settlement of Raglan and related to the erection of a new abattoir building and accounted for 0.05ha of employment land.

Thirteen permissions within the rural general area accounted for the remaining 1.55ha of employment land. These included the erection of a commercial/light industrial storage building at Little Castle Farm, Raglan (DM/2021/01987), erection of a starter unit for b2/B8 uses at Magor Pill Farm (DM/2021/01489) and the change of use of an agricultural barn for the storage of cars at Clawdd Y Parc Farm, Llangybi (DM/2020/01076).

Although there is no specific target relating to this indicator, the Council is keen to monitor employment permissions for B uses in the County. The amount of employment land area permitted during this monitoring period is lower than that recorded in the last AMR (5.04ha) but is comparable with that achieved over most monitoring periods. The Council will continue to monitor this issue in future AMRs and work with colleagues in the Economy and Enterprise Section to actively promote economic opportunities in the County. In addition to the applications discussed here there are also permissions for change of uses to existing employment units that do not result in additional employment land but reflect the 'churn' that occurs within existing provision. For example, the change of use from B2 to B8 in a unit in Caldicot Works, Forge Row on the Severn Bridge Industrial Estate (DM/2021/01071).

While indicators 4 and 5 of this section relate to B use classes, it is useful to note that a number of permissions were granted for other employment generating uses (i.e. non-B uses) during the monitoring period, including some forms of rural enterprise/diversification schemes as detailed in the analysis for Policy S10.

In addition, as detailed in the analysis for Policy S11 (Visitor Economy), 14 applications were approved for tourism uses during the monitoring period, all of which were for tourist accommodation facilities ranging from hotel accommodation to holiday lets and glamping accommodation in various settlements across the County. These will provide a further boost to the visitor economy in Monmouthshire.

5. This indicator seeks to monitor the amount of employment floorspace for B use classes permitted by sector in Monmouthshire. B1 use class accounted for 0.5ha of floorspace approved, B2 use class accounted for 0.47ha and 0.95ha for B8 warehousing and storage use class. A further 1.676ha was approved on two planning applications involving a mixture of B use classes.

Turning more specifically to employment sectors, based on the UK Standard Industrial Classification (SIC) 2007, the employment permissions for 3.59ha of B use classes recorded over the monitoring period were in the following sectors\*\*:

- Wholesale and retail trade; repair of motor vehicles/motorcycles (0.42ha)
- Transport and storage; information and communication (0.87ha)

- Manufacturing (1.48ha)
- Real estate activities; Professional, scientific and technical activities; Administrative and support service activities (0.49ha)
- Agriculture, forestry & fishing (0.14ha)
- Construction (0.20ha)

While there are no specific targets relating to this indicator the Council monitors employment sectors coming forward in the County. This will assist in determining whether the Council's ambitions for growing specific key economic sectors are being achieved. A full review of the existing employment policies is being undertaken as part of the RLDP evidence base. It is recognised that the RLDP has a key role in supporting the Council's vision for economic prosperity and will be one of the main enablers in delivering Monmouthshire's priorities for sustainable economic growth which are set out in Monmouthshire 2040: Our Economic Growth and Ambition Statement.

6. One application was granted during the monitoring period that related to the loss of B uses on allocated or protected employment sites (SAE1 & SAE2) which involved 0.03ha of land.

The planning application related to an identified employment site allocated under policy SAE2p – Severn Bridge, Caldicot. The application related to a small-scale tap room and seating area to sample and sell the beer made on site and involved a change of use of approximately 176.5 sqm of the existing 353sqm B2 use class to A1 use class. Whilst a change in use of part of the unit has occurred it will be ancillary to the existing microbrewery on site and help maintain the viability of the existing business and create new jobs. While the indicator has been triggered by this application there are not considered to be any concerns due to the circumstances of the proposal and conformity with the LDP policy framework. It does not indicate any issue with the implementation of LDP policies and therefore no further investigation is required at present. The Council will continue to monitor such proposals in the future AMRs to determine the effectiveness of the policy framework relating to this matter.

7. The 2021 Welsh Government Commuting Statistics indicate that 61.3% of the County's residents work in the area. This is up on last year's figure of 56.9% and is also the highest level recorded since the monitoring of the Plan began. Despite this rise it remains at a lower level than the Welsh average of 70.7%. However, these figures should not be given too much weight as the data is based on a small sample survey and should therefore be treated with caution. It should be noted that responses for work location relate to the respondent's usual working pattern if coronavirus restrictions were not in place. Therefore, data for 2020 and 2021 do not reflect actual commuting patterns observed during the pandemic.

8. According to the 2021 Welsh Government Commuting Statistics, Monmouthshire has a net outward flow of 2,800 commuters – with 14,300 commuting into the area to work and 17,100 commuting out. There was significant in-commuting from Newport (3,000), Torfaen (1,900), Blaenau Gwent (1,400) and from outside Wales (2,900). The main areas for out-commuting were Bristol (4,600), Newport (2,600), Torfaen (2,400) and Cardiff (1,600) with a further 2,800 commuting to other areas in South West England and 1,200 to other areas outside Wales. The high proportion of commuting to/from areas outside of Wales clearly reflects Monmouthshire's location as a border authority.

There is an aspiration to reduce levels of both in-commuting and out-commuting recorded in Monmouthshire over the Plan period. While the level of out-commuting has remained relatively constant over the Plan period, the level of in-commuting has been variable, ranging from 14,300 during this monitoring period to a high of 24,600. However, these figures should not be given too much weight as the data is based on a small sample survey and should therefore be treated with caution.

While the Council can seek to encourage economic development and approve associated planning applications, travel to work patterns are influenced by wider factors such as family ties and property prices which are outside the control of the plan. The longer-term impacts of Covid-19 and shifts in working patterns with the increase in remote/home working, which is likely to become a longer-term trend, may also influence future commuting flows. Although as indicated above responses for work location relate to the respondent's usual working pattern if coronavirus restrictions were not in place. Therefore, data for 2020 and 2021 do not reflect actual commuting patterns observed during the pandemic.

**Recommendation**

1. No action required at present. Continue to monitor.
2. No action required at present. Continue to monitor.
3. Consider progress of employment sites as part of the Replacement LDP process.
4. No action required at present. Continue to monitor.
5. No action required at present. Continue to monitor.
6. No action required at present. Continue to monitor.
7. No action required at present. Continue to monitor.
8. No action required at present. Continue to monitor.

\*UK Standard Industrial Classification (SIC) 2007. Only includes those sectors for which planning permission has been granted over the monitoring period. For a full list of sectors refer to the SIC 2007.

\*\* Amended to include permission missed in monitoring period 2018 - 19 - DM/2018/00696 – Crick Road, Portskewett – Outline permission for 291 dwellings and 0.73ha Care Home. Care home approved on land allocated for B1 use (SAH2).

◆Data Source: Monmouthshire Employment Land Background Paper for the period April 2020-March 2021

◆◆Amended to clarify that these indicators monitor B use classes only.

◆◆◆Data Source: Welsh Government Commuting Statistics 2021 (release date 31<sup>st</sup> March 2022)

## Rural Enterprise

**Monitoring Aim/Outcome:** Encourage diversification of the rural economy

**Strategic Policy:** S10 Rural Enterprise

**LDP Objectives Supported:** 1, 3, 5, 7 & 14

**Other LDP Policies Supported:** RE1-RE6

### Contextual Changes

There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target <i>(Previous AMR Performance)</i>	Trigger for Further Investigation	Performance 1 April 2021 – 31 March 2022
1 Number of rural diversification and rural enterprise schemes* approved	No target  <i>(2014-15: 7)</i> <i>(2015-16: 10)</i> <i>(2016-17: 6)</i> <i>(2017-18: 8)</i> <i>(2018-19: 7)</i> <i>(2019-20: 15)</i> <i>(2020-21: 8)</i>	None	<b>7</b>

### Analysis

A total of seven applications relating to rural enterprise/diversification were approved during the monitoring period. Two of the applications were approved as rural enterprise schemes and five applications as rural diversification of existing farmsteads.

Of the rural enterprise schemes, an application for a new dog exercising classes/ business was granted at Llanellen, which involved change of use of paddock land for this purpose , and expansion granted for an existing aviation business at The Byre Abergavenny.

With regards to the rural diversification proposals these related to extensions/expansions of existing business which included: extension to caravan storage at Chapel Farm Undy; extension to units for B uses at Betholey House Farm, Pen y Cae Mawr, change of use to storage of vehicles at The Meads Farm Chepstow; and 2 new small starter B2/B8 units in conjunction with existing commercial units at Magor Pill Farm.

The number and consistency of rural diversification and rural enterprise schemes approved since the LDP's adoption (total 68 schemes) suggests that Strategic Policy S10 and the supporting development management policies are operating effectively. The Council will continue to monitor this indicator in future AMRs to determine the effectiveness of this policy framework in relation to the diversification of the rural economy.

**Recommendation**

1. No action is required at present. Continue to monitor.

\*Rural Enterprise Schemes as listed here do not constitute those that require special justification as defined by TAN6

## Visitor Economy

**Monitoring Aim/Outcome:** Encourage high quality sustainable tourism

**Strategic Policy:** S11 Visitor Economy

**LDP Objectives Supported:** 1, 3, 5 & 7

**Other LDP Policies Supported:** T1-T3, RE6, SAT1

### Contextual Changes

There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target <i>(Previous AMR Performance)</i>	Trigger for Further Investigation	Performance 1 April 2021 – 31 March 2022
1 Number of tourism schemes approved <i>(includes extensions/conversions and new build)</i>	No target  <i>(2014-15: 17)</i> <i>(2015-16: 10)</i> <i>(2016-17: 24)</i> <i>(2017-18: 16)</i> <i>(2018-19: 22)</i> <i>(2019-20: 17)</i> <i>(2020-21: 14)</i>	None	<b>17 tourism schemes approved</b>
2 Number of tourism facilities lost through development, change of use or demolition	Minimise the loss of tourism facilities  <i>(2014-15: 5)</i> <i>(2015-16: 0)</i> <i>(2016-17: 1)</i> <i>(2017-18: 3)</i> <i>(2018-19: 3)</i> <i>(2019- 20: 7)</i> <i>(2020-21: 1)</i>	Loss of any 1 tourism facility in any 1 year	<b>1 tourism facility lost</b>
<b>Analysis</b>			
1. 17 applications were approved for tourism uses during the monitoring period, all of which were for tourist accommodation facilities. These included: <ul style="list-style-type: none"> <li>• 10 applications for holiday lets (all conversions) in various settlements*.</li> </ul>			



- 7 new glamping accommodation sites: 1 pod at Penallt; 2 pods at Whitecastle; 8 Bell tents Rockfield Monmouth; 3 Shepherd huts and 3 yurts Barbadoes Hill Tintern; 3 pods at Llangottock Lingoed; and 2 pods at Gaer Fawr.

Collectively, these new holiday lets and glamping facilities provide 36 new units and 43 new bed spaces and will provide a further boost to the visitor accommodation available in Monmouthshire.

The number of tourist accommodation facilities approved over the monitoring period suggests that the relevant Plan policies and adopted 'Sustainable Tourism Accommodation SPG' are operating effectively allowing such developments to take place in Monmouthshire.

Comparison with previous AMRs demonstrates that the number of tourism schemes approved during the current monitoring period remains at a positive level. Cumulatively a total of 136 tourism schemes have been approved since the LDP's adoption in February 2014 which further indicates that the LDP tourism policy framework is operating effectively to enable such development in the County.

The Council will continue to monitor tourism applications closely in future AMRs to determine the effectiveness of the policy framework relating to the provision of tourist facilities.

2. One application has been permitted during the monitoring period relating to the loss of tourism facilities. This related to the demolition of a holiday let and erection of a domestic garage at Court Windermere Bettws Newydd.

While visitor accommodation has been lost within Monmouthshire over the monitoring period and subsequently the trigger for this indicator has been met, the loss is small in number and justified within the context and requirements of the LDP policy framework. The Council will continue to monitor such proposals in future AMRs to determine the effectiveness of the policy framework relating to this issue, given the importance of tourism to the County's economy.

No tourist facilities were refused planning permission during the current monitoring period.

**Recommendation**

1. No action is required at present. Continue to monitor.

2. No action is required at present. Continue to monitor.

\* Llantilio Crossenny, Llanowell, Llanybi, Llandenny, Devauden and Rockfield Monmouth

## Efficient Resource Use and Flood Risk

**Monitoring Aim/Outcome:** To ensure development accords with the principles of sustainable development

**Strategic Policy:** S12 Efficient Resource Use and Flood Risk

**LDP Objectives Supported:** 1, 8, 9, 10 & 11

**Other LDP Policies Supported:** SD1-SD4

### Contextual Changes

There are no contextual changes for this period.

Indicator	Target <i>(Previous AMR Performance)</i>	Trigger for Further Investigation	Performance 1 April 2021 – 31 March 2022
1. Proportion of development on brownfield land as a percentage of all development permitted <i>(including change of use of land) (excludes householder, conversions and agricultural buildings)</i>	Increase proportion of development on brownfield land  <i>(2014-15: 28% /17.3ha)</i> <i>(2015-2016: 16.8%/10.51ha)</i> <i>(2016-17: 51.2% /18.6ha)</i> <i>(2017-18: 40.18%/21.58ha)</i> <i>(2018-19: 12.7% / 3.7ha)</i> <i>(2019-20: 21% /5.3ha)</i> <i>(2020-21: 28.3% /6ha)</i>	No increase in proportion of development on brownfield land for 2 consecutive years	<b>3.5ha</b> <b>31.8%</b>
2. Amount of development (by TAN15 category) permitted in C1 and C2 floodplain areas not meeting all TAN15 tests	All developments to be compliant with TAN15 requirements  <i>(2014-15: 1)</i> <i>(2015-16: 0)</i> <i>(2016-17: 0)</i>	Planning permission is granted contrary to TAN15 requirements	<b>0 application granted in Zone C2</b>

	(2017-18: 1) (2018-19:1) (2019-20: 0)		
3. Number of new developments permitted that incorporate on-site renewable energy generation*	Increase in the number of new developments permitted incorporating renewable energy generation  (2014-15: 2) (2015-16: 9) (2016-17: 5) (2017-18: 1) (2018-19: 3) (2019-20: 6) (2020-21: 1)	No annual increase	5
4. Number of new developments completed that incorporate on-site renewable energy generation **	Increase in the number of new developments completed incorporating renewable energy generation  (2014-2015: N/A) (2015-2016: 4) (2016-2017: 3) (2017-2018:2) (2018-19: 1) (2019-20: 1) (2020-21:0)	No annual increase	1

**Analysis**

1. A total of 11 ha of development was permitted over the monitoring period, whereby 3.5 ha was located on brownfield sites. This equated to 31.8% of all development (excluding householder, conversions and agricultural buildings) as being permitted on brownfield land and therefore represents an increase in the proportion of development on brownfield land from the previous few monitoring periods.

A large proportion of brownfield land permitted at 54% /1.9ha within the current monitoring period was in association with employment development. This was mainly

in association with a large 10,000sqm new manufacturing unit within the existing Magor Brewery site (1.45ha) and also a new yeast propagation building (0.026ha). A further 0.43ha was associated with various small-scale extensions to existing employment units around the County. This included new office building at Chepstow garden centre (0.01ha), warehouse facility at Raglan garden centre (0.03ha), a new abattoir building at Raglan butchers (0.09ha) , a creche facility at Chepstow racecourse (0.0024ha) and various extensions to industrial units at Raglan, Servenside Industrial estate and Llantrissant (0.3ha).

Retail development accounted for 28%/ 0.97ha of brownfield land due to permission granted for the redevelopment of Magor Motors to a retail convenience unit (0.2ha); an extension to retail space at Usk Garden Centre (0.07ha) and an extension to Aldi foodstore and carpark Abergavenny (0.7ha).

Residential development accounted for 12.5%/ 0.44ha of brownfield land permitted. This was mainly in association with housing infill plots within existing residential curtilage/garden areas.

The remaining small proportion of development permitted on brownfield land related to community facilities: 1.7% /0.06ha was in association with extensions to Usk School, Chepstow Athletic Club and a bin store on Chepstow high street; and renewable energy 1.68%/0.1ha for solar car ports at Chepstow Comprehensive and Innovation House, Wales 1 Magor.

As with the previous two monitoring years: 2018-19 (12.7%/3.7ha) 2019-2020 (21%/5.3 ha) the proportion of development permitted on brownfield sites is similar, with a lower percentage of brownfield development compared to greenfield. This is reflective of the limited brownfield land available within the County for development. The proportion of development on brownfield land (31.8%) however, has increased from the previous two years (2018-19: 12.7% and 2019-2020: 21%) resulting in a positive green indicator.

The Council will continue to monitor this indicator to determine the effectiveness of the policy framework relating to this issue.

2. No applications have been granted planning permission contrary to TAN15 requirements in either Zone C1 or C2 floodplain over the monitoring period. Policy S12 is consequently functioning effectively in this respect. The Council will continue to monitor this indicator to determine the effectiveness of the policy framework relating to this issue.

3. Five applications have been approved incorporating on-site renewable energy. These included the two solar carports at Chepstow Comprehensive School and Innovation House, Wales 1, Magor; a 60sqm solar panel array at Crooked Billets, Devauden; solar panels and air source heat pumps for the 15 new houses (allocation SAH11(ii)) at Well Lane Devauden; and the installation of an air source heat pump at 17 Willow Drive, Monmouth. As with previous monitoring periods, a limited number of on-site

renewable energy schemes have been permitted, particularly ground-mounted solar panels, which is believed to be a result of the reduction of Government incentive schemes (Feed in Tariff). Moreover, it is considered that the majority of smaller scale renewable energy schemes fall under permitted development, and therefore are not picked up by the planning system.

It is important to note that collectively a total of 32 schemes incorporating on-site renewable energy have been permitted since the LDP's adoption in 2014 which suggests that Strategic Policy S12 and its supporting policies are operating effectively in respect of the provision of renewable energy.

The Council will nevertheless continue to monitor this issue closely in future AMRs to determine the effectiveness of the policy framework relating to efficient resource use.

4. One additional scheme incorporating on-site renewable energy generation has been recorded as completed within the current monitoring period. This related to the installation of roof mounted solar panels on at the newly built affordable homes at Dingestow. It should be noted that since the Plan's adoption in 2014, a total of 12 schemes incorporating on-site renewable energy have been completed and are operational. This further indicates that Strategic Policy S12 and its supporting policies are operating effectively in respect of the provision and completion of on-site renewable energy schemes.

The Council will nevertheless continue to monitor this issue closely in future AMRs to determine the effectiveness of the policy framework relating to efficient resource use.

#### **Recommendation**

1. No action is required at present. Continue to monitor.

2. No action is required at present. Continue to monitor.

3. No action is required at present. Continue to monitor.

4. No action is required at present. Continue to monitor.

\*Additional monitoring indicator included in the monitoring framework in order to identify schemes in 4.

\*\*Based on applications granted permission for on-site renewable energy since LDP adoption

## Landscape, Green Infrastructure and the Natural Environment

**Monitoring Aim/Outcome:** To protect open space and sites of acknowledged nature conservation and landscape importance

**Strategic Policy:** S13 Landscape, Green Infrastructure and the Natural Environment

**LDP Objectives Supported:** 8

**Other LDP Policies Supported:** LC1-LC6, GI1 & NE1

### Contextual Changes

There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target <i>(Previous AMR Performance)</i>	Trigger for Further Investigation	Performance 1 April 2021 – 31 March 2022
1. Amount of Greenfield land lost to development which is not allocated in the development plan <i>(includes new built development – housing, employment but excludes agricultural buildings)</i>	Minimise the loss of non-allocated Greenfield land  <i>(2014-15: 26 ha)</i> <i>(2015-16: 44.6 ha)</i> <i>(2016-17: 16.5 ha)</i> <i>(2017-18: 8.98ha)</i> <i>(2018-19: 9.71ha)</i> <i>(2019-20: 18.27ha)</i> <i>(2020-21: 11.7ha)</i>	Any loss of non-allocated Greenfield land in any 1 year	<b>7.5ha*</b>
2. Amount of public open space / playing fields lost to development which is not allocated in the development plan	Minimise the loss of open space / playing fields to development that is not allocated in the development plan  <i>(2014-15: 1.47ha)</i> <i>(2015-16: 0.76ha)</i> <i>(2016-17: 0)</i> <i>(2017-18: 0)</i> <i>(2018-19 :1.74ha)</i> <i>(2019-20: 0.1ha)</i> <i>(2020-21: 0)</i>	Any loss of open space due to development, not allocated in the development plan in any 1 year	<b>0 ha</b>

<p>3. Developments permitted / completed that are within internationally / nationally important nature conservation areas**</p>	<p>None adversely affected</p> <p><i>(2014-15: N/A)</i>  <i>(2015-16: 0)</i>  <i>(2016-17: 0)</i>  <i>(2017-18:0)</i>  <i>(2018-19:1)</i>  <i>(2019-20: 3)</i>  <i>(2020-21:1)</i></p>	<p>Recorded damage or fragmentation of designated sites / habitats</p>	<p><b>1</b></p>
<p>4. Developments granted permission that cause harm to the overall nature conservation value of locally designated sites</p>	<p>Minimise developments that would cause harm to the overall nature conservation value of locally designated sites</p> <p><i>(2014 -15: N/A)</i>  <i>(2015-16:1)</i>  <i>(2016-17: 1)</i>  <i>(2017-18:1)</i>  <i>(2018 – 19: 2)</i>  <i>(2019-20: 2)</i>  <i>(2020-21: 0)</i></p>	<p>1 or 2 developments result in overall harm for 2 consecutive years, or 3 or more developments result in harm in any 1 year</p>	<p><b>1</b></p>
<p>5. Number of new developments delivering habitat creation and restoration</p>	<p>Increase number of new developments delivering habitat creation / restoration</p> <p><i>(2014-15: 1)</i>  <i>(2015-16: 1)</i>  <i>(2016-17: 0)</i>  <i>(2017-18:2)</i>  <i>(2018-19 :1)</i>  <i>(2019-20 :0)</i>  <i>(2020-21:0)</i></p>	<p>None</p>	<p><b>0</b></p>
<p><b>Analysis</b></p>			
<p>1. Over the current monitoring period, 26 permissions were granted on greenfield land which is not allocated for development in the LDP, totalling 7.5ha. This is lower than the last two previous monitoring periods (which had the exceptions of unallocated sites policy prior to the revocation of TAN1) but similar in range to other monitoring periods (8.98ha in</p>			

2017-18; 9.71ha in 2018-19). The greenfield loss is not as high as earlier periods in the review (44.6ha in 2015-16 and 26ha in 2014-15) which was predominantly due to the increase in larger scale renewable energy (solar PV arrays) schemes permitted which were justified within the context and requirements of the LDP policy framework and national planning policy; there were no such renewable energy schemes permitted over the current monitoring period.

Employment and rural enterprise proposals accounted for the majority of non-allocated greenfield land permitted at 4.4ha. This included an HGV carpark expansion to Magor Brewery (1.8ha) justified on the basis that the site was always identified as there being a need for HGV expansion and the greenfield land was within the existing Brewery compound rather than an expansion into open countryside. Other employment permissions were a change of use of agricultural land to dog exercise area at Llanellen (1.8ha); a change of use of agricultural land to caravan storage Chapel Farm Undy (0.74ha); extension to an agricultural shed for aviation business at Hardwick Lane, Abergavenny (0.001ha); extension of B2/B8 starter units at Magor Pill Farm (0.01ha); and extensions on poultry units at Parklands Llandogo to upgrade staff facilities (0.08ha).

Tourism accommodation facilities accounted for a further 1.8ha of non-allocated greenfield land. These permissions included seven glamping accommodation sites. Fundamentally, the glamping accommodation facilities permitted are not permanently sited and relate to a reversible use of agricultural land.

The remaining 1.3ha of non-allocated greenfield land permitted over the monitoring period related to a range of uses. Seven permissions related to 'horsiculture activities' accounting for 0.37ha - including riding arenas and stables; community facilities with a carpark extension at Caldicot Castle (0.92ha) and replacement courts Chepstow Athletic club (0.04ha); an application for extension of residential curtilage at Trelawney, Llanvair Discoed (0.02); and a solar panel array (0.006ha) at Crooked Billets, Devauden. These were considered to be an appropriate use of land in rural areas and to comply with the LDP policy framework.

While the monitoring data indicates that there has been a loss of non-allocated greenfield land over the monitoring period due to the aforementioned permissions (albeit less than previous two monitoring periods) and subsequently the trigger for this indicator has been met, the loss is justified within the context and requirements of the LDP policy framework as evidenced above. It does not indicate any issue with the implementation of LDP policies and therefore no further investigation is required at present. The Council will continue to monitor such proposals in future AMRs to determine the effectiveness of the policy framework relating to this issue.

2. There were no applications permitted on areas of open space not allocated for development in the LDP over the monitoring period. This suggests that the indicator target and monitoring outcome to protect and minimise the loss of non-allocated open space has been achieved in 2020-21.



The Council will continue to monitor the amount of non-allocated public open space lost to development in future AMRs to determine the effectiveness of the policy framework relating to this issue.

3. One application was permitted within a nationally important nature conservation area during the monitoring period. This related to a permission for a garden room extension at Pond Cottage, Mynyddbach, which was within 100m, of the boundary of Mywngloddfa Mynyddbach Bat roost Special Scientific Interest (SSSI) and Wye Valley and Forest of Dean Special Area of Conservation (SAC).

The proposal was justified on the basis that Habitats Regulations Assessments (HRA) and detailed surveys had been undertaken to inform the assessment of impact of the scheme, which was fully mitigated against and conditioned on the consent granted.

This indicates that the policy framework relating to nature conservation is functioning effectively in protecting nature conservation sites of international /national importance. The Council will continue to monitor permission and completions within these nature conservation sites to determine the effectiveness of the policy framework relating to this matter.

4. One application was permitted that were considered to cause harm to the overall nature conservation value of locally designated sites. This related to a replacement dwelling at Springfield, Penperlleni and the increase in footprint of the proposed replacement dwelling resulting in new loss of SINC grassland.

The application was justified on the basis that the ecological appraisal submitted as part of the application indicated that the remainder of the SINC grassland at the site will be sensitively managed and it is proposed to plant 21 new trees on the site. A planning condition has used on the consent to secure the future management of the grassland. Given the overall size of the site, the mitigation planting proposed and subject to sensitive management of the remainder of the SINC and no further loss of grassland, it was considered that significant harm to the SINC will be avoided and therefore refusal of the application would not be reasonable in this case.

Overall, as only one application has been considered to cause harm to a locally designated site, this indicates that the policy framework relating to nature conservation is functioning effectively in protecting nature conservation sites of local importance. The Council will continue to monitor permission and completions within these nature conservation sites to determine the effectiveness of the policy framework relating to this matter.

5. There were no developments permitted to specifically deliver habitat creation and restoration during the monitoring period.

While no applications were granted to deliver habitat creation and restoration, it is likely that other schemes approved over the monitoring period will help restore habitat through improved Green Infrastructure networks. Although there is no trigger for further investigation in relation to this indicator, the Council will continue to monitor the issue in

future AMRs to determine the effectiveness of the policy framework in relation to Landscape, Green Infrastructure and the Natural Environment.

**Recommendation**

1. No action is required at present. Continue to monitor.

2. No action is required at present. Continue to monitor.

3. No action is required at present. Continue to monitor.

4. No action is required at present. Continue to monitor.

5. No action is required at present. Continue to monitor.

\*Additional 1.41ha greenfield land relates to allocated sites SAH11 (ii) (Devauden) and SAH11(i) (b) (Cross Ash Garage) and is therefore excluded.

\*\*Indicator has been amended in line with the SA indicator for ease of data collection

## Waste

**Monitoring Aim/Outcome:** Meet the County's contribution to local waste facilities

**Strategic Policy:** S14 Waste

**LDP Objectives Supported:** 12

**Other LDP Policies Supported:** W1-W6, SAW1

### Contextual Changes

There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target <i>(Previous AMR Performance)</i>	Trigger for Further Investigation	Performance 1 April 2012 – 31 March 2021
Amount of waste management capacity permitted expressed as a percentage of the total capacity required as identified in the Regional Waste Plan	<p>Aim to provide between 2.2 and 5.6 hectares for new in-building waste management facilities located on appropriate B2 employment sites over the plan period</p> <p><i>(2014-15: 1.49ha permitted; 32.5ha potential waste management sites)</i></p> <p><i>(2015-16: 0.24ha permitted; 26.86ha potential waste management sites)</i></p> <p><i>(2016-17: 0ha permitted; 26.26ha potential waste management sites)</i></p> <p><i>(2017-18: 0ha permitted; 26.26ha)</i></p>	Amount of B2 employment land falls below 5.6 ha	<p><b>Waste capacity permitted 0ha</b></p> <p><b>Identified potential waste management sites 26.26ha</b></p>

	<p><i>potential waste management sites)</i></p> <p><i>(2018-19: 0ha permitted; 26.26ha potential waste management sites)</i></p> <p><i>(2019-20: 0ha permitted; 26.26ha potential waste management sites)</i></p> <p><i>(2020-21: 0ha permitted; 26.26ha potential waste management sites)</i></p>		
<b>Analysis</b>			
<p>1. There were no permissions for waste management capacity during the monitoring period. Additionally, there was no take up of B2 land over the monitoring period, the amount of land available for potential waste management sites (i.e. B2 employment sites and existing waste disposal or management sites) remains the same as the previous AMR at 26.26ha. There remains, therefore, ample land available for potential waste management sites in relation to the maximum requirement of 5.6ha.</p>			
<b>Recommendation</b>			
<p>1. No action is required at present. Continue to monitor.</p>			

## Minerals

**Monitoring Aim/Outcome:** Safeguard areas of aggregates resources

**Strategic Policy:** S15 Minerals

**LDP Objectives Supported:** 12

**Other LDP Policies Supported:** M1-M3

### Contextual Changes

There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target <i>(Previous AMR Performance)</i>	Trigger for Further Investigation	Performance 1 April 2020 – 31 March 2021
1. Extent of primary land-won aggregates resources as a percentage of total capacity identified in the Regional Technical Statement	A minimum land bank of 10 years to be maintained  <i>(2014-15: 0)</i> <i>(2015-16: 0)</i> <i>(2016-17: 0)</i> <i>(2017-18: 0)</i> <i>(2018-19: 0)</i> <i>(2019-20: 0)</i>	10 years land bank is not maintained	<b>0</b>
2. Number of permitted permanent non-mineral developments on safeguarded sites that do not comply with Policy M2*	Minimise the number of permanent non-mineral developments on safeguarded sites  <i>(2014-15: 0)</i> <i>(2015-16: 0)</i> <i>(2016-17: 0)</i> <i>(2017-18: 0)</i> <i>(2018-19: 0)</i> <i>(2019-20: 0)</i> <i>(2020-21: 0)</i>	If any such developments are permitted	<b>0</b>
<b>Analysis</b>			
1. No land-based minerals extraction took place in the County during the monitoring period. There has, therefore, been no reduction in the land bank, which relies on the			

reserves available at Ifton Quarry. This quarry has not been worked for some time but has the benefit of an existing planning permission. Given the importance of maintaining a 10 year land bank the Council will continue to monitor this issue closely in future AMRs.

2. There were no permissions for permanent non-mineral developments on safeguarded sites that did not comply with Policy M2 during the monitoring period.

This indicates that Policy M2 is being implemented effectively and no further investigation is required at present. The Council will continue to monitor this issue in future AMRs to determine the effectiveness of the policy framework relating to this issue.

**Recommendation**

1. No action is required at present. Continue to monitor.

2. No action is required at present. Continue to monitor.

\*Indicator amended to include reference to Policy M2 for clarification

## Transport

<b>Monitoring Aim/Outcome:</b>	To increase sustainable forms of transport and ensure that all development meets sustainable transport planning principles
<b>Strategic Policy:</b>	S16 Transport
<b>LDP Objectives Supported:</b>	1-6, 9 & 13
<b>Other LDP Policies Supported:</b>	MV1-MV10

### Contextual Changes

As previously reported, the decision was announced in June 2019 that the M4 Relief Road would not proceed, following the conclusion of a public inquiry into the project and the publication of the Inspector’s Report. The route within Monmouthshire is currently safeguarded in the Adopted LDP. In June 2021 the Deputy Minister for Climate Change released a written statement to the effect that the TR111 route corridor protection for the M4 relief road was to be removed. This decision relieves local authorities of the need to consult Welsh Government on proposed planning developments in the area. Further details and the implications for Monmouthshire are given in the analysis below.

Indicator	Target <i>(Previous AMR Performance)</i>	Trigger for Further Investigation	Performance 1 April 2021 – 31 March 2022
1. Number of improvements to transport secured through S106 agreements	No target  <i>(2014-15: 3)</i> <i>(2015-16: 3)</i> <i>(2016-17: 2)</i> <i>(2017-18: 4)</i> <i>(2018-19: 3)</i> <i>(2019-20: 1)</i> <i>(2020-21: 0)</i>	None	<b>0 S106 agreement delivering transport improvements</b>
2. Progression of Local Transport Plan* (LTP) schemes detailed in Policy MV10 in accordance with the LTP delivery timetable	LTP proposals implemented in accordance with the LTP delivery timetable	LTP proposals detailed in Policy MV10 are not being implemented in accordance with the LTP delivery timetable	<b>Progression detailed in analysis below</b>

## Analysis

During the current monitoring period there were no transport and pedestrian improvements secured through a S106 agreement, which is reflective of the low number of planning applications, particularly for major development, approved during the monitoring period. While there is no specific target relating to this indicator, the Council is interested in monitoring the amount of transport improvements secured through S106 agreements. As may be expected, given that progress with numerous allocated LDP sites was slower than anticipated, there were a relatively small number of transport improvements secured via S106 agreements in relation to these sites in the early part of the Plan period. However, in total, in the 8 years to date, of the 16 S106 agreements which have resulted in transport improvements 9 have related to allocated sites. The Council will continue to monitor this issue in future AMRs.

2. The progress of LTP\* schemes detailed in Policy MV10 in accordance with the LTP timetable is as follows:

### **Welsh Government Road Schemes:**

**M4 corridor enhancement scheme Magor to Castleton:** Following the conclusion of a public inquiry into the project and the publication of the Inspector's Report, the Welsh Government announced the decision in June 2019 that the M4 Relief Road would not proceed. The route within Monmouthshire is currently safeguarded in the Adopted LDP. In June 2021 the Deputy Minister for Climate Change released a written statement to the effect that the TR111 route corridor protection for the M4 relief road was to be removed. This decision relieves local authorities of the need to consult Welsh Government on proposed planning developments in the area.

**Rail Schemes:** Following the decision to not progress the M4 corridor enhancement scheme a Written Statement from the Welsh Minister for Economy and Infrastructure, stated that the Welsh Government had appointed an expert Commission (the South East Wales Transport Commission) to "consider the problems, opportunities, challenges and objectives for tackling congestion on the M4 in south east Wales and make recommendations to the Welsh Government on a suite of alternative solutions". In November 2020, the commission reported making 58 recommendations. The Burns Delivery Board was created in Spring 2021 to bring together Welsh Government, Transport for Wales and local authorities, including Monmouthshire County Council, to deliver these. One of the key recommendations was for better local rail services and new stations between Cardiff and Severn Tunnel Junction. The TfW Burns Team 2021 Annual Report was published in January 2022 reporting on progress on this. Of most note for Monmouthshire the Unit submitted a £2.7m bid in May 2021 to the development fund, to progress the technical studies needed for rail timetabling, station feasibility and an outline business case. At the time of the publication of the report transfer of funding from UK Government to TfW was in progress for the rail technical studies.

Although not specifically identified in Policy MV10, the LTP identifies a number of additional transport schemes in Monmouthshire which are programmed for delivery over the 2015-



2020 period and are also being monitored through the AMR process. One such scheme is the Magor and Undy new walkway rail station. Following the publication of the South East Wales Transport Commission Report (Burns Report), Transport for Wales is now progressing delivery of this project.

#### **Monmouthshire County Council Road Schemes:**

**B4245 Magor/Undy By-pass:** (length to be safeguarded indicated on Proposals Map). See above. The M4 corridor enhancement project would have provided a by-pass for Magor/Undy. The South East Wales Transport Commission report proposes investigation of a new connection between the A48, the B4245 and Severn Tunnel Junction station to the east of Rogiet (see below) which, depending on the exact design, may provide a by-pass on an alternative alignment. A WelTAG study has been commissioned and is expected to report later in 2022.

**B4245/M48 Link Road\*\* and B4245/Severn Tunnel Junction Link Road:** These projects were seen as prerequisites for a large extension at Severn Tunnel Junction station (north side). The then proposed car park extension turned out to be unaffordable and undeliverable. Following the rebuilding of the road overbridge at Severn Tunnel Junction station as part of the rail electrification works, plans have been prepared for a smaller car park extension on the south side of Severn Tunnel Junction which can be delivered without these road schemes, and these are expected to be delivered during 2022/23.

The South East Wales Transport Commission report proposes investigation of a connection between the A48, the B4245 and Severn Tunnel Junction station, a study has been commissioned and is expected to report later in 2022.

**A48 Chepstow Outer By-pass:** The Chepstow Transport WelTAG stage 2 study, which was jointly sponsored by the Welsh Government, Monmouthshire County Council and Gloucestershire County Council concluded in March 2021. It recommends the construction of a traffic relief road for Chepstow to allow traffic to avoid Chepstow town centre and reconstruct the current A48 to improve active travel and buses in and around Chepstow town centre. MCC is currently investigating funding options for a WelTAG stage 3 (full business case / detailed design) study.

**A472 Usk By-pass:** No progress

#### **Public Transport Improvement Schemes:**

**Abergavenny Rail Station Interchange\*\*:** Outline planning for the proposed new accessible footbridge has confirmed feasibility. Detailed design is planned for 2021/22 with delivery expected in 2022/23. Monmouthshire County Council has engaged consultants to review plans for the bus-rail interchange, the proposed car park extension and improved active travel access. This study will report in 2022/23.

**Chepstow Rail Station and Bus Station Interchange\*\*:** Proposals for Chepstow rail station improvements were included in the Chepstow Transport study that reported in March 2021 (see above). A WelTAG stage 3 (full business case / detailed design) study has commenced, public consultation was undertaken in July 2022, and the study is expected to report later in 2022.

**Severn Tunnel Junction (STJ) Interchange\*\*:** The proposed upgrade at Severn Tunnel Junction is part of the Welsh Government/Cardiff Capital Region joint 'Metro Plus' programme. A 175-space extension to the car park was fully designed in 2020/21 and is expected to be delivered in 2022/23.

**Monmouth coach stop:** No further work

**Monmouth Park and Ride\*\*:** No further work.

**Chepstow Park and Ride\*\*:** No further work.

**Monmouth bus station improvement:** Shelter upgrades will be delivered later in 2022.

**Abergavenny bus station improvement:** There was some work to reconfigure the bus station, to improve shelter and to enable social distancing by waiting passengers. The medium-long term solution is to move the bus station to the rail station.

### **Walking and Cycling Schemes**

**Monmouth Links Connect 2\*\*:** The remaining Monmouth Links Connect 2 programme has been superseded by the Monmouth Active Travel Integrated Network Maps. Further development work has been undertaken on the proposed Monmouth Wye Active Travel Crossing and the Kings Fee link.

**Abergavenny walking and cycling network:** The Abergavenny town centre public realm scheme has been completed. Further studies on the active travel routes across the castle meadows and towards the station and south east Abergavenny have been initiated.

**Llanfoist pedestrian and cycling river crossing:** - Planning permission was granted in 2018/19, however National Resources Wales (NRW) refused to grant a Flood Risk Activity Permit (FRAP). MCC's appeal was turned down. MCC is currently looking at options to reduce the flooding risk so that NRW will be able to grant a FRAP.

**Severn Tunnel Junction pedestrian and cycling access:** See above

Further progress on the LTP schemes will be reported in future AMRs.

The Council will continue to monitor the progress of the aforementioned schemes in future AMRs to determine whether they are being implemented in accordance with the LTP delivery timetable.

<b>Recommendation</b>
1. No action is required at present. Continue to monitor.
2. No action is required at present. Continue to monitor.

\*the 2015 Monmouthshire Local Transport Plan (LTP) has replaced the 2010 South East Wales Regional Transport Plan (RTP). The transport schemes identified in the RTP have been carried forward to the LTP – accordingly the indicator wording has been amended to reflect this.

\*\* Indicates those schemes identified in the South East Wales Transport Alliance Regional Transport Plan.

## Place Making and Design

**Monitoring Aim/Outcome:** To protect sites and buildings of acknowledged built and historic interest

**Strategic Policy:** S17 Place Making and Design

**LDP Objectives Supported:** 14 & 15

**Other LDP Policies Supported:** DES1-4, HE1-4

### Contextual Changes

The Placemaking Wales Charter was launched by the Minister at the RTPi Cymru Welsh Planner Conference on 23rd September 2020. Following the launch of the Charter Monmouthshire County Council signed up to the Charter on the 15<sup>th</sup> September 2021 confirming its commitment to deliver and maintain high quality places that enhance the health and well-being of residents and future generations.

Indicator	Target <i>(Previous AMR Performance)</i>	Trigger for Further Investigation	Performance 1 April 2021 – 31 March 2022
1.Number of listed buildings and historic sites	No applications to result in the loss of listed buildings	There is a loss of more than 1 listed building each year for 3 or more consecutive years*	<b>Refer to analysis (1) below</b>
2. Number of conservation areas with up-to-date character appraisal	100% of identified draft Conservation Area Appraisals by 2016**	Target is not met	<b>19 Complete (100%) Refer to analysis (2) below</b>
3.Sample of planning applications granted for developments with potential for significant design / environmental implications	All development to contribute to the creation of a high-quality well-designed environment	Monitoring results are negative	<b>Refer to analysis (3) below</b>
4.Sample of planning applications granted for developments with the	No adverse impact on the historic environment	Any development adversely affects	<b>Refer to analysis (4) below</b>

potential for significant impact on buildings of historic / archaeological interest, scheduled ancient monuments and conservation areas		the historic environment	
5.Occasions when development permitted would have an adverse impact on a listed building, conservation area, site of archaeological significance, or historic landscape park or their setting	Development proposals do not adversely impact upon buildings and areas of built or historic interest and their setting  <i>(2014-15: none)</i> <i>(2015-16: none)</i> <i>(2016-17: none)</i> <i>(2017-18: none)</i> <i>(2018-19: none)</i> <i>(2019-20: one)</i> <i>(2020-21: none)</i>	1 or more planning consents are issued where there are outstanding objections from the Council's Conservation Team, Cadw or GGAT	<b>None recorded</b>

### Analysis

#### 1.Number of listed buildings and historic sites:

	<b>2011 Base date</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>
<b>Listed Buildings</b>	2146	2153	2153	2152	2151	2149	2148	2149
<b>Scheduled Ancient Monuments</b>	169	164	164	164	164	164	164	164
<b>Historic Parks and Gardens</b>	44	45	45	45	45	45	45	45
<b>Archaeologically Sensitive Areas</b>	10	10	10	10	10	10	10	10
<b>Landscapes of Outstanding Historic Interest</b>	3	3	3	3	3	3	3	3

No Listed Buildings were delisted over the monitoring period and there was one new listing at Luburnum Cottage Abergavenny taking the total number across Monmouthshire back up to 2,149. There were no changes in relation to Scheduled Ancient Monuments, Historic Parks and Gardens, Archaeologically Sensitive Areas or Landscapes of Outstanding Historic Interest over the monitoring period.

The indicator has therefore been satisfied as there has not been a net loss of more than 1 listed building each year for 3 or more consecutive years. Since monitoring began in 2015 there has been a cumulative loss of 4 listed buildings. Nevertheless, this is not considered to be significant and the Heritage Team has not raised concerns in relation to these losses. There have also been new listings to properties within the past 3 years. The Council will

continue to monitor the number of listed buildings and historic sites to determine the effectiveness of the policy framework relating to this issue.

2. Like the previous monitoring period, no further Conservation Area Appraisals have been adopted as Supplementary Planning Guidance during the monitoring period. A total of 19 Conservation Area Appraisals have however been adopted and the target of 100% of identified draft Conservation Area Appraisals by 2016 was therefore met in the 2015 - 2016 monitoring period. The remaining 12 Conservation Area Appraisals will be progressed in the future subject to available resources.

3. The Members of Planning Committee design tour in March 2022 considered 6 applications that were approved under the LDP. The sites all related to residential schemes: Two strategic sites allocated in the LDP: 250 dwellings at Deri Farm Abergavenny; and 345 dwellings at former Fairfield Mabey, Chepstow; an allocated 60/40 Main Village site at Dingestow; and an allocated site Cwrt Burrium in the Rural Secondary Settlement of Usk. Two windfall residential sites were also visited at: former Sudbrook Shipyard, Sudbrook, and land at Walnut Tree Cottage Llangybi, which had gained consent/constructed in recent years.

Members reacted positively to the majority of the residential developments and had no major concerns. They were pleased with the benefits of the comprehensive Green Infrastructure (GI) that was beginning to take place in the Deri Farm site – which is one of the Council’s first major housing sites to fully embrace the GI policy. This site was able to demonstrate to Members the benefits of the GI policy and its associated detailed SPG, which guides the delivery, implementation and management of GI within residential development schemes.

Members were also impressed with the placemaking emerging at Mabey Bridge with a new public square created outside Brunel House, a landmark listed building, and the development of different neighbourhoods on this larger housing development each with their own distinctive architectural character.

The ‘60/40’ affordable housing site at Dingestow was received well, where the build quality and evidence of renewable energy measures for the affordable units was praised. The surrounding landscaping and well-chosen boundary enclosures in the open street scenes, such as transparent railings with green landscaping helped create a pleasant environment for those living within the housing and surrounding vicinities.

Although disappointment that the LDP allocation of 20 units (and 7 affordable homes) at Cwrt Burrium Usk could not be achieved due to flood risk constraint, the seven houses ( 2 affordable) constructed were considered visually pleasing with high quality materials. While these were commented upon as large properties they were considered to be in-keeping with the surrounding built context and the 2 affordable units were considered high quality and not differing from the market dwellings in material quality.

Members were less impressed with the design of elements of the residential scheme at Llangybi where, in particular, the garages for the market housing units were considered to be poorly sited and over large, given the size of each plot.

The houses at Sudbrook Shipyard generated mixed views, with some concerns in relation to the proximity and outlook of some of the properties onto the large existing electricity sub-station. However, the energy efficient design, including solar panels on market houses was commended.

The design tour has demonstrated that there are currently some very good examples being developed that demonstrate innovative and energy efficient residential development that provide a sense of place, and that the Council's GI SPG vision and its current implementation within sites is beginning to take shape and enhance the landscaping and setting of developments.

The Council will continue to monitor the design and materials of new development to determine the effectiveness of the policy framework relating to design.

4. No applications have been identified by the Council's Heritage Team, which have potential for significant impact upon Monmouthshire's historic environment.

The trigger has not been initiated and it is considered the current LDP policy 'development in Conservation Areas' policy (HE1) is working effectively. However, we will continue to closely monitor development within sensitive historic areas.

5. No applications have been identified by the Council's Heritage Team over the monitoring period with an outstanding objection from the Council's Heritage Team, Cadw or GGAT.

The trigger has not been initiated and it is considered the current the LDP policies that protect the historic environment are functioning effectively. The Council will continue to monitor the number of listed buildings and historic sites to determine the effectiveness of the policy framework relating to this issue.

**Recommendation**

1. No action required at present. Continue to monitor.

2. No action required at present. Continue to monitor.

3. No action required at present. Continue to monitor.

4. No action required at present. Continue to monitor.

5. No action required at present. Continue to monitor.

\*Trigger wording amended to clarify that the trigger relates to a loss of more than 1 listed building each year for 3 or more consecutive years.

\*\*Target wording amended for clarification, relates to the 18 draft Conservation Area Appraisals that were in progress during the lead up to the adoption of the LDP.

### 6 Sustainability Appraisal Monitoring Framework

- 6.1 The Sustainability Appraisal monitoring expands the assessment of the performance of the LDP against the Sustainability Appraisal (SA) Monitoring Objectives. The data collated includes a mix of qualitative and quantitative data with a commentary in the latter column to describe the progress and provide a recommendation. Not all of the indicators originally listed in the SA monitoring framework are included, information is only provided for those indicators where data is available.
- 6.2 There is an overlap with some LDP indicators, these indicators are marked in bold and coloured green for clarity. This is intended to provide an indication of how the LDP monitoring and SA monitoring are interlinked. A brief commentary is provided although reference should be made to Section 5 LDP Policy Analysis for additional information.
- 6.3 There are a number of SA indicators where information is not published annually, for example those based on the Census. The purpose of the monitoring framework is to review changes on an annual basis, as a consequence these are not necessarily going to be useful moving forward in terms of future monitoring. They have been retained in order to provide a baseline, and while work has been undertaken to try to find alternative sources of information, none appear to be available.
- 6.4 The traffic light rating system used for the LDP Monitoring Indicators has not been taken forward for use with the SA Monitoring. Many of the SA objectives are aspirational. In addition, the LDP alone would not be the only factor that would need to be considered in achieving their aims. The SA Monitoring does not include targets as such, unlike the LDP monitoring, it would therefore prove difficult to interpret the commentary into a traffic light rating. The symbols associated with certain indicators identify the desired direction for change. The symbols refer to; (+) increase or more; (-) decrease, less or none and (nc) no change. As this relates to the eighth SA monitoring period since the adoption of the LDP, it is compared to the previous seven AMRs and highlights emerging trends. Accordingly, the direction of change is referred to as relevant in the commentary section. This is utilised to assess the LDP's progression towards meeting the identified sustainable development indicators.



6.5 Information contained in the SA monitoring framework in the main relates to a wide range of data produced internally, by various departments of the Council and externally from other organisations. Where data has been sourced externally, a footnote is provided to ensure the data source is easily identifiable.

### Sustainability Appraisal Monitoring

Headline	Objective	SA Indicators	Data	Commentary
Accessibility	Allow equitable access for all to jobs, services and facilities they need, in a way that reduces reliance on car use	<p><b>1.</b> Average travel to work distance (-)</p> <p><b>2.</b> Proportion of people travelling to work by public transport, walking or cycling (+)</p> <p><b>3. Proportion of the workforce who remain in their own area for work, according to travel to work statistics (+)</b></p> <p><b>4. Proportion of housing development completed within or adjoining the main towns, Severnside Settlements, Rural Secondary Settlements (RSS) and rural general, as identified in Policy S1.</b></p>	<p><b>1.</b> 21.9km**</p> <p><b>2.</b> 16.7%**</p> <p><b>3.</b> 61.2%*****</p> <p><b>4.</b> Main Towns: 43.5%, Severnside: 46%, RSS: 5.3%, Rural General: 5.2%</p> <p><b>5.</b> 0%</p>	<p><b>1 – 2.</b> The 2011 Census recorded 16.7% of people travelling to work by public transport, walking or cycling. The average travel to work distance was 21.9km. Whilst the 2021 Census has now taken place, data in relation to travel to work has yet to be released. A meaningful comparison will be made at the time of the next AMR, when travel to work data from the 2021 Census has been released.</p> <p><b>3.</b> The Welsh Government travel to work statistics identify 61.2% of the Monmouthshire workforce remaining in their own area for work. This figure has increased by 4.3% since the previous AMR. However, these figures should not be given too much weight as the data is based on a small sample survey and should therefore be treated with caution.</p> <p><b>4.</b> The Main Towns provided the largest proportion of dwelling completions over the monitoring period equating to 43.5% (157) of the overall figure (361). The Severnside Settlements accounted for a total of 46% (166) of completions, an increase compared with the previous monitoring period (32.7%). The Rural Secondary Settlements accounted for 5.3% (19) of completions and the Rural General area, which incorporates figures from the Main Villages, accounted for 5.2% (19). The Policy Analysis in Section 5 relating to the Spatial Strategy provides full analysis of this indicator.</p>

Headline	Objective	SA Indicators	Data	Commentary
		5. Percentage of major* new development within 10 minute walk from a frequent and regular bus service (+)(includes residential, employment, retail and leisure permissions only)'		5. 0 major residential schemes approved over the monitoring period. This reflects a decrease in planning permissions due to the majority of allocated sites already having planning permission and the LDP reaching the latter stages of the Plan period. The decrease in planning permissions also reflects the restriction due to phosphates which is considered to be a contributing factor.  <b>Continue to monitor SA objective.</b>
Housing Page 186	Provide a range of types and tenures of housing that allows people to meet their housing needs	1. People in housing need (-) 2. <b>Affordable home completions (+)</b> 3. <b>General market home completions</b> 4. <b>Annual level of housing completions monitored against the Average Annual Requirement (AAR)*****</b> 5. <b>Total cumulative completions monitored against the cumulative requirement (Cumulative AAR)*****</b>	1. 468 per year over 5 Year Period (2020 base date) 2. 35 3. 326 4. -89 units 5. -1,500 at end of 10 years of monitoring recorded in the 2020/21 AMR. A further 361 completions recorded during the 2021/22 monitoring period. 6. 0	1. The Local Housing Market Assessment (LHMA) 2020-2025 uses a methodology prescribed by Welsh Government to calculate housing need which is different to that used to provide evidence for the LDP. The results, therefore, are not directly comparable. The 468 figure should not be taken as a target for the delivery of affordable housing as new build homes are not the only supply of affordable homes in Monmouthshire. Acquisitions of existing properties offer a reliable source of increasing the provision affordable homes. In addition, the Council is working with private landlords to increase the supply of private rented homes and to bring empty homes back into use. Other initiatives include the government's Help to Buy scheme. The social rent need identified in the LHMA is 319.61 per year, Low Cost Home Ownership is 115.20 per year and Intermediate Rent is 33 per year. Low cost homeownership need will be addressed through a variety of mechanisms including S106 contributions on new build housing schemes negotiated by the Council as well as LCHO resales. As stated above this figure should not be taken as an annual target, it does however provide an indication of current projected need for affordable

Headline	Objective	SA Indicators	Data	Commentary
		<p><b>6. Density of housing permitted on allocated sites (SAH1 – SAH10)</b></p> <p><b>7. The number of dwellings permitted and completed on strategic sites as identified in policy S3.</b></p> <p><b>8. Number of affordable dwellings built through rural exception schemes</b></p> <p><b>9. Number of dwellings provided in accordance with the settlement hierarchy set out in Policy S2</b></p>	<p>7. 0 dwellings permitted, 229 completed</p> <p>8. 0</p> <p>9. See table in commentary section</p>	<p>housing within the County and sets a benchmark the Council can work towards.</p> <p><b>2 – 3.</b> There were 35 affordable home completions and 326 market dwelling completions over the monitoring period.</p> <p><b>4 - 5</b> Changes to monitoring of housing delivery were announced by the Welsh Assembly Government in March 2020. The changes removed the five-year housing land supply policy and replaced it with a policy statement making it explicit that the housing trajectory, as set out in the adopted LDP and agreed with the Housing Stakeholder Group, would be the basis for monitoring the delivery of development plan housing requirements as part of LDP Annual Monitoring Reports. Two indicators were included for the first time in the 2019-20 AMR, these replaced the previous indicator which measured the five-year housing land supply. The first of these indicators measures the annual level of housing completions monitored against the Average Annual Requirement (AAR). In 2021-2022 this figure was -89 dwellings (-19.8%) if compared against the LDP requirement of 450 dwellings per year. The second of these indicators measures the total cumulative completions monitored against the cumulative requirement (Cumulative AAR). Ten years' worth of housing completions was recorded in 2020-21 AMR period delivering a shortfall of -1,500 units against the Plan requirement of 4,500 units. A further 361 dwellings were completed in the current monitoring period. The Policy Analysis in Section 5 relating to the Housing Provision provides a full analysis of the new indicators.</p>

Headline	Objective	SA Indicators	Data	Commentary
				<p><b>6.</b> 0 residential schemes approved over the monitoring period on allocated housing sites. This reflects that the majority of allocated sites already having planning permission and the LDP reaching the latter stages of the Plan period.</p> <p><b>7.</b> There has been an increase in the number of completions on strategic sites over the monitoring period (229 completions 2021-2022) compared to the previous AMR (183 completions 2020 – 2021). The majority of strategic site completions (88) relate to the SAH3 Fairfield Mabey site. Other completions were as follows; SAH1 Deri Farm (51), SAH5 Rockfield Farm, Undy (49) and SAH7 Sudbrook Paper Mill (41),</p> <p><b>8.</b> No rural exception schemes were permitted or completed over this monitoring period. While there is no target in relation to the number of completions for rural exception schemes the Council will continue to monitor this issue closely in future AMRs to determine the effectiveness of the policy framework relating to rural exception schemes.</p> <p><b>9.</b> The table below provides a breakdown of the 361 dwelling completions in comparison with the settlement hierarchy set out in Policy S2. The Policy Analysis in Section 5 relating to the Spatial Strategy provides a full analysis of this indicator.</p>

Headline	Objective	SA Indicators	Data	Commentary		
					<b>2021 – 2022</b>	<b>Target</b>
				<b>Main Towns</b>	43.5%	41%
				<b>Sevenside</b>	46%	33%
				<b>Rural Secondary</b>	5.3%	10%
				<b>Rural General</b>	5.2%	16%
				<b>Continue to monitor SA objective.</b>		
Health, safety & security	To improve health and wellbeing by encouraging more healthy lifestyles, and protecting people from risk that may impact on their health and/or safety	1. Amount of open space created as a result of planning permissions	1. 0 ha	1. 0 ha of additional open space was approved as a result of planning permissions over the monitoring period. This data is collected from the Development Management and excludes any outline applications or applications awaiting the signing of S106 agreements. This is consistent with the previous monitoring period but a substantial decrease on the 2019/20 monitoring period (12.7ha).		
				<b>Continue to monitor SA objective.</b>		
Community	To support and promote the distinctive character of local communities and community cohesion	<b>1. Number of community and recreation facilities granted planning permission (+)</b> <b>2. Amount of community and recreation facilities lost to other uses.</b> <b>3. Amount of public open space / playing</b>	<b>1. 13</b> <b>2. 1</b> <b>3. 0ha</b>	1. Thirteen planning applications were granted planning permission for community and recreation uses over the monitoring period. Eight of the applications related to community uses and five to recreation. Permissions for community uses included a new pre-school educational facility at Whitecastle, Monmouth; an extension to Usk Primary School; a change of use from A3 to nursery at Unit 103, Wales One, Magor; a change of use from C3 to a children's care home at Dobson's Farm, Abergavenny; a change of use from dwelling to dentist, Lidstone, Abergavenny; a carpark extension to Caldicot Castle Country Park; and a new green bin store in Chepstow High Street. Permissions for recreational uses included a change of use from B8 to Café at Goytre;		

Headline	Objective	SA Indicators	Data	Commentary
		<p>fields lost to development which is not allocated in the development plan</p>		<p>new 100 and 50 seater stands at Chepstow AFC; enhancements to Chepstow Athletic club, Abergavenny Cricket Club and Linda Vista Gardens, Abergavenny. This represents an increase in the number of community / recreation facilities granted (2018-2019; 8, 2019-2020; 12, 2020-2021; 3) and therefore meets the desired direction of change. For further detail refer to the Policy Analysis in Section 5 relating to Community and Recreation Facilities.</p> <p><b>2.</b> There has been a loss of one community facility over the period monitored. The loss was in relation to the conversion of Kingdom Hall in Raglan a dis-used meeting hall which was granted permission for conversion to residential use. While the data collected indicates that the community facility was lost to alternative uses over the monitoring period and subsequently the trigger for this indicator has been met, the loss is justified within the context and requirements of the LDP policy framework. For further detail refer to the Policy Analysis in Section 5 relating to Community and Recreation Facilities.</p> <p><b>3.</b> There were no applications permitted on areas of open space not allocated for development in the LDP over the monitoring period. This suggests that the indicator target and monitoring outcome to protect and minimise the loss of non-allocated open space has been achieved in 2020-21.</p> <p><b>Continue to monitor SA objective.</b></p>
Biodiversity	Protect, value, manage and enhance healthy	<p><b>1. Developments permitted that cause harm to the overall</b></p>	<p><b>1.</b> 1 application <b>2.</b> 0</p>	<p><b>1.</b> There was one application granted over the monitoring period that will cause harm to the overall Nature Conservation value of locally designated sites, in relation to Springfield SINC. The application was</p>

Headline	Objective	SA Indicators	Data	Commentary
	functioning ecosystems, habitats and natural species diversity, valuing nature conservation interests wherever they are found	<p><b>Nature Conservation value of locally designated sites (-)</b></p> <p><b>2. Number of new developments delivering habitat creation and restoration</b></p> <p><b>3. Hectares of ancient woodland lost to development (-)</b></p> <p><b>4. Development permitted within internationally / nationally important nature conservation areas.</b></p>	<p><b>3.</b> No data available for the 2021-2022 monitoring period.</p> <p><b>4.</b> 1</p>	<p>justified on the basis that the ecological appraisal submitted as part of the application indicated that the remainder of the SINC grassland at the site will be sensitively managed and it is proposed to plant 21 new trees on the site. For further detail refer to the Policy Analysis in Section 5 relating to Landscape, Green Infrastructure and Natural Environment.</p> <p><b>2.</b> There were no developments permitted to specifically deliver habitat creation and restoration during the monitoring period. While no applications were granted to deliver habitat creation and restoration, it is likely that other schemes approved over the monitoring period will help restore habitat through improved Green Infrastructure networks.</p> <p><b>3.</b> No data available for the monitoring period. This indicator will continue to be monitored closely in the next AMR.</p> <p><b>4.</b> There was 1 development permitted within internationally / nationally important nature conservation areas during the monitoring period, which related to a permission for a garden room extension at Pond Cottage, Mynyddbach. The proposal was justified on the basis that Habitats Regulations Assessments (HRA) and detailed surveys had been undertaken to inform the assessment of impact of the scheme, which was fully mitigated against and conditioned on the consent granted. For further detail refer to the Policy Analysis in Section 5 relating to Landscape, Green Infrastructure and Natural Environment.</p> <p><b>Continue to monitor SA objective.</b></p>

Headline	Objective	SA Indicators	Data	Commentary
Landscape	To maintain and enhance the quality and character of the landscape, including its contribution to the setting and character of settlements	1. Number of trees protected by TPOs lost to development (-)	1. No data available for the 2021-2022 monitoring period.	1. No data available for the 2021-2022 monitoring period. This indicator will continue to be monitored closely in the next AMR.  <b>Continue to monitor SA objective.</b>
Built Environment	To maintain and enhance the built environment for both its visual character and distinctiveness and to create a better living environment.	1. <b>Planning permission granted for renewable and low carbon energy development.</b> 2. <b>Number of new developments completed that incorporate on-site renewable energy generation. (i.e. permissions following LDP adoption that have been completed over the 2021-2022 monitoring period)</b> 3. <b>Sample of planning applications granted for developments with</b>	1. 5 2. 1 3. 6	1. Five applications were approved for on-site renewable energy generation during the monitoring period. These schemes included; 2 solar car ports at Chepstow Comprehensive School and the Wales One site in Magor; a solar panel array at Devauden; solar panels and heat pumps for the 15 dwellings at the allocated site (SAH11(ii)) at Well Lane, Devauden; and the installation of a heat pump at 17 Willow Drive, Monmouth. This compares to a total of one scheme in the previous AMR. For further detail refer to the Policy Analysis in Section 5 on Efficient Resource Use and Flood Risk.  2. One additional scheme incorporating on-site renewable energy generation has been recorded as completed within the current monitoring period. This related to the installation of roof mounted solar panels on at the newly built affordable homes at Dingestow. It should be noted that since the Plan's adoption in 2014, a total of 11 schemes incorporating on-site renewable energy have been completed and are operational.



Headline	Objective	SA Indicators	Data	Commentary
		<p><b>the potential for significant design / environmental implications.</b></p>		<p><b>3.</b> The Planning Committee design tour on the 9<sup>th</sup> March 2022 considered 6 applications that were approved under the LDP. The sites all related to residential schemes: Two strategic sites allocated in the LDP: 250 dwellings at Deri Farm Abergavenny; and 345 dwellings at former Fairfield Mabey, Chepstow; an allocated 60/40 Main Village site at Dingestow; and an allocated site in the Rural Secondary Settlement of Usk. Two windfall residential sites were also visited at: former Sudbrook Shipyard , Sudbrook, and land at Walnut Tree Cottage Llangybi , which had gained consent/constructed in recent years. Refer to the Place Making and Design Policy Analysis in Section 5 for further details.</p> <p><b>Continue to monitor SA objective.</b></p>
Historic heritage	Understand, value, protect and restore, where necessary, the historic cultural heritage of the area, including features of the built and semi-natural environment	<p><b>1. Number of listed building and historic sites (-)</b></p> <p><b>2. Sample of planning applications granted for developments with the potential for significant impact on buildings of historic / archaeological interest, scheduled ancient monuments and conservation areas</b></p>	<p><b>1.</b> Listed Buildings: 2149, Scheduled Ancient Monuments: 164, Historic Parks &amp; Gardens: 45, Archaeological Sensitive Areas: 10 and Landscapes of Historic Importance: 3</p>	<p><b>1.</b> There was a marginal increase (+1) in the number of listed buildings since the previous monitoring period. There were no changes in relation to Scheduled Ancient Monuments, Historic Parks and Gardens, Archaeologically Sensitive Areas or Landscapes of Outstanding Historic Interest over the monitoring period.</p> <p><b>2.</b> The Planning Committee design tour on the 9<sup>th</sup> March 2022 considered 6 applications that were approved under the LDP. The sites all related to residential schemes: Two strategic sties allocated in the LDP: 250 dwellings at Deri Farm Abergavenny; and 345 dwellings at former Fairfield Mabey, Chepstow; an allocated 60/40 Main Village site at Dingestow; and an allocated site in the Rural Secondary Settlement of Usk. Two windfall residential sites were also visited at: former Sudbrook Shipyard , Sudbrook, and land at Walnut Tree Cottage Llangybi , which had gained consent/constructed in recent</p>

Headline	Objective	SA Indicators	Data	Commentary
		<p>adversely affected by development.</p> <p><b>3. Number of conservation areas with an up-to-date character appraisal</b></p>	<p>2. 6</p> <p>3. 19 up to date Conservation Area character appraisals.</p>	<p>years. Refer to the Place Making and Design Policy Analysis in Section 5 for further details.</p> <p><b>3.</b> A total of 19 Conservation Area Appraisals have been produced and adopted as SPG. Refer to the Place Making and Design Policy Analysis in Section 5 for further details.</p> <p><b>Continue to monitor SA objective.</b></p>
Air	To reduce all forms of air pollution in the interests of local air quality and the integrity of the atmosphere to protect from climate change	<p><b>1.</b> Number of locations where air quality exceeds objective levels per annum (-)</p> <p><b>2.</b> Percentage of people employed using their car/van as their main way of commuting to and from work either by driving or as a passenger (-)</p> <p><b>3.</b> Proportion of people employed travelling to work by public transport, walking or cycling (+)</p>	<p><b>1.</b> 0</p> <p><b>2.</b> 81.4%**</p> <p><b>3.</b> 16.7%**</p>	<p><b>1.</b> The annual objective level of nitrogen dioxide was not exceeded in 2021. For the fifth year running there was no exceedance in Usk. The indicator will continue to be monitored in future AMRs.</p> <p><b>2 – 3.</b> The 2011 Census recorded 16.7% of people travelling to work by public transport, walking or cycling. The mode of commuting statistics is also taken from the 2011 Census identifying 81.4% of people employed as using their car/van as their main way of commuting to and from work. Whilst the 2021 Census has now taken place, data in relation to travel to work has yet to be released. A meaningful comparison will be made at the time of the next AMR, when travel to work data from the 2021 Census has been released.</p> <p><b>Continue to monitor SA objective.</b></p>
Water quality	To maintain and improve the quality of ground,	<b>1.</b> % of rivers reaching 'good' water quality status (+)	<p><b>1.</b> 25%***</p> <p><b>2.</b> 0</p>	<b>1.</b> The Water Framework Directive (WFD) combines ecological and chemical status in its reporting, the surface water body will need to reach good status in both elements in order to reach an overall 'good

Headline	Objective	SA Indicators	Data	Commentary
	surface and coastal waters	2. Proportion of allocated sites and all other developments of over 10 dwellings/1ha that incorporate SUDS (+)		<p>status'. In the latest (interim) Water Watch Wales Cycle 3 (2021) ,25% of rivers in Monmouthshire achieve Good status.</p> <p>2. 0 major residential schemes incorporating SUDS approved over the monitoring period. This reflects a decrease in planning permissions due to the majority of allocated sites already having planning permission and the LDP reaching the latter stages of the Plan period. The decrease in planning permissions also reflects the restrictions due to phosphates which are considered to be a contributing factor.</p> <p><b>Continue to monitor SA objective.</b></p>
Water supply	To maintain the quantity of water available including potable water supplies, and ground water and river levels	1. Proportion of groundwater bodies reaching 'good' quantity status (+)	1. 100%***	<p>1. Monmouthshire sits within three groundwater bodies, the Usk Devonian Old Red Sandstone (ORS), Wye Secondary Devonian ORS and Usk and Wye southern Carboniferous Limestone. All three groundwater bodies had good status for quantity as per the Water Watch Wales for the Cycle 3 (2021) data.</p> <p><b>Continue to monitor SA objective.</b></p>
Flood risk	Ensure that new development is designed and located to avoid the risk of flooding, and ensure the risk of flooding is not increased elsewhere	<p>1. <b>Number of permissions for development in Flood Zones C1 and C2 not meeting all TAN 15 tests (-)</b></p> <p>2. Proportion of allocated sites and all other developments of</p>	<p>1. 0</p> <p>2. 0</p> <p>3. 2***</p>	<p>1. No applications have been granted planning permission contrary to TAN15 requirements in either Zone C1 or C2 floodplain over the monitoring period. This replicates the results of the previous monitoring period.</p> <p>2. 0 major residential schemes approved over the monitoring period. This reflects a decrease in planning permissions due to the majority of allocated sites already having planning permission and the LDP reaching the latter stages of the Plan period.</p>

Headline	Objective	SA Indicators	Data	Commentary
		<p>over 10 dwellings/1ha that incorporate SUDS (+)</p> <p><b>3.</b> Instances where rivers experienced summer low flow (-)</p>		<p><b>3.</b> There are three key river monitoring stations in Monmouthshire positioned on the River Usk, River Wye and River Monnow. The flow data is based upon the days in which these have fallen below the Q95 flow during the period from 1<sup>st</sup> April 2021 to 31<sup>st</sup> March 2022. Q95 is the 95<sup>th</sup> percentile, meaning flow is greater than this for 95% of the time and lower than this for 5% of the time. On average, flows are below Q95 for around 18 days per year. It is often used as a typical indicator of summer low flows. In the latest monitoring period, flows fell below Q95 at 2 of the 3 monitoring stations, namely, at the River Wye and the River Usk. At the River Wye monitoring station flows were below the Q95 for 38 days and at the River Usk monitoring station for 8 days. There were 2 periods when flows in the River Wye fell below the Q95, from 20.07.21 for 8 days to 27.07.21 and from 29.08.21 for 30 days to 27.09.21. In the previous AMR (2020-2021) the same monitoring stations recorded flows below the Q95, however at a considerably lower rate of 17 and 2 days respectively.</p> <p><b>Continue to monitor SA objective.</b></p>
Minerals and waste	To ensure that primary materials and minerals are managed in a sustainable way, by safeguarding mineral areas, encouraging re-use and recycling	<p><b>1. Number of permitted permanent non-mineral developments on safeguarded sites that do not comply with Policy M2 (-)</b></p> <p><b>2. Proportion of Monmouthshire's</b></p>	<p><b>1.</b> 0</p> <p><b>2.</b> 62%****</p> <p><b>3.</b> 0ha permitted</p> <p><b>4.</b> 0</p>	<p><b>1.</b> There were no permissions for permanent non-mineral developments on safeguarded sites that did not comply with Policy M2 during the monitoring period. This is in line with the previous monitoring period.</p> <p><b>2.</b> The latest data published is for the 2020 – 2021 period which suggests 62% of Monmouthshire's total household waste was recycled or composted (based on municipal waste collected/generated as per the indicator). This has decreased since the previous AMR which indicated</p>

Headline	Objective	SA Indicators	Data	Commentary
	and avoiding final disposal of resources	household waste collections being recycled and composted (+) <b>3. Amount of waste management capacity permitted expressed as a percentage of the total capacity required as identified in the Regional Waste Plan</b> <b>4. Extent of primary land-won aggregates resources as a percentage of total capacity identified in the Regional Technical Statement.</b>		64.6% was recycled or composted. This indicator will continue to be monitored in future AMRs.  <b>3.</b> There were no permissions for waste management capacity during the monitoring period. For further information refer to the Policy Analysis in Section 5 relating to Waste.  <b>3.</b> No primary land-won aggregates were extracted over the monitoring period. There has therefore, been no reduction in the land bank in Monmouthshire. For further information refer to the Policy Analysis in Section 5 relating to Minerals.  <b>Continue to monitor SA objective.</b>
Land/soil	To use land efficiently by prioritising development on previously developed land where possible, and using existing land efficiently by tackling	<b>1. Proportion of development permitted on greenfield land as a percentage of all development excluding householder, conversions and agricultural buildings (nc or -)</b>	<b>1.</b> 68.2% <b>2.</b> 7.5ha <b>3.</b> 0dpha <b>4.</b> 0ha	<b>1.</b> A total of 11.0ha of development was permitted over the monitoring period, 7.5ha of which was located on greenfield sites. This equated to 68.2% of all development (excluding householder, conversions and agricultural buildings) as being permitted on greenfield land. The amount of greenfield land permitted for development is lower than the previous three monitoring periods (2020-2021; 15.052ha (71.7%) 2019-2020; 19.79ha (79%) ,2018-2019; 25.27ha (87.1%), 2017-2018; 32.12ha (59.8%).

Headline	Objective	SA Indicators	Data	Commentary
	contamination and protecting higher grade agricultural soil	<p><b>2. Amount of Greenfield land lost to development which is not allocated in the development plan</b></p> <p><b>3. Annual average densities of new housing development (+)</b></p> <p><b>4. Hectares of agricultural land at Grade 3a and better lost to major* development (excluding LDP allocations and agricultural development)'</b></p>		<p>The Council will continue to monitor this indicator to determine the effectiveness of the policy framework relating to this issue.</p> <p><b>2.</b> Over the monitoring period 26 permissions were granted on greenfield land not allocated for development in the LDP, totalling 7.5 hectares. This is a decrease on the last AMR (11.7ha) and is the lowest amount of non-allocated greenfield land permitted. (2014-15: 26ha, 2015-16: 44.6ha, 2016-17: 16.5ha, 2017-18: 8.98ha, 2018-19: 9.71ha, 2019-20: 18.27ha, 2020-2021; 11.7ha). For further detail refer to the Landscape, Green Infrastructure and Natural Environment Policy Analysis in Section 5.</p> <p><b>3.</b> 0 residential schemes approved of more than 10 dwellings over the monitoring period for residential schemes.</p> <p><b>4.</b> None of the major applications permitted over the monitoring period resulted in the loss of any agricultural land at Grade 3a and above.</p> <p><b>Continue to monitor SA objective.</b></p>
Energy	To secure energy efficiency improvements in all new buildings and encourage energy generation from renewable sources.	<b>1. Number of new developments completed that incorporate on-site renewable energy generation. (i.e. permissions following LDP adoption that have</b>	<b>1. 1</b>	<b>1.</b> One additional scheme incorporating on-site renewable energy generation has been recorded as completed within the current monitoring period. This related to the installation of roof mounted solar panels on at the newly built affordable homes at Dingestow. It should be noted that since the Plan's adoption in 2014, a total of 11 schemes incorporating on-site renewable energy have been completed and are operational.

Headline	Objective	SA Indicators	Data	Commentary
		been completed over the 2021-2022 monitoring period)		Continue to monitor SA objective.
Employment	Provide a range of jobs within Monmouthshire that help meet the needs of the resident workforce	<p><b>1. Net employment land supply/ development and take-up of employment land (+)</b></p> <p><b>2. Amount of employment land lost to non-employment uses</b></p> <p><b>3. Proportion of resident workforce working in Monmouthshire (+)</b></p> <p><b>4. Average travel to work distance (-)</b></p> <p><b>5. Percentage of vacant units within CSA of each town and local centre</b></p>	<p><b>1.</b> Supply 40.16ha, Take-up 0.0545ha</p> <p><b>2.</b> 0.03ha</p> <p><b>3.</b> 61.3%*****</p> <p><b>4.</b> 21.9km**</p> <p><b>5.</b> Abergavenny: 3.6%, Caldicot:6.1%, Chepstow: 11.2%, Monmouth: 15.5%, Magor: 0%, Raglan: 9.1%, Usk: 8.5%</p>	<p><b>1.</b> The Employment Land Background Paper identified 40.16ha of employment land available across the County (the supply relates to SAE1 Identified Industrial and Business Sites only) meaning that sufficient employment land remains available. The take-up rate of employment land stood at 0.055ha over the monitoring period. The take-up<sup>11</sup> is lower than the last AMR (0.3803ha) and represents the lowest take up over the Adopted LDP period. For further information refer to the Economy and Enterprise Policy Analysis in Section 5.</p> <p><b>2.</b> One application was granted during the monitoring period that related to the loss of B uses on allocated or protected employment sites (SAE1 &amp; SAE2) which was a loss of 0.03ha. For further information refer to the Economy and Enterprise Policy Analysis in Section 5.</p> <p><b>3.</b> The Welsh Government travel to work statistics identify 61.3% of the Monmouthshire workforce remaining in their own area for work. This figure has increased by 4.4% since the previous AMR. However, these figures should not be given too much weight as the data is based on a small sample survey and should therefore be treated with caution.</p> <p><b>4.</b> The average travel to work distance was 21.9km at the time of the 2011 Census. Whilst the 2021 Census has now taken place, data in relation to travel to work has yet to be released. A meaningful</p>

<sup>11</sup> Employment land take-up relates to SAE1 Identified Industrial and Business Sites, SAE2 Protected Employment Sites and Mixed Use Sites.

Headline	Objective	SA Indicators	Data	Commentary																				
				<p>comparison will be made at the time of the next AMR, when travel to work data from the 2021 Census has been released.</p> <p><b>5.</b> Vacancy rates recorded in the Central Shopping Areas (CSA) for all of the County's towns and local centres all decreased or remained the same with the exception of Monmouth (15.5%) which saw a marginal increase. The other vacancy rates include Abergavenny (3.6%), Caldicot (6.1%), Chepstow (11.2%), Magor (0%), Raglan (9.1%) and Usk (8.5%). The decrease reflects that centres in Monmouthshire have recovered reasonably well from the impacts of the pandemic. Vacancy rates recorded in all the County's Central Shopping Areas (CSA) with the exception of Monmouth were below the GB High Street vacancy rate (14.5% June 2021, Local Data Company).</p> <p><b>Continue to monitor SA objective.</b></p>																				
Wealth creation	Raise prosperity and quality of life by developing a more self-sustaining local economy encouraging indigenous growth	<p><b>1.</b> Range of SAE1/SAE2/Identified Mixed Use Sites available, distribution and size</p> <p><b>2. Planning permissions granted for employment use by settlement</b></p> <p><b>3. Planning permissions granted for employment use by sector</b></p>	<p><b>1.</b> See table in commentary section</p> <p><b>2.</b> Main Towns: 0.30ha, Severnside: 1.69ha, RSS: 0.05ha, Rural General: 1.55ha</p> <p><b>3.</b> See table in commentary section.</p> <p><b>4.</b> 61.2%*****</p>	<p><b>1.</b> The table below identifies the range of employment sites across the County by location along with the size of the sites available. While a large proportion of land is located in Magor there is distribution across the Main Towns and some of the Rural Secondary Settlements.</p> <table border="1"> <thead> <tr> <th>Site Reference</th> <th>Site Name/Location</th> <th>Site Use Class</th> <th>Remaining land available (ha)</th> </tr> </thead> <tbody> <tr> <td>SAE1a</td> <td>Wales One, Magor (west)</td> <td>B1</td> <td>4.0</td> </tr> <tr> <td>SAE1b</td> <td>Quay Point, Magor</td> <td>B1/B2/B8</td> <td>13.76</td> </tr> <tr> <td>SAE1c</td> <td>Gwent Europark, Magor</td> <td>B8</td> <td>13.3</td> </tr> <tr> <td>SAE1d</td> <td>Westgate, Llanfoist</td> <td>B1/B2</td> <td>1.3</td> </tr> </tbody> </table>	Site Reference	Site Name/Location	Site Use Class	Remaining land available (ha)	SAE1a	Wales One, Magor (west)	B1	4.0	SAE1b	Quay Point, Magor	B1/B2/B8	13.76	SAE1c	Gwent Europark, Magor	B8	13.3	SAE1d	Westgate, Llanfoist	B1/B2	1.3
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Headline	Objective	SA Indicators	Data	Commentary			
		<p><b>4. Proportion of resident workforce working in Monmouthshire (+)</b></p> <p><b>5. Number of people in-commuting to Monmouthshire</b></p> <p><b>6. Number of people out-commuting from Monmouthshire</b></p> <p><b>7. Tourism expenditure (+)</b></p> <p><b>8. Number of rural diversification/enterprise schemes approved</b></p> <p><b>9. Number of tourism schemes approved</b></p> <p><b>10. Number of tourism facilities lost through development, change of use or demolition</b></p>	<p><b>5.</b> 14,300*****</p> <p><b>6.</b> 17,100*****</p> <p><b>7.</b> £182.79 Million *****</p> <p><b>8.</b> 7</p> <p><b>9.</b> 17</p> <p><b>10.</b> 1</p>	SAE1e	Ross Road, Abergavenny	B1/B2	1.5
				SAE1f	Newhouse Farm, Chepstow	B2/B8	4.0
				SAE1g	South Woodside, Usk	B1	1.3
				SAE1h	Pill Row, Caldicot	B1/B8	1.0
				SAE2w	Wales One, Magor	B1/B2/B8	0.57
				SAH2	Crick Road, Portskewett	B1	1.0
				SAH3	Fairfield Mabey, Chepstow	B1	0.65
				SAH4	Wonastow Road, Monmouth	B1	2.78
				SAH5	Rockfield Farm, Undy	B1	2.0
				<p><b>2.</b> The Severnside area accounted for the majority of permissions relating to employment over the monitoring period equating to 1.69ha. The Rural General settlements followed with 1.55ha and then the Main Towns with 0.30ha. The Rural Secondary Settlements accounted for 0.05ha. For further information refer to the Economy and Enterprise Policy Analysis in Section 5.</p> <p><b>3.</b> The table below only identifies those sectors where planning permission for employment uses occurred over the monitoring period. The largest proportion of employment floorspace for B use classes permitted related to Manufacturing. For the full list of sectors and additional information refer to the Economy and Enterprise Policy Analysis in Section 5.</p>			

Headline	Objective	SA Indicators	Data	Commentary														
				<table border="1" data-bbox="1205 347 2031 790"> <thead> <tr> <th data-bbox="1205 347 1805 387">Sector</th> <th data-bbox="1805 347 2031 387">Size(ha)</th> </tr> </thead> <tbody> <tr> <td data-bbox="1205 387 1805 427">Manufacturing</td> <td data-bbox="1805 387 2031 427">1.48ha</td> </tr> <tr> <td data-bbox="1205 427 1805 507">Wholesale &amp; retail trade; repair of motor vehicles and motor cycles</td> <td data-bbox="1805 427 2031 507">0.42ha</td> </tr> <tr> <td data-bbox="1205 507 1805 587">Transport &amp; storage; information and communication</td> <td data-bbox="1805 507 2031 587">0.87ha</td> </tr> <tr> <td data-bbox="1205 587 1805 707">Real estate activities; Professional, scientific and technical activities; Administrative and support service activities</td> <td data-bbox="1805 587 2031 707">0.49ha</td> </tr> <tr> <td data-bbox="1205 707 1805 746">Agriculture, forestry &amp; fishing</td> <td data-bbox="1805 707 2031 746">0.14ha</td> </tr> <tr> <td data-bbox="1205 746 1805 786">Construction</td> <td data-bbox="1805 746 2031 786">0.2ha</td> </tr> </tbody> </table> <p data-bbox="1205 834 2136 1023"><b>4.</b> The Welsh Government travel to work statistics identify 61.3% of the Monmouthshire workforce remaining in their own area for work. This figure has increased by 4.4% since the previous AMR. However, these figures should not be given too much weight as the data is based on a small sample survey and should therefore be treated with caution.</p> <p data-bbox="1205 1070 2136 1375"><b>5 – 6.</b> The 2021 Welsh Government Commuting Statistics identified a total of 14,300 commuting into Monmouthshire and 17,100 out of Monmouthshire. The level of in-commuting has decreased significantly since the previous monitoring period (2020 – 2021: 19,000) with the level of out-commuting decreasing (2020 – 2021: 19,600), resulting in a net outflow of commuters. However, these figures should not be given too much weight as the data is based on a small sample survey and should therefore be treated with caution. The Economy and</p>	Sector	Size(ha)	Manufacturing	1.48ha	Wholesale & retail trade; repair of motor vehicles and motor cycles	0.42ha	Transport & storage; information and communication	0.87ha	Real estate activities; Professional, scientific and technical activities; Administrative and support service activities	0.49ha	Agriculture, forestry & fishing	0.14ha	Construction	0.2ha
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Headline	Objective	SA Indicators	Data	Commentary
				<p>Enterprise Policy Analysis in Section 5 provides a further breakdown of this information.</p> <p><b>7.</b>The Monmouthshire STEAM report (2021) identified the total annual tourism expenditure as £182.79 Million over the 2021 period. This compared to £81.16 Million over the 2020 period, equating to a 122.2% increase. This is a significant increase since the previous period and reflects the recovery since the impact of the Covid-19 pandemic on the tourism and hospitality industries.</p> <p><b>8.</b> A total of 7 applications relating to rural diversification/enterprise were approved during the monitoring period. 2 of the applications were approved as rural enterprise schemes and 5 applications as rural diversification of existing farmsteads. Full details of which can be found in the Rural Enterprise Policy Analysis in Section 5.</p> <p><b>9 – 10.</b> A total of 17 tourism schemes were approved over the monitoring period all of which were tourist accommodation facilities. These included 10 conversions to holiday lets, and 7 new glamping accommodation sites.</p> <p>One planning application was approved which involved the loss of tourism facilities over the monitoring period. This related to the demolition of a holiday let and erection of a domestic garage in its place at Court Windermere, Bettws Newydd. The application was justified within the overall LDP policy framework. The Visitor Economy Policy Analysis in Section 5 provides full detail of the type of tourism facilities gained over the monitoring period.</p>

Headline	Objective	SA Indicators	Data	Commentary
				<b>Continue to monitor SA objective.</b>

\*Major development - development involving one or more of the following: developments of 10 or more dwellings or 0.5ha or more for outline and full applications; development of building or buildings where the floor space to be created is 1000m<sup>2</sup> or more; developments on site with an area of 1ha or more; winning or working of minerals, or use of the land for mineral working deposits; or, waste development.

\*\*Figure derived from Census 2011

\*\*\* Contains Natural Resources Wales information © Natural Resources Wales and database right. All rights reserved

\*\*\*\* Welsh Government Stats Wales

\*\*\*\*\*Welsh Government Commuting Statistics (2021)

\*\*\*\*\*Monmouthshire STEAM Report (2021)

\*\*\*\*\* This is one of two new indicators that have been added to replace the previous five-year housing land supply indicator, to reflect the requirements of the Development Plans Manual (March 2020) following the revocation of Technical Advice Note (TAN) 1: Joint Housing Land Availability Studies (January 2015)

## 7 Conclusions and Recommendations

### 7 Conclusion and Recommendations

- 7.1 This is the eighth AMR to be prepared since the adoption of the Monmouthshire LDP. As the LDP has been operational for eight years, trends have emerged through the monitoring process as to which policies are performing as intended and which are not. The AMR indicates that good progress is being made in delivering many of the Plan's policies with identified targets being met and that the LDP strategy remains sound. However, the AMR also indicates that there continues to be certain elements of the Plan which are not progressing as intended.
- 7.2 Section 5 provides a detailed assessment of how the Plan's strategic policies, and associated supporting policies, are performing against the identified key monitoring targets and outcomes and whether the LDP strategy and objectives are being delivered. This has enabled the Council to make an informed judgement of the Plan's progress in delivering the targets/monitoring outcomes and policies during this monitoring period. The table below provides a visual overview of the effectiveness of the Plan's policies during the current monitoring period based on the traffic light rating used in the assessment.
- 7.3 Overall, the plan is working effectively with the majority of the monitoring targets being achieved, a slight increase to 57 from last year's 54 green rating. There has been a slight decrease in the number of indicators that have not achieved the target this year, but there is an appropriate justification, and no concerns are raised (26 compared to last year's 29). 'Red' ratings recorded during the current monitoring period remained at 3 for the second consecutive year. Further commentary is provided below.

Targets / monitoring outcomes* are being achieved	<b>57</b>
Targets / monitoring outcomes* are not currently being achieved but there are no concerns over the implementation of the policy	<b>26</b>
Targets / monitoring outcomes* are not being achieved with subsequent concerns over the implementation of policy	<b>3</b>
No conclusion can be drawn due to limited data availability or no applicable data	<b>7</b>

\*For those indicators with no target/trigger the monitoring outcomes are assessed and rated accordingly

## Key Findings

- 7.4 Information collected through the monitoring process indicates that the majority of indicator targets and monitoring outcomes are being achieved (green traffic light rating), indicating that the relevant Plan policies are performing as intended. The most significant achievements include the following:

### Strategy and Housing

- Six of the seven LDP allocated strategic housing sites have planning permission, of which four are under construction (Deri Farm, Abergavenny; Fairfield Mabey, Chepstow; Rockfield Farm, Undy; and Sudbrook Paper Mill). One site is partially complete (Wonastow Road, Monmouth), with the remaining phase at Drewen Farm awaiting a phosphate solution before it can be progressed. Permission was granted on the seventh at SAH6 Vinegar Hill, Undy in June 2022 and will therefore be recorded as a permission during the next monitoring period.
- Progress continues to be made towards the implementation of the LDP allocations, with 65% of completions coming forward on allocated sites (236 units). Large windfall sites accounted for 22% of completions (80 units) and small sites accounted for the remaining 13% (45 units).

### Economy and Enterprise

- The County has a total of 40.16 hectares of employment land available, indicating that sufficient employment land is maintained to meet the identified take up rate. Work on the RLDP is exploring why the remaining employment sites have not yet come forward, and will consider whether or not they should be de-allocated or if alternative interventions would secure their delivery.
- One planning application was approved on an allocated SAE1 site at Beaufort Park in Chepstow relating to a change of use from a retail warehouse to B1 light industrial including the expansion of the unit to include a mezzanine floor.
- There has been progress in terms of employment permissions within the County, with a further 19 permissions granted for a range of B use class employment uses on protected employment sites (SAE2) and elsewhere in the County, for example as rural diversification and rural enterprise schemes providing employment opportunities in a range of sectors.
- Seven planning applications were approved for rural diversification or enterprise schemes. Some related to B use class uses such as small starter B2/B8 units also contributing to the point above and others were for rural enterprises such as a new dog exercise business at Llanellen and the expansion of an aviation business at The Byre, Abergavenny.
- The Council approved proposals for 17 tourism related applications, relating to 10 holiday lets proposals and seven glamping facilities. Comparison with previous AMRs demonstrates that the number of tourism schemes approved during the current monitoring period remains at a positive level. The Sustainable Tourism Accommodation Supplementary Planning Guidance [SPG] (November 2017) has helped clarify our general support for this important sector of our economy.

### **Retail and Community Facilities**

- Four Central Shopping Areas have seen a fall in vacancy rates, Abergavenny, Caldicot, Chepstow and Usk and two centres saw no change, Raglan and Magor, with Magor having no vacant units for the second consecutive year.
- The proportion of A1 retail uses within the towns' Primary Shopping Frontages generally accord with the thresholds identified in the Primary Shopping Frontages SPG.
- Thirteen planning applications were approved for community and recreation uses during the monitoring period. These involved an extension to Usk Primary School, change of use from a dwelling to a dentist, new green bin store in Chepstow High Street, a new 100 and 50 seated stands at Chepstow Town AFC and enhancements to Chepstow Athletic Club, Abergavenny Cricket Club and Linda Vista Gardens, Abergavenny. Also of note, although not a gain, the enhancement to the existing burial facility at Usk Natural Burial Ground.

### **Environment**

- A total of 11ha of development was permitted over the monitoring period, of which 3.5ha was located on brownfield sites. This equates to 31.8% of all development (excluding householder, conversions and agricultural buildings) and is an increase on last year's figure of 28.3%. The ratio between greenfield/brownfield development is reflective of the limited brownfield land available within the County for development.
- No new applications have resulted in the loss of open amenity space.
- No applications have been granted planning permission contrary to TAN15 requirements in either Zone C1 or C2 floodplain over the monitoring period.
- Five applications have been approved incorporating on-site renewable energy. These include two solar car ports at Chepstow Comprehensive School and Innovation House, Wale 1, Magor and solar panels and air source heat pumps for the 15 new houses (SAH11(ii)) at Well Lane, Devauden. It is important to note, however, the monitoring does not include householder schemes and the majority of smaller scale renewable energy schemes fall under permitted development and therefore are not picked up by the planning system.
- Ample land remains available for potential waste management sites and there has been no reduction in the minerals land bank.
- There were no applications that resulted in the loss of listed buildings or historic sites and no development permitted which would have an adverse impact on the historic environment.

7.5 This indicates that much of the policy framework is operatively effectively allowing appropriate development to take place and that good progress has been made in implementing the LDP.

7.6 The analysis also indicates that there are various policy indicators which are not being achieved but there are no corresponding concerns over policy implementation (amber

traffic light rating). Further investigation has determined that there are justified reasons for the performance recorded and this is not representative of any fundamental issue with the implementation of the policy framework or strategy at this time. The most significant findings in relation to these are as follows:

### **Housing**

- 361 dwellings were built during the monitoring period (326 general market and 35 affordable). Whilst this trigger has been met as completions have been 10% less than the LDP strategy build rate for two consecutive years, completions recorded over the second half of the plan monitoring period have been significantly higher than those achieved during the first half of the plan monitoring period (1,529 completions 2018-2022 compared to 956 completions 2014-2018).
- Completions are 19.8% below (-89 units) the Average Annual Requirement (AAR) of 450 dwellings per annum. This is, however, an improvement on the early years of the Plan period with housing completions in the most recent monitoring periods being much closer to the AAR: -7 units (-1.6%) in 2018/19, -94 units (-20.9%) in 2019/20, and -31 (-6.9%) in 2020/21. This is due in main to the speed with which the strategic sites have come forward.
- Dwelling permissions during 2021/22 were lower than recorded in any of the previous monitoring periods at 39 dwellings, all of which were general market. This decrease is due to a combination of factors including the majority of LDP allocated sites already having planning permission with the LDP having reached the end of the Plan period, hence the importance of progressing the RLDP at pace. In addition, the introduction of the measures in January 2021 to control phosphate levels in the River Usk and River Wye Catchment areas, which cover a large proportion of the County, has impacted on our ability to grant planning permissions in a significant proportion of the County. Officers and Cabinet Members are working hard to secure a solution to this challenge.
- The number of dwellings permitted in the main towns is significantly lower than previous monitoring periods and is the lowest recorded since the adoption of the LDP, accounting for 23.1% of residential permissions. Again, this reflects LDP Strategic Sites already having planning permissions and the impact of the phosphate restrictions on development.
- Progress continues towards the implementation of the Plan's spatial strategy with 43.5% (157 dwellings) of recorded completions delivered in the County's main towns. However, Monmouth accounted for only 2% with 3 completions while Chepstow accounted for 61% (96 units) and Abergavenny accounted for 37% (58 units). These are largely attributable to the SAH3 - Fairfield Mabey, Chepstow and SAH1 – Deri Farm, Abergavenny allocations which have planning permission and are under construction. Completions within the Severnside area, Rural Secondary Settlements and Rural General areas all remained within the acceptability range indicating that overall, the housing is being delivered in accordance with the spatial strategy.



- While there have been no planning permissions triggering the delivery of on-site affordable housing during the monitoring period, some progress has been on the delivery of two Main Village Allocations. Nine affordable dwellings are under construction at SAH11(ii) Well Lane, Devauden and four affordable dwellings at SAH11(ix)(a) Land rear of Carpenters Arms, Llanishen.

#### **Economy and Enterprise**

- One planning application was approved relating to the loss of B use class on an allocated (SAE1) or protected (SAE2) employment site. This however, involved 0.03ha of land relating to the change of use of approximately 176.5 sqm of existing 353sqm of B2 use class to A1 use class to provide a small tap room and seating area in a microbrewery in a unit on SAE2p – Severn Bridge, Caldicot.
- One application was permitted during the monitoring period relating to the loss of tourism facilities. This related to the demolition of a holiday let and erection of a domestic garage at Court Windermere, Bettws Newydd. The loss is however, considered to be justified within the context and requirements of the LDP policy framework.

#### **Retail and Community Facilities**

- A marginal decline down from 73% to 72% in A1 retail uses in Abergavenny Primary Shop Frontage and a decline down from 80% to 76% in Chepstow Primary Shop Frontage. However, overall, the towns' primary shop frontages are functioning well.
- Two applications were permitted for new A1 food and non-bulky retail developments in the County's town/local centres during the period monitored. However, three applications (65% of new retail uses) were permitted outside of the centres. Of those permitted outside existing centres, one related to an extension to an existing retail unit at Usk Garden Centre, the second related to a new convenience store on the old Magor Motors site in Magor and the third was for a small-scale tap room and seating area to sample and sell the beer made on the site at Severn Bridge Industrial Estate. On balance, it was considered both met relevant local and national retail planning policy and guidance.
- One community facility has been granted permission to an alternative use during the monitoring period, relating to the change of use of Kingdom Hall, Raglan from a dis-used meeting hall to residential. However, the loss is justified within the context and requirements of the LDP policy framework.

#### **Environment**

- Approximately 7.5ha of land was permitted on non-allocated greenfield land during the monitoring period. This is a decrease on last year's figure; however, this remains above the target of no loss of non-allocated greenfield land. In each case, however, the loss was considered justified within the context and requirements of the LDP policy framework at the time of decision making and is reflective of the limited brownfield opportunities in the County.

7.7 Notwithstanding the above, the information collected through the monitoring process has identified three key policy indicator targets that are not progressing as intended (red traffic light rating). These relate to overall housing completion figures, affordable housing delivery rates and vacancy rates in Monmouth's Central Shopping Area:

#### **Strategy and Housing**

- Housing delivery records covering the 10-year plan period 2011 - 2021 set out that the Plan had delivered a shortfall of 1,500 homes (33.3%) when compared to the 10-year Plan requirement of 4,500 dwellings. However, in more recent AMRs the % under delivery has steadily declined as the strategic sites have come forward. This shortfall is largely attributable to the lead in period of the strategic housing sites, many of which continue to deliver homes now which contributes to the RLDP housing delivery: it is worth noting that 1,263 homes have planning permission and due to be built in the near future<sup>12</sup>. The impacts of phosphates restrictions is also now affecting site commencements and therefore completions. During this monitoring period, 361 dwellings were completed. Given the importance attached to the supply of housing land, a full review of the LDP commenced in 2017 and culminated with the publication of the Final Review Report in March 2018. The latest position on the RLDP is discussed below in the recommendations section.

#### **Affordable Housing**

- 35 affordable homes were completed during the monitoring period accounting for 9.7% of total completions recorded (361). This is well below the LDP target of 96 affordable homes per annum. Housing delivery records covering the 10-year plan period 2011 - 2021 set out that the Plan has delivered 658 affordable homes compared to a target of 960 affordable homes (a shortfall of 302 affordable homes). Proportionately, this shortfall is almost identical to the shortfall in total housing delivery. Furthermore, there were no new planning permissions for 5 or more dwellings during the monitoring period that triggered the delivery of on-site affordable housing. This shortfall is largely attributable to the lead in period of the strategic housing sites, many of which continue to deliver homes now which contributes to the RLDP housing delivery: it is worth noting that there are 280 affordable homes with consent and due to be built in the near future<sup>13</sup>. The impact of phosphates restrictions is also now affecting site commencements and therefore completions. This reduced trend of affordable housing delivery is therefore anticipated to continue in the short-term awaiting progress on the RLDP.

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<sup>12</sup> This figure excludes sites in the upper Wye catchment which are unlikely to come forward in the near future until as phosphates solution is identified and implemented.

<sup>13</sup> This figure excludes sites in the upper Wye catchment which are unlikely to come forward in the near future until as phosphates solution is identified and implemented.

### **Retail and Community Facilities**

- As increased vacancy rates have occurred for three consecutive years in the Monmouth Central Shopping Area, the trigger for this indicator has been met. While Monmouth only saw a marginal increase in vacancy rates from 15.4% to 15.5% in this monitoring period, this is an overall increase from 10.1% in the 2018 monitoring period.

### **Supplementary Planning Guidance (SPG)**

- 7.8 SPG preparation and adoption will be limited over coming years as resources will be focused on the preparation of the Replacement Plan.

### **Sustainability Appraisal (SA) Monitoring**

- 7.9 Section 6 expands the assessment of the performance of the LDP against the Sustainability Appraisal (SA) monitoring objectives. There is an overlap between some of the LDP and SA indicators helping to demonstrate how the LDP monitoring and SA monitoring are interlinked.

- 7.10 Some of the most notable findings specific to the SA during the current monitoring period include:

- The annual objective level of nitrogen dioxide was not exceeded in in 2021/22. For the fifth year running there was no exceedance in Usk.
- Monmouthshire sits within three groundwater bodies, the Usk Devonian Old Red Sandstone (ORS), Wye Secondary Devonian ORS and Usk and Wye southern Carboniferous Limestone. All three groundwater bodies had good status for quantity as per the Water Watch Wales for the Cycle 3 (2021) data.
- Water flow levels fell below the summer flow level at two of the three monitoring stations. The River Wye for 38 days and River Usk for 38 days, over two periods. The River Monnow remained above the summer flow level.
- The latest waste data published for 2020-2021 suggests that 62% of Monmouthshire's total household waste was recycled or composted. This has decreased since the previous AMR which indicated 64.6% was recycled or composted.
- No agricultural land at Grade 3a and above has been lost to major development over the monitoring period.
- The Monmouthshire STEAM report (2021) identified the total annual tourism expenditure as £182.79 Million over the 2021 period. This compared to £81.16 Million over the 2020 period, equating to a 122.2% increase. This is a significant increase since the previous period and reflects the recovery since the impact of the Covid-19 pandemic on the tourism and hospitality industries.

## Conclusions & Recommendations

- 7.11 Overall, the 2021-22 AMR indicates that good progress continues to be made in implementing many of the Plan's policies and that overall, the strategy remains sound. However, while progress has been made in relation to the Plan's Strategic Housing Sites, cumulative completion rates for the Plan period are lower than the Plan requirement and remain a matter of concern if Monmouthshire's housing needs are to be met. However, this is due to a time-lag in site delivery rather than an issue with the sites not happening at all.
- 7.12 The LDP reached the end of the Plan period at the end of 2021, with 10-years' worth of completions recorded in the previous monitoring period and while all seven strategic housing allocations now have planning permission<sup>14</sup> and will continue to play an important role in housing delivery and completion rates in the short term, the reduction in dwellings permitted during the AMR period is cause for concern. Analysis of anticipated completions, in consultation with the house building industry indicates that completion rates are estimated to remain stable for a couple of years and then forecast to reduce the lower levels (253 units – 2025/26 and 166 units in 2026/27), with only strategic sites and small sites contributing to the forecast in 2026/27. These forecasts do not however, include any contribution from the emerging RLDP which will improve housing land supply as the plan progresses to adoption. In the meantime, however, the time lag between the two plans is an area of concern for its implications on housing delivery in the County.
- 7.13 The number of dwellings approved during the monitoring period has also been lower than any previous monitoring periods and whilst this is partially due to the Strategic Sites having permissions, the restrictions associated with phosphates is considered to be a contributing factor.
- 7.14 Similar concerns are shared with the level of affordable housing secured and completed during the monitoring period. This again is considered to be reflective of a combination of the strategic sites gaining planning permission and being built out and restrictions on development due to phosphates constraints. No new planning permissions were approved during the monitoring period that triggered the delivery of on-site affordable housing. Some progress has, however, been made on a couple of Main Village sites with 9 affordable dwellings under construction at SAH11(ii) Well Lane, Devauden and 4 affordable dwellings at SAH11(ix)(a) Land rear of Carpenters Arms, Llanishen.
- 7.15 As can be seen from the analysis throughout Section 5, the announcement during the last monitoring period regarding phosphate water quality issues in the River Usk and Wye Catchments continues to have implications for the ongoing delivery of

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<sup>14</sup> SAH6 Vinegar Hill, Undy gained permission in June 2022 and will therefore be recorded in the next monitoring period. SAH4 Wonastow Road, Monmouth site is partially complete, with the remaining phase at Drewen Farm awaiting a phosphate solution before it can be progressed.

development in the County. The Council is committed to seeking solutions to the phosphate issue and is in proactive discussions with the key organisation, including NRW, Welsh Government, DCWW and the development industry, to seek viable and timely solutions in the affected settlements. Of note, DCWW recently announced an investment programme to seek to address strategic phosphate mitigation to enable development in the future. Nevertheless, the short term implications on the delivery of new homes raises concerns. This situation will be kept under review in collaboration with DCWW, NRW and other stakeholders.

- 7.16 These issues reinforce the need to progress with the RLDP to provide a continued policy framework and mechanism for addressing the County's housing and affordability issues. The Council reached the Preferred Strategy stage of the RLDP process in Summer 2021, with stakeholder consultation in July and August 2021, alongside the second call for candidate sites. Following this, a number of challenges have arisen which have impacted on the progression of the RLDP and require further consideration, namely the Welsh Government objection to the Sustainable and Resilient Communities Preferred Strategy<sup>15</sup> and phosphate water quality issues in the Rivers Wye and Usk.
- 7.17 In light of the aforementioned concerns with housing delivery and associated outcomes, the progression of the RLDP remains a key priority of the Council. On 27th September 2022 Council endorsed the proposal to progress the RLDP with a new growth and spatial strategy. A revised Preferred Strategy will be reported to Council in December 2022 for endorsement to be issued for statutory consultation/engagement in December 2022 - January 2023. This meeting will also seek Council's agreement of the RLDP Revised Delivery Agreement, which will amend the project timetable for Plan preparation, for submission to the Welsh Government for Ministerial approval.
- 7.18 With regard to the consecutive increased vacancy rates in the central shopping area of Monmouth, it is worthy of note that the rise in vacancy rates has been experienced in the primary frontage only, with a decrease in rates across the secondary frontages. This may, in part reflect the continued impact of the Covid-19 pandemic on high streets across the UK, particularly given the loss of some national chains from the town centre, such as Peacocks.
- 7.19 WG guidance<sup>16</sup> published in response to the Covid-19 pandemic recognises that whilst retail development should continue to be focused in town centres, retail and

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<sup>15</sup> Welsh Government's Planning Division raised significant concerns regarding the Strategy's proposed level of growth and 'general conformity' with policies 1 and 33 of the FW2040, suggesting that growth in Monmouthshire would undermine growth in the national growth area of Cardiff, Newport and the Valleys. Welsh Government's letter unusually prescribes a maximum growth of 4,275 dwellings over the Plan period (285 dwellings per annum) which is below the Adopted LDP's annual dwelling requirement of 450 dwellings per annum and Preferred Strategy's consultation dwelling requirement figure of 507 dwellings per annum.

<sup>16</sup> Building Better Places - The Planning System Delivering Resilient and Brighter Futures: Placemaking and the Covid-19 recovery (WG, July 2020) - <https://gov.wales/planning-policy-covid-19-recovery> ; Welsh Government

commercial centres should be enabled to operate as flexibly as possible. This will ensure that going forward retail and commercial centres are hubs of social and economic activity and the focal point for a diverse range of services and cultural activities/functions, which support the needs of local communities. This approach should enable the planning system to be responsive, flexible and pragmatic to assist with the recovery from Covid-19. Any impacts from this on the County's town centres will be recorded in the next monitoring period.

7.20 Locally, the Council put in place a number of interim measures during the height of the Covid-19 pandemic, such as street café licences and prioritising pedestrian movements throughout the town centres, many of which have remained in place since the Covid restrictions have been lifted. In addition, the Council through its Regeneration team has submitted a funding bid to secure a share of Central Government's 'Levelling Up Fund' to make improvements to Market Hall and Shire Hall, two key buildings in the town centre as well as improvements to Monnow Street and Blestium Street. A 'Levelling Up Fund' bid was also submitted for the acquisition of 7-43 Newport Road, Caldicot, public realm improvements to Caldicot town centre and refurbishment of Caldicot Wellbeing Centre.

7.21 Although, with the exception of Monmouth, high street vacancy rates are stable and below the GB average (14.5% June 2021, Local Data Company), it is recognised that high street vitality plays a key role in the character and attractiveness of our market towns. WG Transforming Towns funding seeks to support town centres, and Monmouthshire has submitted a comprehensive bid for this grant funding. The cost of living and energy costs crises pose additional threats to businesses as costs increase and customer spending decreases. The situation will be continued to be monitored as part of the AMR and the annual retail surveys.

7.22 Accordingly, the AMR recommends the following:

1. Continue to progress work on the RLDP and seek Council endorsement to consult on a revised Preferred Strategy at the end of 2022/early 2023.
2. Continue to work with the relevant organisations to seek solution to the phosphate water quality issues in the Usk and Wye Riverine SACs.
3. Continue to work with other Council departments and relevant stakeholders to explore options for increasing affordable housing delivery.

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letter regarding temporary permitted development rights in town centres, 30 March 2021 - <https://gov.wales/coronavirus-covid-19-new-temporary-permitted-development-rights-support-economic-recovery-html>

4. Submit the eighth AMR to the Welsh Government by 31 October 2022 in accordance with statutory requirements. Publish the AMR on the Council's website.
5. Continue to monitor the Plan through the preparation of successive AMRs.

## Appendix 1 – Timing and Phasing of Sites

### Allocations

Settlement Tier / Settlement	Allocated Site Name	Total site capacity	Development Progress		Units beyond the plan period*				
			Total Completions on site	U/C	2022-2023	2023-2024	2024-2025	2025-2026	2026-2027
<b>Main Towns</b>									
Abergavenny	Deri Farm (DC/2014/01360)	250	234	16	0	0	0	0	0
	Coed Glas (DC/2015/01587)	51	51	0	0	0	0	0	0
Chepstow	Fairfield Mabey (DM/2019/00001, DM/2019/01960 (AH) & DM/2019/01961)	373	106	69	22	100	76	0	0
Monmouth	Wonastow Road (DC/2015/00390 & DC/2015/00392)	340	340	0	0	0	0	0	0
	Wonastow Road (remainder of site)	110	0	0	0	0	0	0	0
	Tudor Road Wyesham	35	0	0	0	0	0	0	0
<b>Sevenside Settlements</b>									
Portskewett	Crick Road (DM/2019/01041)	269	0	0	0	50	50	50	50



Settlement Tier / Settlement	Allocated Site Name	Total site capacity	Development Progress		Units beyond the plan period*				
Magor Undy	Rockfield Farm (Phase 1)(DM/2018/01606)**	144	106	37	1	0	0	0	0
	Rockfield Farm (remainder of site) (DM/2016/00883(O/L))	122	0	0	0	30	35	35	22
	Land at Vinegar Hill (DM/2019/01937)***	155	0	0	0	50	55	50	0
	Land at Vinegar Hill (remainder of site)	70	0	0	0	0	0	0	0
Sudbrook	Former Paper Mill (DC/2015/01184)	210	165	33	7	5	0	0	0
<b>Rural Secondary Settlements</b>									
Penperlleni	Land South of Usk Road (DC/2013/01001)	40	40	0	0	0	0	0	0
Raglan	Land at Chepstow Road (DM/2018/00769)(O/L)	45	0	0	0	5	30	10	0
Usk	Cwrt Burrium****	7	7	0	0	0	0	0	0
<b>Main Villages</b>									
Cross Ash	Land adj Cross Ash Garage (DM/2017/01335)	6	0	0	0	6	0	0	0
	Land adj Village Hall	10	0	0	0	0	0	0	0
Devauden	Land at Well Lane (DM/2018/01741)	15	0	15	0	0	0	0	0
Dingestow	Land South East (DM/2018/01404)	15	15	0	0	0	0	0	0
Grosmont	Land to the west	15	0	0	0	0	0	0	0

Settlement Tier / Settlement	Allocated Site Name	Total site capacity	Development Progress		Units beyond the plan period*				
Little Mill	Land to the north	15	0	0	0	0	0	0	15
Llanddewi Rhydderch	Land rear Village Hall	5	0	0	0	0	0	0	0
Llanellen	Land to the northwest	15	0	0	0	0	0	0	0
Llanfair Kilgeddin	Land north (DM/2018/02001(O/L))	5	0	0	0	0	5	0	0
Llangybi	Land at Ton Road	10	0	0	0	0	0	0	0
Llanishen	Land rear Carpenters Arms (DM/2019/02053(RM))	8	4	0	0	4	0	0	0
	Church Road	5	0	0	0	0	0	0	0
Mathern	Land to the west	15	0	0	0	0	0	0	0
Penallt	Land southwest (DM/2015/00606)	10	0	0	0	0	10	0	0
Pwllmeyric	Hill Farm	17	0	0	0	0	0	0	0
Shirenewton	Land to east (south of minor road) (DM/2018/02066(O/L))	11	0	0	0	0	0	11	0
Werngifford Pandy	Land adjacent	15	0	0	0	0	0	15	0

\* LDP Plan period runs to December 2021 - for consistency with long standing monitoring exercises financial years have been used for the actual and forecast completions.

\*\* Original outline permission for 266 dwellings. Phase 1 of development is 144 dwellings

\*\*\* Hybrid application for 155 dwellings - 72 as full application, 83 in outline only

\*\*\*\* Approved 23.04.20 for 7 dwellings

Sites with planning permission

Settlement Tier / Settlement	Site Name	Total site capacity	Development Progress		Units beyond the plan period*				
			Total Completions on site	U/C	2022-23	2023-24	2024-25	2025-26	2026-27
<b>Main Towns</b>									
Abergavenny	Ross Road (DC/2007/01679) (DM/2020/1787)	9	0	9	0	0	0	0	0
	Mulberry House (DM/2014/01015)	25	0	7	0	0	0	0	0
	Magistrates Court (DM/2018/00007)	47	47	0	0	0	0	0	0
	17-25 Brecon Road (DM/2018/00156)	24	24	0	0	0	0	0	0
Chepstow	Osborn International (DC/2009/00910)	169	44	0	0	0	0	0	0
Monmouth	Hillcrest Road, Wyesham (DM/2019/02054)	11	0	0	0	11	0	0	0
	Land west Rockfield Road (DM/2017/00539(O/L))	70	0	0	0	0	0	0	0
<b>Severnside Settlements</b>									
Caldicot	Former White Hart Inn (DC/2013/00796)	16	16	0	0	0	0	0	0
	Church Road (DM/2019/01761)	130	44	23	17	43	3	0	0

Settlement Tier / Settlement	Site Name	Total site capacity	Development Progress		Units beyond the plan period*				
Rogiet	Green Farm (DC/2015/01328)	11	0	0	0	0	5	5	0
	Ifton Manor Farm (DC/2015/00095)	14	14	0	0	0	0	0	0
Sudbrook	Old Shipyard (DM/2018/01828)	46	46	0	0	0	0	0	0
<b>Rural Secondary Settlements</b>									
Llanfoist	Land at Grove Farm (DM/2019/00346)	106	6	37	4	59	0	0	0
<b>Rural</b>									
Llanellen	Llanellen Court Farm (DC/2015/00474)	14	0	14	0	0	0	0	0
	Llanellen Court Farm (DC/2015/00983)	14	0	0	0	14	0	0	0

\* LDP Plan period runs to December 2021 - for consistency with long standing monitoring periods the completion figure for the full 12-month period 2021-22 have been used.

## APPENDIX 2



monmouthshire  
sir fynwy

## Equality and Future Generations Evaluation

<p><b>Name of the Officer</b> completing the evaluation Mark Hand</p> <p><b>Phone no:</b> 07773478579 <b>E-mail:</b> markhand@monmouthshire.gov.uk</p>	<p><b>Please give a brief description of the aims of the proposal</b></p> <p>Scrutiny of the adopted Monmouthshire Local Development Plan (LDP) eighth Annual Monitoring Report (AMR) and recommendation for endorsement of the AMR to the Welsh Government in accordance with statutory requirements.</p>
<p><b>Name of Service area</b></p> <p>Planning (Planning Policy)</p>	<p><b>Date</b> 02/09/2022</p>

1. **Are your proposals going to affect any people or groups of people with protected characteristics?** Please explain the impact, the evidence you have used and any action you are taking below.

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Age	The AMR includes indicators that monitor health and access to community facilities and open space. These matters affect all of our communities but could disproportionately affect children and elderly people who may have limited ability to travel greater distances.	None.	The AMR includes indicators that monitor health and access to community facilities and open space.
Disability	The AMR includes indicators that monitor health and access to community facilities and open space. These matters affect all of our communities but could disproportionately affect people with disabilities who may have limited ability to travel greater distances.	None	The AMR includes indicators that monitor health and access to community facilities and open space.
Gender reassignment	None	None	N/A
Marriage or civil partnership	None	None	N/A
Pregnancy or maternity	None	None	N/A

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Race	None	None	N/A
Religion or Belief	None	None	N/A
Sex	<p>The AMR includes indicators that monitor employment provision. One of the challenges facing the County is the imbalance between male and female earnings, although this situation is improving. The Proposal aims to provide economic growth and employment provision, which could indirectly impact on wage equality and therefore access to housing and quality of life. The jobs in the foundation economy are disproportionately occupied by females. This sector is vital to support our communities, as are jobs in tourism. Neither sectors are generally well-paid, although they often offer flexible working conditions that can assist work-life balance. Wage levels are not within the remit of planning policy and policies to try to seek only high paid jobs could be to the detriment of this vital economic sector.</p>	None	N/A
Sexual Orientation	None	None	N/A

## 2. The Socio-economic Duty and Social Justice

The Socio-economic Duty requires public bodies to have due regard to the need to reduce inequalities of outcome which result from socio-economic disadvantage when taking key decisions This duty aligns with our commitment as an authority to Social Justice.

	Describe any positive impacts your proposal has in respect of people suffering socio economic disadvantage	Describe any negative impacts your proposal has in respect of people suffering socio economic disadvantage.	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
<b>Socio-economic Duty and Social Justice</b>	<p>The Social Justice strategy focuses on three main areas: tackling loneliness and isolation; tackling poverty and promoting equitable economic prosperity; and giving children the best start in life. The AMR provides detail relating to specific indicators that monitor a wide range of topic areas including affordable housing with a specific indicator relating to average house prices. Good quality and affordable housing is important in achieving poverty reduction and equitable prosperity, and supporting the best start in life.</p>	N/A	<p>This and successive AMRs will measure the impacts of the LDP on a range of social, economic and environmental indicators. The results of the AMRs will identify trends and allow remedial action to be taken, if necessary, to ensure the LDP objectives are being delivered. The monitoring process will also inform and shape the RLDP by reflecting on what is working and what is not.</p> <p>The results of the eighth AMR identifies an issue in relation to affordable dwelling completions whereby these were below the LDP target of 95 homes per annum with only 35 completions over the 2021 – 2022 monitoring period. Overall dwelling permissions were also at the lowest since adoption of the LDP with only 39 dwellings permitted over the monitoring period. While progress has been made in relation to the Plan’s Strategic Housing Sites, cumulative housing completions and affordable housing delivery rates for the Plan period are significantly lower than the Plan requirement and remain a matter of concern if Monmouthshire’s housing needs are to be met. However, this is due to a time-lag in site delivery rather than an issue with the sites not happening at all: it is worth noting that 1,263 homes (including 280 affordable homes) have planning permission and due to be built in the near future .</p>



## Policy making and the Welsh language.

How does your proposal impact on the following aspects of the Council's Welsh Language Standards:	Describe the positive impacts of this proposal	Describe the negative impacts of this proposal	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts
<p><b>Policy Making</b></p> <p>Effects on the use of the Welsh language,</p> <p>Promoting Welsh language</p> <p>Treating the Welsh language no less favourably</p>	<p>This and successive AMRs will measure the impacts of the LDP on a range of social, economic and environmental indicators. The Planning (Wales) Act 2015 provides a statutory basis to the established practice of giving consideration to the impacts of LDPs on the use of the Welsh language and that sustainability appraisals include specific consideration of such impacts.</p>	<p>N/A the AMR is a monitoring tool of the Adopted LDP reporting data from 01/04/21– 31/03/22</p>	<p>The results of the AMR will identify trends and allow remedial action to be taken, if necessary, to ensure the LDP objectives are being delivered. The monitoring process will also inform and shape the RLDP by reflecting on what is working and what is not.</p> <p>The AMR will be published in both Welsh and English.</p>
<p><b>Operational</b></p> <p>Recruitment &amp; Training of workforce</p>	<p>N/A the AMR is a monitoring tool of the Adopted LDP reporting data from 01/04/21– 31/03/22</p>	<p>N/A</p>	<p>N/A</p>
<p><b>Service delivery</b></p> <p>Use of Welsh language in service delivery</p> <p>Promoting use of the language</p>	<p>The AMR will be published in both Welsh and English.</p>	<p>None of the Planning Policy team are Welsh speakers, however, there are robust systems in place to deal with phone calls and correspondence without delaying the provision of the service.</p>	<p>This and successive AMRs will measure the impacts of the LDP on a range of social, economic and environmental indicators. The Planning (Wales) Act 2015 provides a statutory basis to the established practice of giving consideration to the impacts of LDPs on the use of the Welsh language and that sustainability</p>

			appraisals include specific consideration of such impacts.
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**4. Does your proposal deliver any of the well-being goals below?** Please explain the impact (positive and negative) you expect, together with suggestions of how to mitigate negative impacts or better contribute to the goal. There's no need to put something in every box if it is not relevant!


Well Being Goal	Does the proposal contribute to this goal? Describe the positive and negative impacts.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
<p><b>A prosperous Wales</b> Efficient use of resources, skilled, educated people, generates wealth, provides jobs</p>	<p><i>The LDP strategy seeks to increase employment opportunities within Monmouthshire; the policy framework protects existing employment sites and allocates additional land for employment use.</i></p> <p><b>Positive:</b> The AMR monitors the implementation of the Plan as a whole, including employment policies.</p> <p><b>Negative:</b> None.</p>	<p>Continue to monitor employment land supply and take up throughout the County through the annual Employment Land Survey undertaken by the Planning Policy Service. The data from the next survey will inform the 2022-23 AMR. The results of AMRs to date will identify trends and allow remedial action to be taken, if necessary, to ensure the LDP objectives are being delivered, those objectives being directly related to creating a prosperous Wales. The monitoring process will also inform and shape the RLDP by reflecting on what is working and what is not.</p>
<p><b>A resilient Wales</b> Maintain and enhance biodiversity and ecosystems that support resilience and can adapt to change (e.g. climate change)</p>	<p><i>The LDP strategy seeks to maintain and enhance biodiversity within Monmouthshire; the policy framework protects existing sites and promotes green infrastructure.</i></p> <p><b>Positive:</b> The AMR monitors the implementation of the Plan as a whole, including biodiversity impacts.</p> <p><b>Negative:</b> None.</p>	<p>Continue to monitor biodiversity throughout the County to inform the 2022-23 AMR.</p> <p>The results of AMRs to date will identify trends and allow remedial action to be taken, if necessary, to ensure the LDP objectives are being delivered, those objectives being directly related to creating a resilient Wales. The monitoring process will also inform and shape the RLDP by reflecting on what is working and what is not.</p>

Well Being Goal	Does the proposal contribute to this goal? Describe the positive and negative impacts.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
<p><b>A healthier Wales</b> People's physical and mental wellbeing is maximized and health impacts are understood</p>	<p><b>Positive:</b> The AMR monitors the implementation of the Plan as a whole. The sustainability appraisal/strategic environmental appraisal measures LDP impact on a range of sustainability indicators including open space, air and water quality.</p> <p><b>Negative:</b> None.</p>	<p>Continue to monitor sustainability indicators throughout the County to inform the 2022-23 AMR. The results of AMRs to date will identify trends and allow remedial action to be taken, if necessary, to ensure the LDP objectives are being delivered. Creating healthy communities forms part of delivering sustainable development. The monitoring process will also inform and shape the RLDP by reflecting on what is working and what is not.</p>
<p><b>A Wales of cohesive communities</b> Communities are attractive, viable, safe and well connected</p>	<p><b>Positive:</b> The AMR monitors the implementation of the Plan as a whole, including the spatial strategy. The recent Covid-19 pandemic emphasised the importance of socially sustainable communities and ensuring a balanced demography.</p> <p><b>Negative:</b> None.</p>	<p>Continue to monitor indicators to inform the 2022-23 AMR. The results of AMRs to date will identify trends and allow remedial action to be taken, if necessary, to ensure the LDP objectives are being delivered. Creating healthy communities forms part of delivering sustainable, resilient and cohesive communities. The monitoring process will also inform and shape the RLDP by reflecting on what is working and what is not.</p>
<p><b>A globally responsible Wales</b> Taking account of impact on global well-being when considering local social, economic and environmental wellbeing</p>	<p><b>Positive:</b> The AMR monitors the implementation of the Plan as a whole. The sustainability appraisal/strategic environmental appraisal measures LDP impact on a range of sustainability indicators. Preparation of the AMR allows the Council to assess LDP impact on the social, economic and environmental well-being of the County.</p> <p><b>Negative:</b> None.</p>	<p>Continue to monitor SA indicators to inform the 2022-23 AMR. The monitoring process will also inform and shape the RLDP by reflecting on what is working and what is not.</p>
<p><b>A Wales of vibrant culture and thriving Welsh language</b></p>	<p><b>Positive:</b> The AMR monitors the implementation of the Plan as a whole, including impact on community</p>	<p>Continue to monitor indicators throughout the County to inform the 2022-23 AMR. The Planning</p>

Well Being Goal	Does the proposal contribute to this goal? Describe the positive and negative impacts.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
Culture, heritage and Welsh language are promoted and protected. People are encouraged to do sport, art and recreation	<p>facilities. The Welsh language impact is a material planning consideration and was fully considered during the adoption of the LDP via the SA/SEA process.</p> <p><b>Negative:</b> None.</p>	(Wales) Act 2015 provides a statutory basis to the established practice of giving consideration to the impacts of LDPs on the use of the Welsh language and that sustainability appraisals include specific consideration of such impacts. The monitoring process will also inform and shape the RLDP by reflecting on what is working and what is not.
<p><b>A more equal Wales</b> People can fulfil their potential no matter what their background or circumstances</p>	<p><b>Positive:</b> Preparation of the AMR allows the Council to assess LDP impact on the social, economic and environmental well-being of the County.</p> <p><b>Negative:</b> None.</p>	<p>Continue to monitor indicators throughout the County to inform the 2022-23 AMR. The results of the eighth AMR identify an issue in relation to housing delivery, affordable dwelling completions were below the LDP target of 95 units per annum with only 35 completions. This affects the ability of our communities to secure appropriate and affordable accommodation. Overall dwelling permissions were also at the lowest since adoption of the LDP with only 39 dwellings permitted over the monitoring period. The continued progression of a RLDP is therefore essential in addressing inequality. Creating a more equal Wales forms part of delivering sustainable development.</p> <p>The monitoring process will also inform and shape the RLDP by reflecting on what is working and what is not.</p>

#### 4. How has your proposal embedded and prioritised the sustainable governance principles in its development?

Sustainable Development Principle	Does your proposal demonstrate you have met this principle? If yes, describe how. If not explain why.	Are there any additional actions to be taken to mitigate any negative impacts or better contribute to positive impacts?
 <p>Long Term</p> <p>Balancing short term need with long term and planning for the future</p>	<p>The eighth AMR measures short/medium term impacts since Plan adoption which enables future comparative analysis. Sustainable development is central to the adopted LDP.</p>	<p>Successive AMRs will be prepared on an annual basis, providing both an annual evaluation of Plan performance and year by year comparison from which emerging long term trends may be identified and reported on. This will inform the evidence base for the RLDP.</p>
 <p>Collaboration</p> <p>Working together with other partners to deliver objectives</p>	<p>The AMR measures Plan implementation and delivery. The LDP was prepared through extensive engagement with a wide range of internal and external stakeholders.</p>	<p>The Council will continue to monitor and report on this in the 2022-23 AMR and will consider any actions required in light of the AMR findings. The AMR indicates that some of the Plan's objectives are not being delivered, particularly in terms of housing delivery, and therefore officers recommend to continue to progress work on the RLDP.</p>
 <p>Involvement</p> <p>Involving those with an interest and seeking their views</p>	<p>The LDP was prepared through extensive engagement with a wide range of internal and external stakeholders.</p>	<p>There is no requirement to undertake public consultation on this AMR. The RLDP will nevertheless be taken forward through extensive community and stakeholder engagement, expanding on the methods used previously, including through the use of digital involvement options to provide communities with information and the ability to engage with the RLDP in a virtual manner.</p>
 <p>Prevention</p> <p>Putting resources into preventing problems occurring or getting worse</p>	<p>The AMR demonstrates the extent to which the LDP strategy and objectives are being achieved and whether the Plan's policies are functioning effectively. Emerging trends may be identified and appropriate action considered at an early stage.</p>	<p>The AMR recommends to continue to progress work on the RLDP. This will ensure up to date policies and proposals in the County once the RLDP is adopted.</p>

Sustainable Development Principle	Does your proposal demonstrate you have met this principle? If yes, describe how. If not explain why.	Are there any additional actions to be taken to mitigate any negative impacts or better contribute to positive impacts?
 <p>Considering impact on all wellbeing goals together and on other bodies</p>	<p>The AMR measures the impact of the LDP on the social, economic and environmental well-being of the County.</p>	<p>Future AMRs will examine LDP impacts over a longer period and evidence the emergence of any trends at different spatial scales. Delivering sustainable development (social, economic and environmental) is central to the LDP.</p> <p>Continue to monitor indicators to inform the 2022-23 AMR.</p>

**Council has agreed the need to consider the impact its decisions has on the following important responsibilities: Corporate Parenting and Safeguarding. Are your proposals going to affect any of these responsibilities?**

	Describe any positive impacts your proposal has	Describe any negative impacts your proposal has	What will you do/ have you done to mitigate any negative impacts or better contribute to positive impacts?
Safeguarding	None.	None.	N/A.
Corporate Parenting	The AMR monitors affordable housing provision. The monitoring process will inform and shape the RLDP by reflecting on what is working and what is not. The RLDP has the potential to provide affordable housing, delivery and allocation of which should be cognisant of the needs of children leaving care.	None.	N/A.

**5. What evidence and data has informed the development of your proposal?**

An extensive range of data sets have been used to prepare the AMR, from a wide range of sources both internal and external to the Council. These are clearly referenced in the document, but include:

The Development Management planning application database and Monmouthshire County Council publications including:

- Monmouthshire LDP 'Retail Background Paper', August 2022. <https://www.monmouthshire.gov.uk/app/uploads/2022/08/Retail-Background-Paper-2021-Final.pdf>
- Monmouthshire LDP 'Employment Background Paper', May 2022. <https://www.monmouthshire.gov.uk/app/uploads/2022/05/Employment-Land-Background-Paper-2021-2022.pdf>

Additional data has been provided by colleagues in the Ecology, Tourism, Housing, Waste and Transport Services.

External sources of data include Welsh Government, Natural Resources Wales, Office for National Statistics and Stats Wales.

**6. SUMMARY: As a result of completing this form, what are the main positive and negative impacts of your proposal, how have they informed/changed the development of the proposal so far and what will you be doing in future?**

Page 3

**Positive** - The AMR is a positive tool for monitoring the effectiveness of the LDP and ultimately determining whether any revisions to the Plan are necessary. It aims to demonstrate the extent to which the LDP strategy and objectives are being achieved and whether the Plan's policies are functioning effectively. It allows the Council to assess the impact of the LDP on the social, economic and environmental well-being of the County and identifies any significant contextual changes that might influence the Plan's implementation or revision.

The AMR is required to be prepared each year following plan adoption, providing an annual evaluation of plan performance and year by year comparison. This is the eighth AMR to be prepared since the adoption of the LDP and is based on the period 01 April 2021 – 31 March 2022. The findings of the eighth AMR have been analysed and compared to the findings in previous seven AMRs allowing emerging trends to be identified and reported on.

The AMR recommends that work progresses on the RLDP. It is further recommended that the AMR is scrutinized and recommended for endorsement to submit to the Welsh Government in accordance with statutory requirements.

**Negative** – None. There are no implications, positive or negative, for social justice, corporate parenting or safeguarding.

**7. ACTIONS: As a result of completing this form are there any further actions you will be undertaking? Please detail them below, if applicable.**

What are you going to do	When are you going to do it?	Who is responsible
Submit the eighth AMR to the Welsh Government by 31 <sup>st</sup> October 2022 in accordance with statutory requirements. Publish the AMR on the Council's website.	October 2022	Head of Placemaking, Regeneration, Highways and Flooding Head of Planning Planning Policy Team

**8. VERSION CONTROL:** The Equality and Future Generations Evaluation should be used at the earliest stage, such as informally within your service, and then further developed throughout the decision making process. It is important to keep a record of this process to demonstrate how you have considered and built in equality and future generations considerations wherever possible.

Page 232

Version No.	Decision making stage	Date considered	Brief description of any amendments made following consideration
1.0	Place Scrutiny Committee	11/10/2022	
1.1	Individual Cabinet Member	26/10/2022	



<b>SUBJECT:</b>	<b>REVENUE &amp; CAPITAL BUDGET MONITORING 2022/23 – MONTH 4 FORECAST</b>
<b>MEETING:</b>	<b>PERFORMANCE AND OVERVIEW SCRUTINY COMMITTEE</b>
<b>DATE:</b>	<b>11<sup>th</sup> October 2022</b>
<b>DIVISION/WARDS AFFECTED:</b>	<b>ALL</b>

## 1. PURPOSE:

- 1.1 To provide Committee members with information on the Authority's financial forecasts for the 2022/23 financial year in respect of the revenue budget, capital programme, and associated reserves position.
- 1.2 This report is being considered for pre-decision scrutiny by the Performance and Overview Committee as part of their responsibility to:
  - assess whether effective budget monitoring is taking place;
  - monitor the extent to which budgets are spent in accordance with the agreed budget and policy framework;
  - challenge the reasonableness of variances to budget, and;
  - consider the progress in relation to mandated budget savings proposals for the year.
- 1.3 Feedback from this Committee will be included in the report which is due to be received by Cabinet on the 19<sup>th</sup> October 2022.

## RECOMMENDATIONS TO PERFORMANCE AND OVERVIEW SCRUTINY COMMITTEE

- i. That the Performance and Overview Scrutiny Committee perform pre-decision scrutiny on the Authority's Month 4 financial forecasts for the 2022/23 financial year in respect of the revenue budget, capital programme, and associated reserves position.
- ii. That the Committee as part of their role assesses whether effective budget monitoring is in place; the extent to which budgets have been spent within the agreed budget and policy framework, including the reasonableness of the explanation for variances and; consider the achievement of progress in meeting mandated budget savings targets.
- iii. That Committee feedback is provided and included as part of the report which is due to be received by Cabinet at its meeting on the 19<sup>th</sup> October 2022.

## 2. RECOMMENDATIONS TO CABINET:

- 2.1 That Cabinet recognises the significant over spend forecast at Month 4 against the Authority's revenue budget of £8.8m, which is primarily as a result of:
  - **£3.5m forecast over spend in Children's services** due to the increasing numbers of high cost placements and continued use of agency staff;

- **£1.6m forecast over spend in Adults care services** following a dramatic influx of clients requiring services post-pandemic, with some clients requiring more intense services due to delayed health care during the pandemic;
- **£0.5m forecast over spend in Additional learning needs** budgets due to the increasing cost and number of out of County placements;
- **£1.3m forecast over spend in meeting the needs of the Homeless** following national policy change initiatives and where inadequate funding has been provided;
- **£0.5m forecast over spend in MonLife services** as income levels are failing to meet targets in the areas of Leisure and Outdoor education;
- **£2m forecast over spend in relation to the expected outcome of workforce pay negotiations** which is expected to be significantly above the 3.5% budgeted.

Together with a number of other over and under spends summarised in paragraph 3.7 and detailed in **appendix 1** to this report.

- 2.2 That Cabinet request that the Strategic leadership team immediately look to arrest the forecast over spend through a range of appropriate budget recovery measures as outlined in this report.
- 2.3 That Cabinet recognises the importance of a balanced outturn position being achieved for 2022/23, in that it safeguards the need to draw further upon any planned use of reserves and capital receipts and which will be required to assist in meeting the unprecedented financial challenges presenting over the medium term and where funding levels are expected to fall significantly short in meeting these challenges.
- 2.4 That Cabinet recognise the ongoing financial risks to the revenue budget of the outcome of ongoing pay negotiations, and the potential impact of the cost of living crisis on communities, and the associated financial impact this will have on the Council.
- 2.5 That Members note that the overall revenue budget continues to be subsidised by £2.65m of capital receipts which are being used to fund identified eligible expenditure under the flexible use of capital receipts directive.
- 2.6 That Members note the forecast 100% delivery of the budgeted mandated savings as detailed in **appendix 2** and as approved by full Council previously.
- 2.7 Cabinet notes the extent of forecast movements in Schools reserve usage contained in **table 4**, and **appendices 1 & 3** which highlight the possibility of a further six schools entering into a deficit reserve position by the end of the financial year.
- 2.8 Cabinet considers the forecast capital outturn spend of £85.6m as outlined in **appendix 1** that currently indicates a forecast over spend of £209k, noting the continuing difficulty in delivering capital projects to their allocated budget in the current challenging economic environment.

### 3. KEY ISSUES:

- 3.1 In setting the 2022/23 budget there was an expectation that the Council would see a gradual return to a more stable operating environment relative to the last two years, with the direct impacts of the pandemic potentially set to ease.
- 3.2 There was a known and accepted risk that the Welsh Government Hardship fund would end and consequently any direct or indirect costs resulting from the pandemic would fall upon the Council to fund. It was also highlighted that the challenges experienced in achieving historic income levels would continue, and that the permanent change in national policy initiative around the needs of the homeless would not be adequately funded by Welsh Government.
- 3.3 The timing and degree to which these risks would manifest was the key uncertainty within the budget setting process, and on that basis, Cabinet agreed a package of measures to combat the known and unknown pressures presenting in terms of a mix of base budget provision of a further £10.1m and the creation of specific earmarked reserves of £4m.
- 3.4 In respect of the £10.1m of budget pressures that were accommodated, these were notably:
- All pay and pension related spending pressures in our schooling system, up to a threshold of a 3% pay award
  - The increasing demand on schools and the Local Education Authority of pupils with additional learning needs
  - The increasing complexity of cases being placed on our children's social services in respect of looked after children and for whom the Council acts as corporate parent
  - The growing impact of an ageing population on adult social services and the challenges that result from a fragile and unsustainable social care market in Wales
  - Significant service pressures within the passenger transport unit and within recycling and waste and that look to ensure that the Council supports and sustains key service delivery
  - Responding to the needs of homelessness with housing related support
  - Further investment in our Highways and transport infrastructure alongside our IT and network estate
- 3.5 It is therefore disappointing that despite accommodating the above pressures into the 2022/23 budget, that at Month 4 significant further in year service pressures are forecast, with many of these pressures developing in the same key areas that have been provided additional support in the budget.
- 3.6 **Table 1** below summarises the forecast £8.8m net over spend against the Council's revenue budget for the year.

**Table 1: 2022/23 Revenue budget forecast as at Month 4**

Month 4 Revenue budget forecast	Total budget for the year	Total forecast expenditure / (income)	Total forecast variance to budget	Variance as a % of budget
Directorate	£000's	£000's	£000's	%
Social Care, Health & Safeguarding	58,189	63,245	5,056	8.7%
Children & Young People	59,513	60,254	741	1.2%
Communities & Place	23,687	24,303	616	2.6%
MonLife	4,567	5,046	479	10.5%
Chief Executives Unit	3,244	3,244	0	0.0%
People & Governance	4,733	4,733	0	0.0%
Resources	7,664	8,421	757	9.9%
Corporate Costs & Levies**	25,654	27,571	1,917	7.5%
Treasury & Reserves	5,448	5,223	(225)	-4.1%
Financing	(192,699)	(193,240)	(541)	-0.3%
<b>Total</b>	<b>0</b>	<b>8,800</b>	<b>8,800</b>	

**\*\* Includes the estimated impact (£2.1m) of the non-teaching pay award over and above the 3.5% already budgeted for. Once this value is finalised, it will become a cost to individual directorates rather than being held corporately.**

3.7 A full breakdown of the variances forecast by services at Month 4 is contain within **appendix 1**, however at a summary level the principal pressures and mitigating savings forecast are within the areas of:

Pressure/Saving	£000's	Description
<b>Children's services</b>	3,519	Despite stabilisation in Children looked after numbers, there are increasing numbers of high cost placements, including extremely costly emergency arrangements for children where there is no regulated placement. Alongside this there is continued use of agency staff to fill vacancies.
<b>Adults Services</b>	1,598	Older Adults budgets have seen a dramatic influx of clients requiring services as we move out of the pandemic, with continued pressures from hospitals to discharge patients into the social care sector, and some clients requiring more intense services due to delayed health care during the pandemic.
<b>Additional Learning Needs</b>	533	Due to placement costs outside of our own schools (£401k), a reduction in income from other Councils for out of County pupils attending our schools (£68k), and additional support for pupils attending our own schools (£51k).
<b>Housing</b>	1,327	Primarily due to national policy change impacting upon the service and where our housing costs in relation to the needs of the Homeless are not attracting full funding. £315k in net additional costs, and £989k where by emergency accommodation placements do not allow the Council to claim full housing benefit subsidy.
<b>MonLife</b>	479	Due to the sections inability to generate the expected income targets in relation to Leisure and Outdoor education services.
<b>Passenger Transport Unit (PTU)</b>	424	Increased pay, fuel and repair costs have meant that operators have handed back contracts resulting in re-negotiated external prices or increased in-house provision required.

<b>Pressure/Saving</b>	<b>£000's</b>	<b>Description</b>
<b>Non-teaching pay award</b>	2,017	An allowance has been made within the forecast for the estimated result of pay award negotiations over and above the 3.5% already budgeted for. Negotiations continue between local government employer's representatives and trade unions.
<b>Car Parks &amp; Civil Parking Enforcement</b>	255	Parking enforcement fines will not hit budgeted targets and in addition there are over spends in expenditure primarily in transport, premises and software costs.
<b>Markets</b>	129	The number of traders has dropped off considerably since Covid-19 and this has meant the service is struggling to meet income targets alongside increases in waste disposal costs.
<b>Council tax</b>	(542)	Out-performance of budgeted Council tax collection.
<b>Borrowing costs</b>	(225)	A reduction in net budgeted borrowing costs reflective of a lower than budgeted interest rate environment and significant capital slippage at the end of 2021/22.
<b>Staff vacancies</b>	(496)	Significant staff vacancies being carried in the establishment over the first half of the financial year.
<b>Solar Farm &amp; Sustainability</b>	(113)	Improved income from our Solar Farm and PV installations caused by the increased market rates for energy.
<b>Neighbourhood services</b>	(227)	Primarily due to the improvement gained from the installation of LEDs in our street-lighting over and above budgeted levels (£125k), and Waste contract savings resulting from a strong recycling market (£92k).

#### **4 Ongoing budgetary risks**

- 4.1 Whilst immediate mitigating action is underway to arrest the significant forecast in-year deficit we need to be acutely aware of the further financial risks presenting during 2022/23 and in light of the turbulent socio-economic environment currently facing households, businesses and the public sector.
- 4.2 The Cost of living crisis is having a significant impact on our communities, with a growing need for additional Council services, the impact upon demand for the Council's income generating services, and risks around future debt recovery. Alongside this, the wider economic and inflationary environment continues to impact service delivery, both in respect of cost and supply chain disruption, and in presenting continued recruitment challenges.
- 4.3 The wider and longer lasting indirect impact of the pandemic on Council services also needs to be considered, particularly in the areas of Homelessness, Children's services, Adult social care and Children's additional learning needs. There remains significant latent and complex demands in these areas as a result and some of these impacts will take a significant period of time to unwind.
- 4.4 Significant savings from existing staff vacancies have already been factored into forecasts and alongside this there is very little scope for further savings in financing and treasury budgets in light of the current economic environment.
- 4.5 Importantly the overall outturn position continues to be supported by £2.65m of identified eligible expenditure to be funded from capital receipts under the flexible use of capital receipts directive. Reliance on these mitigations was a short-term measure only and is not sustainable at this level beyond 2022/23 as capital receipts forecast to be generated start to fall away.

- 4.6 In considering all of the above, this presents a unique and unprecedented operating environment for the Council, and one which severely curtails the immediate ability of the Council to influence its primary expenditure and income drivers, and therefore its ability to be able to bear down on cost, or increase income to any significant degree without resorting to more extreme measures.
- 4.7 When looking beyond this financial year, it is important to note that the majority of the savings already identified during the year to assist the in-year budget recovery are one-off or temporary in nature and will not bring any further benefit to future year's budgets. Conversely, the majority of those pressures highlighted above are demand driven and recurrent in nature and will need to be considered as part of the wider budget process for 2023/24 and beyond.
- 4.8 As we look to the remainder of the financial year the key financial focus continues to be in arresting the forecast over spend position. To that end, mobilising a range of budget mitigation measures will be vital to ensuring that the Council ends the year in a financially sustainable position and in limiting the need to substantially deplete reserve balances. This will be particularly important in light of what will be an incredibly challenging budgetary process leading into 2023/24.

## 5 Potential budget mitigation measures

Mitigation measure	Application	Risks
<b>Reserves</b>	Reserves have been replenished by approximately £10m over past two years, with particular focus at the end of 2021/22 in providing protection against some the budget risks now manifesting (In particular Social care, Homelessness, Leisure income, and Pay).	Need to be acutely aware of the emerging challenging 2023/24 budget situation where unprecedented pressures are materialising around demand, inflation, energy, pay, and levels of funding. A degree of reserve cover will be vital in mitigating some of the more temporary pressures presenting.
<b>Capitalisation directive</b>	Identification of further revenue costs, over and above the £2.65m already budgeted, that can be categorised as enabling service transformation, and that can be legitimately funded from capital receipts under the regulations.	The application of capital receipts under this directive is limited to the amount of receipts generated in the same financial year as the expenditure is incurred. Whilst £9.8m in receipts are forecast this year, a minimal amount has actually been banked to date.  Capital receipts are a one-off source of funding and further use under this measure will restrict the amount available for future capital investment.
<b>Funding</b>	Further unbudgeted grant funding becoming available during the remainder of the year.  Of particular note, there is currently no allowance within the financial forecasts for	All parts of the public sector are facing significant budget challenges in the current global economic environment and notably Welsh Government have made significant funding commitments in 2022/23 in relation to Free School

Mitigation measure	Application	Risks
	any further grant funding or cost displacement in respect of Social care. Recent years have seen significant winter pressure grant, or a form of compensatory Health funding.	meal provision, the Ukrainian crisis, and the Cost of Living crisis. Further funding commitments to Local Government therefore come with a significant level of uncertainty.
<b>Cost moderation</b>	Non-pay cost reduction in supplies and services, third party, premises, and transport budgets.  Pay budget cost reduction - significant vacancies are currently being held across services with many being forecast to be filled during the Autumn. Given the current recruitment market challenges it is expected that further savings could materialise.	A significant proportion of expenditure is driven by demand and, alongside this, in the current economic environment the Council has limited ability to influence and negotiate cost levels.  With only six months remaining of the financial year immediate action would need to be taken to have a material impact.
<b>Reduced services</b>	The Council could look to reduce the level of service it provides, either through reduced capacity or by the switching off of discretionary services.	Both the legacy impact of the pandemic and the current cost of living crisis is placing huge pressure upon communities, which consequently places additional and more complex demands upon Council services. The Council plays a vital role in mitigating these impacts through both the discretionary and non-discretionary services it provides.

## 6 Progress against 2022/23 budgeted mandated service savings

6.1 The 2022/23 budget included mandated savings totalling £2.129m and the progress against these is summarised in **table 3** below and in more detail in **appendix 2**.

**Table 3: Progress against mandated savings**

Directorate	2022/23 Budgeted Savings £000	Savings forecast £000	Delayed Savings £000	Savings Unachievable £000	% Achieved
Social Care & Health	(120)	(120)	0	0	100%
Communities & Place	(959)	(959)	0	0	100%
Resources	(300)	(300)	0	0	100%
Chief Executives Unit	(33)	(33)	0	0	100%
Corporate Costs & Levies	(717)	(717)	0	0	100%
<b>Total</b>	<b>(2,129)</b>	<b>(2,129)</b>	<b>0</b>	<b>0</b>	<b>100%</b>

6.2 It is pleasing to note the forecast 100% delivery of mandated savings, especially in light of the ongoing challenges faced by services in current operating conditions. Finance officers will continue to work with services to ensure that these mandated savings are fully delivered as well as identifying any further areas of service efficiency which may deliver additional savings.

## 7 School balances

7.1 From a financial perspective, 2021/22 was another unprecedented year for schools who continued to receive several significant Welsh Government grants to support them and their pupils during, and following a period of significant disruption to learning. This resulted in all but one of our schools bringing forward a surplus balance into the 2022/23 financial year, with the vast majority carrying significant surplus balances above those guided by Welsh Government school funding regulations (£50k for a Primary, £100k for a Secondary or Special school).

7.2 The Authority requires schools carrying balances above those levels guided by Welsh Government to provide investment plans setting out how they intended to spend the excess balances being held. These plans informed the budget process for 2022/23.

7.3 At month 4, the forecast is for an overall contribution from school balances of £5.1m, resulting in a forecast surplus at year-end of £1.8m.

**Table 4: Forecast movement in school balances for 2022/23**

Draft Council Fund Outturn 2022/23 – School Balances Summary outturn position at Month 4	(A) Opening Reserves (Surplus) / Deficit Position 2022/23	(B) Draw / (Contribution) from / (to) School Balances @ Month 4	(C) Draw / (Contribution) from / (to) School Balances @ Month 6	(D) Draw / (Contribution) from / (to) School Balances @ Month 9	(A+B) Forecast Reserve Balances at 2022/23 Outturn
	£000's	£'000	£'000	£'000	£'000
<b>Cluster</b>					
Abergavenny	(2,145)	1,181			(963)
Caldicot	(2,165)	1,570			(596)
Chepstow	(695)	863			168
Monmouth	(1,869)	1,425			(443)
Special	(82)	106			24
<b>Total</b>	<b>(6,956)</b>	<b>5,145</b>			<b>(1,810)</b>

7.4 The budget for 2022/23 made allowance for a pay award for schools staff up to a threshold of 3%, with any award agreed above this level to be funded from schools balances. The above forecast is predicated upon a further pressure of 2% over and above the 3%



budgeted based upon the most likely outcome of the initial pay discussions. This accounts for £1.2m of the overall £5.1m forecast draw upon school balances this year.

- 7.5 The investment plans enacted by schools look to deliver the best learning outcomes for pupils in line with the purpose of the grant funding provided over the past two financial years. **Appendices 1 & 3** outline the forecast movement in individual school balances for the year, and whilst it is clear that the investment plans enacted will bring many school balances more in line with those levels guided by Welsh Government, it is disappointing to note that a further six schools are now forecast to move into deficit by year-end.
- 7.6 There remains significant concern from a financial perspective that the inherent structural budget deficits that led to a significant number of schools being in deficit pre-pandemic in some cases still remain. Whilst the current economic climate is severely challenging, schools balances are designed to provide a level of financial resilience to mitigate and smooth such risks and are not expected to fund ongoing day-to-day expenditure. Officers will continue to work closely with those schools of concern and look to aid the return to a more sustainable budget plan over the medium term.

## **8 Capital outturn forecast**

- 8.1 The capital expenditure forecast detailed in **appendix 1** indicates a forecast over spend of £209k, with £114k being attributed to additional refurbishment costs on properties acquired for Children's Services, and £95k on the Crick Road Care Home scheme relating to additional equipment required to ensure resident's privacy.
- 8.2 Finance officers will continue to work with the project managers concerned to seek budget mitigation measures, either through cost reduction measures or through alternative funding mechanisms.
- 8.3 The current economic environment continues to have a significant impact on the overall capital programme with cost inflation and supply chain issues continuing to present a challenge to project delivery. Whilst every effort is being made by project managers to work within the budgetary plans set, it is inevitable as the year progresses that further cost pressures will materialise. This will in turn limit the scope of project delivery, especially in the areas of property maintenance and Infrastructure works where less schemes can be delivered within the overall budget allocated.
- 8.4 Four schemes are indicating delays at this early stage in the year, with £2.3m forecast slippage following revision of project timescales:
- £2m for Housing provision for the homeless due to the complex lead time of acquiring properties;
  - £153k delay in the SRS Data Hall migration due to issues encountered with commercial providers;
  - £100k for the Penyrhiw Sewage Treatment Works where the scheme has encountered delays in progressing survey and design works due to external factors;

- £25k for the Abergavenny Skate Park S106 Scheme as additional funding is being sought from external partners to deliver on the preferred project within budget.

8.5 Whilst the month 4 forecast highlights only £2.3m of capital slippage, previous year's trends would indicate that this will increase substantially as the year progresses, and as more certainty becomes available both in terms cost and contract delivery timescales.

8.6 The forecast movement in capital receipts balances for the year is shown below. Whilst overall balances on the face of it are healthy, there remains the risk that forecast receipts receivable for 2023/24 onwards are at comparatively low levels, and combined with the fact that receipts are continuing to be used to subsidise the revenue budget through capitalisation direction means that the scope for further capital investment funded via receipts will be limited.

**Table 5: Forecast movement in capital receipt balances**

	<b>2022/23</b>	<b>2023/24</b>	<b>2024/25</b>	<b>2025/26</b>	<b>2026/27</b>
	<b>£000</b>	<b>£000</b>	<b>£000</b>	<b>£000</b>	<b>£000</b>
Balance as at 1st April	10,414	13,289	13,204	12,259	10,763
Capital receipts used for financing	(4,263)	(1,294)	(1,194)	(1,094)	(1,094)
Capital receipts used to support capitalisation direction	(2,650)	(507)	(507)	(507)	(507)
Capital receipts Received or Forecast	9,788	1,715	756	104	104
<b>Forecast Balance as at 31st March</b>	<b>13,289</b>	<b>13,204</b>	<b>12,259</b>	<b>10,763</b>	<b>9,266</b>

## 9 RESOURCE IMPLICATIONS:

9.1 The report itself covers the resource implications of the entirety of the revenue and capital budget activity during the year. There are no further resource implications as a result of the recommendation in this report.

## 10 EQUALITY AND FUTURE GENERATIONS EVALUATION (INCLUDES SOCIAL JUSTICE, SAFEGUARDING AND CORPORATE PARENTING):

10.1 This report provides Members with information on the forecast revenue and capital outturn position of the Authority and carries no decisions. There are therefore no equality of future generations' implications directly arising from this report.

## 11 CONSULTEES:

Strategic Leadership Team  
Performance & Overview Scrutiny Committee  
Cabinet

## 12 BACKGROUND PAPERS:

*Appendix 1* – Detailed outturn statements and directorate commentaries

*Appendix 2* – Progress against mandated budget savings

*Appendix 3* – Forecast movement in individual school balances

## 13 AUTHORS:

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## Overall Revenue Position

Table 1: 2022/23 budget summary forecast at Month 4

Service Area	Original Budget 2022/23	Budget Adjustments	Revised Annual Budget	Forecast Outturn	Forecast (Under) / Over Spend @ Month 4
	'000's	'000's	'000's	'000's	'000's
Social Care, Health & Safeguarding	57,877	312	58,189	63,245	5,056
Children & Young People	58,990	523	59,513	60,254	741
Communities & Place	23,588	99	23,687	24,303	616
MonLife	4,430	137	4,567	5,046	479
Chief Executives Unit	3,155	89	3,244	3,244	0
People & Governance	4,663	70	4,733	4,733	0
Resources	6,660	1,004	7,664	8,421	756
Corporate Costs & Levies	26,207	(554)	25,653	27,571	1,918
<b>Net Cost of Services</b>	<b>185,570</b>	<b>1,680</b>	<b>187,250</b>	<b>196,818</b>	<b>9,568</b>
<b>Appropriations</b>	<b>6,652</b>	<b>(1,204)</b>	<b>5,448</b>	<b>5,223</b>	<b>(226)</b>
<b>Expenditure to be Financed</b>	<b>192,223</b>	<b>476</b>	<b>192,699</b>	<b>202,040</b>	<b>9,342</b>
<b>Financing</b>	<b>(192,223)</b>	<b>(476)</b>	<b>(192,699)</b>	<b>(193,240)</b>	<b>(542)</b>
<b>Net General Fund (Surplus) / Deficit</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>8,800</b>	<b>8,800</b>

Table 2: 2022/23 budget detailed forecast at Month 4

Service Area	Original Budget 2022/23	Budget Adjustments	Revised Annual Budget	Forecast Outturn	Forecast (Under) / Over Spend @ Month 4
	'000's	'000's	'000's	'000's	'000's
Adult Services	9,548	(45)	9,503	9,148	(355)
Children Services	17,795	44	17,840	21,359	3,519
Community Care	26,111	277	26,387	28,468	2,081
Commissioning	1,418	2	1,420	1,346	(74)
Partnerships	436	8	445	445	0
Public Protection	1,910	21	1,931	1,870	(61)
Resources & Performance	659	4	663	609	(54)
<b>Social Care, Health &amp; Safeguarding</b>	<b>57,877</b>	<b>312</b>	<b>58,189</b>	<b>63,245</b>	<b>5,056</b>
Individual Schools Budget	47,775	500	48,276	48,451	176
Resources	1,162	5	1,167	1,199	32
Standards	10,053	17	10,070	10,604	533
<b>Children &amp; Young People</b>	<b>58,990</b>	<b>523</b>	<b>59,513</b>	<b>60,254</b>	<b>741</b>
Enterprise, Housing & Community Animation	2,921	(84)	2,837	3,174	337
Facilities & Fleet Management	6,958	(82)	6,876	7,387	511
Neighbourhood Services	11,944	34	11,978	11,751	(227)
Placemaking, Highways & Flood	1,765	231	1,996	1,991	(5)
<b>Communities &amp; Place</b>	<b>23,588</b>	<b>99</b>	<b>23,687</b>	<b>24,303</b>	<b>616</b>
Countryside & Culture	1,101	44	1,144	1,141	(3)
Finance & Business Development	2,263	21	2,283	2,297	14
Leisure, Youth & Outdoor Adventure	1,067	73	1,139	1,608	469
<b>MonLife</b>	<b>4,430</b>	<b>137</b>	<b>4,567</b>	<b>5,046</b>	<b>479</b>
Policy, Scrutiny & Customer Service	3,155	89	3,244	3,244	0
<b>Chief Executives</b>	<b>3,155</b>	<b>89</b>	<b>3,244</b>	<b>3,244</b>	<b>0</b>
Democratic Services	2,560	15	2,576	2,589	13
Emergency Planning	158	2	160	160	0
People	1,945	53	1,998	1,985	(13)
<b>People &amp; Governance</b>	<b>4,663</b>	<b>70</b>	<b>4,733</b>	<b>4,733</b>	<b>0</b>

Service Area	Original Budget 2022/23	Budget Adjustments	Revised Annual Budget	Forecast Outturn	Forecast (Under) / Over Spend @ Month 4
Commercial, Corporate & landlord Services	1,115	559	1,674	1,744	71
Finance	2,659	430	3,089	3,837	749
Future Monmouthshire	4	1	5	0	(5)
Information Communication Technology	2,883	14	2,897	2,839	(58)
<b>Resources</b>	<b>6,660</b>	<b>1,004</b>	<b>7,664</b>	<b>8,421</b>	<b>756</b>
Precepts & Levies	22,319	312	22,630	22,629	(1)
Coroner's	171	0	171	171	0
Archives	196	0	196	196	0
Corporate Management	385	0	385	382	(2)
Non Distributed Costs (NDC)	651	0	651	651	0
Strategic Initiatives	867	(867)	0	2,017	2,017
Insurance	1,619	1	1,620	1,524	(96)
<b>Corporate Costs &amp; Levies</b>	<b>26,207</b>	<b>(554)</b>	<b>25,653</b>	<b>27,571</b>	<b>1,918</b>
<b>Net Cost of Services</b>	<b>185,570</b>	<b>1,680</b>	<b>187,250</b>	<b>196,818</b>	<b>9,568</b>
Fixed Asset Disposal Costs	0	0	0	0	0
Interest & Investment Income	(100)	0	(100)	(341)	(241)
Interest Payable & Similar Charges	3,956	0	3,956	4,148	192
Charges Required under Regulation	6,714	0	6,714	6,663	(51)
Borrowing Cost Recoupment	(3,520)	0	(3,520)	(3,845)	(325)
Contributions to Reserves	188	0	188	188	0
Contributions from reserves	(586)	(1,204)	(1,790)	(1,590)	200
<b>Appropriations</b>	<b>6,652</b>	<b>(1,204)</b>	<b>5,448</b>	<b>5,223</b>	<b>(226)</b>
<b>Expenditure to be Financed</b>	<b>192,223</b>	<b>476</b>	<b>192,699</b>	<b>202,040</b>	<b>9,342</b>
General Government Grants	(77,524)	0	(77,524)	(77,524)	0
Non Domestic Rates	(34,753)	0	(34,753)	(34,753)	0
Council tax	(87,309)	(476)	(87,785)	(88,105)	(320)
Council Tax Benefit Support	7,363	0	7,363	7,142	(222)
<b>Financing</b>	<b>(192,223)</b>	<b>(476)</b>	<b>(192,699)</b>	<b>(193,240)</b>	<b>(542)</b>
<b>Net General Fund (Surplus) / Deficit</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>8,800</b>	<b>8,800</b>

## DIRECTORATE – DIVISION VARIANCE COMMENTS

<b>SOCIAL CARE, HEALTH &amp; SAFEGUARDING DIRECTORATE</b>	<b>Month 4</b>	<b>Month 6</b>	<b>Month 9</b>	<b>Outturn</b>
<b>Deficit / (Surplus) £'000s</b>	5,056	0	0	0

### **SOCIAL CARE, HEALTH & SAFEGUARDING DIRECTOR'S COMMENTARY:**

Four months into the 2022/23 financial year we are predicting an over spend of £5.056m based on known commitments and expectations against the directorate budget.

Within the Children's Service budget there is a predicted over spend of £3.519m, due to the increasing numbers of high cost placements, where we are presently supporting 23 placements at the end of July that account for over £6m of annual spend, including extremely costly emergency arrangements for children where there is no regulated placement. There is continued use of agency staff to fill vacancies. This financial year sees the full effect of costs resulting from the removal by Welsh Government of the COVID hardship fund, Social Care Recovery Fund and Social Care Pressures grants. On a more positive note, Children Looked After numbers continue to stabilise at 204 for the end of July.

The combined Adults budget is forecast to over spend by £1.598m and similar to Children's has seen the full year effect in costs to be borne by the budget from the loss of three vital Welsh Government funding streams. Older Adults budgets have seen a dramatic influx of clients requiring services as we move out of the pandemic, with continued pressures from hospitals to discharge patients into the social care sector, and some clients requiring more intense services due to delayed health care during the pandemic. A few in house services are currently undergoing reviews, with in year savings being used to partially offset over spends.

Public Protection had a cash injection this year and as a result is operating at £61k within its budget, due to savings from vacant posts.

### **Adult Services**

<b>Outturn Forecast</b>	<b>Month 4</b>	<b>Month 6</b>	<b>Month 9</b>	<b>Outturn</b>
<b>Deficit / (Surplus) £'000s</b>	(355)	0	0	0

The under spend is largely in the My Day My Life service and a review will be commissioned to determine the delivery model moving forward as we exit the pandemic and what is required to meet the future needs of our disability clients.

### **Children Services**

<b>Outturn Forecast</b>	<b>Month 4</b>	<b>Month 6</b>	<b>Month 9</b>	<b>Outturn</b>
<b>Deficit / (Surplus) £'000s</b>	3,519	0	0	0

Due to the increasing numbers of high cost placements, where we are presently supporting 23 placements at the end of July that account for over £6m of annual spend, including extremely costly emergency arrangements for children where there is no regulated placement. There is continued use of agency staff to fill vacancies. This financial year sees the full effect of costs resulting from the removal by Welsh Government of the COVID hardship fund, Social Care Recovery Fund and Social Care Pressures grants.

### **Community Care**

<b>Outturn Forecast</b>	<b>Month 4</b>	<b>Month 6</b>	<b>Month 9</b>	<b>Outturn</b>
<b>Deficit / (Surplus) £'000s</b>	2,081	0	0	0



This financial year we have made 34 additional care home placements which has added to the over spend, along with the increase demand, especially for 24 hour care provision for domiciliary care to aid hospital discharge, to meet the challenges of an ageing population, but as a result of the pandemic clients are of a higher dependency as a result of delayed health care.

### Commissioning

Outturn Forecast	Month 4	Month 6	Month 9	Outturn
Deficit / (Surplus) £'s	(74)	0	0	0

Saving from staff vacancy which is currently planned to go out to recruitment.

### Partnerships

Outturn Forecast	Month 4	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	0	0	0	0

No variance forecast.

### Public Protection

Outturn Forecast	Month 4	Month 6	Month 9	Outturn
Deficit / (Surplus) £'s	(61)	0	0	0

Savings from staff vacancies.

### Resources & Performance

Outturn Forecast	Month 4	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	(54)	0	0	0

Savings from vacancies which are currently out to recruitment.

### CHILDREN & YOUNG PEOPLE DIRECTORATE

	Month 4	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	741	0	0	0

### CHILDREN & YOUNG PEOPLE DIRECTOR'S COMMENTARY:

The Directorate's Month 4 position is an over spend of £741k, which is largely due to additional ALN expenditure reported in the Standards section.

### Individual Schools Budget

Outturn Forecast	Month 4	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	175	0	0	0

The ISB over spend is due to the following, which was not included in the budget:-

- funding of two protected salaries and a Teaching & Learning Responsibility payment (TLR) which falls to the Authority to fund (£45k);
- back pay for staff, which was not included in the MTFP. This was due to the late agreement for the pay award and the budget had already been set (£100k);
- payment for a bespoke home to school transport arrangement to Caldicot School pending a final catchment area review (£20k);
- School Staff Wellbeing Project (£9k)

<b>Resources</b>				
<b>Outturn Forecast</b>	<b>Month 4</b>	<b>Month 6</b>	<b>Month 9</b>	<b>Outturn</b>
<b>Deficit / (Surplus) £'000s</b>	32	0	0	0
The over spend is due to several cost centres not being able to currently fully meet the 2% staff efficiency saving.				
<b>Standards</b>				
<b>Outturn Forecast</b>	<b>Month 4</b>	<b>Month 6</b>	<b>Month 9</b>	<b>Outturn</b>
<b>Deficit / (Surplus) £'000s</b>	533	0	0	0
<p>The overspend of £533k, is largely due to ALN, which has seen costs increase due to the following:-</p> <ul style="list-style-type: none"> <li>• Several pupils have either moved into Monmouthshire or have left a Monmouthshire school to attend a school in their home County, so we are no longer able to recoup the income from other LA's (£68k)</li> <li>• 2 new pupils attending an independent school (£105k)</li> <li>• Full year costs for 2 pupils currently at an Independent school, who decided to stay on for Year 14 (were previously leaving at the end of Year 13 / the Summer Term (£60k))</li> <li>• 1 pupil accessing SALT and Seirrah Therapies (£24k)</li> <li>• 1 pupil attending MonLife (£30k)</li> <li>• 3 new pupils attending schools in Blaenau Gwent &amp; increase in costs for an existing pupil (£105k)</li> <li>• 2 new pupils attending schools in Newport (£17k)</li> <li>• 1 new pupil moving to a Bristol school (£9k)</li> <li>• 1 new pupil potentially to attend a school in Torfaen, currently going through Tribunal (£50k)</li> <li>• Staff costs due to the expansion of Pembroke SNRB (£32k)</li> <li>• Blaenau Gwent contacted us to advise they had been paying transport costs, that we were liable for, as the pupil is a Looked After Child (£19k)</li> </ul> <p>The remainder of the overspend is due to additional staff costs in the Education Welfare Support Team (EWS) and the EWS and Psychology Service being unable to currently meet the 2% staff efficiency savings.</p>				
<b>COMMUNITIES &amp; PLACE DIRECTORATE</b>	<b>Month 4</b>	<b>Month 6</b>	<b>Month 9</b>	<b>Outturn</b>
<b>Deficit / (Surplus) £'000s</b>	616	0	0	0
<p><b>COMMUNITIES &amp; PLACE DIRECTOR'S COMMENTARY:</b></p> <p>The Directorate is forecasting an outturn position of £616k adverse at Month 4. The inflationary rises and a post-covid environment are seeing an impact upon the cost of the provision of key services. In addition, national policy changes are impacting upon the services particularly within school catering and housing which are not attracting full funding.</p> <p>Each service area sets out the detail behind these projects in the next sections of this report. Across all services, we will continue to ensure that all eligible costs are claimed from any funding available.</p>				
<b>Enterprise, Housing &amp; Community Animation</b>				
<b>Outturn Forecast</b>	<b>Month 4</b>	<b>Month 6</b>	<b>Month 9</b>	<b>Outturn</b>
<b>Deficit / (Surplus) £'000s</b>	337	0	0	0

Enterprise & Community Animation is forecasting a £337k over spend at month 4, this is mainly due to:

- **Borough Theatre** – £20k over spend – The refurbishment works are now expected to last a month longer than originally intended and this will affect the number of shows that can be scheduled between now and year end, impacting turnover and causing a projected £20k shortfall against budget.
- **Enterprise Mgt** - £29k over spend – Due to an increase in staff costs over and above available budget and an increase in contribution to City Deal.
- **Housing** - £338k over spend, this can be broken down into these main areas: -
  - **Homelessness** – £315k over spend – Current projections for the year indicate the authority will spend circa £2.285m on B&B accommodation for our homeless and an additional £665k on ancillary spend including security and damage repairs, which in part relates to accommodating those with higher support needs. The majority of this cost will be offset by pre-paid Covid-19 grant (£760k), Housing Prevention grant (£509k) and Housing Benefit (£1.393m) but the service will still be left with a £315k over spend against budget to manage. This is a volatile area where accommodation demands can fluctuate month by month so this figure could vary between now and outturn.
  - **Shared Housing & Private Leasing** - £3k under spend – Increased rental income figures have been offset by an increase in property repair and maintenance leaving a net £3k under spend. The repairs expenditure relates to an increase in handing properties back to landlords withdrawing from private renting and higher turnover of properties relating to properties not being used to prevent homelessness, but as temporary accommodation. The receipt of rental payments can be volatile so this figure could change between now and year end and we will provide an update at month 6.
  - **Strategic Services & Renovation Grants** – net £23k over spend – Mainly due to additional software and subscription costs in strategic services and increased administration costs for renovation grants.
- **Business Growth & Enterprise** – £35k under spend – Due in the main to the Strategic Operations Team forecasting a £34k under spend, recruitment into the team is ongoing but delays in filling posts have resulted in a staffing saving.
- **Community & P/Ships development** - £14k under spend - due to the ability to passport staff costs to UKG Ukraine funding.

All other service areas are reporting a balanced budget.

### Facilities & Fleet Management

Outturn Forecast	Month 4	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	511	0	0	0

Facilities & Fleet management are forecasting a £511k over spend, due to-

- **Schools Catering** – £129k over spend – The unit is continuing to prepare the service in readiness for the roll-out of universal free school meals. Reception and infant classes will start from September but in order to ensure the service is ready for the Junior roll-out in April the decision has been made to accelerate recruitment of the required number of staff to ensure they have all received the appropriate amount of training. This has meant our total costs have exceeded available funding resulting in a budget pressure. WG have indicated the possibility of further funding later in the year to cover off any shortfalls so there is a potential that this will be covered.

- **Passenger Transport** – £424k over spend – Cost of living inflation increases have had a material impact on the PTU service, the additional burden of increased pay, fuel and repair costs have meant that operators have handed back contracts and our in-house budgets are being stretched due to :-
  - **External Commissioning** – Currently reporting a £218k over spend due to increased contract prices from re-negotiation and variations (£118k), an agreed 9% increase was implemented in April but we are still seeing regular ‘hand backs’ from our operators, this invariably leads to the contract going back out at a higher price or it having to be taken on in-house. In addition, the contracts are set to be re-tendered in September, the potential price impact is unknown, but officers have built in an additional £100k as a contingency.
  - **Internal Operations** – £206k over spend – If operator’s hand back contracts and they cannot be re-issued externally the route has to be provided in-house, this means the service has to purchase new vehicles and recruit extra staff. The issue we are currently facing is that even though the internal option might be the most cost effective versus external contract price it is still costing the authority more to run than we had available in the budget for the original contract. The more numerous the ‘hand backs’ the more cost burden is taken on in-house and when you add in additional inflationary increases on fuel and spares it is creating an unmanageable budget pressure within the service.
- **Fleet Maintenance** - £13k over spend – This is due to a reduction in the number of members of the car salary sacrifice scheme resulting in actual savings falling below budgeted levels. Fleet maintenance itself is currently forecasting a balanced budget, but we will review at Month 6 as there is potential for the outturn to be impacted by a spike in repairs or the effect of inflationary increases.
- **Building Cleaning & Public Conveniences (PCs)** - £55k under spend – this is due to a saving on business rates as we no longer pay them on PC’s (£25k) and improved turnover in Cleaning (£30k).

### Neighbourhood Services

Outturn Forecast	Month 4	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	(227)	0	0	0

Neighbourhood Services are forecasting to under spend by £227k, this is due to-

- **Highways, Swtra & Streetlighting** – £135k under spend - This is due to Streetlighting as a result of 1) Energy has underspent by £125k - the budget was set at 19/20 consumption levels, this has been found to be too high due to the improvement gained since then from the installation of LEDs, this has meant our actual cost of energy has fallen well below budget. 2) Staff saving of £10k due to the delay in filling a vacant post. Highways Operations and SWTRA & External Clients are both forecasting a break-even budget.

**Waste & Street Scene** - £92k under spend – The under spend is due to contract savings resulting from a strong recycling market, but these savings have been part offset by challenging income targets in commercial trade waste and garden waste services and by an increase in costs from the delays in the roll out of polypropylene bags due to vehicle manufacturing delays.

### Placemaking, Highways & Flood

Outturn Forecast	Month 4	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	(5)	0	0	0

Placemaking, Highways & Flood is forecasting to under spend by £5k, this is as a result of -

- **Planning & Building Control** – £79k over spend – Over spend in Planning due to the inability to make staff vacancy savings (£21k), hardware and software costs to update microfiche system (£38k) and a shortfall in S106 fee income (£20k).
  - **Planning Policy & LDP** – £200k under spend - Further delays in the progression of the LDP have meant that it is unlikely the full reserve budgeted funds will be spent this year. A corresponding adverse variance in reserves is reported in the Appropriations section meaning that there is no overall financial benefit to this delay.
  - **Car Parks & Civil Parking Enforcement** - £255k over spend – Early indications are that parking enforcement fines will not hit budgeted targets and there will be a £176k shortfall this year, in addition there are over spends in expenditure primarily in transport, premises and software costs of £72k resulting in a total £255k budget pressure within the service area.
- Highways management & flooding** - £137k under spend – Staffing under spend due to delays in filling vacant posts and improved road closure and SAB income.

<b>MONLIFE DIRECTORATE</b>	<b>Month 4</b>	<b>Month 6</b>	<b>Month 9</b>	<b>Outturn</b>
<b>Deficit / (Surplus) £'000s</b>	479	0	0	0

#### **MonLife DIRECTOR'S COMMENTARY:**

The Monlife directorate is forecasting to over spend by £479k, the two main areas of focus continue to be leisure and outdoor services, with these areas providing the most significant financial challenges in the current economy. Monlife are completing deep dives of each business unit assessing the best options for future sustainability and the tactics needed to improve performance in these areas. Future development work includes working closely with CYP and Social Services on other programs to reduce our over spend and ensure the future sustainability of our services.

#### **(Monlife) Countryside & Culture**

<b>Outturn Forecast</b>	<b>Month 4</b>	<b>Month 6</b>	<b>Month 9</b>	<b>Outturn</b>
<b>Deficit / (Surplus) £'000s</b>	(3)	0	0	0

Countryside & Culture is forecasting to under spend by £3k due to a small under spend on third party contracts.

#### **(Monlife) Finance & Business Development**

<b>Outturn Forecast</b>	<b>Month 4</b>	<b>Month 6</b>	<b>Month 9</b>	<b>Outturn</b>
<b>Deficit / (Surplus) £'000s</b>	14	0	0	0

Finance & Business Development is forecasting to over spend by £14k due to lower than anticipated income.

#### **(Monlife) Leisure, Youth & Outdoor Adventure**

<b>Outturn Forecast</b>	<b>Month 4</b>	<b>Month 6</b>	<b>Month 9</b>	<b>Outturn</b>
<b>Deficit / (Surplus) £'000s</b>	469	0	0	0

Leisure, Youth & Outdoor Adventure is forecasting to over spend by £469k, this is mainly due to: -

**Leisure Services** - £299K over spend mainly due to the sections inability to generate the expected income targets. Memberships have grown significantly over the past 12 months and recovered to pre-pandemic levels; however, this still falls short of the income target set for the section built on a model pre-pandemic which looked at commercial growth over a 3-year period. Due to the impact of the cost-of-living crisis and Covid-19 this model is unachievable at present, we continue to work hard with

teams to mitigate the financial loss and we hope that the significant investment in our site and targeted campaigns will assist in delivering more income.

**Youth & Education** - £189k over spend mainly due to: -

Youth Services - £13k over spend due to increased transportation costs where changes in licence legislation has meant the section has needed to buy in transportation rather than use existing staffing.

Outdoor Adventure Service - £176k over spend. The sections current income target was derived from a pre-pandemic business model that focused on a 3-year delivery plan first focusing on MCC internal schools and then moving on to commercial focused model. The impact of the pandemic has meant that the delivery of this model has been delayed this has led to a shortfall in income due to schools being reluctant to return to residential model (this is slowly changing). A project working group is set up looking at way to mitigate the financial loss part of this work will involve working closely with schools who show massive interest in the outdoor learning as the new curriculum in Wales is adopted which looks to support creative lessons with real life meaning.

<b>CHIEF EXECUTIVES UNIT DIRECTORATE</b>	<b>Month 4</b>	<b>Month 6</b>	<b>Month 9</b>	<b>Outturn</b>
<b>Deficit / (Surplus) £'000s</b>	0	0	0	0

**HEAD OF POLICY, PERFORMANCE AND SCRUTINY COMMENTARY:**

At present all services are forecasting a balanced position. However, based on demand patterns in previous years it is likely that the Welsh Language budget will move into over spend. Budget pressures previously experienced in community hubs were recognised with funding in the 22/23 budget enabling these areas to be placed on a more stable financial footing and reducing the risk of over spends associated with a drop-off in room bookings post-pandemic and the operation of the Post Office in Usk.

<b>Policy, Scrutiny &amp; Customer Experience</b>				
<b>Outturn Forecast</b>	<b>Month 4</b>	<b>Month 6</b>	<b>Month 9</b>	<b>Outturn</b>
<b>Deficit / (Surplus) £'000s</b>	0	0	0	0

All services within Policy, Scrutiny & Customer Experience are forecasting a balanced budget at Month 4.

<b>PEOPLE &amp; GOVERNANCE DIRECTORATE</b>	<b>Month 4</b>	<b>Month 6</b>	<b>Month 9</b>	<b>Outturn</b>
<b>Deficit / (Surplus) £'000s</b>	0	0	0	0

**PEOPLE & GOVERNANCE DIRECTOR'S COMMENTARY:**

People & Governance is reporting a break-even position at Month 4, more detail can be found in the sections below.

<b>Democratic Services</b>				
<b>Outturn Forecast</b>	<b>Month 4</b>	<b>Month 6</b>	<b>Month 9</b>	<b>Outturn</b>
<b>Deficit / (Surplus) £'000s</b>	13	0	0	0

Democratic Services is forecasting to over spend by £13k, this is due to -

- **Organisational Development** – £5k over spend – mainly due to inability to achieve staff vacancy saving.

- **Members Costs** - £15k over spend – due to cost pressures caused by transition to new cabinet membership structure and software maintenance costs.
- **Legal Services** - £21k over spend – due to increases in legal costs and systems & software contracts (£27k), potential under recovery of fee income (£17k) offset by under spends in staffing due to delays in recruiting posts (£23k).
- **Land Charges** - £29k under spend – this is as a result of improved search income and savings from a vacant post.

### Emergency Planning

Outturn Forecast	Month 4	Month 6	Month 9	Outturn
Deficit / <b>(Surplus)</b> £'s	0	0	0	0

Emergency Planning is reporting a break-even budget.

### People

Outturn Forecast	Month 4	Month 6	Month 9	Outturn
Deficit / <b>(Surplus)</b> £'000s	(13)	0	0	0

People Services is forecasting to under spend by £13k at Month 4

- **People Services** – net £39k under spend – mainly due to net under spends in staffing across the department due to senior post vacancies and savings in Occupational Health due to a reduction in demand. This has been part offset by the cost of the implementation of a new system within payroll.
- **Corporate Training** – Reporting a break-even budget.
- **Communications** - £26k over spend – due to staff over spends caused by maternity cover and pay band increases plus increases in software licence costs. This has been partially offset by secondment income.

RESOURCES DIRECTORATE	Month 4	Month 6	Month 9	Outturn
Deficit / <b>(Surplus)</b> £'000s	756	0	0	0

### RESOURCES DIRECTOR'S COMMENTARY:

The Resources Directorate is showing signs of early budget pressure. Departments will continue in their efforts to reduce or contain pressures and to identify cost savings that can be achieved where this is practicable and does not have an unacceptable impact on core service delivery.

The most significant factor driving the forecast over spend is in relation to Housing benefits where national policy change has brought about increased expenditure required in relation to the housing needs of the Homeless. Whilst the housing placement cost element of this falls to the Communities & Place directorate, the shortfall in housing benefit subsidy claimable on B&B placements is a significant additional cost to the resources directorate. There are limited options available to the Council to arrest this situation in the very near term, however the Council is currently exploring options for a more permanent and lower cost solution.

There are significant offsetting under spends within the directorate as a result of staff vacancies being held. It is recognised that some of these vacancies have been unfilled for a significant period and that this is not a sustainable or resilient position for many of the service areas in the directorate to be in, and work is actively ongoing to rectify this.

### Finance

Outturn Forecast	Month 4	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	748	0	0	0

Finance is forecasting to over spend by £748k, this is mainly due to -

- **Revenues** - £1.002m over spend, this is due in the main to –
  - **Housing Benefits** - £989k over spend - The majority of this over spend relates to emergency homeless B&B placements for which we are unable to claim full housing benefit subsidy. The forecast is based on a pro rata of cost incurred to date and will therefore fluctuate as placements change. This situation will be carefully monitored, and variations reported in future forecasts. These costs were previously claimed from Covid-19 hardship funding but that has now ceased.
  - **Council Tax** - £106k over spend – due to an £87k over spend against salary costs as staff budget was moved to Finance as part of structure adjustments and which forms part of the under spend in that service area. The remaining shortfall relates to summons income projecting to be £19k lower than budgeted.
  - **Debtors and Charity relief** - £92k under spend – The forecast under spend is mainly due to expected administration grant funding (net of known expenditure) for the various grant support schemes that we are currently administering for Welsh Government (£87k) and a small under spend in Debtors due to reduced printing & postage costs (£5k).
- **Finance** - £178k under spend – This is a result of vacancies at senior management and where we are anticipating that these positions will be filled by December.
- **Audit** - £67k under spend – This is due to staff vacancy savings.
- **Systems & Cashiers** – £9k under spend – due to –
  - Cashiers - £12k over spend - the delay in fully implementing the decision to remove cheques has meant we will be unable to achieve the £20,000 staff saving that was carried over in the budget from 2020/21. This pressure has been partially offset by in year staff vacancies bringing the over spend down to £12k.
  - Systems - £21k under spend - The team have been carrying some vacancies, which have now largely been filled. Also, £7,000 income has been received for the purchase card rebate.

### Future Monmouthshire

Outturn Forecast	Month 4	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	(5)			

Staff costs have been recovered from external partners.

### Information, Communication & Technology

Outturn Forecast	Month 4	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	(58)	0	0	0

ICT is forecasting to under spend by £58k at month 4, this is due to-

- **Digital Programme Office** - £2k under spend – due to small savings in allowances and subsistence.



- **Shared Resource Service** - £33k under spend – our contribution to the SRS service is currently projecting to be less than budgeted.
- **Digital Design & Innovation** - £8k under spend - mainly due to savings in staffing where a post has been replaced at a lower grade.
- **Cyber Security** - £14k under spend - due to staff savings as a post was only filled in May and savings on supplies & services.

### Commercial & Corporate Landlord

Outturn Forecast	Month 4	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	71	0	0	0

Commercial & Corporate Landlord is forecasting to over spend by £71k -

- **Investment Properties** - £85k over spend, due to –
  - **Newport Leisure Park** - £52k under spend – currently projecting to generate £52k surplus above budget, where incremental rent increases on the site have ensured our rental receipts remain at the appropriate levels although we will be continually monitoring this position due to the potential effect the cost of living crisis could have on the leisure industry.
  - **Castlegate Business Park** - £137k over spend – Castlegate has significantly improved its position with the rental of 3 vacant units this year, which has considerably reduced our landlord liabilities. However the rent free period means we will fall short of our income target by £137k in this financial year but this will be rectified in 23/24 once full year rental is payable.
- **Landlord Services** - £37k under spend – staffing savings caused by delays in filling vacant posts.
- **County Farms** - £31k over spend – income projections are down due to a number of empty farms, these are due to be re-let but we've had to source consultants to facilitate in the lettings and also make improvements to the properties before the tenant can move in. Further updates will be provided at M6.
- **Solar Farm & Sustainability** - £113k under spend – due to improved income from our Solar Farm and PV installations caused by the increased market rates for energy.
- **Industrial Units** - £23k under spend – Rental income has increased above budget due to a number of new lettings.
- **Markets** - £129k over spend. The number of traders has dropped off considerably since Covid-19 and this has meant the service is struggling to meet income targets by £100k. There is also a potential net increase in spend of £30k mainly due to an increase on waste disposal costs. Officers are considering options to encourage traders back into the markets so it is hopeful that the position will improve by year end.
- **Property Services** – Currently forecasting a break-even budget.

CORPORATE COSTS & LEVIES DIRECTORATE	Month 4	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	1,918	0	0	0

### Precepts & Levies

Outturn Forecast	Month 4	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	(2)	0	0	0
Minor variance to original budget forecast following clarification of final precepts due.				
<b>Coroners Services</b>				
Outturn Forecast	Month 4	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	0	0	0	0
No variance forecast.				
<b>Corporate Management</b>				
Outturn Forecast	Month 4	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	(2)	0	0	0
Minor variance currently forecast following some small unbudgeted income streams.				
<b>Non-Distributed Costs</b>				
Outturn Forecast	Month 4	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	0	0	0	0
No variance forecast.				
<b>Strategic Initiatives</b>				
Outturn Forecast	Month 4	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	2,017	0	0	0
Current pay modelling is based on a pay award offer of £1,925 for non-teaching staff which would result in a forecast pressure of around £2.017m within services. For month 4 forecasting purposes an allowance for this pressure has been made within the Corporate directorate until such time that the Council has certainty on the final offer agreed.				
<b>Insurance</b>				
Outturn Forecast	Month 4	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	(95)	0	0	0
The Council recently went out to tender on its insurance cover which has resulted in premiums payable for 2022/23 being £95k less than anticipated reflective of a very competitive insurance market.				
<b>APPROPRIATIONS DIRECTORATE</b>				
Outturn Forecast	Month 4	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	(225)	0	0	0
<b>Fixed Asset Disposal Costs</b>				
Outturn Forecast	Month 4	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	0	0	0	0
No variance forecast.				
<b>Interest &amp; Investment Income</b>				
Outturn Forecast	Month 4	Month 6	Month 9	Outturn

<b>Deficit / (Surplus) £'000s</b>	<b>(241)</b>	<b>0</b>	<b>0</b>	<b>0</b>
<p>A significant upward movement in the interest rates available on investment balances has been seen since the budget was set for 2022/23. Whilst this is welcomed, the Council overall is a net borrower from the market and consequently will also see borrowing costs increase significantly as fixed rate periods end.</p>				
<b>Interest Payable &amp; Similar Charges</b>				
<b>Outturn Forecast</b>	<b>Month 4</b>	<b>Month 6</b>	<b>Month 9</b>	<b>Outturn</b>
<b>Deficit / (Surplus) £'000s</b>	<b>191</b>	<b>0</b>	<b>0</b>	<b>0</b>
<p>As above, the rising interest rate environment in placing upward pressure on borrowing costs as fixed rate periods come to an end. This has been mitigated somewhat by entering into longer term loans at comparably lower rates, however short term borrowing costs have risen more quickly than originally budgeted.</p>				
<b>Charges Required Under Regulation</b>				
<b>Outturn Forecast</b>	<b>Month 4</b>	<b>Month 6</b>	<b>Month 9</b>	<b>Outturn</b>
<b>Deficit / (Surplus) £'000s</b>	<b>(51)</b>	<b>0</b>	<b>0</b>	<b>0</b>
<p>This budget covers the statutory amount the Council is obliged to set aside to fund future loan repayments and the forecast is slightly lower than the £6.7m budget due to significant slippage in the capital programme which has reduced the need to borrow as quickly as anticipated.</p>				
<b>Borrowing Cost Recoupment</b>				
<b>Outturn Forecast</b>	<b>Month 4</b>	<b>Month 6</b>	<b>Month 9</b>	<b>Outturn</b>
<b>Deficit / (Surplus) £'000s</b>	<b>(325)</b>	<b>0</b>	<b>0</b>	<b>0</b>
<p>This budget represents a technical accounting adjustment where by borrowing costs relating to the purchase of capital assets is repatriated from service budgets to ensure that the full life cost of assets is borne by the end user. The variance to budget relates to vehicles purchased at the end of 2021/22 which were originally anticipated to be financed through a sale and leaseback arrangement, however following an options appraisal were found to be more cost effective to be purchased outright and financed from borrowing.</p>				
<b>Contributions to / from Reserves</b>				
<b>Outturn Forecast</b>	<b>Month 4</b>	<b>Month 6</b>	<b>Month 9</b>	<b>Outturn</b>
<b>Deficit / (Surplus) £'000s</b>	<b>200</b>	<b>0</b>	<b>0</b>	<b>0</b>
<p>Due to delay on Local development plan costs, the £200k reserve contribution will not be required this financial year.</p>				
<b>FINANCING DIRECTORATE</b>	<b>Month 4</b>	<b>Month 6</b>	<b>Month 9</b>	<b>Outturn</b>
<b>Deficit / (Surplus) £'000s</b>	<b>(542)</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Council Tax Benefit Support</b>				
<b>Outturn Forecast</b>	<b>Month 4</b>	<b>Month 6</b>	<b>Month 9</b>	<b>Outturn</b>
<b>Deficit / (Surplus) £'000s</b>	<b>(222)</b>	<b>0</b>	<b>0</b>	<b>0</b>
<p>Caseload currently continues to fall and is now closer to pre-pandemic levels. We may however see numbers increase over coming months as the cost of living crisis deepens.</p>				

<b>Council Tax</b>				
<b>Outturn Forecast</b>	<b>Month 4</b>	<b>Month 6</b>	<b>Month 9</b>	<b>Outturn</b>
<b>Deficit / (Surplus) £'000s</b>	<b>(320)</b>	<b>0</b>	<b>0</b>	<b>0</b>
Overall, we currently anticipate a surplus in income collected. Generally, the tax base remains strong, although there are signs of an increase in exemptions and discounts being awarded. The surplus reflects a continued strong collection rate over time, over and above the 99% rate used for budget setting.				
<b>General Government Grants</b>				
<b>Outturn Forecast</b>	<b>Month 4</b>	<b>Month 6</b>	<b>Month 9</b>	<b>Outturn</b>
<b>Deficit / (Surplus) £'000s</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
Income received to budget.				

## 2. **SCHOOLS**

- 2.1. A Board of Governors who are responsible for managing the school's finances directly governs each of the Authority's Schools. However, the Authority also holds a key responsibility for monitoring the overall financial performance of schools. Below is a table showing the outturn forecast Schools' balances position based on month 4 projections for each Educational Cluster.

<b>Draft Council Fund Outturn 2022/23 – School Balances Summary outturn position at Month 4</b>	<b>(A) Opening Reserves (Surplus) / Deficit Position 2022/23</b>	<b>(B) Draw / (Contribution) from / (to) School Balances @ Month 4</b>	<b>(C) Draw / (Contribution) from / (to) School Balances @ Month 6</b>	<b>(D) Draw / (Contribution) from / (to) School Balances @ Month 9</b>	<b>(A+B) Forecast Reserve Balances at 2022/23 Outturn</b>
	<b>£000's</b>	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>
<b>Cluster</b>					
Abergavenny	<b>(2,145)</b>	1,181			<b>(963)</b>
Caldicot	<b>(2,165)</b>	1,570			<b>(596)</b>
Chepstow	<b>(695)</b>	863			<b>168</b>
Monmouth	<b>(1,869)</b>	1,425			<b>(443)</b>
Special	<b>(82)</b>	106			<b>24</b>
<b>Total</b>	<b>(6,956)</b>	<b>5,145</b>			<b>(1,810)</b>

- 2.2. Collective School Balances at the beginning of the financial year amounted to £6,956,114 surplus. At Month 4 the Schools forecast anticipated draw on reserves is £5,145,631, resulting in a forecast surplus balance of £1,810,483 at year-end. (The majority of the surplus balance brought forward is due to several grants being awarded to schools at 2021-22 year end; Revenue Maintenance, Winter

of Wellbeing, ALN New System, Recruit Recover & Raise Standards, Attendance Support & Community Schools, RISG and LA Education Grant).

2.3. The Local Authority budget for 2022/23 made allowance for a pay award for schools staff up to a threshold of a 3%, with any award agreed above this level to be funded from schools balances. The above forecast is predicated upon a further pressure of 2% over and above the 3% budgeted based upon the most likely outcome of the initial pay discussions. This accounts for £1.2m of the overall £5.145m forecast draw upon school balances this year.

2.4. The movement of individual schools forecast to be in deficit at the end of the year is shown below:

Start of year	Month 4	Month 6	Month 9
<b>Total: 1</b>	<b>Total: 7</b>	<b>Total:</b>	<b>Total:</b>
Chepstow Comprehensive	Chepstow Comprehensive		
	Ysgol Y Fenni		
	Archbishop Rowan Williams (CIW)		
	Cross Ash		
	Kymin View		
	Llandogo		
	Pupil Referral Service		

2.5. There isn't a consistent picture of schools' balances. There has been a fluctuating trend for some time with some schools showing a continuing reduction in schools balances, which is of concern, and others a more stable trend. However, as previously advised, grants awarded to schools at 2020/21 and 2021/22 year-ends have resulted in a large increase in overall school balances. Schools have developed grant investment plans in line with the terms and conditions of these grants and the balances are expected to reduce considerably during 2022/23.

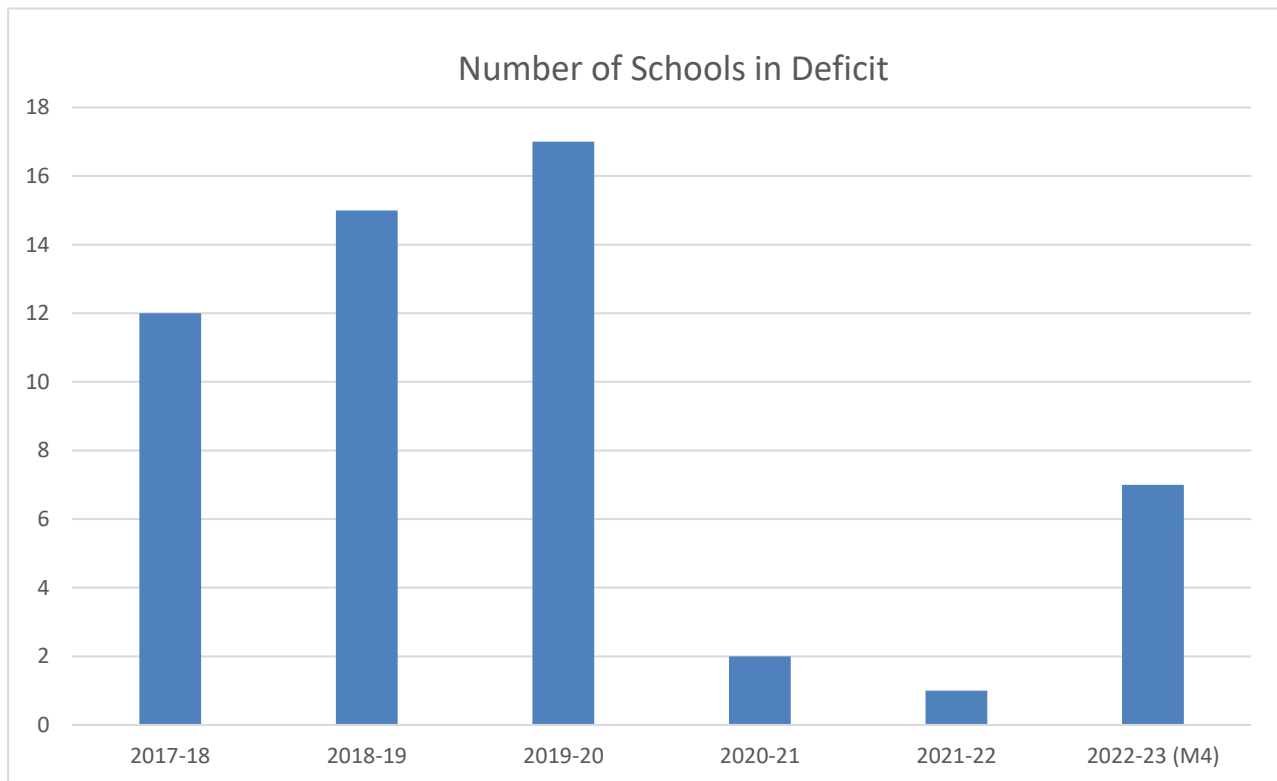
2.6. The projected return of six schools into deficit balance by the end of the year is disappointing and points to inherent structural budget deficits remaining in some cases, or a lack of planning for budgetary risks in the current economic environment. Finance officers will continue to work closely with those schools of concern and look to aid the return to a more sustainable budget plan over the medium term.

2.7. All schools that do register a deficit balance at the end of a financial year are required to bring forward budget recovery plans. These recovery plans will be confirmed with both the Local Education Authority and each School's Governing Body. Once finalised the schools with significant deficits will be monitored by the Cabinet member for both Children and Young People and Resources on a termly basis.

Financial Year-end	Net level of School Balances
2014-15	(1,140)
2015-16	(1,156)
2016-17	(269)
2017-18	(175)
2018-19	<b>Page 261</b> 232

2019-20	435
2020-21	(3,418)
2021-22	(6,956)
2022-23 (Forecast)	(1,810)

2.8. The increase in school balances during 2020/21 and 2021/22 resulted in a reduction in the number of schools in deficit, as illustrated in the following table: -



### 3 CAPITAL OUTTURN

3.1 The summary forecast Capital budget position at Month 4 is as follows:

#### Forecast Capital Outturn Position 2022/23 at Month 4

	Slippage B/F	Original Budget	Budget Adjust ments	Provisional Slippage	Revised Budget 2022/23	Forecast Expenditure / (Financing)	Variance
	£000's	£000's	£000's	£000's	£000's	£000's	£000's
<b>Expenditure</b>							
Capitalisation Directive	0	2,650	0	0	2,650	2,650	0
Development Schemes Over £250k	13,893	330	0	0	14,224	14,433	209
Development Schemes Under £250k	844	2,698	0	(2,000)	1,541	1,541	0
Schools & Education	27,865	13,681	0	0	41,546	41,546	0
Infrastructure	1,062	3,428	0	(100)	4,390	4,390	0
ICT Schemes	552	882	0	(153)	1,281	1,281	0
Property Maintenance	2,686	4,017	0	0	6,704	6,704	0
Renovation Grants	912	900	0	0	1,812	1,812	0
Section 106	1,147	0	0	(25)	1,122	1,122	0
Specific Grant Funded	3,715	1,000	3,922	0	8,637	8,637	0
Vehicle Leasing	0	1,500	0	0	1,500	1,500	0
<b>Total Expenditure</b>	<b>52,676</b>	<b>31,086</b>	<b>3,922</b>	<b>(2,278)</b>	<b>85,406</b>	<b>85,615</b>	<b>209</b>
<b>Financing</b>							
Supported Borrowing	0	(2,431)	0	0	(2,431)	(2,431)	0
General Capital Grant	0	(3,593)	0	0	(3,593)	(3,593)	0
Grants and Contributions	(32,382)	0	(3,922)	0	(36,304)	(36,304)	0
S106 Contributions	(1,854)	0	0	25	(1,829)	(1,829)	0
Unsupported Borrowing	(14,930)	(19,967)	0	2,253	(32,644)	(32,853)	(209)
Earmarked Reserve & Revenue Funding	(192)	0	0	0	(192)	(192)	0
Capital Receipts	(3,318)	(3,595)	0	0	(6,913)	(6,913)	0
Leasing	0	(1,500)	0	0	(1,500)	(1,500)	0
<b>Total Financing</b>	<b>(52,676)</b>	<b>(31,086)</b>	<b>(3,922)</b>	<b>2,278</b>	<b>(85,406)</b>	<b>(85,615)</b>	<b>(209)</b>

- 3.2 The capital budget forecast outturn at month 4 is an over spend £209k, with £114k being attributed to extra refurbishment costs on properties acquired for Children’s Services and £95k at Crick Road Care Home for additional equipment required for resident’s privacy.
- 3.3 It should be noted that there is a risk surrounding the refurbishment of the Tintern Wireworks Bridge at Tintern in conjunction with Gloucestershire County Council which is facing cost pressure due to the complexity of restoring this listed structure and the increased cost of materials.
- 3.4 There is £2.278m forecast Capital Slippage at month 4 as four schemes have advised of delays within their project timescales:
- £2m for Housing provision for the homeless due to the complex lead time of acquiring properties;
  - £153k delay in the SRS Data Hall migration due to issues encountered with commercial providers;
  - £100k for the Penyrhiw Sewage Treatment Works where the scheme has encountered delays in progressing survey and design works due to external factors;
  - £25k for the Abergavenny Skate Park S106 Scheme as additional funding is being sought from external partners to deliver on the preferred project within budget.

### 3.5 Useable Capital Receipts Available

- 3.6 In the table below, the effect of the changes to the forecast capital receipts on the useable capital receipts balances available to meet future capital commitments are illustrated.

	<b>2022/23</b>	<b>2023/24</b>	<b>2024/25</b>	<b>2025/26</b>	<b>2026/27</b>
	<b>£000</b>	<b>£000</b>	<b>£000</b>	<b>£000</b>	<b>£000</b>
Balance as at 1st April	10,414	13,289	13,204	12,259	10,763
Capital receipts used for financing	(4,263)	(1,294)	(1,194)	(1,094)	(1,094)
Capital receipts used to support capitalisation direction	(2,650)	(507)	(507)	(507)	(507)
Capital receipts Received or Forecast	9,788	1,715	756	104	104
<b>Forecast Balance as at 31st March</b>	<b>13,289</b>	<b>13,204</b>	<b>12,259</b>	<b>10,763</b>	<b>9,266</b>



Disinvestment Matrix 2022-23

REF.	Disinvestment 2022-23	2022/23 Budgeted Savings £000	Value of Saving forecast at Month 4 £000	Value of Saving forecast at Month 6 £000	Value of Saving forecast at Month 9 £000	Value of Saving achieved at Outturn £000	Delayed Savings £000	Savings deemed Unachievable YTD £000
	Social Care & Health	(120)	(120)	0	0	0	0	0
	Communities & Place	(959)	(959)	0	0	0	0	0
	Resources	(300)	(300)	0	0	0	0	0
	Chief Executives Unit	(33)	(33)	0	0	0	0	0
	Corporate Costs & Levies	(717)	(717)	0	0	0	0	0
	<b>Totals Disinvestments by Directorate</b>	<b>(2,129)</b>	<b>(2,129)</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

		2022/23 Budgeted Savings £000	Value of Saving forecast at Month 4 £000	Value of Saving forecast at Month 6 £000	Value of Saving forecast at Month 9 £000	Value of Saving achieved at Outturn £000	Delayed Savings £000	Savings deemed Unachievable £000	Traffic Light based Risk Assessment	Assessment of Progress	Risk of current forecast saving NOT being achieved ( High / Medium / Low )
Page 2655	Social Care & Health										
	SC6 Fees & Charges 2022/23	(120)	(120)	0	0	0	0	0		On Target	Low
	<b>Total Social Care &amp; Health</b>	<b>(120)</b>	<b>(120)</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>			
	Communities & Place										
	C&P10 Increase in discretionary Fees & Charges	(13)	(13)	0	0	0	0	0		On Target	Low
	C&P4 Waste management savings - Contract & dry recyclates rates	(856)	(856)	0	0	0	0	0		On Target	Low
	C&P4 Street Lighting - Energy Savings	(90)	(90)	0	0	0	0	0		On Target	Low
	<b>Total Communities &amp; Place</b>	<b>(959)</b>	<b>(959)</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>			
	Chief Executive's Unit										
	PCE0003 Reversal of previous pressure - Contact Centre - Additional staff to cope with booking system at HWRC	(33)	(33)	0	0	0	0	0		On Target	Low
<b>Total Chief Executive's Unit</b>	<b>(33)</b>	<b>(33)</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>				
Resources											
RES 11 Solar farm income increase	(300)	(300)	0	0	0	0	0		On Target	Low	
<b>Total Resources</b>	<b>(300)</b>	<b>(300)</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>				
Corporate Costs & Levies											
CORP 5 Increase in Capitalisation directive	(442)	(442)	0	0	0	0	0		On Target	Low	
CORP 10 Council tax base increase	(275)	(275)	0	0	0	0	0		On Target	Low	
<b>Total Corporate Costs &amp; Levies</b>	<b>(717)</b>	<b>(717)</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>				

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	A	B	C	(A+C)
	Opening Reserves 2022-23 (Surplus)/Deficit	Budgeted (Surplus)/Deficit for year	Forecast (Surplus)/Deficit for year	Forecast closing Reserves 2022-23 (Surplus)/Deficit
<b>Abergavenny cluster</b>				
E003 King Henry VIII Comprehensive	(755,570)	313,402	389,048	(366,522)
E073 Cantref Primary School	(254,092)	113,601	134,790	(119,302)
E072 Deri View Primary School	(189,790)	88,335	133,741	(56,050)
E035 Gilwern Primary School	(230,955)	43,725	116,685	(114,270)
E037 Goytre Fawr Primary School	(117,735)	64,455	81,985	(35,750)
E093 Llanfoist Fawr Primary School	(219,419)	60,278	86,308	(133,112)
E044 Llantillio Pertholey CiW Primary School (VC)	(109,698)	67,247	91,517	(18,181)
E045 Llanvihangel Crucorney Primary School	(136,822)	24,922	23,616	(113,206)
E090 Our Lady and St Michael's RC Primary School (VA)	(58,649)	(11,198)	24,920	(33,728)
E067 Ysgol Gymraeg Y Fenni	(72,015)	59,455	98,709	26,694
<b>Caldicot cluster</b>				
E001 Caldicot School	(807,785)	210,761	734,528	(73,257)
E068 Archbishop Rowan Williams CiW Primary School (VA)	(171,322)	153,954	187,566	16,244
E094 Castle Park Primary School	(159,298)	86,732	133,874	(25,424)
E075 Dewstow Primary School	(358,616)	30,955	100,426	(258,191)
E034 Durand Primary School	(104,979)	51,596	84,811	(20,168)
E048 Magor CiW Primary School (VA)	(196,816)	44,046	105,942	(90,874)
E056 Rogiet Primary School	(89,223)	60,846	79,041	(10,182)
E063 Undy Primary School	(210,643)	93,244	101,561	(109,081)
E069 Ysgol Gymraeg Y Ffin	(66,783)	18,971	42,083	(24,700)
<b>Chepstow cluster</b>				
E002 Chepstow School	124,934	310,153	369,873	494,807
E091 Pembroke Primary School	(218,667)	72,640	126,891	(91,776)
E057 Shirenewton Primary School	(239,292)	102,983	107,939	(131,353)
E058 St Mary's Chepstow RC Primary School (VA)	(104,932)	62,636	33,934	(70,998)
E060 The Dell Primary School	(146,839)	21,856	119,246	(27,593)
E061 Thornwell Primary School	(110,622)	98,488	105,398	(5,224)
<b>Monmouth cluster</b>				
E004 Monmouth Comprehensive	(814,258)	408,886	591,414	(222,844)
E032 Cross Ash Primary School	(79,755)	69,722	86,620	6,865
E092 Kymin View Primary School	(133,714)	80,552	152,013	18,299
E039 Llandogo Primary School	(214)	(10,121)	9,060	8,846
E074 Osbaston CiW Primary School (VC)	(93,147)	8,316	43,288	(49,859)
E051 Overmonnow Primary School	(162,470)	28,200	155,228	(7,242)
E055 Raglan CiW Primary School (VC)	(160,593)	57,805	31,876	(128,717)
E062 Trellech Primary School	(153,939)	64,096	93,103	(60,836)
E064 Usk CiW Primary School (VC)	(270,840)	227,960	262,834	(8,006)
Cluster Total	<u>(6,874,560)</u>	<u>3,179,498</u>	<u>5,039,867</u>	<u>(1,834,693)</u>
<b>Special School</b>				
E095 PRU	(81,554)	31,090	105,764	24,210
Special Total	<u>(81,554)</u>	<u>31,090</u>	<u>105,764</u>	<u>24,210</u>
Total	<u><u>(6,956,114)</u></u>	<u><u>3,210,588</u></u>	<u><u>5,145,631</u></u>	<u><u>(1,810,483)</u></u>

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## Monmouthshire's Scrutiny Forward Work Programme 2022-23

Performance and Overview Scrutiny Committee				
Meeting Date	Subject	Purpose of Scrutiny	Responsibility	Type of Scrutiny
7 <sup>th</sup> July 2022	<b>Forward Work Programme</b>	To discuss the process for formulating a forward work programme and agree items for future inclusion.	Hazel Ilett	Work Programming
	<b>Welsh Language Annual Monitoring Report 2021-22</b>	To scrutinise the Council's performance in complying with Welsh Language Standards.	Matthew Gatehouse	Performance Monitoring
	<b>Revenue and Capital Outturn 2021-22 Budget Monitoring Report</b>	To scrutinise the draft report and identify any areas of for future scrutiny	Jonathon Davies Peter Davies	Budget Monitoring
	<b>Monmouthshire Council Self-Assessment 2021-2022</b>	To scrutinise the Council's performance during 2021-2022 against the goals outlined in the Corporate Plan 2017-2022, agreeing any areas for future scrutiny.	Richard Jones Emma Davies Matthew Gatehouse	Performance Monitoring
<b>28<sup>th</sup> September 2022 - CANCELLED</b>				
<b>Joint Scrutiny with People 11<sup>th</sup> October 2022</b>	<b>Safeguarding Performance Report</b>	To scrutinise the performance of the service area.	Jane Rodgers	Performance Monitoring
	<b>Chief Officer for Social Care and Health: Annual Report</b>	To conduct pre-decision scrutiny on the report and scrutinise the performance of the service area.	Jane Rodgers	Pre-decision Scrutiny/Performance Monitoring

## Monmouthshire's Scrutiny Forward Work Programme 2022-23

Performance and Overview Scrutiny Committee				
Meeting Date	Subject	Purpose of Scrutiny	Responsibility	Type of Scrutiny
<i>Just P&amp;O Committee items:</i>	<b>Chief Officer for Education: Annual Report</b>	To conduct pre-decision scrutiny on the report and scrutinise the performance of the service area.	Will Mclean	Pre-decision Scrutiny/Performance Monitoring
	<b>Local Development Plan annual monitoring report</b>	To scrutinise the annual monitoring report for the current adopted LDP prior to submitting to Welsh Government.	Rachel Lewis Mark Hand	Performance Monitoring
	<b>Month 4 Budget Monitoring Report</b>	Scrutiny of the Council's budgetary position (revenue and capital).	Jonathon Davies	Budget Monitoring
<b>21<sup>st</sup> November 2022</b>	<b>Socially Responsible Procurement Strategy</b>	To conduct pre-decision scrutiny on the Strategy.	Scott James Beth Macpherson Steve Robinson	Pre-decision Scrutiny
	<b>Planning Annual Performance Report</b>	Scrutiny of the annual performance report prior to submission to Welsh Government.	Phil Thomas Mark Hand	Performance Monitoring
	<b>Strategic Risk Register</b>	To agree any future risks for scrutiny.	Matthew Gatehouse	Work Programming
<b>15<sup>th</sup> December 2022</b>	<b>Welsh Education Strategic Plan</b>	<b>To be confirmed by committee</b> To scrutinise performance against the action plan.	Sharon Randall Smith Will Mclean	Performance Monitoring
	<b>Month 6 Budget Monitoring Report</b>	Scrutiny of the Council's budgetary position (revenue and capital).	Jonathon Davies	Budget Monitoring

## Monmouthshire's Scrutiny Forward Work Programme 2022-23

Performance and Overview Scrutiny Committee				
Meeting Date	Subject	Purpose of Scrutiny	Responsibility	Type of Scrutiny
10 <sup>th</sup> January 2023	<b>Public Protection 2021-22 Performance Report</b>		David Jones	Performance Monitoring
	<b>Registration Services Annual Report 21/22</b>		David Jones	Performance Monitoring
	<b>Procurement Performance Review</b>	Review of the joint working arrangements and benefits realised to date.	Scott James Beth Macpherson Steve Robinson	Performance Monitoring
23 <sup>rd</sup> February 2023				
27 <sup>th</sup> April 2023				

### Items for future Inclusion into the Work Programme

- **Council and community resilience:** following the impact of the pandemic.
- **Use of Reserves:** Future proofing and resilience planning as well as supporting long-term strategic priorities.
- **Recruitment and retention:** Effect on the Council's performance and ability to deliver.
- **Asset Management Strategy:** Long-term strategy for these assets where there might be a change of service provision. Workshop to seek some assurances on the focus of the asset management strategy and discuss the concept of selling or retaining assets ~ this could feed into early work on the Asset Management Strategy

## Monmouthshire's Scrutiny Forward Work Programme 2022-23

### Workshops:

- Asset Management Strategy ~ Workshop to seek some assurances on the focus of the strategy and the concept of selling or retaining assets ~ this could feed into early work on the Asset Management Strategy



## Cabinet, Council and Individual Cabinet Member Decisions (ICMD) Forward Plan

Monmouthshire County Council is required to publish a forward plan of all key decisions to be taken. Council and Cabinet items will only be considered for decision if they have been included on the planner no later than the month preceding the meeting, unless the item is considered urgent.

Committee / Decision Maker	Meeting date / Decision due	Subject	Responsible Cabinet Member	Purpose	Author	Date item added to the planner
Council	01-Sep-25	RLDP for Adoption		To adopt the RLDP following receipt of the Inspector's report, making it the County's Development Plan as defined by S38(6) of the Planning and Compulsory Purchase Act 2004	Mark Hand / Rachel Lewis	23-Aug-22
Council	01-Sep-24	RLDP submission for examination		To endorse the submission of the Deposit RLDP to the Welsh Government for examination by an independent Inspector. By agreeing, Council will be saying it wants this document to be the adopted RLDP for	Mark Hand / Rachel Lewis	23-Aug-22
Cabinet	01-Dec-23	Adoption of Abergavenny Placemaking Plan		To adopt the Abergavenny Placemaking Plan, co-produced with Abergavenny Town Council, to inform future regeneration priorities and grant bids	Mark Hand / Dan Fordham	3-Oct-22
Cabinet	01-Jul-23	Adoption of Magor Placemaking Plan		To adopt the Magor with Undy Placemaking Plan, co-produced with Magor with Undy Town Council, to inform future regeneration priorities and grant bids	Mark Hand / Dan Fordham	3-Oct-22
Cabinet	01-Jul-23	Adoption of Monmouth Placemaking Plan		To adopt the Monmouth Placemaking Plan, co-produced with Monmouth Town Council, to inform future regeneration priorities and grant bids	Mark Hand / Dan Fordham	3-Oct-22
Cabinet	07-Jun-23	2022/23 Revenue and Capital Monitoring - Month 12			Jon Davies	
Council	01-Jun-23	RLDP Preferred Strategy consultation report		To endorse the RLDP Preferred Strategy including any proposed changes arising from the public consultation.	Mark Hand / Rachel Lewis	3-Oct-22

ICMD	05-Apr-23	Welsh Church Fund Working Group - meeting 7 held on 9th March 2023			Dave Jarrett	
Council	09-Mar-23	Capital Strategy & Treasury Strategy			Jon Davies	17-May-22
Council	09-Mar-23	Final Budget Sign Off including Council Tax Resolution			Jon Davies	
Cabinet	01-Mar-23	2022/23 Revenue and Capital Monitoring - Month 9			Jon Davies	17-May-22
Cabinet	01-Mar-23	2023/4 Final Revenue and Capital Budget Proposals			Jon Davies	17-May-22
Cabinet	01-Mar-23	2023/4 WCF/Trust Treasury Fund Investments			Dave Jarrett	17-May-22
Cabinet	01-Mar-23	Monmouthshire Destination Management Plan			Matthew Lewis	10-Feb-22
Cabinet	01-Feb-23	Adoption of Transforming Chepstow Masterplan		To adopt the Transforming Chepstow Masterplan, co-produced with Chepstow Town Council, to inform future regeneration priorities and grant bids	Mark Hand / Dan Fordham	3-Oct-22
Cabinet	01-Feb-23	Transforming Towns Strategic Grant regeneration priorities		To agree the priority projects for bids for WG Strategic grant funding to 24/25	Mark Hand / Dan Fordham	3-Oct-22
ICMD	25-Jan-23	Community Council and Police Precepts - final			Jon Davies	17-May-22

Council	19-Jan-23	Council Tax Reduction Scheme			Ruth Donovan	31-May-22
Cabinet	18-Jan-23	Draft Revenue & Capital Proposals			Jon Davies	
ICMD	14-Dec-22	Council Tax Base report			Ruth Donovan	31-May-22
ICMD	14-Dec-22	2023/4 Community Council & Police Precepts - draft			Jon Davies	17-May-22
ICMD	14-Dec-22	Welsh Church Fund Working Group			Dave Jarrett	17-May-22
Cabinet	07-Dec-22	2022/23 Revenue and Capital Monitoring report - Month 6			Jon Davies	17-May-22
Cabinet	07-Dec-22	MCC Statement of Accounts			Jon Davies	17-May-22
Council	01-Dec-22	Procurement Strategy			Scott James	7-Sep-22
Council	01-Dec-22	Corporate Parenting Strategy			Diane Corrister	24-Aug-22
Council	01-Dec-22	RLDP Preferred Strategy		To seek Council endorsement of the new Preferred Strategy for eight week consultation over December and January	Mark Hand / Rachel Lewis	25-Jul-22

Council	01-Dec-22	Community and Corporate Plan		To seek approval of the Community and Corporate Plan which articulates the authority's purpose, values and priorities along with activity to deliver these up to March 2023 when a longer-term plan will	Matt Gatehouse / Paul Matthews	20-Sep-22
Council	01-Dec-22	Final Statement of Accounts			Peter Davies	7-May-21
ICMD	30-Nov-22	Highways TRO Amendment Order 6 - speed limit changes including Wye Valley Villages, Gilwern and Usk		Agreement to make the traffic order	Mark Hand	23-Aug-22
ICMD	30-Nov-22	Planning Annual Performance Report (APR) Deferred to 30-Nov-22			Mark Hand Phil Thomas/Paul Griffiths	
Cabinet	09-Nov-22	Socially Responsible Procurement Strategy			Scott James	22-Aug-22
Cabinet	09-Nov-22	A County of Sanctuary		To begin the process of formally applying to become a county of sanctuary for those fleeing persecution and to provide updates on the Council's ongoing support for Ukrainians and future accommodation for	Matt Gatehouse	20-Sep-22
Cabinet	09-Nov-22	Proposal to establish a Welsh Medium Seedling school in Monmouth		To seek cabinet approval to commence statutory consultation processes to establish a Welsh Medium seedling provision in Monmouth.	Debbie Graves	23-Sep-22
Cabinet	09-Nov-22	Review of school places in Caldicot Town		To seek cabinet approval to commence statutory consultation processes in relation to the provision of School places in Caldicot Town.	Debbie Graves	23-Sep-22
Cabinet	09-Nov-22	Revenue & Capital MTFP update and process			Jon Davies	17-May-22
Cabinet	09-Nov-22	MonLife Heritage Strategy (or ICMD)			Matthew Lewis	10-Feb-22

Cabinet	09-Nov-22	SPF Update Report			Hannah Jones	12-Sep-22
Council	27-Oct-22	Annual Safeguarding Report			Kelly Turner	24-Aug-22
Council	27-Oct-22	Social Care & Health: Directors Report 2021/22			Jane Rodgers	6-Jul-22
ICMD	26-Oct-22	Local Development Annual Monitoring Report (AMR			Rachel Lewis/Cllr Paul Griffiths	Deferred from 12th Oct
ICMD	26-Oct-22	Welsh Church Fund Working Group			Dave Jarrett	14/7/22
ICMD	26-Oct-22	Highways TRO Amendment Order 5 - speed limit changes including Devauden and B4245 Caldicot <b>DEFERRED TO 30 NOV</b>		Agreement to make the traffic order	Mark Hand	23-Aug-22
Cabinet	19-Oct-22	22/23 Revenue and Capital Monitoring report - Month 4			Jon Davies	17-May-22
Cabinet	19-Oct-22	Regional Partnership Board - Gwent Market Position Statement		To provide a Market Stability Report produced by the Regional Partnership Board setting out a high level overview and Assessment of care & support, and of the stability of the market for regulated	Phil Diamond Head of Regional Partnership Team Mark Saunders, Regional Service Manager - Regional	22-Sep-22
Cabinet	19-Oct-22	PSOW annual letter		Present the Public Services Ombudsman For Wales' annual report as required by the letter received Aug 22	Matt Phillips	28-Sep-22
Cabinet	19-Oct-22	Community and Corporate Plan		To seek endorsement of the new Community and Corporate Plan setting out the purpose, values and priorities for the organisation along with a description of some of the things we will do to deliver	Gatehouse / Paul Matt	20-Sep-22

ICMD	12-Oct-22	Local Development Annual Monitoring Report (AMR)		DEFERRED TO 26 OCT	Rachel Lewis/Cllr Paul Griffiths	23/08/22
ICMD	12-Oct-22	Ending Library Fines		To approve the abolition of library fines on all books enabling more people to enjoy reading without the worry of incurring a fine if they are unable to return their books on time	Cheryl Haskell/Fookes?	20-Sep-22
ICMD	12-Oct-22	Welsh Church Fund Working Group		DEFERRED TO 26 OCT	Dave Jarrett	14/07/22
ICMD	12-Oct-22	Planning Annual Performance Report (APR) <b>Deferred to 30-Nov-22</b>		Sign off prior to submission to WG	Mark Hand	23-Aug-22
ICMD	28-Sep-22	Transport Policy			Deb Hill Howells - MG	22-Aug-22
ICMD	28-Sep-22	B4245 speed limit		DEFERRED TO 26 OCT	Mark Hand	18-Jul-22
Council	27-Sep-22	Tackling poverty and inequalities			Nick John	24-Aug-22
Council	27-Sep-22	RLDP Options Report			Rachel Lewis	25-Jul-22
Council	27-Sep-22	Rivers and Ocean			Hazel Clatworthy	9-Jun-22
Council	27-Sep-22	Monmouthshire County Council self - assessment report 2021/2			Richard Jones	23-May-22

ICMD	14-Sep-22	Welsh Church Fund Working Group - meeting 2 held on 21st July 2022 (no meeting/no report - withdrawn)			Dave Jarrett	17-May-22
Cabinet	07-Sep-22	Transport Policy Consultation Update.			Deb Hill Howells	22-Aug-22
Cabinet	07-Sep-22	Cost Of Living			Matt Phillips	25-Jul-22
ICMD	31-Aug-22	Homeseach Policy & Procedure - Amendments & Welsh Translation Requirement			Ian Bakewell	
ICMD	31-Aug-22	MY DAY, MY LIFE SERVICE EVALUTATION			Ceri York	15-Aug-22
ICMD	03-Aug-22	Additional Resources in Educations Strategy		Resources required to develop and maintain schools education systems and the implementatin of WG Ed Tech Programme	Sian Hayward	14-Jun-22
ICMD	03-Aug-22	Designation of Secondary Catchment Areas			Matthew Jones	6-Jun-22
ICMD	03-Aug-22	Welsh Church Fund Working Group - meeting 1 held on 23rd June 2022 - <b>Moved to ICMD 3rd Aug 2022</b>			Dave Jarrett	
Cabinet	27-Jul-22	Wye Valley Villages Future Improvement Plan			Mark Hand	1-Jul-22
Cabinet	27-Jul-22	Regen Three Year Programme			Mark Hand	1-Jul-22

Cabinet	27-Jul-22	Review of Chepstow High Street closure			Mark Hand	1-Jul-22
Cabinet	27-Jul-22	Home to School Transport Policy 2023-24.			Deb Hill Howells	27-Jun-22
Cabinet	27-Jul-22	MUCH (Magor & Undy Community Hall) report			Nick Keys	9-Jun-22
Cabinet	27-Jul-22	Shared Prosperity Fund Local Investment Plan and Regional Lead Authority Arrangements			Hannah Jones	23-May-22
Cabinet	27-Jul-22	Welsh Church Fund Working Group - meeting 1 held on 23rd June 2022 - <b>Moved to ICMD 3rd Aug 2022</b>			Dave Jarrett	17-May-22
Cabinet	27-Jul-22	2021/22 Revenue and Capital Monitoring outturn			Peter Davies/Jon Davies	17-Feb-22
Cabinet	27-Jul-22	Play Sufficiency Assessment and Action Plan 22/23			Matthew Lewis	10-Feb-22
Cabinet	27-Jul-22	Housing Support Programme Strategy (Homeless Strategy)			Ian Bakewell	
Council	23-Jun-22	Standards Committee Annual Report		This report is the first annual report from the Standards Committee to Council as required by the change in law set out in the Local Government and Elections Act 2021. It has to report on the discharge of the	Matt Phillips	29-Sep-22





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