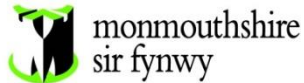


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Neuadd y Sir
Y Rhadyr
Brynbuga
NP15 1GA

County Hall
Rhadyr
Usk
NP15 1GA

Tuesday, 9 January 2024

Dear Councillor

CABINET

You are requested to attend a **Cabinet** meeting to be held at **Steve Greenslade Room, County Hall, Usk** on **Wednesday, 17th January, 2024**, at **5.00 pm**.

AGENDA

1. Apologies for Absence
2. Declarations of Interest
3. DRAFT REVENUE AND CAPITAL BUDGET PROPOSALS 2024/25 1 - 110

Division/Wards Affected: All

Purpose: To set out draft revenue and capital budget proposals for financial year 2024/25.

To commence a period of consultation on draft budget proposals for a four-week period ending 15th February 2024.

Author: Peter Davies
Deputy Chief Executive (S151 Officer)

Jonathan Davies
Head of Finance (Deputy S151 Officer)

Contact Details: Peter Davies - E-mail: peterdavies@monmouthshire.gov.uk
Jonathan Davies - E-mail: jonathandavies2@monmouthshire.gov.uk

4. COMMUNITY AND CORPORATE PLAN PERFORMANCE UPDATE 111 - 146

Division/Wards Affected: All

Purpose: To provide Cabinet with an update on the progress that has been made to deliver the commitments set out in the Community and Corporate Plan 2022-28.

Author: Richard Jones, Performance and Data Insight Manager
Hannah Carter, Performance Analyst

Robert McGowan, Policy and Scrutiny Officer

Contact Details: E-mail: richardjones@monmouthshire.gov.uk
E-mail: hannahcarter@monmouthshire.gov.uk
E-mail: robertmcgowan@monmouthshire.gov.uk

5. RESPONSE TO WELSH GOVERNMENTS PHASE 2 CONSULTATION ON A FAIRER COUNCIL TAX SYSTEM 147 - 158

Division/Wards Affected: All

Purpose: The purpose of this report is to seek endorsement of Monmouthshire County Council's response to the Welsh Governments Phase 2 consultation on a fairer council tax system.

Author: Ruth Donovan – Assistant Head of Finance: Revenues, Systems and Exchequer

Contact Details: Email: ruthdonovan@monmouthshire.gov.uk
Tel: 01633 644592

6. REVISED COUNTER FRAUD, CORRUPTION & BRIBERY POLICY 159 - 190

Division/Wards Affected: All

Purpose: To receive, consider and approve the Council's updated and revised Counter Fraud, Corruption and Bribery Policy.

Author: Jan Furtek, Audit Manager

Contact Details: janfurtek@monmouthshire.gov.uk

7. STATUTORY CONSULTATION ON PROPOSALS TO INCREASE THE CAPACITY OF YSGOL GYMRAEG Y FENNI 191 - 242

Division/Wards Affected: All

Purpose: The purpose of the report is to seek Members' permission to consult with stakeholders on the Council's intention to increase the capacity of Ysgol Gymraeg Y Fenni to 420 places through its relocation to the site previously occupied by the former Deri View Primary School.

Members will be aware of their previous commitment to relocate Ysgol Gymraeg Y Fenni to the Deri View site as part of the band B proposals that involved the establishment the 3-19 School in Abergavenny. This report is to agree the school organisation route that will allow for the relocation and associated increase in capacity.

Author: Matt Jones, Access Unit Manager

Contact Details: matthewdjones@monmouthshire.gov.uk

8. REPURPOSING OF ACCOMMODATION IN THE COUNTY FARMS
PORTFOLIO TO SUPPORT HOMELESSNESS AND OTHER POLICY
OBJECTIVES

243 - 274

Division/Wards Affected: All

Purpose: To seek approval for the repurposing of vacant cottages held within the County Farms Portfolio to support policy objectives such as alleviating pressures with homelessness and to address the reliance on unsuitable temporary accommodation.

Author: Nick Keyse – Acting Head of Landlord Services
Ben Thorpe – Development Surveyor

Contact Details: nicholaskeyse@monmouthshire.gov.uk
benthorpe@monmouthshire.gov.uk

Yours sincerely,

Paul Matthews
Chief Executive

CABINET PORTFOLIOS

County Councillor	Area of Responsibility	Ward
Mary Ann Brocklesby	<p>Leader Lead Officer – Paul Matthews, Matthew Gatehouse</p> <p>Whole Authority Strategy and Direction Whole authority performance review and evaluation Promoting localism within regional and national frameworks Relationships with Welsh Government, UK Government and local government associations Regional Relationships with City Regions and Public Service Board Strategic Procurement Local Food production and consumption, including agroforestry and local horticulture</p>	Llanelly
Paul Griffiths	<p>Cabinet Member for Planning and Economic Development Deputy Leader Lead Officer – Frances O'Brien</p> <p>Economic Strategy Local development plan and strategic development plan including strategic housing sites Homelessness, affordable housing delivery and private sector housing (empty homes, leasing scheme, home improvement loans, disabled facilities grants and adaptive tech) Supporting Town Centres including car parking and enforcement Development Management and Building Control Skills and Employment Broadband connectivity Car parks and civil enforcement trading standards, environmental health, public protection, and licencing</p>	Chepstow Castle & Larkfield
Rachel Garrick Ben Callard	<p>Cabinet Member for Resources (Job Share) Lead Officers – Peter Davies, Frances O'Brien, Jane Rodgers</p> <p>Finance including MTFP and annual budget cycle Benefits Digital and information technology Human resources, payroll, health and safety Land and buildings Property maintenance and management Emergency planning</p>	Caldicot Castle Llanfoist & Govilon

<p>Martyn Groucutt</p>	<p>Cabinet Member for Education Lead Officers – Will McLean, Ian Saunders</p> <p>Early Years Education All age statutory education Additional learning needs/inclusion Post 16 and adult education School standards and improvement Community learning Sustainable communities for learning Programme Youth service School transport</p>	<p>Lansdown</p>
<p>Ian Chandler</p>	<p>Cabinet Member for Social Care, Safeguarding and Accessible Health Services Lead Officer – Jane Rodgers</p> <p>Children’s services Fostering & adoption Youth Offending service Adult services Whole authority safeguarding (children and adults) Disabilities Mental health and wellbeing Relationships with health providers and access to health provision</p>	<p>Llantilio Crossenny</p>
<p>Catrin Maby</p>	<p>Cabinet Member for Climate Change and the Environment Lead Officer – Frances O’Brien, Ian Saunders</p> <p>Decarbonisation Transport planning, public transport, highways and MCC fleet Active travel and Rights of way Waste management, street care, litter, public spaces, and parks Pavements and back lanes Flood alleviation, management and recovery Countryside, biodiversity, and river health</p>	<p>Drybridge</p>
<p>Angela Sandles</p>	<p>Cabinet Member for Equalities and Engagement Lead Officers – Frances O’Brien,, Matthew Gatehouse, Jane Rodgers</p> <p>Community inequality and poverty (health, income, nutrition, disadvantage, discrimination, isolation and cost of living crisis) Citizen engagement and democracy promotion including working with voluntary organisations Citizen experience - community hubs, contact centre, and customer service and registrars Leisure centres, play and sport Tourism Development and Cultural strategy Public conveniences</p>	<p>Magor East with Undy</p>

	Electoral Services and constitution review Communications, public relations and marketing Ethics and standards Welsh Language	
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Aims and Values of Monmouthshire County Council

Our purpose

To become a zero-carbon county, supporting well-being, health and dignity for everyone at every stage of life.

Objectives we are working towards

- Fair place to live where the effects of inequality and poverty have been reduced;
- Green place to live and work with reduced carbon emissions and making a positive contribution to addressing the climate and nature emergency;
- Thriving and ambitious place, where there are vibrant town centres and where businesses can grow and develop
- Safe place to live where people have a home where they feel secure in;
- Connected place where people feel part of a community and are valued;
- Learning place where everybody has the opportunity to reach their potential

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.



SUBJECT:	DRAFT REVENUE AND CAPITAL BUDGET PROPOSALS 2024/25
MEETING:	CABINET
DATE:	17th January 2024
DIVISION/WARDS AFFECTED:	All

1 PURPOSE:

- 1.1 To set out draft revenue and capital budget proposals for financial year 2024/25.
- 1.2 To commence a period of consultation on draft budget proposals for a four-week period ending 15th February 2024.

2 RECOMMENDATIONS:

- 2.1 That Cabinet approves the release of its draft revenue budget proposals for 2024/25 for consultation to run until 15th February 2024.
- 2.2 That Cabinet approves the release of its draft capital budget proposals for 2024/25 and indicative capital budgets for 2025/26 to 2027/28 as set out in **appendix 4** for consultation to run until 15th February 2024.
- 2.3 That Cabinet notes the adverse implications and current uncertainties arising out of the provisional budget announcement of Welsh Government as outlined in this report and agrees the response outlined at **appendix 3**.
- 2.4 That Cabinet recommends the use of £2.8m of capital receipts to fund revenue costs associated with organisational change that support the draft revenue budget proposals.

3 Budget context and summary

- 3.1 Councils across the UK are continuing to face significant financial challenges. It is widely acknowledged that local government funding has not kept pace with increased service demand and inflationary pressures. 2024/25 will be no different.
- 3.2 The Council has seen continuing financial headwinds which are having a severe impact upon the service operating environment:
 - The Inflationary drivers impacting pay and supplies and services continue to far outstrip available resources;
 - Demand led pressures continue to increase in the areas of Homelessness, Social Care, Children's additional learning needs, and Transport;
 - Interest rates have risen sharply to combat inflation, significantly above economic forecasts;

- The Council continues to deal with a shortage of staff resources due to the ongoing labour market challenges that requires more costly temporary solutions to be used;
- Supply chain issues continue which requires more costly alternative or expedited arrangements;
- The cost of living crisis has continued to have a significant impact on our communities, and will be further exacerbated over the medium term by weak growth forecast in the UK economy that impacts public sector spending, and the recent sharp interest rate rises that will impact housing costs as we move through the year.

3.3 All the above results in a growing need for supportive Council services, a reduced demand for income generating services, increased risks around debt recovery, and a continued high-cost operating environment.

4 Provisional Local Government Settlement

4.1 On the 20th December 2023, the Minister for Finance and Local Government announced the Provisional Settlement for 2024/25.

4.2 The headlines of the Settlement are:

- On average, Welsh Local Authorities will receive a 3.1% increase in general revenue funding next financial year.
- Individual Authority Settlements range from +2.0% to +4.7%.
- Floor protection is in place, with additional funding of £1.3 million provided to ensure that no Local Authority received a settlement increase of less than 2%.

4.3 Monmouthshire will receive a 2.3% increase in Aggregate External Finance (AEF) in 2024/25. In cash terms this equates to £2.68m after taking into account taxbase adjustments.

4.4 The below average settlement for Monmouthshire is linked to data underpinning the settlement, notably distributional increases linked to population and free school meal eligibility. These are partially offset by increases in Monmouthshire's distribution relating to pupil numbers and benefits.

4.5 There is currently no indicative date for receipt of the Final Settlement, although it is anticipated that this would be no sooner than the publication date of the Welsh Government (WG) final budget which is due on 27th February 2024. This will mean a limited amount of time between the announcement of Final Settlement and the Council's budget-setting meeting (29th February 2024). Whilst this has also been the case in recent years, timing may prove more problematic than usual for 2024/25, due to uncertainties regarding specific grants and other funding as outlined below.

4.6 The Welsh Government's recent review of local government finance aims to reduce administrative burdens on Local Authorities and offer greater funding flexibility. Several specific grants are expected to transfer into the wider Revenue Support Grant in 2024/25, but no specific grant transfers have been made at Provisional Settlement. It is assumed that all transfers will now be announced as part of the Final Settlement. As there is currently little visibility

over what will transfer, the timing of the changes effectively curtails any funding flexibility for 2024/25.

- 4.7 The Provisional Settlement provides some details on specific revenue grants. However, information is at an all-Wales level and incomplete at this stage, with grants totalling more than £25 million yet to be confirmed, including the Sustainable Waste Management Grant (£16 million).
- 4.8 The information made available indicates significant changes and reductions that will be difficult to manage in several key service areas. At an all-Wales level, specific grants (excluding those that are yet to be confirmed) will reduce by £92.6m next financial year.
- 4.9 £51.7m of grants are indicated to cease after the current year, including:
- Teachers Pay (£21.3m) – Local Authorities were made aware that WG would not be continuing with this funding into 2024/25 which will increase the pressure on school's reserves;
 - Free school meal holiday provision (£8.9m) – this reflects cessation of the scheme that commenced during the Covid-19 pandemic;
 - Childcare Offer (£20 million) – no longer being administered by Local Authorities
- 4.10 Significant reductions to grants include:
- **Retail, Leisure and Hospitality Rates Relief Grant:** a reduction of £50.8 million, reflecting the decision to reduce the level of relief from 75% to 40%. Whilst classed as a Local Government grant stream, this should not have an impact on Monmouthshire funding. It would be offset by increased NDR from the affected businesses, payable to the all-Wales pool.
 - **Social Service Workforce Grant:** a reduction of £10m or 22% from £45 million to £35 million. This will have a significant impact for Monmouthshire given it is a key funding stream supporting core Social Services expenditure. Extrapolating the all-Wales percentage decrease allocation suggests an estimated reduction of £250k for Monmouthshire. This grant reduction will be in addition to the expected tapering of the Regional Integration Fund, which is another key funding stream for Social Services and therefore a further significant challenge for this area to manage in 2024/25.
 - **Homelessness:** No One Left Approach: a reduction of £5m or 33.3%; and Discretionary Homelessness Prevention: a reduction of £6.5m or 52%. This implies that additional sums allocated for 2023/24 will not be continued next financial year. This will be difficult to manage given the demand increases in this area over recent years.
 - **Communities for Work+:** a reduction of £10.5m or 38%, from £27.3m to £16.8m. This grant was previously part of Children and Communities Grant before becoming a standalone grant in 2023/24. Whilst a level of reduction was anticipated for 2024/25, the indicative reduction is greater than anticipated.

- 4.11 There are no materially significant increases to grants for 2024/25.
- 4.12 As set out above, the picture in relation to specific grants is challenging and uncertain. Additional clarity will be sought in coming weeks to clarify and understand the impact on service delivery and the ability for services to manage the reductions.
- 4.13 General Capital Funding at an all-Wales level will be £180m for 2024/25, of which Monmouthshire will receive £4.9m. This funding is not specific to individual capital schemes and will aid in supporting Monmouthshire's overall capital investment plans for 2024/25, as outlined later in this report.
- 4.14 The Council's response to the Minister's statement is outlined at **appendix 3**.

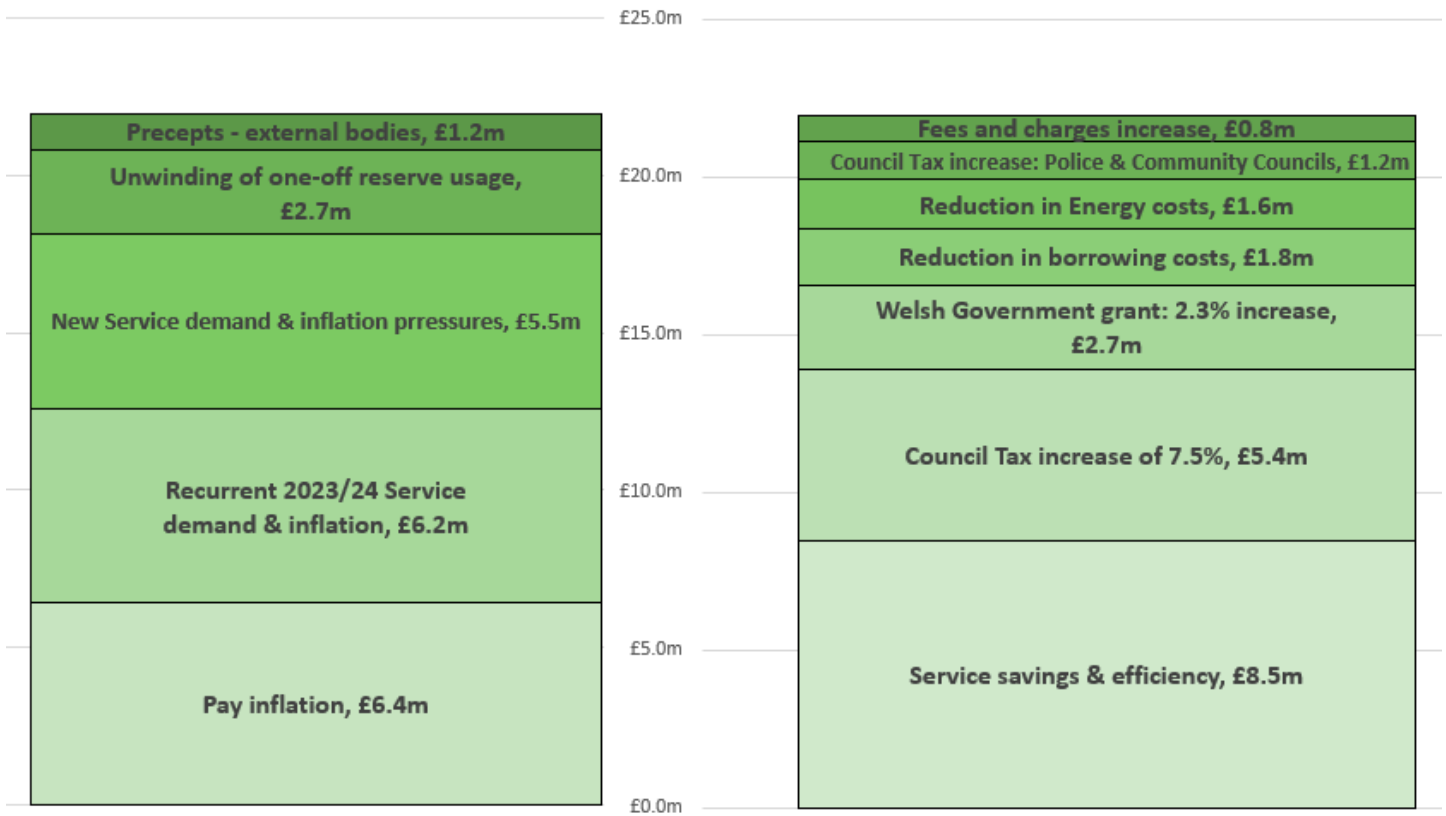
5 Draft Revenue budget

- 5.1 Cabinet outlined its budget principles for 2024/25 in their report of 15th November 2023 which recognised that the outlook in years ahead is even more challenging, and that the budget for 2024/25 therefore needs to be responsible and sustainable.
- 5.2 The work undertaken in the current year to address the in-year overspend through a budget recovery plan and strengthened governance arrangements carries itself through to the budget proposals for 2024/25.
- 5.3 In order to conserve an appropriate and prudent level of financial resilience, the draft budget for 2024/25 removes any dependency on the one-off use of revenue reserves to support core revenue expenditure.
- 5.4 Any budget setting means making choices about how and where the Council's resources are spent. This year, the choices are stark: our funding will not cover all the services we provide in their current form.
- 5.5 The absolute choice for the proposals is to protect and sustain for now and for the future the services which we know are important to the residents of Monmouthshire without compromising the financial stability of the Council.
- 5.6 Continuing the policy intent to mitigate the impact of the budget proposals on those most in need holds primacy in the draft budget proposals that follow.
- 5.7 This is highlighted through the identification of, and investment made to address pressures in Social care, Homelessness, and Children's additional learning needs. When implementing savings in these areas, careful consideration has been given to minimising impact, and prioritising support for those in greatest need. Service offers have evolved and adapted to ensure the best possible outcomes for individuals in these critical areas.

- 5.8 Whilst hard choices have had to be made to protect services, the services that are available to residents this year will be available in 2024/25. Waste collections will remain the same. Leisure centres, recycling centres, libraries and community hubs are all remaining open.
- 5.9 The draft budget increases funding for social care and health by 5.8% and for local schools by 2.5%. However, even these increases will not fully cover the increase in demand and inflationary costs being experienced. So, to fund these services, we are intending to change the way some things operate and also plan to increase income through council tax and charging to cope with the huge pressure on services.
- 5.10 There will continue to be a focus on tackling inequalities and to protect the most vulnerable in our society. This means our support for additional learning needs provision will increase as will the specialist resource bases for disabled children and young people helping them stay in their local schools. Above all we will work with partners and support our communities, providing advice and practical help for those worst hit by the Cost-of-Living crisis, such as community fridges, mental health support, housing and welfare advice.
- 5.11 **Meeting the budget gap**
- 5.12 Cabinet published their budget setting process and timetable at their meeting on the 15th November 2023. This highlighted an initial budget gap of £14.4m, which was made up of gross expenditure pressures of £22.7m or 10%, offset by modelled increases in funding of £8.3m or 4% by way of increased Welsh Government grant, Council tax and fees and charges for services.
- 5.13 This is the second successive year that the Council has needed to tackle gross expenditure pressures of £20m+. Whilst the Council in the past has regularly dealt with financial challenges in the order of £5m - £10m in an annual planning cycle, the scale of the pressure for 2024/25 is challenging, and particularly following a budget cycle for the current financial year which saw significant service change needing to be delivered across the Council which continues to draw on staff capacity and resources.
- 5.14 Work has continued since November to update the range of planning assumptions and variables that impact the Council's budget:
- The impact of the provisional Welsh Government settlement, announced on 20th December 2023;
 - The Council Tax Base for 2024/25 approved by Individual Cabinet Member decision on 20th December 2023;
 - Updated economic forecasts including inflation and the impact of the real living wage announcement in October 2023;
 - Review of pay award assumptions in light of most recent inflation forecasts and the agreement of the 2023/24 NJC pay award;
 - The need to address demand pressures as evidenced through in-year budget monitoring.
- 5.15 Taking account of the above, the updated additional increase in expenditure projected for 2024/25 is £21.9m and is detailed below.

Expenditure pressures for 2024/25 (£21.9m)

How the pressures will be met



5.16 Expenditure pressures for 2024/25

- 5.17 The Council is facing in-year service expenditure pressures of around £6.2m in the current 2023/24 financial year, which have primarily resulted from increasing demand for Council services alongside the increased cost of provision in a high inflation environment.
- 5.18 These are predominantly centred around the service areas of Social care, Transport, Waste, Homelessness, and Children’s additional learning needs. The assessment of these pressures carried out by services indicates that these pressures are expected to remain throughout 2024/25.
- 5.19 Alongside this, services have indicated that a further £5.5m of new demand and inflationary led service pressures are expected to materialise in 2024/25, primarily in those same services experiencing pressure in the current year.
- 5.20 Both the recurrent and newly identified service pressures are outlined in paragraphs 5.35 to 5.40, and in further detail in **appendix 1**.
- 5.21 Pay inflation for 2024/25 has been modelled using all-Wales data including evidence provided by the Welsh Local Government Association and feedback from national employers and is anticipated to introduce further budgetary pressure of £6.4m.

- 5.22 The use of reserves to support the 2023/24 budget will not be maintained for 2024/25 and, when set alongside other reserve movements, introduces additional budgetary pressure of £2.7m.
- 5.23 The precept that the Council collects and pays over on behalf of the Office of Police and Crime Commissioner for Gwent and Community Councils is currently forecast to increase by £1.2m.
- 5.24 **How the pressures will be met**
- 5.25 Cabinet has looked at every mechanism available to meet the funding shortfall including the flexibilities within the grant support from Welsh Government, savings from service efficiencies and redesign, a review of borrowing costs, and additional income through raising fees and charges and through council tax increase.
- 5.26 The provisional settlement from Welsh Government received on 20th December 2023 provided a funding increase of 2.3%, significantly below the 3.1% all-Wales average and the increase of 3% used in the original budget modelling. Whilst the 2.3% increase introduces additional income of £2.68m to the Council, this needs to be considered against £21.9m of expenditure pressures the Council is facing.
- 5.27 The Council has undertaken a review of its borrowing costs and will bring forward a recommendation to reprofile the amount it sets aside to meet future debt repayments that will result in lower costs for the current year and 2024/25 totalling £1.8m.
- 5.28 The Council's energy costs are projected to reduce by £1.6m compared to the current year. Work continues to reduce consumption and work towards Cabinet's objective of reducing carbon emissions and making a positive contribution to addressing the climate and nature emergency.
- 5.29 It is proposed that additional income of £0.8m for 2024/25 will be generated through increases in discretionary fees & charges for services.
- 5.30 The remaining sum of £13.8m can only be met through a combination of service efficiencies, service reductions and through council tax increases.
- 5.31 Striking the right balance between council tax rises and the reduction of services that support the most vulnerable in our community is not easy and involves inherent choice.
- 5.32 The draft budget proposes a council tax increase of 7.5% introducing additional income of £5.4m. This equates to an increase of £2.26 per week for a Band D property. We anticipate that 64% of households will meet this charge in full, with the remaining 36% benefiting from a dispensation. The final level of Council Tax will only be decided following the consultation process as part of the final budget proposals.
- 5.33 The remaining shortfall of £8.5m will be met by service savings proposals which are set out in paragraph 5.40 and with further information attached at **appendix 1**. An assessment of their cumulative impact is provided at **appendix 2**.
- 5.34 We will continue to utilise capital receipts up to a maximum of £2.8 million to meet qualifying revenue expenditure that looks to generate longer term organisational change that enables delivery of services more efficiently and effectively.

Figure 1: High level budget summary

2024/25 Draft budget proposals (£000's)										
Net Expenditure Budgets	Adjusted Base Budget 2023/24	Service saving	Service pressure	Pay increase	Reserve / Corporate Adjustments	Energy costs	Fees and charges	Grant income	Council Tax Income	Draft Budget 2024/25
Children and Young People	62,482	(1,617)	1,611	2,432		(820)	(70)			64,018
Social Care and Health	64,094	(4,685)	7,410	1,488		(102)	(388)			67,817
Communities & Place	25,470	(746)	1,305	1,167	9	3	(332)			26,877
Monlife	8,353	(615)	285	528		(437)	(27)			8,087
Resources	8,381	(375)	290	329	(79)	(220)				8,326
Chief Executive's unit	3,181	(86)	47	146						3,288
Law & Governance	2,667	(33)	135	125						2,894
Corporate Costs & Levies	30,517	(200)	641	185	(2,845)				1,163	29,462
Sub Total	205,147	(8,357)	11,724	6,399	(2,914)	(1,576)	(817)	0	1,163	210,769
Borrowing Costs	9,170				(1,796)					7,374
Contributions to Earmarked reserves	63								625	688
Contributions from Earmarked reserves	(4,681)				4,386					(295)
Total Expenditure	209,699	(8,357)	11,724	6,399	(324)	(1,576)	(817)	0	1,788	218,536
Funding Budgets										
Aggregate External Financing (AEF)	(122,675)							(2,680)		(125,355)
Council Tax (MCC)	(66,955)								(5,425)	(72,380)
Council Tax (MCC Premium)	0								(753)	(753)
Council Tax (Gwent Police)	(15,505)								(1,163)	(16,668)
Council Tax (Community Councils)	(3,381)									(3,381)
Council Fund Contribution	(1,184)				1,184					0
Total Funding	(209,699)	0	0	0	1,184	0	0	(2,680)	(7,341)	(218,536)
Total Budget	0	(8,357)	11,724	6,399	860	(1,576)	(817)	(2,680)	(5,553)	0

5.35 Service Pressures

5.36 Service specific spending pressures have been subject to rigorous review with the total of £11.724m needing to be considered as part of the draft budget. A summary table of these pressures is provided below with more detail provided in **appendix 1**.

Pressures by Directorate	Recurrent 2023/24 Pressure	New pressure	Total 2024/25 Pressure
	£000	£000	£000
Children & Young People	650	961	1,611
Social Care & Health	4,116	3,294	7,410
Communities & Place	1,146	159	1,305
Monlife	145	140	285
Resources	0	290	290
Chief Executives Unit	0	47	47
People & Governance	135	0	135
Corporate Costs & Levies	0	641	641
Totals	6,192	5,532	11,724

5.37 The most significant areas of pressure are:

School transport	£745,000	The transport budget is facing pressure from the expenses of contractors. They are charging more because of the current market conditions and high fuel costs. Some of the transport budget helps pupils with additional learning needs to get to a school / specialist placement that can meet their needs. The number of pupils going to placements outside the county is going down but the cost of the existing contracts is going up a lot. Also, some pupils who stay in Monmouthshire schools still need to be taken to Monmouthshire specialist resources bases.
Additional learning provision (ALP)	£542,000	£100,000 for schools to provide short-term intensive support for pupils with additional learning provision (ALP) who are facing a crisis situation. £375,000 to provide adequate ALP for children/young people with additional learning needs (ALN) who require a local authority led IDP. £67,000 to create increased capacity in the Vulnerable Learner Lead role to meet the high/ increasing demand.
King Henry 3-19 school	£324,000	£125,000 to meet the costs of increased rates on the new building. £199,000 for additional management costs for the new specialist resource base.
Social care provider fees	£2,760,000	A budget pressure is expected from the review of care provider fees across Childrens and Adults social care as part of the yearly fee negotiations. Care providers face various costs and pressures, such as the rise of the real living wage, inflation, fuel, insurance, and non-care staff pay.
Social care demand & inflation	£4,116,000	£3,909,000 - Adult services remain in a highly volatile operating position with risks associated with demand levels, complexity of demand, inflationary pressures, and labour shortages. £207,000 - Children's services have an estimated pressure due to increasing costs of staffing, provider fees and inflation. The service has implemented an ambitious savings plan to review placements, but still faces challenges in recruiting and retaining child protection social workers.
Social care workforce grant reduction	£250,000	Welsh Government have announced a 22% reduction in this grant for 2024/25 that is supporting core expenditure within social care.
Foster carer allowances	£185,000	Annual review of allowances ahead of Welsh Government's announcement of the 2024/25 fee structure in January 2024.
Waste & Recycling	£1,009,000	Recycling market pressures, contract inflation and recurrent pressures from 2023/24.

Transport	£296,000	£200,000 due to the rising costs of fuel, hire, parts and maintenance for the transport fleet. £50,000 for the annual uplift of home to school contracts. £46,000 due to the Green Car Scheme income target shortfall.
MonLife income	£176,000	£100,000 from a shortfall in income for the Borough Theatre, and £45,000 on Markets income. Grant funding shortfalls to support the costs of the Youth service (£25,000) and the Blue badge scheme (£6,000)
Contact centre / Hubs	£99,000	Pressures as a result of increased telephony licencing costs (£69,000) and service staffing (£30,000).
Welsh Language	£30,000	Increased demand for Welsh language translations.
Members Allowances	£135,000	Cost of members allowances and associated on-costs will exceed available budget. This is made up of the recurring pressure already reported in 2023/24 plus the effect of the potential pay awards for 2024/25.
Resources	£290,000	£108,000 for permanent leadership capacity within landlord services to enable faster progress in delivering against the Council's policy objectives. £54,000 to reflect increased contributions to the shared revenues & benefits service with Torfaen. £128,000 to reflect the increased administration of Council tax premiums that will be funded from additional income generated.
Corporate costs and levies	£641,000	£200,000 to reflect the expected increase in Insurance premiums as a result of market pressures and claims experience. The remainder relates to an increase in non-controllable costs of precepts, levies, and charges in relation to the Fire service, Coroner service, and external audit fees.

5.38 Service savings and efficiencies

5.39 The draft budget proposals bring forward service budget savings of £8.357m. A summary of saving proposals by service area is shown below with further details outlined in **appendix 1**.

Savings proposals by Directorate	2024/25
	£000
Children & Young People	(1,617)
Social Care & Health	(4,685)
Communities & Place	(746)
Monlife	(615)
Resources	(375)
Chief Executives Units	(86)
People & Governance	(33)
Corporate Costs & Levies	(200)
Totals	(8,357)

5.40 The notable savings proposals are:

Schools funding	£835,000	Investment in schools remains a high priority for the Council and funding will increase by 2.5% for 2024/25. Cabinet have carefully considered the allocation to schools, mindful of the pressures faced and the volatility of individual school budgets through factors such as pupil numbers and increasing numbers of pupils with additional learning needs. The Council will not be able to fully fund schools for all inflationary related pressures, in so far there will still be a requirement for schools to make efficiency savings that contribute to meeting the wider budget challenge faced by the Council for 2024/25.
Additional learning needs	£534,000	A reduction in the cost of out-of-county and independent specialist placements for pupils with ALN by investing in the quality and capacity of local, community schools and specialist resource bases (SRBs)
Education Achievement Service	£35,000	A reduction in the core contribution to the Education Achievement Service of 10%
Gwent Music	£39,000	A reduction in subsidy with hardship fund being maintained
Before school clubs	£70,000	An increase in the charge for the childcare element of before school clubs from £1 to £2
Adult social care	£1,494,000	Staffing review - consolidating existing vacancies within direct care, ceasing the in-house residential respite provision for adults with learning disabilities, reorganising the My Day, My Life and Individual Support Service, and replacing some social workers with social care assessors.
Adult social care	£1,130,000	Practice change agenda – Implementing strategies to manage demand, strengthen oversight, control costs, generate savings and enable practice change in adult social care. These include applying consistent eligibility criteria, reviewing current care packages, pursuing health contributions, re-commissioning services, expanding reablement and direct payments, and aligning with community and housing support.
Adult social care	£578,000	An increase from £100 to £120 per week for clients receiving non-residential care. This proposal looks at what additional income would be obtained should the cap increase following all-Wales negotiations with Welsh Government. The amount that people are charged for their care would remain subject to an individual financial assessment.
Children's services	£1,300,000	Placement and practice change - reviewing children's care plans in high-cost placements and developing appropriate services and placements to support their long-term needs.
Social care	£388,000	An increase in a range of fees and charges across social care and health as outlined within the consolidated fees and charge schedules. All fees and charges are subject to an individual financial assessment.
Garden Waste collection	£75,000	The charge for the garden waste collection service has been increased by 10% in line with the Cabinet decision taken in January 2023 to ensure the service undertakes full cost recovery.
Food waste bag provision	£50,000	Stop the free provision of food waste bags, make bags available for purchase at cost price at outlets across Council buildings and at some local independent stores within Monmouthshire.
Council car	£8,000	Removal of the Council Car.
Home to school transport	£93,000	To undertake a review of the home to school contracts that utilise vehicles that have 8 seats or fewer with a view to bringing service delivery in-house for the high-cost contracts.
Home to school transport	£3,000	To increase the cost of concessionary seats on home to school transport by 10% to generate additional income and offset the rising transport cost.
Planning	£98,000	Reflects a request to the Welsh Government from all 25 Local Planning Authorities and the WLGA to increase statutory planning application fees by 25% to help towards covering the full costs of providing the planning service.
Car parking	£66,000	To increase car parking charges and charges for permits by 10%.
Trade waste	£30,000	Fees & Charges - Increase in Trade waste fees, sale of bags & bins

Homelessness	£400,000	To reduce the number of people in unsuitable and costly temporary accommodation and move towards a more sustainable model of housing provision.
Museums	£40,000	Realign the museums services by closing two museums for an additional day per week and reviewing business support.
Attractions	£10,000	Close Old Station Tintern for one day a week on Mondays from 1st April 2024, except for four bank holidays.
Countryside & Culture	£10,000	Withdraw the MCC contribution to Abergavenny Tourist Information Centre. The service is run by Bannau Brycheiniog National Park Association (BBNPA) in partnership with Abergavenny Town Council.
Outdoor adventure	£70,000	Move to a more sustainable model for the outdoor adventure service, which is part of the MonLife directorate based at Gilwern.
Leisure centres	£140,000	Leisure centres - Change closing times: Weekday closure 21:30, Weekend closure 16:30
MonLife	£120,000	Introduce a phased area management structure within Monlife.
Commercial & Investment properties	£308,000	Reflection of the forecast improvement in rental income across the portfolio as a result of revised tenancies agreed.

5.41 Council Tax rate, base and premiums

5.42 A Council tax increase of 7.5% is proposed for 2024/25. For a current Band D property this will equate to a charge of £1,682.01 (Council only element excluding Community council or Police levy) and would illustratively be an additional £117.35 a year or £2.26 a week for 2024/25.

Illustrative weekly impact of a 7.5% increase in Council tax rate									
Bands	A	B	C	D	E	F	G	H	I
Increase per week	£1.50	£1.76	£2.01	£2.26	£2.76	£3.26	£3.76	£4.51	£5.27

5.43 Overall, the Council Tax base calculated for 2024/25 has risen by 1.4% compared to 2023/24. This increase takes into account the anticipated changes in dwellings and the introduction of council tax premiums.

5.44 Any income generated from council tax premiums (net of administration expenditure) will be transferred to an earmarked reserve to be used in future to further the Council's progress in addressing housing issues in the County.

5.45 The estimated total additional income as a result of Council tax base changes, net of premiums and changes to CTRS (Council Tax Reduction Scheme), is £402,000.

5.46 Budgetary Risk and uncertainty

5.47 **Service budget savings** - The budget process for 2024/25 is challenging. The initial budget gap identified of £14.4m resulted in services being asked to deliver a level of savings which will once again require significant service change. Given the capacity constraints across the Council, this clearly presents a significant budgetary risk in 2024/25.

5.48 This will be particularly acute within Social Care where savings totalling £4.7m will be expected to be delivered within a service which has a trend of significant over-spends, continues to experience challenging levels and complexity of demand, coupled with significant workforce pressures.

- 5.49 **Pay awards** - Uncertainty will remain around the pay awards for local government staff and teaching staff. Actual pay awards will not be confirmed nationally by independent pay bodies until later in 2024 and therefore further consideration might need to be given in-year to adjust pay budgets at that time. Whilst the pay award assumptions factored into the budget are set at a level which is seen as prudent, there remains an unknown risk of the effect of the wider economic and political landscape as we move through 2024.
- 5.50 **Funding** - The Provisional Settlement provides some details on specific revenue grants. However, information is at an all-Wales level and with grants totalling more than £25m yet to be confirmed, including the Sustainable Waste Management Grant (£16m).
- 5.51 **Pension costs** - The impact of the latest actuarial review of the Teacher's Pension Scheme (TPS) will take effect from 1st April 2024, with Employer's contributions due to increase by 5 percentage points to 28.6% of pensionable pay. This is a 21.1% increase to the level of pension contributions currently paid.
- 5.52 The estimated impact for Monmouthshire is approximately £1.5m. However, this is not currently accounted for in the Council's draft budget, as there is an assumption that the UK Government will fund the increase to the TPS. It is expected that there will be consequential funding for Wales, but the timing of this confirmation is uncertain. The Welsh Government minister has expressed intentions to press the UK Treasury for assurances on this matter. Recent announcements about the timing of the Spring Budget suggest that confirmation may not be received until the date of that announcement, which is anticipated to be on 7th March 2024.
- 5.53 Increases to unfunded pension schemes could also affect the level of the Council's contribution to the South Wales Fire and Rescue Service. Confirmation of the pension contribution rate change is being sought from the Treasury, but it is still uncertain, and therefore at this stage is excluded from the draft budget.
- 5.54 **Reserves and Capital Receipts strategy**
- 5.55 Cabinet were clear in their budget strategy framework for 2024/25 that there is a need to progress the Council on a path towards financial sustainability including conserving an appropriate and prudent level of financial resilience.
- 5.56 Reliance on revenue reserves to fund core revenue expenditure should be avoided because they are a finite resource. This means that using reserves in this way immediately creates a gap in the budget for the following year.
- 5.57 The draft budget for 2024/25 eliminates the use of revenue reserves to fund core expenditure. The budget does include total revenue reserve usage of £0.5m which is being used to support one-off expenditure that is required to progress the Local Development Plan, and, drawing on previously allocated funding to support Ukrainian refugees.
- 5.58 The draft budget continues to include the use of £2.8m of capital receipts to fund the one-off revenue costs associated with organisational change. This approach will need to be reviewed over the medium-term in part or in full as receipt generation reduces. Drawing on capital receipts in this way reduces the balance available to fund any capital expenditure which may consequently increase the Council's need to borrow to fund the expenditure.

6 **Draft Capital budget**

- 6.1 The capital budget strategy was updated and approved by Council in March 2023. Whilst an updated capital strategy for 2024/25 will be considered by Council alongside the treasury strategy at its meeting on 7th March 2024, the underlying principles of the strategy remain fit for purpose and have been used in preparing the draft capital budget proposals.
- 6.2 The capital strategy requires the capital programme to be financially sustainable without leading to borrowing levels that are unaffordable, unsustainable and imprudent.
- 6.3 The draft capital budget proposals for 2024/25 continue to support the priorities of the Council and are wholly aligned with the priorities set out in the Community and Corporate Plan. Notably this includes ensuring that resources are aligned to meet the plans for tackling the longer-term challenges that communities and public sector organisations are facing.
- 6.4 The existing capital programme is very much dominated by the investment in the new Abergavenny 3-19 school which involves total investment of £69.3m in creating the first operationally Net Zero Carbon 3-19 School in Wales, alongside the completion of the new Crick Road care home.
- 6.5 Aside from this investment, the current four-year capital programme very much represents a consistent investment into maintaining the Council's infrastructure base through planned investment in:
- Property and county farms maintenance
 - Highways infrastructure & transports schemes
 - Disabled facilities grants & access for all
 - Match funding to leverage external grant opportunities to invest in infrastructure
 - Investment in the Cardiff capital city region deal
 - Funding of eligible revenue costs associated with service reform, to support the draft revenue budget
 - ICT investment
- 6.6 Whilst the current planned investment in the Council's asset infrastructure goes a long way in meeting the requirement to maintain the existing estate, there still remains a considerable number of backlog pressures that sit outside of the core capital programme, and this has significant risk associated with it and is being closely monitored. This will be considered more fully in the next iteration of the capital strategy.

7 Capital funding

- 7.1 The provisional settlement outlines that the Council's unhypothecated capital allocation will be £4.931m, which represents a £6,000 increase over 2023/24. This will be the second successive year of higher capital funding, following an increase of £818k seen in 2023/24.
- 7.2 Welsh Government have however indicated that capital funding in 2025/26 will be reduced back to levels more in line with previous indicative settlements, and the Council will need to align its forward capital plans accordingly to make allowance for this.
- 7.3 Clarification is also required on specific capital grant funding streams where there are initial indications from Welsh Government that these are being removed or consolidated, or that the criteria are being tightened and that may impact on some of the pressures and bids being considered. This may also need further consideration in the final budget proposals.

- 7.4 This will present future challenges to the Council as it looks to maintain its assets and consider future capital investment that responds to the needs of communities and in allowing the Council to pursue the goals set out in the Community and Corporate plan.
- 7.5 The Council has limited recourse to internal resources in the form of capital reserves and receipts, and any resultant borrowing required to support the capital programme directly impacts on the revenue budget.
- 7.6 In light of the current pressures on the Council's medium-term revenue budget, and the principles on which any prudential borrowing must be taken of affordability, prudence and sustainability, the use of further prudential borrowing will need to be carefully assessed.
- 7.7 The level of capital receipts anticipated over the next 4-year window has not been increased as the Council awaits the conclusion of the replacement Local Development Plan.
- 7.8 The Council continues to use the benefit of Welsh Government guidance that allows the Council to make flexible use of capital receipts to meet revenue expenditure associated with service reform.
- 7.9 The 2024/25 revenue budget proposals include the proposed use of capital receipts for this purpose of £2.8m. It is accepted that this is not a sustainable long term means by which to support the revenue budget but is seen as necessary given the current financial challenges.
- 7.10 The table below illustrates the forecast balance on the useable capital receipts reserve over the period 2023/24 to 2027/28 taking into account current capital receipts forecasts provided by Landlord Services and revised balances drawn to finance forward indicative budgets.

Forecast Useable Capital Receipts	2023/24	2024/25	2025/26	2026/27	2027/28
	£000	£000	£000	£000	£000
Balance as at 1st April	12,446	8,080	6,390	5,427	3,965
Less: capital receipts used for financing	(4,043)	(1,158)	(1,058)	(1,058)	(1,058)
Less: capital receipts used to support capitalisation directive	(3,008)	(3,111)	(508)	(508)	(508)
Less: Reserve cover for redundancies	(1,000)	0	0	0	0
Capital receipts Received	1,043	0	0	0	0
Capital receipts Forecast	2,642	2,578	603	103	103
Forecast Balance as at 31st March	8,080	6,390	5,427	3,965	2,503

- 7.11 The core capital programme does not generally include specific grant funded schemes as a consequence of such funding announcements and grant awards not being confirmed in time to feature in the final budget proposals. These are added to the capital programme during the year.

8 Capital cost pressures

- 8.1 The current Capital programme is impacted by the same external factors impacting upon the revenue budget and outlined in detail earlier in this report. Inflation, supply chain issues and internal resourcing capacity is meaning that current capital budgets are being delayed or deliver less for the same amount of budget.
- 8.2 The indicative capital programme will be reviewed prior to final budget setting to establish the suitability of the brought forward indicative capital schemes, and principally:

- Whether the schemes are still relevant to current Council priorities;
- Are current budgets allocated still workable given factors such as inflation, supply chain issues and internal capacity to deliver;
- Are there any more urgent schemes coming forward, either from the backlog list of pressures or otherwise that need to displace existing schemes;
- Whether there are any further external funding opportunities;
- Does the capital programme remain prudent and affordable in light of the wider economic pressures and revenue budget gap;
- Does potential slippage from the 2023/24 capital budget provide opportunities to re-purpose existing budgets to allow one-off investment in immediate capital risks.

8.3 Draft Capital budget

8.4 The draft capital budget for 2024/25 and indicative medium-term programme is shown at **appendix 4**.

8.5 At draft budget stage, a number of immediate capital cost pressures have been identified by services, principally within the areas of urgent health and safety works, and legal and regulatory obligations.

8.6 An initial scrutiny exercise has been carried out of the proposed cost pressures which has resulted in a small number of cost pressures being endorsed for inclusion in the draft budget for 2024/25.

8.7 There remain a number of areas of further development of the remaining proposals to establish the capacity of the Council to deliver the works during 2024/25 and the affordability of funding the proposals in light of the associated impact on the revenue budget. These will be progressed over the coming weeks as better information becomes available on the progress of the current year's capital budget, and any flexibility that maybe offered from delays or under spends on existing schemes of work.

8.8 The schedule of immediate capital cost pressure is shown below with an indication of the decision made on investment at draft budget stage:

Capital cost pressure	Priority category	£000's	Draft budget decision
Rights of Way bridges - emergency closure orders / bridge removal	Health & Safety, Legal and regulatory	70	Fund from £6k additional settlement & unsupported borrowing
Rights of Way priority bridge replacement programme	Health & Safety, Legal and regulatory	80	Fund from unsupported borrowing
Depot Health & Safety improvements	Health & Safety, Legal and regulatory	350	Further development required
Highways & Structures	Health & Safety, Legal and regulatory	3,377	Further development required
Transport Depot - South of County	Deliver community & corporate plan priorities	300	Further development required

Decarbonisation surveys	Deliver community & corporate plan priorities	100	Further development required
New Authority Website	Deliver community & corporate plan priorities	250	Further development required
Total		4,527	

8.9 The consequence of the draft budget proposals is an increase in unsupported borrowing of £144,000 for 2024/25. Whilst this will have a negligible impact on the revenue budget for 2024/25, the overall affordability of borrowing will be considered further by Members in setting an affordable and balanced annual revenue budget at final budget setting stage.

8.10 This will be complimented by the Treasury Management Strategy Statement that will be presented to full Council on the 7th March 2024, which will incorporate a range of prudential indicators that look to ensure that the Council's level of borrowing remains prudent, proportionate and sustainable.

9 Budget consultation & engagement

9.1 The information contained in this report constitutes the draft budget proposals that are now made available for formal public consultation and member scrutiny, including the requirement to consult businesses. The formal consultation period will run for a period of four weeks ending on 15th February 2024.

9.2 Cabinet are interested in consultation views on the draft proposals and the underlying budget strategy adopted. This is the opportunity for Members, the public, community groups, and other key stakeholders (e.g. town and community councils) to consider the budget proposals and make comments on them. Cabinet will not however, be prepared to recommend anything to Council on 29th February that has not been subject to a Future Generations Assessment and Equality Impact Assessment, and therefore a deadline to receive alternative proposals has been set as 15th February 2024.

9.3 The Council will look to purposefully engage via:

- **Face to face and virtual engagement events – Countywide and targeted**
- **Special Budget page on Council website**
- **Online survey and social media campaign**
- **Council Scrutiny meetings – Jan-Feb 2024**

9.4 Given the nature and extent of the budget challenge faced for 2024/25 and the range and extent of the budget savings proposals, it is important that the Council reaches out, engages and listens to feedback. This will in turn inform the final budget proposals that are to be considered in February.

9.5 Further information on consultation events will be made available on the Council website [here](#), along with ways for people to engage in and respond during the consultation process.

9.6 Final budget proposals following consultation and receipt of the final settlement will go to the Cabinet meeting on 28th February 2024 and approval of Council Tax and final budget proposals will take place at full Council on 29th February 2024.

10 OPTIONS APPRAISAL:

- 10.1 Directorates are required to consider and outline the options that have been considered for each of the budget savings proposals and pressures identified in this report. The detail is contained in separate working papers and summarised under **appendix 1**.
- 10.2 The means of assessing whether the final budget proposals for 2024/25 have been successfully implemented is undertaken throughout the year via regular budget monitoring and periodic reports to Cabinet and then to Select committee for scrutiny.
- 10.3 Alongside the Community and Corporate Plan, the Council continues to develop and monitor the performance of the Council against service business plans. Taken together these arrangements enable the Council to evaluate its success and progress against its longer-term plans within the resources available.

11 REASONS:

- 11.1 To agree the draft budget proposals for 2024/25 for consultation purposes.

12 RESOURCE IMPLICATIONS:

- 12.1 As identified in the report and appendices.

13 WELLBEING OF FUTURE GENERATIONS IMPLICATIONS (INCORPORATING EQUALITIES, SUSTAINABILITY, SAFEGUARDING and CORPORATE PARENTING):

- 13.1 An initial impact assessment has been produced for the draft proposals and is attached as **appendix 2**. This enables us to assess the overall potential impact of the budget on people within our communities. We recognise that the proposals will affect different groups of people in different ways. We evaluate the impact on those people who possess protected characteristics. We also look at the cumulative financial impact of the proposals on households at different income levels. Finally, assessment also looks at the budget through the lens of sustainable development principle established by the Well-being of Future Generations Act.
- 13.2 Given the scale of the budget challenge for 2024/25, it is inevitable that this has identified some negative impacts on some groups of people. The nature of the services we provide means that almost any change to a council service will have a socio-economic impact. We know, for example, that disabled people will be more likely to use social services and people on lower incomes will be more affected by increased fees and charges.
- 13.3 Conducting the assessment alongside the development of the budget has allowed us to identify actions that mitigate the potential negative effects of our proposals on vulnerable people and households on the lowest incomes. It also highlights the anticipated positive effects of increasing expenditure on certain groups. This helps to offset some of the effects. The assessment will be updated to take account of feedback received during the budget consultation.

CONSULTEES:

Strategic Leadership Team
Cabinet

APPENDICES:

Appendix 1	2024/25 Draft revenue budget proposals
Appendix 2	Cumulative Future Generations Evaluation
Appendix 3	Response to Welsh Government's Local Government provisional settlement
Appendix 4	Draft Capital budget summary 2024/25 to 2027/28

BACKGROUND PAPERS

List of full Future Generations Evaluations:

[Budget cost pressures](#)

[Budget cost savings](#)

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Y GYLLIDEB BUDGET

2024/25

DRAFT BUDGET PROPOSALS

**Gyda'n gilydd, ar gyfer ein dyfodol
Together, for our future**



monmouthshire
sir fynwy

Foreword



Cllr Mary Ann Brocklesby

(Leader – Monmouthshire County Council)



Cllr Ben Callard

(Cabinet Member for Resources)

Monmouthshire County Council has published its draft budget for 2024/25. It is particularly challenging for all councils due to the costs and demands on services increasing beyond the modest rise in funding.

This coming year, we are planning for our funding to increase to just under 200 million pounds. This sum is made up of council tax, which is 37% of the pot and money from the Welsh government, which is the other 63%.

Any budget setting means making choices about how the money is spent. This year, our choices are stark: our funding will not cover all the services we provide in their current form. Our absolute choice for the proposals we bring to you is to protect and sustain, for now and for the future, the services which we know are important to all of you here in Monmouthshire. We will do so without compromising the financial stability of our Council. We know that you expect us to be **fair**, to base our choices on protecting the **most vulnerable** and our increasingly fragile **environment** while always delivering the best **value for money**.

With what we are proposing, most of you won't notice any change to the council services you receive. Bin collections will remain the same. Leisure centres, recycling centres, libraries and hubs will all remain open. We propose increasing our funding for health and social care by 5.8% and for schools by 2.5%. However, sad to say, even these increases will not fully cover the increase in demand and inflationary costs. So, in order to fund these services, we are intending to change the way some things operate. And we are also planning to increase council tax by an average of 7.5% to cope with the considerable pressure on your services.

Rest assured, we will continue to fully fund the council tax reduction scheme to support those who need most help paying council tax.

We will continue to invest in our communities. As examples, there is a new school under construction in Abergavenny, complementing the new schools in Caldicot and Monmouth. Improvements in active travel will still include the new bridge over the rivers in Abergavenny and Monmouth and a new cycle path connecting communities in Caldicot.

We will continue to tackle inequalities and protect the most vulnerable in our society.

This means our support for additional learning needs provision will increase, as will the specialist resource bases for children and young people with disabilities, helping them stay in their local schools. Above all, we will work with partners and support our communities, providing advice and practical help

for those worst hit by the Cost-of-Living crisis; such as community fridges, mental health support, housing and welfare advice.

In putting these proposals forward, you can see that we have had to share really difficult decisions. Now we want to hear from you. Do you think we are making the right choices?

Are there things we can do together with you that will better protect our services, people and the environment?

We know that in difficult times, the people of Monmouthshire come together, supporting each other and its communities.



PROTECTING OUR MOST VULNERABLE

A FINANCIALLY RESPONSIBLE COUNCIL

REDUCING INEQUALITIES

2024/25

DRAFT BUDGET PROPOSALS

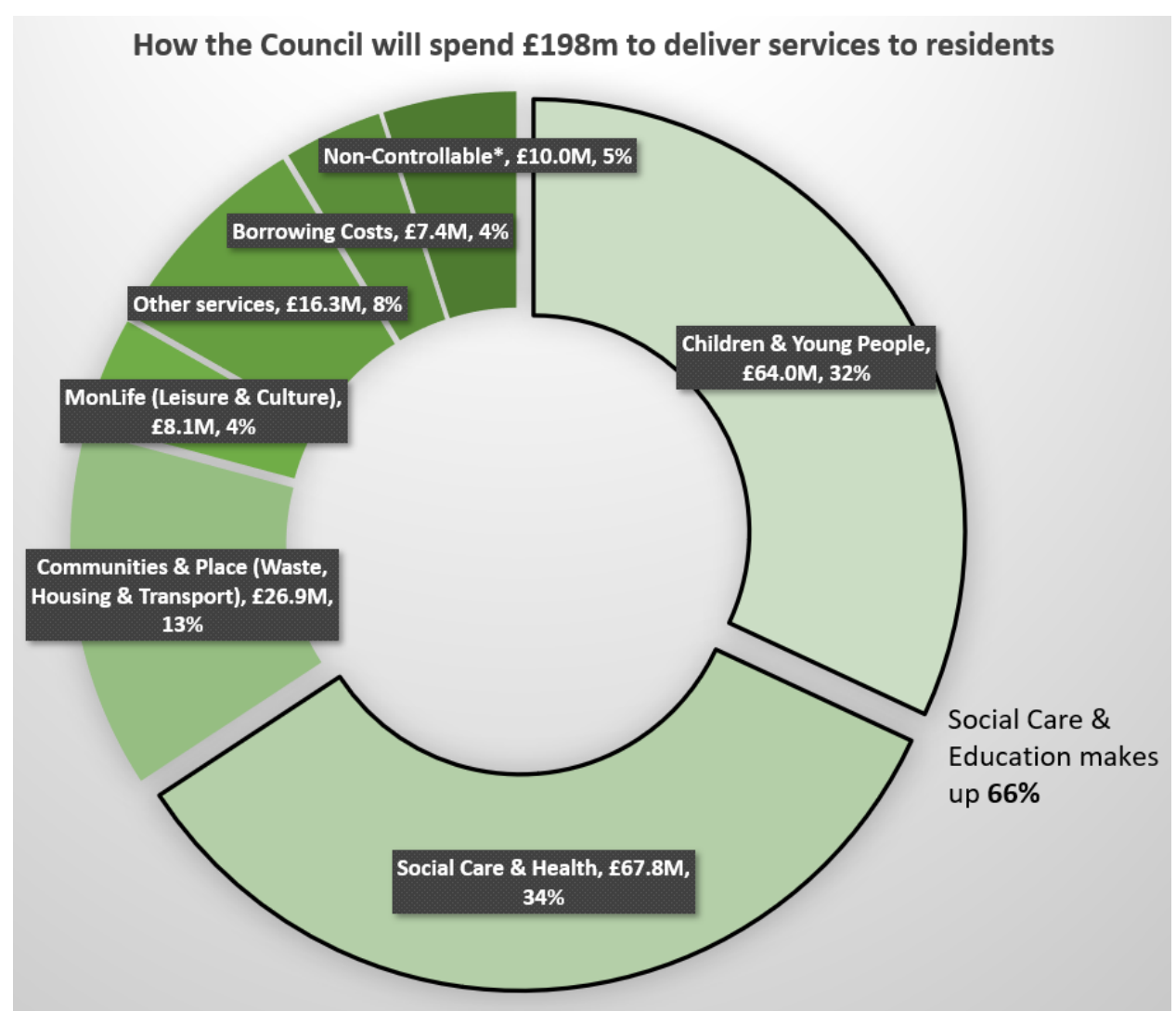
PLANNING FOR THE FUTURE

PROTECTING OUR ENVIRONMENT

Gyda'n gilydd, ar gyfer ein dyfodol
Together, for our future

The Council's Budget Challenge

The Council is proposing an overall net budget of £198m for 2024/25 that it will use to fund local services. How the proposed budget is allocated across services is set out below:



*Levies paid to other organisations such as the Fire Service, National Parks, and Drainage Boards.

In setting the budget for 2024/25, the Council is having to deal with one of the most difficult budget challenges it has faced. We estimate that the cost of delivering the same services next year has increased by around £21.9m.

Service Demand & Inflation: The Council is facing cost pressures resulting from increasing demand for Council services alongside the increased cost of provision in a high inflation environment. These are predominantly centred around the service areas of social care, transport, waste, homelessness, and children's additional learning needs. These cost pressures are outlined in more detail in **Section 2** of this document.

Pay inflation: Higher pay awards are being agreed nationally, reflecting the rate of inflation, but this is also putting pressure on our budget for 2024/25.

How we propose to close the budget gap

Even though Monmouthshire is due to receive an increase in Welsh Government support of 2.3% for next year, roughly £2.6m, this needs to be considered against the £21.9m of additional costs the Council is now facing.

The Council has undertaken a review of its borrowing costs and will bring forward a recommendation to reprofile the amount it sets aside to meet future debt repayments that will result in lower costs for the current year and 2024/25 of £1.8m.

Energy costs are projected to reduce by £1.6m compared to the current financial year. Work continues to reduce consumption and work towards the Cabinet objective of reducing carbon emissions and positively contributing to addressing the climate and nature emergency.

It is proposed that additional income of £0.8m for 2024/25 will be generated through increases in discretionary fees & charges for services. The remaining sum of £13.8m can only be met through a combination of service efficiencies, service reductions and through council tax increases.

Striking the right balance between council tax rises and the reduction of services that support the most vulnerable in our community is not easy and involves making difficult decisions. The draft budget proposes a council tax increase of 7.5%, introducing additional income of £5.4m. This equates to an increase of £2.26 per week for a Band D property.

It is anticipated that 64% of households will meet this charge in full, with the remaining 36% benefiting from a level of exemption. The final level of Council Tax will only be decided following the consultation process as part of the final budget proposals.

The remaining shortfall of £8.5m will be met by service savings proposals, which are set out in **Section 1** of this document.

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Children & Young People

2023/24 Budget	2024/25 Draft Budget	% Change
£62,428,000	£64,018,000	+2.5%

The Directorate is responsible for the funding, management and leadership of the thirty-four schools in Monmouthshire County Council. There are approximately 11,000 pupils in Monmouthshire's schools and the Directorate provides funding to its schools to provide a wide and balanced curriculum to its learners. The Directorate is also responsible for supporting schools to provide additional support for learners with additional learning needs and those learners who need extra help in attending school. These services have seen significant growth in demand in the period post pandemic.

Schools budget efficiency after uplifting budget for funding of projected pay pressures

- **Saving: £835,000**
- **Proposal Title:** The proposal will see schools asked to make efficiency savings of £835,000 after uplifting budgets by the projected pay pressures for 2024/25.
- **Saving and Pressure:** The proposal is expected to save £835,000, but it will create pressure for the schools to absorb a proportion of the pay awards and inflation from their existing budgets.
- **Staffing Impact:** The proposal could result in staff reductions in schools, as each 1% pay award for teachers and non-teaching staff is equivalent to a pressure of £375k and £141k respectively. Schools' Governing Bodies will have to take local decisions which will determine the impact on a school-by-school basis.
- **Service Impact:** The proposal could have a negative impact on service delivery. It may also increase inequality and reduce the chances of children having the best start in life because additional support will no longer be afforded.
- **External Funding:** All available funding opportunities have been explored. Schools will have the ability to access grant funding streams to support learners.
- **Corporate Alignment:** The proposal does not require any amendments to MCC policy.

CYP support - Release expected reserve from solar panels on schools

- **Saving: £120,000**
- **Proposal Title and Description:** The proposal aims to use the rebates from the solar panels installed on some schools to fund the mainstream education budget instead of holding them in a central reserve.
- **Budget Impact:** This would generate a benefit of £120,000 per year for the CYP Resources service area, starting from 2024/25.
- **Service Delivery Impact:** The proposal would not impact schools.
- **Policy Impact:** The proposal would have no impact on any policies or service delivery.

CYP Support - Freeze vacancy in student access team

- **Saving: £34,000**
- **Proposal:** There is currently a vacancy in the student access team, which will remain frozen.

Net saving on Additional Learning Needs (ALN) placements

- **Saving: £534,000**
- **Proposal title and description:** The proposal is about Additional Learning Needs (ALN) placements costs. It aims to reduce the cost of out-of-county and independent specialist placements for pupils with ALN by investing in the quality and capacity of local, community schools and specialist resource bases (SRBs).
- **Proposal savings and pressures:** The proposal expects to save £937k from reduced placements in other local authorities and independent schools and incur £403k of increased costs for Monmouthshire schools. This will result in a net saving of £534k.
- **Proposal impact on staffing and service delivery:** It does not involve any reduction in Monmouthshire staff, but rather a potential increase in staff employed across Monmouthshire schools and SRBs, funded by the cost avoidance of placement fees from other local authorities. The proposal will improve the inclusion and quality of provision for Monmouthshire pupils with ALN.
- **Proposal alignment and evaluation:** This aligns with the MCC Community & Corporate plan to reduce inequality and allows everybody to have the opportunity to reach their potential. The proposal does not require any amendments to MCC policy or any option appraisal.

ALN & Standards - Continue to hold a vacancy open in the MoSTS (Monmouthshire Specialist Teaching Service) team

- **Saving: £20,000**
- **Proposal:** There is currently a vacancy in the Monmouthshire Specialist Teaching Service (MoSTS) team which will remain frozen.

ALN & Standards - EAS contribution reduction of 10%

- **Saving: £35,000**
- **Proposal title and description:** The proposal will reduce the core contribution of Monmouthshire County Council to the Education Achievement Service (EAS) by 10%, which amounts to £35,000. The current budget for the EAS is £363,434.
- **Proposal scope and description:** The EAS is a regional service that provides school improvement support to all schools in Monmouthshire and four other partner authorities.
- **Service delivery impact:** The impact of the proposal on the service delivery depends on the decisions made by the EAS. This will be done in conjunction with Monmouthshire elected members and officers. There are significant risks associated with any diminution of school improvement support, which is a crucial statutory role.
- **Policy impact:** The impact of the proposal on the policy could result in the removal of some direct services to schools. However, this would have no or minimal impact on the core school improvement activities provided by the EAS.
- **Mitigation:** The proposal suggests mitigating actions to reduce the budget pressure, such as increasing the engagement with schools through professional discussions, school self-evaluation and encouraging schools to collaborate. The EAS may choose to reduce the range of support and professional learning they offer.

Gwent Music - reduce subsidy with hardship fund maintained

- **Saving: £39,000**
- **Proposal title and budget:** The proposal is a budget reduction for the contribution MCC makes to Gwent Music, a service that provides music lessons and projects to schools in Monmouthshire. The proposal aims to reduce the total contribution to Gwent Music by £39,000 in 2024/25.
- **Budget impact and staffing impact:** The proposal will not affect the staffing of Monmouthshire, but it will affect the capacity of Gwent Music. Most music teachers are self-employed, with a small number of core staff who are employed. The proposal will have an impact towards the experiences provided for children and young people across Monmouthshire schools.
- **Proposal scope and description:** The proposal is to reduce the subsidy for class projects, such as whole-class string projects, which give pupils a first chance to learn an instrument. The hardship fund for low-income families will be maintained, but the costs of class lessons will have to be met by parents or schools (this can be done through grant funding such as the Pupil Deprivation Grant (PDG)).
- **Supporting data and evidence:** The proposal is based on the annual contributions made to Gwent Music by Monmouthshire, as well as other partners and the previous reductions and changes that Gwent Music has made to its delivery.
- **Key risks and issues:** The proposal poses a risk of Gwent Music being unable to continue to provide the same level of service across Monmouthshire and pupils being unable to access music lessons. The mitigating actions are to maintain the hardship fund and for Gwent Music to identify where savings can be made.

Breakfast club charges

- **Saving: £70,000**
- **Proposal title and objective:** The proposal is to increase the charges of before school clubs to generate an extra income of £70,000 per year. The clubs provide childcare and breakfast for primary pupils and the charge is only for the childcare element.
- **Supporting data and evidence:** The service has identified a range of different scenarios of how the charge increase would affect the income, assuming a variable drop-off rate of pupils. The current charge is £1 per session, and the proposed options are £1.50, £2.00, or £2.50.
- **Staffing impact:** All the staff are school based staff and funded via the Local Authority, if this increase were not to be agreed a number of staff may see their hours reduced or face redundancy.
- **Service impact:** The service acknowledges that there will be a negative impact on families who may not be able to afford the increased charges and on schools that may face a reduction in pupil numbers and staff. However, providing a free breakfast is a statutory requirement and pupils entitled to free school meals will not be charged for the childcare element.
- **External funding and corporate alignment:** The proposal indicates that there are no external funding opportunities for this service area at this current time. The service remains committed to providing children with access to the provision in line with national policies.

Social Care & Health

2023/24 Budget	2024/25 Draft Budget	% Change
£64,094,000	£67,817,000	+5.8%

The Directorate continues to provide personalised care and support to vulnerable residents, supporting people to live safely and independently within their own homes and communities. We have care and support plans in place for more than 1,500 adults and more than 550 children and families; we provide foster care or residential placements for more than 200 children and support more than 300 adults to access residential placements. Despite a challenging context of high demand across social care and health and inflationary pressure on the cost of care, we continue to maintain good quality services and develop innovative, practice-based solutions to achieving financial sustainability whilst minimising the impact on our most vulnerable individuals.

Adults' social services - Directorate Staffing Review

- **Saving: £1,494,000**
- **The proposal's objective and scope:** The proposal is about creating savings by reducing the workforce within adults' services.
- **Core objective and saving target:** The core objective is to save money whilst causing as minimal service disruption as possible. The overall saving target for this mandate in year 2024 - 2025 is £1,494,000.
- **Four ways to achieve the mandate:** The proposal will be achieved by consolidating existing vacancies within direct care, ceasing the in-house residential respite provision for adults with learning disabilities, reorganising the My Day, My Life and Individual Support Service, and replacing some social workers with social care assessors.
- **Supporting data and evidence:** The proposal is based on data and evidence, such as the current and projected staffing savings, the recent cabinet decisions and recommendations on the future delivery, the differential between qualified and unqualified roles and the impact on service delivery.
- **Budget impact:** The proposal shows the current and proposed budget for the adults' service area, and the total budget change proposed is £1,494,00 in 2024/25.

Children's services - Placement and Practice Change

- **Saving: £1,300,000**
- **The proposal's objective and scope:** The proposal aims to reduce the money spent on children's placements by £1,300,000 by reviewing children's care plans in high-cost placements and developing appropriate services and placements to support their long-term needs.
- **The proposal's alignment with the WG policy and MCC plan:** This is in accordance with the WG policy direction of eliminating profit from children's social care and the MCC Community & Corporate plan of increasing in-house placements and fostering for Monmouthshire children.
- **The proposal's budget impact and saving target:** It is expected to reduce the budget for children's services by £1,300,000 in 2024/25 by moving children and young people to more cost-effective and suitable placements.
- **The proposal's staffing impact and mitigation:** The proposal does not involve any reduction in staff, but it creates additional pressure on the workforce and leadership within Children's Services. The proposal plans to use grants, additional resources and support from other departments to mitigate this impact.

- **The proposal's service impact and risk management:** This supports the statutory requirement and the best outcomes for children who are looked after by providing appropriate and sufficient placements close to their homes and communities. The proposal identifies potential barriers and risks, such as the difficulty of recruiting in-house foster carers and developing in-house residential and 16-plus placements, and outlines mitigating actions to address them.
- **The proposal's consultation and external funding:** The service continues to work with stakeholders and has considered the opportunities for external funding from Welsh Government grants to support the development of placements and family support services.

Adults' services - practice change agenda

- **Saving: £1,130,000**
- **The proposal's objective:** The proposal is a budget saving for adult social care in 2024/25, with the core objective of reducing the overall cost by £1,130,000 while ensuring fair and equitable care for people with care and support needs.
- **Proposal scope and description:** This involves several strategies to manage demand, strengthen oversight, control costs, generate savings and enable practice change in adult social care. These include applying consistent eligibility criteria, reviewing current care packages, pursuing health contributions, re-commissioning services, expanding reablement and direct payments, and aligning with community and housing support.
- **Supporting data and evidence:** The service has provided data and evidence to support the proposal, such as the impact of the daily panel that scrutinises new packages of care, the number and amount of reductions achieved through reviews, the potential savings from Continuing Health Care disputes, re-commissioning, the demographic and public health challenges that affect the demand and cost of care. All of this work is underpinned by a three-tiered approach to assessing and providing care and support to those who most need it.
- **Budget impact:** The proposal indicates a reduction of £1,130,000 in 2024/25. It is anticipated that the reduction will not impact the number of staff within the service (over and above the staffing savings proposals already set out.)
- **Service impact:** The proposal outlines the impact on the standards of service delivery, such as requiring practice development, oversight panels, additional resources for reviews, re-organisation of home care, communication with people and re-prioritising commissioning and brokerage. The service also considers the implications of being able to meet statutory and legal duties.
- **External funding and corporate alignment:** No external funding has been identified to support the proposal. It aligns with the MCC Community and Corporate plan objective to provide good quality social care and support the wellbeing of people with care and support needs.

Adults' services - Reduction in Adult partnership arrangements for Gwent service delivery models

- **Saving: £55,000**
- **Proposal title and objectives:** The proposal is to reduce the partnership contributions of the Adults' and Children's Services by £55K in 2024/25 by seeking alternative funding sources and reviewing arrangements with health.
- **Regional Partnership Team (RPT) and health funding:** The proposal aims to save £31K by changing the way the partnership team is funded, drawing on regional grant money. A further target of £24K is proposed through reviewing the shared costs of integrated settings with health.

- **Service and Corporate Alignment:** The proposal does not have a direct impact on service delivery or staffing and it aligns with the MCC Community & Corporate plan. It also does not require any amendments to MCC policy, procurement, or asset management.
- **External funding and collaboration opportunities:** The proposal considers the opportunity for external funding from the RIF grants, which can be used to support the Regional Partnership Board executive functions. It also maintains the existing collaboration with health and other Gwent LAs through the RPB and joint arrangements.
- **Risks and mitigation:** The main risk of the proposal is that the RPB may not agree to the different funding arrangements for the RPT, which could affect the regional partnership working. The mitigation strategy is to work jointly with the other Gwent LAs to seek the RPB agreement.

Adults' Services - Savings from service to afford Severn View replacement

- **Saving: £105,000**
- **Proposal:** The financing package of the new Crick Road care home included borrowing, which was required to be paid by the service the year after the new asset becomes operational. This budget reduction reflects the final cost of borrowing and will be used to finance the corresponding loans required.

Review the legal non-residential weekly charge cap from £100 to £120

- **Saving: £578,000**
- **Proposal:** At present, the Welsh Government Social Services and Wellbeing (Wales) Act forbids Local Authorities from charging more than £100 per week for clients receiving non-residential care. This proposal looks at what additional income would be obtained should the cap increase following all-Wales negotiations with the Welsh Government. The amount that people are charged for their care would remain subject to an individual financial assessment. Any change in the amount we can charge people for non-residential care would be subject to Welsh Government approval.

Adults' Services - Review and increase of directorate schedule of fees and charges

- **Saving: £388,000**
- **Proposal:** An increase in a range of fees and charges across social care and health as outlined within the consolidated fees and charge schedules. All fees and charges are subject to an individual financial assessment.

Public Protection - Partial vacancy saving from Environmental Health Officer post

- **Saving: £23,000**
- **Proposal:** To mitigate the budget pressure of the Head of Service post being held, the vacant Environmental Health Officer post will be held.

Communities & Place

2023/24 Budget	2024/25 Draft Budget	% Change
£25,272,000	£26,876,000	+6.3%

The Directorate covers services such as waste, recycling, planning, highways, home to school transport, housing, and the environment. It will keep delivering the many services it offers to residents even though the costs of services are rising, demands are growing and challenges are increasing. It plans to reduce costs by carrying out different proposals across its service areas, such as altering service provision, evaluating existing services and raising fees and charges.

Savings from Siltbuster recycling partnership

- **Saving: £20,000**
- **Proposal:** Savings from the disposal of street sweepings through the Siltbuster recycling plant and partnership were achieved in 2023/24. The additional £20,000 was identified in last year's Medium Term Financial Plan for 2024/25 and can be achieved this year.

Fees & charges - Uplift in garden waste collection costs by 10%

- **Saving: £75,000**
- **Proposal:** The charge for the garden waste collection service has been increased by 10% in line with the Cabinet decision taken in January 2023 to ensure the service undertakes full cost recovery.
- **Budget impact:** This will reduce the budget deficit by £75,000 in 2024/25, by increasing the garden waste collection costs from £50 to £55.
- **Rationale for the proposal:** This is based on the full cost recovery model agreed in 2023, which ensures that the garden waste service is funded by the customers who use it rather than all residents. This uplift in the charge reflects the increased costs that were incurred in 2023/24 for collection and disposal due to the higher-than-expected customer base.
- **Service delivery and policy impact:** It will not affect the quality or frequency of the garden waste collection service, which is a non-statutory service that can be charged for. The proposal will also continue to support the carbon reduction goals by offering the service and reducing individual journeys to the household waste recycling centres. The cost uplift may have a negative impact on lower-income households, who may find the increased costs unaffordable. However, the proposal also offers cost price composters and water butts as alternatives to reduce and treat garden waste at home, which are more environmentally friendly options. The additional service of a Christmas Tree collection was offered in January 2023 and will continue.
- **Risks and mitigation:** The proposal may face the risk of a drop in customer base or a downturn in recycling percentage, which could affect the income and performance targets of the service. However, these risks are low, as the previous consultation and changes in the service did not result in significant customer or recycling loss.

Waste and street services - Restructure to reduce staff costs and not replace a vacant post

- **Saving: £50,000**
- **Proposal:** The Policy and Performance Manager post became vacant in 2023 and a decision was taken not to replace this post to support in-year savings. This post will be kept vacant through 2024/25.

Stop free provision of food waste bags

- **Saving: £50,000**
- **Proposal:** The proposal is to stop the free provision of food waste bags and make bags available for purchase at cost price at outlets across Council buildings and at some local independent stores in Monmouthshire to save costs and reduce single-use plastic. Food waste bins can also be lined with other bags, paper or reusing other bags as liners.
- **Supporting data and evidence:** The service estimates a saving of £50,000 in the first year and £70,000 in the second year, but this does not account for the potential increase in disposal costs and fines if recycling rates drop. There is currently little available data and evidence regarding the impacts of changing from the free provision of food waste bags to charging for them.
- **Budget impact and staffing impact:** This aims to reduce the recycling and waste service budget by £50,000 in 2024/25 by stopping the provision of food waste bags for free. The proposal does not impact the number of staff in the service.
- **Service delivery and policy impact:** The proposal acknowledges that charging for food waste bags could have a negative impact on service participation and recycling rates if people put their food waste in the residual waste bags instead of buying food waste bags or reusing other bags. The proposal may have a negative impact on lower-income households.
- **External funding and options appraisal:** There are no external funding opportunities for the service at present. The service has considered three options: do nothing, cease provision completely, or cease free provision and charge. The proposal favours the third option as the most feasible and cost-effective, making bags available to purchase at £2.50 per roll, which should last the average household one year.
- **Mitigation and up-front investment requirement:** The service suggests some mitigation measures to reduce the negative impact of charging for food waste bags, such as providing cost price bags, promoting alternative options for containment, and introducing in-cab technology to allow online purchase and delivery of bags.

Restructure of the Environmental Protection Act Team

- **Saving: £25,000**
- **Proposal:** Restructuring of the Environmental Protection Act Team in Abergavenny has been completed in 2023/24, which has resulted in a reduction of one post. This efficiency saving can be offered up in the 2024/25 budget.

Removal of Council Car

- **Saving: £8,000**
- **Proposal:** The lease of the car has been cancelled and the vehicle has been returned to the leasing company in 2023/24 generating a £3,000 in-year saving. The full year budget of £8,000 is the full year saving.

Review the provision of small vehicle home to school transport contracts

- **Saving: £93,000**
- **Proposal:** The proposal is to undertake a review of the home to school contracts that utilise vehicles that have 8 seats or fewer with a view to bringing service delivery in-house for the high-cost contracts.
- **Current situation and challenges:** The Council has a statutory duty to provide school transport for eligible learners and it currently commissions 245 contracts. This academic year, 109 contracts are being undertaken in vehicles that have 8 seats or fewer. However, the external market is failing and unstable, resulting in higher costs and lower reliability.
- **Potential savings and benefits:** The proposal estimates that by internalising 17 external small vehicle contracts that exceed £32,000 per academic year, a potential full year saving of £97,000 could be realised. The saving of £64,000 is a partial year saving reflecting the time required for implementation. Moreover, the proposal would mitigate the risk of market failure and support the Council's policy of tackling climate change by using hybrid or electric vehicles.
- **Operational impact and risks:** The proposal would require changing the current service operating model, including expanding the fleet and the workforce, ensuring compliance with vehicle maintenance and licensing requirements and finding suitable locations to store and charge the vehicles. It also identifies several risks and mitigating actions, such as securing the required vehicles, recruiting, and retaining drivers, and monitoring costs.

Home to school transport - Increase the cost of concessionary transport seats from £440 to £484 (10% uplift)

- **Saving: £3,000**
- **Proposal:** The proposal is to increase the cost of concessionary seats on home to school transport by 10% to generate additional income and offset the rising transport cost.
- **Budget impact and saving:** This would result in a total saving of £5,421 for the full academic year 2024/25. The saving of £3,000 reflects the commencement date from September 2024.
- **Policy impact and risks:** Providing parents/carers with the option to purchase a concessionary seat does result in fewer car journeys, which positively contributes to the climate change policy. The proposal may have a negative impact on lower-income households, who may find the increased costs unaffordable. The main risk is that parents/carers may stop paying for concessionary seats, which can be mitigated by allowing them to pay over the academic year.

Increase renewable energy generation opportunities across our estate to reduce demand on grid supply

- **Saving: £50,000**
- **Proposal:** Installation of additional solar panels across the Council estate via the refit scheme to increase renewable energy and generate income.

Planning Income

- **Saving: £50,000**
- **Proposal:** Planning income target increase by £50,000. This target income has been uplifted based on the anticipated increase in the number of major applications that will be received as the Replacement Local Development Plan nears adoption in 2025. However, the limited scope of the Replacement Local Development Plan means that this income increased will not be sustained and so the income target needs to be reviewed and reduced again in 2026/27.

Request to Welsh Government to increase statutory planning application fees by 25%

- **Saving: £98,000**
- **Proposal title and scope:** This saving reflects a request to the Welsh Government from all 25 Local Planning Authorities and the WLGA to increase statutory planning application fees by 25% to help towards covering the full costs of providing the planning service. The decision on planning application fees sits with the Welsh Government.
- **Budget impact and service delivery impact:** This would generate an estimated £98k additional income, help cover the costs of the planning service and maintain current staffing levels. Maintaining service delivery by ensuring the planning service is adequately resourced and funded is essential to support the delivery of the Council's policies.
- **Risks and mitigation:** The main risk of the proposal is that the Welsh Government may not agree to the requested fee increase, which would jeopardise the income target. The mitigation is that a joint letter has been sent by all 25 Welsh LPAs and the WLGA and a similar fee increase has been introduced in England. Another risk is that the increased fees may deter developers, but this is considered low as the fees are still low compared to the development costs.

Fees & Charges - Increase fees by 10% for street naming and numbering, licences, road closures and inspections

- **Saving: £33,000**
- **Proposal:** Increase fees by 10% for street naming and numbering, licences and highway inspections.

Fees & Charges - Uplift in Car Parking Charges by 10%

- **Saving: £66,000**
- **Proposal:** The proposal is to increase car parking charges and charges for permits by 10%.
- **Budget impact and net saving:** The proposal would generate an estimated additional £156,000 per annum. However, various cost pressures offset this, such as reduced income from season permits, business rates bills for new car parks, and civil enforcement service shortfall. The net saving is £66,801 for 2024/25.
- **Car park price increases and permits:** The new car parking charges for different durations, locations and the prices for season tickets are rounded. Residential permits will increase from £69.00 per annum to £75.00 per annum.

2 hr. stay	£2.00
3 hr. stay	£2.40
4 hr. stay	£3.00
All day	£6.20
Daily charge at Rogiet Playing Fields	£2.20 (no change)
Daily charge at Drill Hall, Chepstow, Cinderhill Street, Monmouth and Rowing Club, Monmouth car park	£2.00
5 Day Tariff	£23.00
6 Day Tariff	£27.50
Sunday Tariff	First 2 hours free then £1.30
Long Stay Car Parks Season Tickets:	
12 months	£545.00
6 months	£280.00
3 months	£145.00
Short Stay Car Parks – Season Tickets:	
12 months	£670.00
6 months	£350.00
3 months	£180.00

- Service delivery and policy impact:** The increased income from car parking will be reinvested into delivering the highways service. The proposal enables current staffing and service delivery levels to be maintained, including civil enforcement, car park maintenance and signage, which is essential to support a safe highway network. The proposal may have a negative impact on those with a lower income, who may find the increased costs unaffordable. Free parking for blue badge holders will continue.
- Risks and mitigation:** The service identifies two main risks with the proposal: that the increased fees might deter car park usage and displace parking to neighbouring streets and that the increased fees might deter shoppers or visitors from coming to the towns. The fees are still relatively low compared to other locations and the active travel improvements and season tickets could mitigate the risks. There is limited evidence regarding the impact of free parking on town centre vitality. The service is also going to conduct a review of car parks and civil enforcement in 2024-2025.

Fees & charges - Increase the Sustainable Drainage Systems Approving Body (SAB) discretionary pre-application charges

- Saving: £2,000**
- Proposal:** Increase fees for discretionary SAB pre-application. Increases vary from 0% for small projects on sites less than 1000sqm to 25% for the largest projects on sites over 1 hectare, which increase from £726 to £908 for a Level 2 meeting with written advice.

Sustainable Drainage Systems Approving Body application (SAB) income

- Saving: £25,000**
- Proposal:** SAB income target increased by £25,000. Sustainable Drainage Systems (SuDS) Approving Body (SAB) regulations are now fully in place and most new development proposals require SAB approval. Applications (and therefore application fee income) should increase as the Replacement Local Development Plan nears adoption in 2025 and new applications for major development are submitted.

Fees & Charges - Increase in Trade waste fees, sale of bags & bins

- **Saving: £30,000**
- **Proposal:** Fees and Charges - The introduction of Workplace Recycling Regulations in Wales from April 2024 will require all business, public and third sector workplaces to separate key recyclable materials. The formalisation of the pricing structure for 2024/25 will result in a 6% equivalent increase in trade waste costs. Many businesses will see an increase in costs for this service, but recycling can help reduce an element of cost.

Homelessness – Rapid Rehousing

- **Saving: £400,000**
- **Proposal:** The proposal aims to reduce the number of people in unsuitable and costly temporary accommodation and move towards a more sustainable model of housing provision.
- **Potential savings and benefits:** This is a proposed service change that seeks to save £400,000 in 2024/25 by reducing the overall costs by reducing the use of expensive and unsuitable bed and breakfasts and private sector lettings and providing alternative in-house accommodation by repurposing existing Council properties and provide continued support for residents.
- **Proposal scope and description:** This proposal involves the continuation of several strategies which follow the core objectives and activities of the Rapid Rehousing Transition Plan, which was approved in 2023. These include preventing homelessness, delivering a housing led and person-centred approach, reducing the time spent in temporary accommodation, acquiring, and accessing additional accommodation and increasing the supply and quality of affordable housing.
- **Supporting data and evidence:** Whilst the number of homeless enquiries is currently reducing, there are still 50 residents in bed and breakfast accommodation with numbers regularly fluctuating. The cost of this accommodation is expensive. The service has undertaken a cost analysis of the proposed in-house provision compared to the external provider to estimate these savings.
- **Risks and mitigation:** There are a number of risks to delivering the saving, including changes to the numbers requiring B&B accommodation, delays in potential properties becoming vacant and available, negotiation of leases, refurbishment costs exceeding the budget available and delays in securing planning permission. These risks will be mitigated by maximising opportunities for early intervention to prevent homelessness, maintaining strong relationships with landlords and progressing with necessary plans at the earliest stage.

MonLife

2023/24 Budget	2024/25 Draft Budget	% Change
£8,353,000	£8,088,000	-3.2%

The Directorate continues to provide a range of highly valued customer experiences to enhance the well-being of the residents and visitors of the county. These services aim to provide highly valued quality customer experiences, contribute to delivering the Council's well-being objectives and support the local economy and environment. More than 9,000 residents hold leisure memberships. Thousands of children and adults attend structured programmes that support skills, confidence and learning. Our Cultural assets (including Community Hubs and Attractions) receive over 400,000 visitors each year. Our Rights of Way, Green Infrastructure and Active Travel continue to contribute to decarbonisation in response to the climate and nature emergency. To mitigate the effects of the budget reduction and to improve the sustainability and effectiveness of MonLife, the services continue to explore alternative ways of delivery, such as digital platforms, outsourcing, and working with key partners such as Town and Community Councils, voluntary and community organisations, and funding bodies to enhance its offer and reach.

Realign services within the Town/Market Hall in Abergavenny to improve their potential and ensure continued service delivery

- **Saving: £20,000**
- **Proposal:** The recent vacancy of the Markets Manager post and the realigning of services within directorates, provides an opportunity to review the current operational capacities of the services within the Town/Market Hall and how we can bring these together in a cohesive, cost-effective way.

Realigning existing roles and introducing a new post of Town Hall/Market Hall Operational Site & Events Manager would bring consistency, transparency and a central point of contact for the site. Centralisation of site responsibility will enable current managers to focus on their specific roles, whilst also affording time to focus on the commercial aspect of the services, increasing the usage of the Town/Market Hall, Corn Exchange and theatre spaces.

Museums - Close Abergavenny and Chepstow museums an additional day a week and review business support

- **Saving: £40,000**
- **Proposal title and scope:** The proposal is a budget saving in the museum service area of MonLife, which aims to realign the services by closing two museums for an additional day per week and reviewing business support.
- **Budget impact and saving target:** The proposal estimates a saving of £40,000 in the current budget of £364,000 for the museum service area. The saving target is to be achieved by 2024/25 and maintained for the following years.
- **Service delivery impact and policy alignment:** The proposal claims that there will be limited impact on the service standards for visitors and communities and no impact on statutory or legal duties. The proposal also outlines how the museum service aligns with the council's priorities of tackling inequality and reducing carbon footprint, by providing examples of activities and initiatives that support those goals.
- **Risks and mitigation:** The service identifies that whilst there will be a reduction in opening hours, high quality service delivery will be maintained aligned with the emerging Cultural Strategy.

Attractions - Close Old Station Tintern one day a week

- **Saving: £10,000**
- **Proposal title and description:** The proposal is to close Old Station Tintern, a heritage attraction site in the Wye Valley, for one day a week on Mondays from 1st April 2024, except for four bank holidays. The proposal aims to create a more sustainable service in the long term and align with the other heritage services. The site will remain open and accessible 7 days a week to support walking and wellbeing.
- **Proposal budget impact:** The proposal will reduce the budget of the Heritage Attractions service by £10,000 each year from 2024/25 to 2027/28.
- **Proposal service delivery impact:** This will have a limited impact on the service standards for visitors and local communities, as the site will offer its full range of services on the six-day opening. However, the proposal may affect other businesses and tourism numbers in the area, as well as reduce recruitment opportunities for local people.
- **Proposal policy impact:** The site will continue to support the council's priorities of tackling climate change and reducing inequality by continuing to provide electric charging points and solar panels, going plastic free, using local suppliers, ensuring accessibility, creating learning opportunities, and telling appropriate stories.

Attractions - Utilisation of Share Prosperity Fund (SPF) grants to cover core staffing whilst delivering Todays' Heritage Tomorrow and Creative Futures

- **Saving: £60,000**
- **Proposal:** The proposal is a budget saving of £60k by using our current workforce to deliver the outputs of the Share Prosperity Fund (SPF). This funding will deliver the Todays Heritage Tomorrow project – which will enhance 10 of the county's Heritage sites through the implementation of the Heritage Strategy Action Plan and Creative Futures project – which will work across arts agencies, with youth services and training providers to support and manage creative arts opportunities for young people.

Countryside & Culture - Additional Income Generation

- **Saving: £25,000**
- **Proposal:** Recovering additional project management and project delivery costs from grants.

Countryside & Culture - Countryside Access Income Generation

- **Saving: £35,000**
- **Proposal title and context:** The proposal is a budget saving proposal for the Countryside Access service within the MonLife directorate for 2024/25.
- **Proposal scope and description:** It aims to realign the Countryside Access team to maximise the ability to recover project management and related costs from project budgets and increase income generation. This will require reprioritising the team's activity and adjusting roles and responsibilities.
- **Budget impact:** The proposal expects to reduce the current budget of Countryside Access service by £35,000 each year from 2024/25, whilst project funding is available.
- **Service delivery impact:** The proposal will diminish the flexibility of the Countryside Access team to respond to issues and resolve maintenance and legal problems. It will also constrain future delivery of the council's priorities of tackling climate change and reducing inequality.

Countryside & Culture - Review financial contribution and support to Abergavenny Tourist Information Centre

- **Saving: £10,000**
- **Proposal title and reference number:** The proposal is to withdraw MCC contribution to Abergavenny Tourist Information Centre. The service is run by Bannau Brycheiniog National Park Association (BBNPA) in partnership with Abergavenny Town Council.
- **Budget impact and target year:** The proposal aims to save £10,000 per year by reducing the contribution to BBNPA. The target year is 2024/25.
- **Proposal scope and description:** The proposal involves reconfiguring the service offered within Abergavenny Town Hall, where the TIC is located. A potential future model is integrating a tourism information point within the existing MonLife Hub / Library and box office services.
- **Service delivery and policy impact:** The proposal reflects the financial strain on the partnership arrangements and the high cost per user of the current service. The proposal will maintain access to information for those unable to access online resources and will follow Welsh language policy and procedure.
- **Risks and mitigation:** The main risk is the need to consult and agree on the future operating model with partners and stakeholders. The mitigating action is to have discussions with BBNPA and Abergavenny Town Council. Depending on the final operating model, the proposal may also present collaboration opportunities with the partners.

Countryside & Culture – Recover officer time from S106 funding

- **Saving: £15,000**
- **Proposal:** Recovering project management costs directly associated with the delivery of section 106 funded green infrastructure and recreation schemes.

Leisure, Sports & Outdoor Adventure - Move to a more sustainable operating model, creating a multi-function site with re-engage Pupil Referral Service (PRS) and Social Services

- **Saving: £70,000**
- **Proposal title and service area:** The proposal is to move to a more sustainable model for the outdoor adventure service, which is part of the MonLife directorate based at Gilwern.
- **Proposal scope and description:** The proposal aims to reduce the subsidy for the service, which offers outdoor residential and day visits for young people, by exploring new opportunities with education and social services, developing a more cost-effective business model, and addressing inequalities in outdoor education provision.
- **Budget impact:** The proposal expects to reduce the budget for the outdoor adventure service by £70,000 each year from 2024/25 to 2027/28.
- **Staffing impact:** The proposal does not involve reducing the number of posts but relies on freelance instructors to cover the core services and business in the peak season.
- **Service impact:** The proposal does not affect the statutory or legal duties of the service but may result in less flexibility and commitment from freelance instructors and more pressure on the limited team.
- **External funding:** The proposal does not currently identify any external funding sources, but the service will continue to seek grant funding opportunities in the future through partnership working.

Leisure centres - Change closing times - Weekday Closing 21:30 weekend closure 16:30

- **Saving: £140,000**
- **Budget impact and saving target:** The proposal aims to reduce the budget for the leisure centre service by £140,000 each year from 2024/25 to 2027/28 by reducing opening hours.
- **Proposed reduction in opening hours:** The proposal suggests closing the leisure centres and activities to the public at 9:30pm on weekdays and 4:30pm on weekends and adjusting the staff rota accordingly.
- **Impact and mitigation for customers and staff:** The service acknowledges that some customers and clubs may be affected by the reduced hours and offers to discuss and provide alternative options. The proposal also states that staff will be offered alternative shifts or redeployment opportunities where possible across MonLife services to minimise the loss of hours.
- **Corporate alignment and integrated impact assessment:** The proposal aligns with the MCC Community & Corporate plan by continuing to provide localised leisure opportunities to support wellbeing and contribute to carbon reduction.
- **Options appraisal and consultation:** The proposal considers alternative closures, such as early mornings or one day per week, but rejects them based on the data available and historic usage.

Re-alignment of Youth club provision

- **Saving: £20,000**
- **Proposal title and scope:** The proposal is to explore alternative delivery models for open access youth provision, including community youth clubs, to reduce the core expenditure by £20,000.
- **Supporting data and evidence:** The service has used existing data for the number of individual young people and contacts made at each youth club and youth centre.
- **Budget impact:** The proposal will reduce the current budget by £20,000 in the target year 2024/25.
- **Staffing impact:** The proposal will not affect the number of full-time equivalent staff or posts in the service area, as the alternative delivery models will rely on volunteers, third-sector organisations, and community councils.
- **Service impact:** The service will aim to retain the level of open access youth provision but will require consultation and collaboration with partners and stakeholders, as well as the development of a toolkit to support community animation.
- **External funding:** The proposal will consider the opportunities for external funding, such as the Welsh Government's Youth Support Grant, the Town and Community Councils, and the charities and third sector partners.

Marketing and Memberships Service Redesign

- **Saving: £50,000**
- **Proposal title:** This is a budget saving proposal for the Marketing and Memberships Service in the MonLife Directorate.
- **Proposal scope and description:** The proposal aims to achieve efficiencies by realigning services between departments, reviewing and realigning posts and enhancing the front-of-house software provision for collecting membership payments.
- **Budget impact:** The proposal will result in a cash reduction of £50,000 in the current budget year 2024/25.

- **Service delivery impact:** The proposal will not affect the service standards or the statutory or legal duties. It will align the marketing and promotional offers across all sites, increase footfall and customer satisfaction, and provide more flexible payment options and better collection rates.
- **Policy impact:** The proposal will not affect the council's priorities of tackling climate change and reducing inequality in the Community & Corporate Plan.
- **Equality, Welsh Language, Safeguarding and Future Generations impacts:** The proposal will not impact the groups with protected characteristics, the use of the Welsh language, or the safeguarding responsibilities. It will comply with the national well-being goals described in the Well-being of Future Generations Act.

High level management restructure – Area management model

- **Saving: £120,000**
- **Proposal title and reference number:** The proposal is to introduce a phased area management structure within Monlife.
- **Proposal scope and description:** The proposal aims to improve efficiency, collaboration and customer satisfaction by reducing management layers, using data and central resources, increasing local delivery and empowerment and where possible creating a single point of contact for each area.
- **Budget impact:** The proposal would result in a budget reduction of £120,000 for 2024/25.
- **Staffing impact:** The proposal would affect a number of full-time equivalent staff in Monlife and the reduction of any subsequent posts following the initial review would be managed on an individual basis.
- **Service impact:** It is expected the proposal would have no impact on the standard of service delivery with mitigations implemented where possible. There are no implications on the statutory or legal duties of Monlife.
- **Corporate alignment:** The proposal aligns with the MCC Community & Corporate plan to continue to deliver valued local services.

Increase in fees and charges that are not captured in separate proposals

- **Saving: £27,000**
- **Proposal:** Increase in fees and charges for discretionary services in line with the increase costs of delivering these services.

Resources

2023/24 Budget	2024/25 Draft Budget	% Change
£8,302,000	£8,326,000	+0.3%

The Directorate provides a range of corporate functions that look to both safeguard the Council and in supporting services to adapt and evolve in response to changing circumstances and requirements. The portfolio covers all central finance and revenues functions necessary to maintain oversight and administer the Council's finances. Central teams work with services to drive digital design and innovation, as well as ensuring robust arrangements are in place for information governance and technology. Our Landlord Services teams look to ensure that the Council's land and property portfolio remains fit for purpose. Internal Audit and Corporate Health and Safety fulfil important roles to ensure that controls are in place and operating and that risks are being identified and managed.

Commercial Investments – Reversal of income pressure

- **Saving: £208,000**
- **Proposal:** To reflect the forecast improvement in rental income across the commercial investment portfolio as a result of revised tenancies agreed.

Income - Industrial units, cemeteries, county farms

- **Saving: £100,000**
- **Proposal:** The three service areas have consistently exceeded their income targets over the last number of years, so budgets are being increased to reflect this.

Property services - Gwent Police collaboration

- **Saving: £50,000**
- **Proposal:** The authority provides property design & maintenance services to Gwent Police as part of a collaboration agreement. Projections for 24/25 estimate that income recovery can be increased by £50k to cover pay award and inflation.

Reduction in the shared resource service contribution

- **Saving: £17,000**
- **Proposal:** A reduction in the required contribution to the Shared Resource Service (SRS) following identification of efficiency savings by the organisation. SRS is a collaborative ICT provider in South Wales that provide services to a number of public sector organisations, including Monmouthshire County Council.

Chief Executive's Unit

2023/24 Budget	2024/25 Draft Budget	% Change
£3,181,000	£3,288,000	+3.3%

This Directorate is responsible for a range of support services. This includes Human Resources, Training, Payroll, Policy and Performance, Partnerships, Customer Relations and the Council's scrutiny function. We are focused on reducing costs through better use of data and technology.

Policy - Training & Workforce Development - Staffing re-alignment (£65k) Partnership working in online training delivery (£10.5k)

- **Saving: £75,500**
- **Proposal description:** The proposal aims to restructure the staffing arrangements, delete a vacant post and collaborate with other partners to share online training resources and costs.
- **Budget impact of the proposal:** The proposal would result in saving of £75,500 in 2024/25.
- **Service delivery and policy impact of the proposal:** The proposal would reduce HR capacity by deleting a Chartered Institute of Personnel and Development (CIPD) qualified post. Improving self-service opportunities for managers would provide some mitigation for this. The proposal would also align training development with the employee and corporate objectives, such as carbon literacy.
- **Risks and mitigation of the proposal:** The service face two main risks: the potential delay in developing the online learning system due to joining a consortium and the reduction in the level of support for staffing issues due to the deletion of a post. The mitigation actions include working directly with the developer and using new technology to increase self-service and reduce manual processing. The proposal does not result in any redundancies, legal implications, or policy amendments.

Payroll & HR - Release of contingency budgets for implementation of e-recruitment

- **Saving: £10,000**
- **Proposal:** This funding had been set aside for the implementation of new software. Work by the team has resulted in this being delivered below anticipated costs, enabling part of the budget to be released.

Law & Governance

2023/24 Budget	2024/25 Draft Budget	% Change
£2,667,000	£2,894,000	+8.5%

The Law & Governance Directorate is responsible for providing legal advice and support to the Council and its departments, as well as providing the democratic services and monitoring officer functions. This includes all aspects of legal work from procurement & contracts, property, civil and criminal litigation, employment law, adult and child welfare and land charges. The Directorate is also responsible for ensuring that the decision-making processes across the Council is robust, providing guidance on these issues to elected members and senior officers. Additionally, the Directorate is responsible for overseeing the conduct of elections, managing the Council's records, and providing support to the Council's committees and meetings.

Vacancy Freeze - Paralegal post

- **Saving: £33,000**
- **Proposal:** The Paralegal post became vacant in 23-24 and the decision was made not to fill it to help with in-year budget recovery. The decision has been made to freeze the post for a further 12 months to release the savings in 24-25.

Corporate Costs & Levies

2023/24 Budget	2024/25 Draft Budget	% Change
£27,517,000	£29,462,000	+7.1%

The Directorate oversees the collection and payment of the precepts and levies set by external bodies such as the Police, Community Councils, Fire Service, National Parks and Drainage Boards. It also manages the oversight of the Council's insurances and risk management service to ensure the Council has appropriate cover in place for the services it delivers.

Where cross-cutting pressure and saving proposals are identified at budget setting stage, the corporate budget will often hold these until such time that the proposals are sufficiently developed and able to be apportioned over service budgets.

Draw down against Ukrainian reserve for further related costs

- **Saving: £200,000**
- **Proposal:** Passporting core costs relating to the ongoing support and assistance provided to our Ukrainian residents.

Section 2: Cost Pressures for 2024/25

Cost Pressure	£
Children & Young People	
King Henry 3 – 19: With the new school due to open in Autumn 2024 the rates will increase. It is a requirement through the finance regulations for schools that all rates are funded fully by the Local Authority. This proposal is to see the additional budget granted to the individual school budget to be able to be passed direct to the new school.	125,000
King Henry 3 – 19: Management costs for the new specialist resource base (SRB) to support additional learning provision. A lead teacher for the SRB is needed to start as soon as possible in order to reduce the existing risk factors and develop the provision effectively. The lead teacher would also facilitate the transition process, engage with parents and recruit staff for the SRB. The SRB will require two additional classes for September 2024, one in the primary phase and one in the secondary phase, with a total cost of £199,344. This cost includes one teacher and two level 2 TAs per class, as per the expectation for all other SRBs.	199,000
There are significant pressures in the transport budget due to the costs from contractors. Given the current market contractors and high fuel costs there has been an increase in the costs charged. Part of the transport budget supports pupils with additional learning needs to ensure that they can be taken to a school / specialist placement that can meet their needs. The number of pupils attending out of county placements are reducing but the cost of the existing contracts are significantly increasing. In addition, while pupils are remaining in Monmouthshire schools some will still need to be transported to Monmouthshire specialist resources bases.	745,000
Contingency Fund for ALP: Additional contingency fund of £100,000 for schools to provide short-term intensive support for pupils with Additional Learning Provision (ALP) who are facing a crisis situation. This aims to help children and young people with highly complex additional learning needs and at risk of exclusion, to improve their attendance, to prevent or reduce fixed term and permanent exclusions, and to keep them in MCC schools and avoid expensive out of county provision. The fund is available for pupils with statutory Individual Development Plans (IDPs) who are experiencing a period of crisis, as well as for looked after children (CLA) who do not have an ALN/IDP but who have highly dysregulated behaviour.	100,000
To secure an additional £375,000 to provide adequate Additional Learning Provision (ALP) for children/young people with Additional Learning Needs (ALN) who require a local authority led Individual Development Plan. This will ensure that children/young people with ALN have appropriate ALP to meet their needs, to ensure that children/young people who are looked after have appropriate ALP to meet their needs and to keep children/young people in their community schools whenever possible. This aims to have a positive impact on attendance and reducing exclusions, and to create a truly inclusive educational system that recognises learners' starting	375,000

Cost Pressure	£
points, strengths and educational needs, in line with the Community & Corporate Plan.	
To secure an additional £67,000 to create increased capacity in the Vulnerable Learner Lead role / scope to meet the high / increasing demand, with a potential uplift in the current VLL role and to create a new post for an additional officer who can support the current VLL. This will enable more capacity to manage and support schools to reduce levels of exclusion, to manage the needs of the Children Looked After (CLA) within education in MCC, and to address the challenging bullying agenda, the anti-racism action agenda and the monitoring of Pastoral Support Plans (PSP).	67,000
Total - Children & Young People	1,611,000
Social Care & Health	
To recognise the budget pressure projected from the review of care provider fees across Childrens and Adults social care as part of the annual fee negotiations. Care providers face various costs and pressures, such as the increase of the real Living Wage, inflation, fuel, insurance, and non-care staff pay. The fee negotiations with the care providers are challenging. Despite the backdrop of reducing inflation, circa 2/3rds of the cost pressure are due to staffing, which is largely impacted by increases in the real living wage.	2,760,000
Foster Care - Annual review of allowances ahead of Welsh Government's announcement of the 2024/25 fee structure in January 2024. Recruiting and retaining more foster carers from the local authority, rather than relying on independent fostering agencies (IFAs) to improve outcomes and reduce costs for children who are looked after (CLA). MCC has a high proportion of children in non-kinship foster care who are placed with IFAs (54.7%), which limits MCC's ability to monitor and support the quality of care, and costs more than local authority placements. Foster Wales is working towards a consistent offer for all foster carers in Wales, known as the "National Commitment", which includes the harmonisation of payments and which is significantly higher than MCC's current skills payments.	185,000
Public Protection - Reinstate the Head of Service budget following review of the resourcing of the service.	99,000
Adult & Children services 2023/24 recurrent overspend. £3.909m - Adult services remain in a highly volatile operating position with risks associated with demand levels, complexity of demand, inflationary pressures, and labour shortages. Adult services have a significant overspend: There is an additional need for 26 care home placements, a recurrent pressure from the provider fee proposal and demand for non-residential services and hospital discharge. A quality assurance group has been put in place to review all care packages before approval. £0.207m - Children's services have an estimated pressure due to increasing costs because of staffing, provider fees and inflation. The service has implemented an ambitious savings plan to review placements, but still faces challenges in recruiting and retaining child protection social workers.	4,116,000
Social care workforce grant – Welsh Government have announced a 22% reduction in this grant for 2024/25 that is supporting core expenditure within social care.	250,000
Total Social Care & Health	7,410,000

Cost Pressure	£
Communities & Place	
<p>Waste - Recycling market pressures, contract inflation and recurrent pressures from 2023/24</p> <p>The recycle market has been severely volatile, resulting in an annual cost of £600,000 for disposal instead of the expected net zero. This is the main driver for the overspend in 23-24 and the projected pressure for 24-25.</p> <p>Recycling collections are now seen as core council costs and levels of grant funding have been reduced. This means that the service must rely more on its own budget to meet the statutory 70% recycling targets and the workplace recycling regulations.</p> <p>The service has £3.9m of external contracts for the storage, haulage, disposal and treatment of recycling and waste. These contracts have price increases every year, which have been managed with in-year savings and income in the past, but this approach is unsustainable.</p> <p>Recycling and waste collection is one of the few services that impact every resident every week, with over 3.9m direct interactions per year. The demands and expectations on the service are extremely high and already under pressure. The increase in budget will allow the service to continue as is, without providing additional capacity or reducing demand.</p>	1,009,000
<p>Transport costs pressure: £200k due to the rising costs of fuel, hire, parts and maintenance for the transport fleet.</p> <p>The service has tried to reduce the pressure by reviewing the fleet and off-hiring, selling or terminating lease arrangements for some vehicles.</p> <p>The service still needs a core operational fleet that must be maintained, serviced and inspected. The costs of parts and fuel are increasing and there are delays in obtaining parts.</p> <p>The service has embarked on a fleet transition for cars and light commercial vehicles, but the fleet is predominantly dependent on diesel and exposed to fuel price fluctuations.</p>	200,000
<p>Transport - Green Car Scheme income target shortfall</p> <p>The Tusker scheme was re-launched in 2023 on the basis that the corporate savings would be transferred to the applicant rather than retained by the authority to make the scheme more accessible to staff. The income target will need to be removed as this will not be achievable.</p>	46,000
<p>Annual contract uplift for home to school contracts</p> <p>The Council spends about £5.85m per year on 174 contracts for home to school transport. The contracts have an annual uplift clause that reflects the rising costs of fuel, maintenance and drivers' costs. The uplift is based on the Cost Monitor report by the Confederation of Passenger Transport (CPT).</p> <p>The Council has estimated that the annual uplift for the home to school contracts will result in an additional cost of £50,000 for the next academic year. This is based on a 3% uplift rate, which may change depending on the final CPT report.</p>	50,000
Total – Communities & Place	1,305,000

MonLife	
Reinstate budget from one-off sale of Caterpod	
The service benefited from a one-off sale of £10k in 2023/24. This budget will need to be reinstated as planned for 2024/25.	10,000
Borough Theatre income pressure.	
The Borough theatre is still recovering from a 3-year closure and late opening in January 2023 due to refurbishment, which has compounded the pressures.	
Due to the closure through covid and the refurbishment, we have seen a loss of income and some of the performances booked in could not rebook due to their own scheduling. It has taken nearly 12 months to reinstate acts and audiences to pre covid levels, and we now find ourselves in a better position with the programme for 2024.	100,000
Various strategies are being undertaken to increase the income of the theatre, such as adding more shows, seeking corporate sponsorship, applying for external grants, and reviewing the operational structure of the service.	
Contact Centre - Insufficient Software Budget	
Teams' telephony licence costs have significantly increased. The authority allocates all authority licences to the contact centre this is a whole authority pressure and a licence that is essential to allow the day-to-day operations of our council.	69,000
Community Hubs - Pressures arising from redundancies, service staffing and associated staffing costs.	30,000
Youth - Reduction in grant funding	
The Youth Services core funding has been reduced and the service relies more on grant income and income generation, which are not sustainable. The service has received specific grants for youth mental health and has created innovative ways to use and access them with partners and stakeholders.	25,000
The cost-of-living crisis and the timing of grant funding have affected the service's ability to generate income and cover core services. The service has also lost members of the team who were funded by temporary grants. The service has reduced its holiday programme due to staffing levels and faces difficulties in sustaining core services when staff members are sick or on leave.	
Markets Income Pressure	
A need to increase footfall, events and support local businesses with the market towns and through our market offer and alternative events. The proposals will increase the number of markets held in the market hall, such as farmers market, street food markets, and antiques fayre, as well as other events and activities that are suitable for the season and the visitors.	45,000
The market hall traders' units and stalls will be reviewed to ensure they reflect a full cost recovery model, as some events previously held in the market hall were not hired at cost price.	
Blue Badge funding shortfall	
Blue badges are funded at £6k per annum via Welsh Government RSG. Badge cost is around £12k per annum - a 50% shortfall.	6,000
Total – MonLife	285,000

Chief Executive's Unit	
Increased costs of payroll licenses	17,000
Payroll software is critical. We are anticipating an above inflation increase in the annual license costs from 2024-25.	
Increased demand for Welsh language translations	30,000
Increase the budget for the translation of public documents in line with increased number of documents being published in line with the authority's value of openness. The publication of publicly available documents in Welsh is a statutory requirement under the Welsh Language (Wales) Measure 2011 and the associated Welsh Language Standards.	
Total - Chief Executive's Unit	47,000
Law & Governance	
Cost of members allowances and associated oncosts will exceed available budget. This is made up of the recurring pressure already reported in 2023/24 plus the effect of the potential pay award for 2024/25.	135,000
Total - Law & Governance	135,000
Resources	
Head of Service - Landlord & property	108,000
The proposal looks to allow for the budget for the Head of Commercial and Landlord Services to be re-instated to allow for the post to be permanently recruited into and in turn to enable the leadership capacity of Landlord Services to be restored.	
This will enable it to make better and faster progress in delivering against the Council's policy objectives in so far as they relate to the Council's land and property portfolio.	
Shared benefits service pay inflation.	54,000
The Shared Revenues and Benefits Service is run by Torfaen County Borough Council. Each year the annual contribution Monmouthshire makes increases to reflect the annual pay award and increments for officers of the Shared Service.	
Administration of Council tax premiums	128,000
Additional posts to assist with the administration of council tax premiums (£78k), and £50k recharges for finance staff time that will be funded from the income generated from premiums.	
Total - Resources	290,000
Corporate Costs & Levies	
Insurance premium increase	200,000
The projected increase in premiums payable as a result of market pressures and claims history.	
Coroner levy increase	107,000
Additional costs as a result of the Chief Coroner review of facilities and resourcing within Gwent. This will result in a move of premises and additional staffing being required.	
Audit Wales Fee increase	43,000

Y GYLLIDEB BUDGET



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Budget pressure as a result of fee increases in relation to the introduction of the ISA315 standard and additional resourcing required. This budget pressure represents the increase in 2023/24 and 2024/25.	
Fire levy increase	
A combination of inflationary pressure and funding shortfalls impacting the Authority has required an increase of 5.31% in the total Levy	291,000
Total - Corporate Costs & Levies	641,000
Total Pressures	11,724,000

**For more information on how to engage
in the 'draft budget proposals 2024/25
consultation' please visit:**

**[www.monmouthshire.gov.uk/
budget-2024-2025](http://www.monmouthshire.gov.uk/budget-2024-2025)**



Appendix 2 - Evaluating the Potential Impact of the 2024/25 Budget Proposals

Introduction

This report outlines the results of the initial impact assessment undertaken alongside the individual draft budget proposals for the financial year 2024-25. The assessment had two aims:

- to help assess the overall potential impact of the budget on different people within our communities and,
- to identify actions that mitigate against or reduce the potential negative effects of our proposals on vulnerable people and households on the lowest incomes.

The spending proposals for the next financial year – 2024/2025 are informed by a set of principles against which all our budget decisions were tested and assessed. These are: fairness in budgetary allocations, protecting the most vulnerable citizens and our environment while always delivering value for money.

Spending on front-line service delivery will rise next year but the growth in the council's budget will not be enough to keep pace with increasing demand for our services. Nor will it cover our rising costs for items such as energy or fuel. We've also been hit by higher interest rates which means we must make higher repayments on the borrowing we use for things like building new schools.

The combination of increased demand on services and rising costs means we have had to take some difficult decisions. Decisions that will impact residents in different ways. We recognise, for example, that a reduction in social care could be felt more acutely by older people and disabled people. Increased charges for services will be more of an issue for those on lower incomes. This does not just mean those who are unemployed. People who experience in-work poverty, disabled people or those with protected characteristics may also be impacted.

We assessed the impact of our proposals in three ways:

- an assessment of the impact that changes to policy or increase in charges could have on different groups,
- completion of an overall Integrated Impact Assessment on all budget proposals which could alter a service or the way that service is delivered. This assesses its potential impact on the national well-being goals and the ways of working enshrined in the Well-being of Future Generations Act and the people and groups who possess the protected characteristics specified under the Equality Act 2010,
- a review of the potential impact on those in poverty and assessment of the impact on those experiencing socio-economic disadvantage, in line with the socio-economic duty in Wales.

Below we summarise the headline messages from these assessments. We also analyse the cumulative financial impact of the budget proposals on households with different income levels.

Open and robust scrutiny and challenge is an essential part of the budget setting process. Together they ensure our proposals are shaped in line with the priorities in our community and corporate plan and the issues that matter most to our communities. The assessments we report here are early ones, applying to budget proposals only at this pre-consultation and pre-decision stage. Our analysis will continue to evolve and be updated throughout public consultation in January and February 2024.

The Legal Context

Our evaluation is framed by the obligations we have as a council under the following three acts.

The Equality Act 2010 protects people from discrimination in the workplace and wider society. It provides a legal framework to protect the rights of individuals and advance equality of opportunity for all.

The public sector equality duty means that local authorities must consider or think about how their policies or decisions affect people who are protected under the Equality Act. We must do this when we design policies, deliver services and make decisions.

The protected characteristics are age; disability; sex; gender re-assignment; pregnancy and maternity; sexual orientation; race; religion or belief; marriage and civil partnership.

The Well-being of Future Generations Act creates a legal framework for better decision-making by public bodies in Wales by ensuring that we take account of the long-term, help to prevent problems occurring or getting worse, take an integrated and collaborative approach, and considers and involves people of all ages.

Together, the seven well-being goals and five ways of working provided by the Act are designed to support and deliver a public service that meets the needs of the present without compromising the ability of future generations to meet their own needs.

The Socio-Economic Duty came into effect in Wales on 31st March 2021 placing a responsibility on councils to consider the need to reduce the inequalities that result from socio-economic disadvantage. This evaluation is one of the ways we demonstrate our compliance with these duties.

Our Approach to the Impact Assessment

The approach taken in this assessment has been developed in line with the socio-economic duty, to evaluate the potential impact of the 2024-25 budget proposals on those experiencing socio-economic disadvantage and consider how this might help reduce inequalities. Almost any change to a council service has some socio-economic impact. This is because of the nature of our responsibilities and the extent to which some groups, communities and vulnerable people rely on public services. Our aim is to understand this impact so that we can identify appropriate mitigations wherever possible and minimise the impact on people in greatest need. We will continue to develop this approach as we further embed the requirements of the socio-economic duty in the way we plan, work, and evaluate.

As part of the impact assessment, we have established the cumulative financial impact of the budget. It also brings together the most significant issues and impacts identified by individual budget proposals to understand whether any groups will experience a detrimental position as a result of the cumulative impact of separate proposals.

Defining Poverty: Monmouthshire has adopted the Joseph Rowntree Foundation definition to define poverty 'When a person's resources (mainly their material resources) are not sufficient to meet their minimum needs (including social participation).' This is supplemented by one of the statistical ways of assessing poverty in the UK; the proportion of households where the income is below 60% of the median income. We recognise that there is a correlation between some protected characteristics and an increased risk of poverty. Intersectionality plays a large role; the more protected characteristics a person has, the more likely they are to experience financial hardship¹.

This assessment identifies areas where there is a risk that changes resulting from individual budget proposals may have a significantly greater impact on particular groups when looked at together with other proposals. By doing so we can identify where we may need to mitigate against negative impacts on certain groups of people. Mitigating actions could include re-shaping services to target them more efficiently and to reduce the potential of disproportionate impacts on groups with protected characteristics as defined by the Equality Act 2010.

In developing our approach, we have created three tables which summarise the findings from our assessment. Together these enable a clear understanding of the impacts of the budget proposals and the mitigating actions we have identified to reduce the effects on vulnerable groups and those with protected characteristics. These mitigations were developed in line with the principles guiding the budget setting process.

Table 1 provides an 'at a glance' view of the main proposals and whether they have been assessed as having a positive or negative effect on groups who possess the protected characteristics. It also does this for other important responsibilities such as safeguarding, the Welsh language and the effect on people with low incomes. It uses a simple Red, Amber, Green system to show this.

Table 2 provides an overview of the cumulative financial impact of the proposed increases in fees and charges on six different household compositions. For each of these it uses different income levels to identify the potential effect of our proposals on their household income. The table includes a column that shows what this looks like before and after the mitigations we have put in place.

Table 3 contains an Integrated Impact Assessment for the budget. This is the same tool that accompanies all policy decisions taken by Cabinet or full Council. It summarises the effects of the main changes proposed by the budget on different groups and legislation alongside some of the mitigating actions that have been put in place.

The Impacts and Mitigations

This section draws out some of the key impacts of the proposals on groups with protected characteristics and other important responsibilities such as safeguarding, the Welsh language and the effect on people with low incomes. It also outlines some of the mitigating actions we are taking to reduce any negative effects. More detail on the financial effects are shown later in the analysis. This is done based on income level rather than protected characteristics. However, we recognise that people with some protected characteristics are proportionally more likely to have a lower income.

We also recognise that many people possess more than one protected characteristic. It is not always possible to separate out the disadvantages people face for example the disadvantages faced by young, black women could be related to age, race or sex. We know that this will be an important consideration in finalising our proposals and the mitigating actions that we put in place.

Table 1 – Overview of 2024/25 Budget Savings and Pressure Proposals with more significant identified impacts

Key:

Red – negative impact on this category that is difficult to overcome with mitigating actions.

Amber – some potential negative impact which is lower risk or can be managed with mitigation.

Green – impact is largely positive.

White – no significant impact has been identified at this stage.

The numbers in brackets correlate with the references for individual impact assessments. These can be accessed from the background papers linked in the paper presented to the meeting of Cabinet on 17th January.

	Age	Disability	Gender Re-assignment	Marriage or civil partnership	Pregnancy and Maternity	Race	Religion or Belief	Sex	Sexual Orientation	Welsh Language	Socio-Economic	Safeguarding	Sustainable Development	National Well-being goals
Adult staffing reductions (SCH 2, 5, 7 & 16)	Red	Red				Green	Green	Red			Yellow	Yellow	Yellow	Yellow
Children's practice change (SCH 3 & 4)	Green	Green				Green	Green				Green	Green	Green	Green
Adult practice change (SCH 6, 8, 9, 10, 14 & 15)	Red	Red						Red			Red	Yellow	Yellow	Yellow
Fees uplift (PSCH 1)	Green	Green									Green	Green	Green	Green
Foster carer support (PSCH 2)	Green	Green									Green	Green	Green	Green
Children's and adult overspend (PSCH 4 & 5)	Green	Green									Green	Green	Green	Green
Individual School Budgets (CYP 1)	Red									Red	Yellow			Yellow
ALN net saving (CYP 4)	Green	Green										Green	Green	Green
Gwent Music (CYP 7)	Red	Yellow									Yellow		Yellow	Yellow
Before school club charge (CYP 8)	Yellow										Yellow			Yellow
King Henry VII School specialist resource base (PCYP 2)	Green	Green									Green	Green	Green	Green
ALN transport (PCYP 5)	Green	Green									Green	Green		Green
Before school clubs budget uplift (PCYP 6)	Green										Green	Green		Green
Contingency funding for high tariff ALP (PCYP 8)	Green	Green									Green	Green	Green	Green

	Age	Disability	Gender Re-assignment	Marriage or civil partnership	Pregnancy and Maternity	Race	Religion or Belief	Sex	Sexual Orientation	Welsh Language	Socio-Economic	Safeguarding	Sustainable Development	National Well-being goals
Funding ALP in local authority individual education plans (PCYP 9)	Green	Green									Green	Green	Green	Green
Vulnerable learner lead (PCYP 10)	Green	Green				Green					Green	Green	Green	Green
Garden waste collection charges (C&P 2)											Red			Yellow
Provision of food waste bags (C&P 4)											Yellow			Red
Concessionary fare uplift (C&P 11)	Red	Green			Green						Red			
Increase car parking charges (C&P 18)		Green									Red			Yellow
Recycling and waste management (PC&P 1)	Green	Green											Green	Green
PTU contract (PC&P 6)	Green	Green									Green			Green
Welsh language translations (PCEO 2)										Green				Green
Museums service change (ML 2)									Yellow					Yellow
Old Station Tintern opening hours (ML 3)									Yellow					Yellow
Countryside access staff reduction (ML 6)			Yellow						Yellow					Yellow
Cost neutral outdoor adventure service (ML 9)	Yellow										Yellow			Yellow

	Age	Disability	Gender Re-assignment	Marriage or civil partnership	Pregnancy and Maternity	Race	Religion or Belief	Sex	Sexual Orientation	Welsh Language	Socio-Economic	Safeguarding	Sustainable Development	National Well-being goals
Leisure centre reduced opening hours (ML 10)														
Alternative delivery model open access youth provision (ML 11)														
Markets and membership service redesign (ML 12)														
Area management restructure (ML 13)														
Youth service core budget increase (PML 5)														
Markets income pressure (PML 6)														

Disabled people

The changes proposed to the budget allocations in social care will have an impact on disabled people. Each proposal was therefore considered carefully alongside actions which could mitigate against or reduce negative impacts. The mitigations identified include making more use of community support networks and assistive technology to meet people's needs in new ways as well as strengthening our individual needs assessments. We will also increase expenditure in key services used by some disabled people which will ensure they continue to receive the support they need.

Defining Disability: Disability is when a person has a physical or mental impairment which has a long-term adverse effect on that person's ability to carry out day to day activities. The 2021 Census shows that 19.3% of people who live within the county are classed as disabled under the Equality Act. This is below the Welsh average of 21.1%.

The percentage of people who are disabled in Monmouthshire whose day-to-day activities are limited a lot accounted for 8.2% of Monmouthshire's population, with those whose day-to-day activities are limited a little accounted for 11.1%.

Alongside those who are classed as disabled under the Equality Act, the 2021 Census data shows that 8.2% of people in the county have a long term physical or mental health condition whose day-to-day activities are not limited and therefore not disabled under the Equality Act.

Specific changes that have been identified as having an impact on this characteristic are summarised below.

We will increase budgets and staffing in Additional Learning Needs provision and establish more in-county specialist resource bases for children and young people. This will ensure that all children in the county have fair access to education, no matter their specific needs or disabilities. This will also ensure more children and young people with complex needs can remain in their community school or within a school in Monmouthshire, where possible.

We are increasing spending in Adult Social Care to recognise growing demand and increased costs. This will allow those with physical and learning disabilities as well as ill-health, both mental and physical, to continue to receive support. It will enable disabled people to live independently, access vital services, improve their quality of life and maintain close relationships with family and friends. We will increase the fees we pay to independent social care providers to ensure that disabled people have access to a range of appropriate and high-quality care services.

The proposals will result in a reduction in the level of home care available. This may impact negatively on some adults with physical disabilities, and adults with mental health difficulties including dementia as well as their carers. Some people's needs may not be met at the maximum level. To mitigate this, there we will focus on the assessment and review of peoples' care and support needs. We will make more use of community-based support networks and assistive technology to meet needs.

We propose a re-organisation of day support for people with learning disabilities following a review. This will include stopping in-house residential respite care for adults with learning disabilities. This will create a single staffing structure and will result in some workforce reductions. However, this proposal will provide the opportunity to redesign the support available. This will

result in workforce reductions and will impact particularly on families who wanted this option of respite care to remain available. People with a learning disability will have access to a range of enhanced respite options including supported holidays, Shared Lives, Direct Payments and residential respite. These will be commissioned on an individual basis for those that need it.

Children with more complex needs and disabilities are disproportionately impacted by the lack of suitable placements for children requiring social care support. Practice Change in Social Care seeks to address this through the development of bespoke services and provision.

There are planned increases in fees for social care services, both residential and non-residential. There is currently a cap on the weekly fees that can be charged for non-residential i.e. domiciliary care. The fees are means tested and there are caps on charges that limit the impact on those on the lowest incomes. There are also increases in charges for community meals which will impact on disabled people receiving them.

Age: Elders, Children and Young People.

The effects and mitigations of proposals which will have an impact on the age characteristic are summarised below.

Monmouthshire's Aging Population: Data from Census 2021 shows Monmouthshire has a relatively older population, with those 65 years and older accounting for just over 25% of the total population of the county. This is slightly higher than the Wales average of 21.3%. These age groups also saw the biggest increase in the 2021 census, with the number of people 65 years and older increasing by 26% from 19,043 to 24,000, the highest percentage increase in Wales. Those aged 70-74 saw the largest increase of 44%, followed by the 90+ group which increased by 34%. Alongside these large increases in older age groups were decreases in the percentage of young people in the county, with the number of children aged 0-14 decreasing by 9.3% to 13,800, significantly more than the Wales average which saw a 1% decrease. There was also a small decrease in the working age population by 3.6% to 55,200. These figures clearly display the shift in Monmouthshire's age demographic to an older, ageing population.

Older People

Summarised here are the main proposals that may impact on some older people, particularly those on low incomes and/or who are disabled along with the mitigating actions that have been introduced to lessen the effects on vulnerable people.

Charges for domiciliary care are proposed to increase from £16.60 to £20 per hour. These are capped at £100 per week in Wales which provides a significant mitigation. A further mitigation is provided in the form of means testing as only those who are assessed as being able to afford this will pay. There will also be increases in fees for residential care. This will impact on proportionately more older people. These are also means tested and so the impact on those on the lowest incomes will be mitigated.

There is an increase in charges for community meals from £5.10 to £5.60 per meal which will impact on older people who receive these meals. The financial effect of these changes on different household compositions and income levels is set out in table 2.

Alongside these changes we will increase budgets in Adult Social Care to recognise increasing financial pressures. This will ensure that older people in receipt of care continue to receive support.

This will help them to live independently, access vital services, improve their quality of life and maintain close relationships with family and friends. Uplifting fee rates for social care providers will ensure the continuation of support and will expand the current offer available to older people who do not have family or friends who are able to pay top-up fees.

We will review packages of care for adults to see if these can be provided at a lower cost. We will also focus on reablement services. This can increase people's independence and support them to live lives that matter to them, potentially reducing the need for longer-term care. Older people, particularly those with care and support needs such as frail, elderly people, people with physical and mental disabilities and people with chronic health needs and their carers could be negatively affected by any changes. The risks will be mitigated through individual reviews and assessments.

A reduced workforce within direct care will have a negative impact on some older / frail adults with care and support needs and their carers. Often older adults are being supported to remain at home with the support of family members who can themselves be in older age.

Children and Young People

Children access a range of council services through attending schools, using home to school transport, attending clubs at leisure centres etc. This means that children and their families are often more exposed to changes and could be adversely affected. Continued economic and social pressures are also likely to put increased pressure on some families. Below is a summary of the main proposals that may impact on some children and young people.

The proposal for Individual School Budgets could result in lower staffing levels in schools. This will likely include mostly non-teaching staff but could also include some teachers where statutory ratios can be met. A reduction in staff could have a negative effect on children and young peoples' learning and the ability of schools to provide a wide-ranging post-16 education offer.

We are proposing to increase the cost of before school clubs for learners not eligible for free school meals. This could mean that some families are no longer able to afford the service. Some learners may no longer attend as a result. Similarly, increasing the cost of concessionary home to school transport may prevent some learners from accessing this service. Decreasing our contribution to Gwent Music may mean that fewer children from low-income families are able to attend music lessons. We propose to maintain a hardship fund which would help sustain opportunities for this group.

Children's social services support circa 1,000 children at any one time. The majority of these children will have experienced a range of adversity including poverty, housing insecurity, parental substance misuse, parental mental ill-health or domestic abuse. Increased spending in this area will enable us to provide children and families with vital services. This will help families achieve positive outcomes and support children to remain living safely with family and in their community wherever possible.

The lack of placement choice and availability is having an adverse impact on children requiring social care support. We will support children and young people who are looked after, or care experienced to live closer to their home and communities. We expect to be able to lower our spending as a result.

We will increase foster carer fees and allowances which will aid the council's aim of increasing the number of local authority foster carers in the county. This will mean that less children are placed in more expensive private placements or residential children's homes which can often be outside their community.

Sex

Within the council a number of our proposals include a reduction on the number of jobs. Present indications are that the number of posts affected will be below 20. This doesn't include any decisions that will be taken by school governing bodies. Reductions will be achieved through the release of vacant posts, reducing the number of employed hours or in some cases, redundancies.

While each department's staffing mix differs, the council's workforce is 70% female and therefore any reductions in staff numbers are likely to have a disproportionate effect on women.

We will apply our established Protection of Employment Policy. This will ensure that we are able to redeploy staff wherever possible. A tighter control procedure has been applied to job vacancies since the beginning of October 2023 with a high number of jobs being held vacant to aid the budget recovery position. This will help minimise any redundancies.

Specific changes that have been identified as having an impact on this characteristic include:

The potential for disproportionate impacts on women who make up the majority of both paid and unpaid caring roles. Any reduction in services available for adults with care and support needs will negatively impact on the number of carers; and therefore, the impact will result in less jobs in this area.

Women are more likely to be in low paid jobs than men and so a higher proportion are likely to experience the effects of price increases on services set out in the cumulative financial impact. Females tend to live longer than males so are proportionately more likely to be affected by changes in services that have a disproportionate impact on older people.

Other protected characteristics

At this stage of budget setting, we identified limited effects on other protected characteristics, (marriage and civil partnership, pregnancy and maternity, race, gender reassignment, sexual orientation, religion and belief). Some protected characteristics are linked to an increased risk of poverty. As a result, people with protected characteristics are likely to be disproportionately represented in the lower income bands. The financial effects of the budget are identified in the cumulative financial impact table later in this document.

Race, religion, marriage and civil partnership and sexual orientation and gender identity:

Data from the Census 2021 shows 96.9% of Monmouthshire residents identified their ethnic group within the White category. Within the White ethnic group, 94.2% identified as "English, Welsh, Scottish, Northern Irish or British". The next ethnic group was Asian, Asian British or Asian Welsh accounting for 1.3% (1,185) of Monmouthshire's population, while people identifying as mixed or multiple ethnic groups make up 1.2% (1,115) of Monmouthshire's population.

A decreasing number of Monmouthshire residents described themselves as Christian, down from 62.5% (57,101) in 2011 to 48.7% (45,250) in 2021, although Christian remains the most common response. 43.4% (40,311) of residents reported no religion, an increase from 28.5% (26,018) in 2011. 0.6% (519) of people in Monmouthshire reported 'any other religion'; 0.5% (435) Muslim; 0.4% (339) Buddhist; 0.2% (204) Hindu; 0.1% (102) Sikh and 0.1% (79) Jewish.

The census 2021 also shows 43.2% (40,155) of people in Monmouthshire are married or in a civil partnership, of which 0.3% (322) were in same-sex couples. 24.3% (22,635) of people had never married or never registered a civil partnership. 8.6% (7,952) of people were divorced or their civil partnership had been dissolved; 1.7% (1,540) were separated; and 6.4% (5,958) were widowed or

the surviving partner of a civil partnership. (The question did not apply to the remaining 15.8% of people)

1.1% (872) of Monmouthshire's population identify as lesbian or gay. 1.0% (763) identify as bisexual and 0.05% (42) identify as Asexual.

Some of the impacts identified include; The children's practice change proposal will ensure that suitable placements are available for children in line with their race, culture and identity needs. Care and support plans for adults and their carers / families take account of individual beliefs and provide care and support in a way that promotes and respects individual preferences. This element of the service would not be impacted directly by proposed changes in adult social care; Increasing capacity within the Vulnerable Learners team would allow us to better support schools in implementing various Welsh Government equality plans. These aim to create a fairer and more equal Wales. They include 'Rights, Respect and Equality', challenging bullying agenda, and creating an anti-racist Wales by 2030.

The reasons for identifying limited impacts on these protected characteristics so far include: the possibility these groups are not affected by the proposals; our services already provide inclusive services to all residents and, that we do not have sufficient information on the protected characteristics of all service users beyond that available in the national census, to make a judgement. We will continue to learn and increase our understanding throughout the budget consultation stage. The impact assessment has been made available as part of the consultation process on the budget and we welcome any views on the impacts of our proposals on these protected groups.

Socio-economic Impact

As well as evaluating the effects of changes on groups with protected characteristic, we also need to understand the potential socio-economic effects of the budget.

Any increase in fees and charges for services will have a higher impact on households on the lowest incomes.

Socio-economic deprivation: Data from the 2021 census shows households were considered to be deprived if they met one or more of the following four dimensions of deprivation: employment; education; health and disability; and housing. Overall, Monmouthshire compares favourably against other Welsh local authorities with the highest percentage of households not deprived in any dimensions (51.7%). However, when looking at smaller areas, there are marked variations in deprivation between communities within Monmouthshire, for example, the percentage of households not deprived in any dimensions varies from 65.4% in The Elms to 35.4% in parts of Overmonnow.

In many ways, living in an area of relative affluence and wealth whilst struggling to make ends meet can make that experience even harder and more isolating. This is a challenge we are determined to understand and address.

For families on lower incomes the rising cost of living can place additional pressure on households. This can come from rising energy prices, rising food prices, increasing inflation and higher interest rates. All residents will be impacted by inflation which will result in higher prices. Though the rate of inflation has been steadily decreasing in recent months, it remains relatively high at 3.9%.²

Households on variable rate mortgages or taking out new mortgages will have been impacted by the increases in the Bank of England base rate which will have pushed up borrowing costs. Household with unsecured loans and credit card debt will also be adversely affected by this change. The base rate has been steadily increasing throughout this year. These high rates will bring benefits to savers, however, which will include those of pensionable age who tend to make up a higher proportion of savers.

Household capacity to offset price rises: The extent to which higher prices are offset by wage rises will vary by household and is not included within this assessment. For context, the rate of annual pay growth in average total pay (including bonuses) was 7.2% and growth in regular pay (excluding bonuses) was 7.3% among employees in August to October 2023.³ In real terms (adjusted for inflation), in August to October 2023, total pay rose by 1.3% and regular pay rose by 1.4%. State pensions and benefits increased by 10.1% for 2023/24, in line with the Consumer Price Index (CPI) for the year to September 2022. For 2024/25, state pension rates will increase by 8.5%, in line with the average earnings growth figure for the year to September 2023, and benefit rates will increase by 6.7%, in line with the CPI for the year to September 2023. Rising prices will still have a significant effect on claimants.

These issues may compound financial challenges experienced by some families through the pandemic. Council services are receiving increasing demands and/or complexity of support requirements from residents in the county, such as on homelessness, Children's Services and Adult Social Care. This means some people, particularly those on lower incomes, need additional support, including from services already experiencing increases in demand.

We have undertaken extensive data analysis and qualitative research to further our understanding of inequality at a local level and how it affects people's lives. Close working with partners is being undertaken to track data to help understand the emerging situation and act accordingly.

Actions we are taking to mitigate against negative socio-economic impacts.

Some of the mitigation the council has in place to address financial pressures include:

Charges for social services are linked to peoples' ability to pay. Service users will undergo a means tested assessment of their ability to meet a reasonable charge.

The Council Tax reduction scheme offers some mitigation. It is calculated on individual circumstances. Those in receipt of universal credit, pension credits, job-seekers allowance and other benefits can apply for a reduction. Single person households are eligible for a 25% reduction on Council Tax.

Continued support to those affected by the cost-of-living through a range of methods including:

- The Money Matters campaign. This signposts residents to sources of support. It includes support on money & debt, housing, employment, mental health and wellbeing and utilities. It also provides new localised information on local community projects around the county that provide support.
- Working with Mind Monmouthshire and Citizens Advice Monmouthshire to set up cost of living support drop-in sessions across the county. These offer advice on ensuring people are getting all the money and benefits they are entitled to, making money go further and guidance on managing energy bills. There is also help and advice on getting back into work or more secure employment as well as emotional and wellbeing support.
- Working with partners to provide support for those experiencing food insecurity. This includes community fridges, food clubs and Food and Fun provision.
- Welsh Government provides a grant for households on low incomes to help with the essential cost of attending school, such as buying uniform or kit to take part in particular activities. Many schools have their own stock of uniforms and other essential kit which they can offer to families at low or no cost.

Monmouthshire Council's Housing Support Team support anybody who might be at risk of losing their home for any reason and can provide advice, liaise with landlords or mortgage lenders, or sometimes provide financial help. The team can help support residents to deal with the reasons behind struggling to pay rent or mortgages – such as mental health worries or difficulties accessing the financial support they are entitled to. They also have a service to help residents claim Universal Credit and other benefits.

Monmouthshire Council's Benefits Service provide local advice and support. The team help with Housing Benefit, Universal Credit, Discretionary Housing Payments and Council Tax Reduction. They can also help with individual tailored plans.

We provide and help fund a wide range of services in communities. These include community well-being networks to help people to maintain their independence and prevent people becoming dependent on statutory health and social care; community hubs that provide advice and host community learning opportunities and the skills at work programme which aims to upskill those in lower paid jobs to increase their career prospects.

There will also be a range of additional mitigations that are not fully modelled here.

The Cumulative Financial Impact

This section looks at the combined effect of increased fees and charges on different household compositions and income levels. We do this because many individual changes can sometimes seem small when looked at in isolation but can add up to a significant sum. This is one of the ways we meet our socio-economic duty. It also means we can identify where we need to apply a degree of mitigation to reduce the potential negative impacts of our proposals.

The impact below has been modelled on some of the planned increases in fees and charges. We have used six different household types and identified varying annual household incomes in modelling the cumulative financial impact. The increases in fees and charges modelled to develop this assessment along with further information on the methodology used are shown in Appendix 2. The financial modelling does not include an analysis of people by protected characteristics, although as already indicated people with protected characteristics are likely to be disproportionately represented in the lower income bands.

This column shows the actual anticipated cost of the budget proposals on households in Monmouthshire.

Table 2: Cumulative Financial Impact – Before and after mitigating actions.

Household	Income	Total increase before mitigation (percentage of income shown in brackets)	The amount of money our measures reduce this by	Total increase after mitigation (percentage of income shown in brackets)
Household 1 – 2 Adults, 2 Dependent Children, 1 Older Person	£33,500	£1,663.65 (5.0%)	£1,304.23	£359.42 (1.1%)
	£51,500	£1,663.65 (3.2%)	£1,292.50	£371.15 (0.7%)
	£64,000	£1,663.65 (2.6%)	£1,292.50	£371.15 (0.6%)
	£75,500	£1,663.65 (2.2%)	£1,292.50	£371.15 (0.5%)
Household 2 – 2 Adults, 2 Dependent Children	£22,000	£267.95 (1.2%)	£85.47	£182.48 (0.8%)
	£32,000	£652.25 (2.0%)	£422.83	£229.42 (0.7%)
	£40,000	£652.25 (1.6%)	£411.10	£241.15 (0.6%)
	£64,000	£652.25 (1.0%)	£411.10	£241.15 (0.4%)
Household 3 – 1 Adult, 2 Dependent Children	£15,000	£267.95 (1.8%)	£85.47	£182.48 (1.2%)
	£19,000	£267.95 (1.4%)	£85.47	£182.48 (1.0%)
	£22,000	£267.95 (1.2%)	£85.47	£182.48 (0.8%)
	£32,000	£652.25 (2.0%)	£440.44	£211.81 (0.7%)
Household 4 – 2 Adults (all aged below 66)	£22,000	£151.65 (0.7%)	£85.47	£66.18 (0.3%)
	£40,000	£151.65 (0.4%)	£26.80	£124.85 (0.3%)
	£52,000	£151.65 (0.3%)	£26.80	£124.85 (0.2%)
	£64,000	£151.65 (0.2%)	£26.80	£124.85 (0.2%)
Household 5 – 1 Older Person	£11,500	£1,163.05 (10.1%)	£966.87	£196.18 (1.7%)
	£15,000	£1,163.05 (7.8%)	£966.87	£196.18 (1.3%)
	£20,000	£1,163.05 (5.8%)	£966.87	£196.18 (1.0%)
	£32,000	£1,163.05 (3.6%)	£937.54	£225.51 (0.7%)

Household	Income	Total increase before mitigation (percentage of income shown in brackets)	The amount of money our measures reduce this by	Total increase after mitigation (percentage of income shown in brackets)
Household 6 – 2 Adults (both aged 66 and over)	£22,000	£1,293.05 (5.9%)	£966.87	£326.18 (1.5%)
	£40,000	£1,293.05 (3.2%)	£908.20	£384.85 (1.0%)
	£52,000	£1,293.05 (2.5%)	£908.20	£384.85 (0.7%)
	£64,000	£1,293.05 (2.0%)	£908.20	£384.85 (0.6%)

The proposed Council Tax increase of 7.5% will result in an additional monthly cost of £9.78 on a Band D property. If a household is on a low income, they may be eligible for the Council Tax Reduction Scheme which would reduce their Council Tax bill.⁴ This is calculated on individual circumstances and the entitlement varies; the model includes reductions of 10% and 50% for certain households. It is unlikely that someone on a low income would be paying for social care. As incomes rise it would be expected that many households will be living in more expensive properties and would be paying higher rates of council tax. A breakdown of the charges and methodology used to produce the table above can be found in appendix 2.

Household 1 - 2 Adults, 2 Dependent Children, 1 Older Person

For this household mitigating actions are in place which reduce the potential effects of increased fees and charges from £1,663.65 to £359.42 for those earning £33,500.

Without mitigation, for this household composition fees and charges could increase by £1,663.65 this would equate to 5% of the total income. For households with an income of £51,500, £64,000 and £75,000 this would be 3.2%, 2.6% and 2.2% of the total income, respectively. The largest increases would be the increased cost of before school clubs (those eligible for free school meals, eFSM, in households with lower incomes will not pay for these clubs which has been factored into the model), and the increase in Council Tax. Social care charges have also been considered for the older person within the household, modelling a £881.40 annual increase based on 5 hours of care a week as well as the provision of daily community meals.

Household 2 - 2 Adults, 2 Dependent Children

For this household mitigating actions are in place which reduce the potential effects of increased fees and charges from £267.95 to £182.48 for those earning £22,000.

Without mitigation, for this household composition, fees and charges have been modelled to increase by £267.95 for those earning 22,000 and above or £652.25 for those earning £32,000 and above. The difference is due to the assumed council tax reduction eligibility of the lowest income household alongside the assumed eligibility for eFSM status for the children. The increase would constitute 1.2% of income for a household income of £22,000. For a household income of £32,000 it would be 2%. The percentage of income would be 1.6% and 1% for households with incomes of £40,000 and £64,000, respectively. Alongside the increases noted above for a household with children, charges have been modelled for swimming lessons (+£24 per annum), and concessionary seats on home to school transport (+£88 per annum).

Household 3 - 1 Adult, 2 Dependent Children

For this household mitigating actions are in place which reduce the potential effects of increased fees and charges from £267.95 to £182.48 for households in the three lowest income bands.

Although the income for this household is likely to be less than that of the 2 Adult, 2 Children household, the increase in fees and charges on the household are very similar for the equivalent income bands, with a modelled £267.95 increase in annual costs before mitigations for those on £22,000 and £652.25 for a £32,000 income household. Lower income bands have been included within the model to reflect the possibility of low-income single earner households.

For those earning under £20,000, there is a modelled £267.95 increase also (as per £22,000 band). This would be a 1.8% increase for a £15,000 household and 1.4% increase for a £19,000 household. The low-income households have been assumed to receive mitigated costs for education services based on eFSM status of the children. Mitigations could also be received for council tax as part of the council tax reduction scheme and/or the single persons discount, this likely to be the case – especially for the lower income brackets.

Household 4 - 2 Adults

For this household mitigating actions are in place which reduce the potential effects of increased fees and charges from £151.65 to £66.18 for households on the three lowest income bands modelled.

For this household composition, fees and charges would have increased by £151.65 without mitigation. Therefore, this would be 0.7% of the total if this household composition had an income of £22,000. For a household earning £40,000 this would be 0.4% of their income. For those earning higher incomes such as £52,000 and £64,000, the fees and charges would account for 0.3% and 0.2% of their annual income, respectively. This household composition is likely to be less affected than other households as they do not have any dependent children and may not require certain services such as adult social care.

Household 5 - 1 Older Person

For this household mitigating actions are in place which reduce the potential effects of increased fees and charges from £1,163.05 to £196.18 for households on the three lowest income bands used.

This household could potentially have experienced an increase of £1,163.05 before mitigations were applied. This would be the equivalent of 10.1% of a household income of £11,500, which is broadly in line with the annual state pension allowance. The impact would be 7.8% if the household income is £15,000 and 5.8% and 3.6% if the household income is £21,500 and £40,000. The model includes example potential council tax mitigations of 50% for the 3 lowest income bands (+£58.68) and lists a 25% reduction for the £32,000 income household (an increase of £88.61 rather than £117.35). This household could potentially incur the increased costs for adult social care at all income levels, as well as the increase cost for community meals, however social care charges are means tested. Other potential mitigations for the household include the social care cap being reached, which would limit or could remove any increase in non-residential care fees.

Household 6 - 2 Adults (both aged 66 and over)

For this household mitigating actions are in place which reduce the potential effects of increased fees and charges from £1,293.05 to £326.18 for a household with an income of £22,000

For households earning £22,000, there could be a 5.9% increase in annual costs should there have been no mitigations. The majority of this increase would be from an assumed annual increase in social care costs of £881.40 as the model is based on 5 hours care received for 52 weeks a year. However, the mitigated cost of a £100 cap per week may mean that the household are already at this limit and would therefore see no additional increase in cost. An increase of £260 per year could be from community meal charges – based on an assumption that both members of the household would receive 5 meals a week from the service. As the lowest income bracket listed, there is a potential mitigated cost for council tax of £58.68 - which is an example 50% discount which could be provided via the council tax reduction scheme.

Were the household income £40,000 or higher, it has been modelled that without mitigation there could be a yearly increase of £1,293.05 for the household. Alongside the social care and community meals charges noted above, the model includes a full council tax increase of 7.5%, which is included as £109.53 based on a Band D property. The increase in costs would be 3.2% of total household income for a £40,000 income household, 2.4% for a £52,000 income household and 2% for a £64,000 income household.

Table 3: Integrated Impact Assessment



monmouthshire
sir fynwy

Integrated Impact Assessment document
(Incorporating Equalities, Future Generations, Welsh Language and Socio-Economic Duty)

<p>Name of the Officer: Richard Jones</p> <p>Phone no: 01633 740733 E-mail: richardjones@monmouthshire.gov.uk</p>	<p>Please give a brief description of the aims of the proposal: To deliver a balanced budget while continuing to make progress against the council's longer term aims.</p>
<p>Name of Service area: Chief Executive's</p>	<p>Date: 22nd December 2023</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	Local authorities provide many universal services such as highways and waste collections which bring multiple benefits to all age groups. However, many of our services are delivered to proportionately higher numbers of younger and older people.	Reducing our contribution to Gwent Music (CYP 7) may mean that fewer children from low-income families are able to access funding to allow them to attend music lessons which would otherwise be unaffordable to them. This will mean that peers in school will not have the same opportunities.	The council will provide £9k to support the hardship fund which supports low-income families to allow pupils to have access to music lessons which would otherwise be unaffordable to them (CYP 7).

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?
	<p>The development of a specialist resource base in the new King Henry VIII 3-19 school (PCYP 2) will increase the number of placements available for children and young people with complex needs, reducing the need for those children and young people having to travel to out-of-county specialist placements.</p> <p>Uplifting the additional learning needs (ALN) transport budget (PCYP 5) will ensure that pupils with ALN are able to attend a school or specialist placement that meets their specific needs.</p> <p>Uplifting the budget for before school clubs (PCYP 6) will ensure that children continue to have access to a healthy breakfast before school whilst also providing affordable or free childcare for parents (those who are eligible for free school meals have free access to before school clubs).</p>	<p>Real-terms reductions in individual school budgets (CYP 1) will likely result in redundancies of school staff. Any loss of staff could impact directly on the standards of the school and will also mean that class sizes are likely to increase and the number of courses offered at post-16 education will decrease, meaning less choice for pupils.</p> <p>Increasing the cost of before school clubs (CYP 8) may result in some families no longer being able to afford the service, meaning some children will no longer have access to the club.</p> <p>Stopping the provision of free food waste bags (C&P 4) may make food waste recycling less accessible due to the cost of the bags and residents potentially having to travel further to access food waste bags at</p>	<p>Families will have the option to pay the cost of home to school transport across the year, rather than in one lump sum. In addition, families of children who are unable to walk to school due to reasons such as medical conditions are able to apply for discretionary transport (C&P 11).</p> <p>All pupils that are entitled to free school meals will still be able to access before school clubs for free. All pupils regardless of household income will still have access to a healthy breakfast (CYP 8).</p>

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?
	<p>Providing additional funding to support additional learning provision (ALP) in the authority (PCYP 8, 9) will ensure that children and young people with complex ALN are provided with ALP to meet their identified needs, and to keep children and young people in their community schools, where possible. This will in turn have a positive impact on attendance, reduce exclusions and provide a truly inclusive education system.</p> <p>Increasing capacity within the vulnerable learners' team (PCYP 10) will enable the authority to be more responsive in managing the needs of Children Looked After (CLA) learners and will ensure that supporting vulnerable learners is prioritised.</p> <p>Uplifting the core budget of the Youth Service (PML 5) will ensure that core services continue to be delivered and</p>	<p>a cost-price. This will impact negatively on households on low incomes and those who may struggle to travel to sale locations, including older residents.</p> <p>Increasing the cost of garden waste collection by 10% (C&P 2) may mean that some users are no longer able to afford the service, and will adversely affect those on low income, including older residents.</p> <p>Increasing the cost of concessionary home to school transport (C&P 11) may mean that children from low-income families will no longer be able to access the service.</p> <p>Increases to car park charges (C&P 18) will have a disproportionate effect on low-income households, including older people, as they may have to reduce or cease their use of car parks which could cause a degree of social isolation.</p> <p>The lack of placement choice and availability is having an adverse impact on children requiring social care support. Practice Change in Social Care (SCH 3 & 4) seeks to support children and young</p>	<p>People can use any plastic bag, such as a bread bag, to dispose of food waste (C&P4)</p> <p>Blue badge holders will continue to be able to park for free (C&P 18).</p> <p>Individual care planning for children is in place which takes into account their individual needs and personal outcomes in line with the stage of development. (SCH 3 & 4)</p> <p>There will be a renewed focus on assessment and review of care and support needs with more focus on community-based support networks and assistive technology (SCH 6, 8, 9, 10, 14, 15).</p> <p>We will work to supply food waste bags through the council's estate and at outlets at cost price to reduce the impact (C&P 4).</p>

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?
	<p>young people continue to be supported.</p> <p>Uplifting social care provider fees (PSCH 1) will allow the council to secure care for older people, children and vulnerable adults, and will also mean that care home providers are more likely to accept our rates, resulting in more places being made available for older residents who do not have family to pay 'top-up fees'.</p> <p>Supporting pressures in Adult and Children's Social Care (PSCH 4 & 5) will ensure that both children and young people and older people in receipt of care continue to be supported, helping them to live independently, access vital services, improve their quality of life and maintain close relationships with family and friends.</p>	<p>people who are looked after, or care experienced to live closer to the home and communities and to be appropriately supported to develop their independence.</p> <p>Older people, particularly those with care and support needs and their carers are more likely to be negatively impacted by proposed practice change in Adult Social Care (SCH 6, 8, 9, 10, 14, 15). This includes a reduced workforce.</p> <p>A reduced workforce within direct care will have an impact on older / frail adults with care and support needs and their carers (SCH 2, 5, 7, 12 & 16). Often older adults are being supported to remain at home with the support of family members who can themselves be in older age.</p> <p>Identifying alternative funding streams for the youth service provision (ML 11) could result in overall less evening provision across Monmouthshire, particularly for</p>	<p>Ensure the Social Services and Well-being Act charging legislation is adhered to, so service users are means tested to determine their ability to pay.</p> <p>Increased demand, the fragility of the social care sector and the availability of care staff remain a key risk for Adult Social Care which needs to be considered as part of budget proposals.</p> <p>Where any decisions are required relating to compulsory redundancies the process will make a determination in an unbiased and un-predetermined way and with due regard for the impact relating to protected characteristics.</p>

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?
	<p>There is a focus in Adult Social Care practice change (SCH 6, 8, 9, 10, 14, 15) on maximising reablement services that can increase people's independence and support them to live lives that matter to them reducing the potential need for longer-term care.</p> <p>Meeting increased home to school transport costs (PC&P 6) will ensure that children continue to be provided with transport to school.</p> <p>Uplifting foster carer fees and allowances (PSCH 2) will aid the council's aim of increasing the number of local authority foster carers in the county. This will mean that less children are placed in private placements or residential children's homes which can often be far from their familiar community.</p>	<p>those who do not live in town centres, meaning some young people will either have to travel to access this service or may lose access if they are not able to do so.</p> <p>Increases to the cost of outdoor education (ML 9) may mean that some children from low-income families will no longer be able to attend the service.</p> <p>There are proposals to increase fees and charges in Adult Social Care, including for both non-residential fees and residential care. This will have a disproportionate impact on those adults who are reliant on care, especially those on lower incomes, although charges are means tested.</p>	<p>Pupils from Monmouthshire County Council schools will still receive a discount of 13% on the cost of the outdoor adventure service. Pupils eligible for free school meals will still receive a discount of 50%. Schools will likely subsidise the cost of this service; this may mean that the rise in cost will not be passed on to families, however this remains at the discretion of individual schools (ML 9).</p>
Disability	The development of a specialist resource base in the new King Henry	Reducing our contribution to Gwent Music (CYP 7) could mean that the service is no	We will work to supply food waste bags through the council's estate and at

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?
	<p>VIII 3-19 school (PCYP 2) will increase the number of placements available for children and young people with complex needs, including those with disabilities, and will reduce the need for children and young people to travel to out-of-county specialist placements.</p> <p>Uplifting the additional learning needs (ALN) transport budget (PCYP 5) will ensure that pupils with ALN are able to attend a school or specialist placement that meets their specific needs.</p> <p>Providing additional funding to support additional learning provision (ALP) in the authority (PCYP 8, 9) will ensure that children and young people with complex ALN are provided with ALP to meet their identified needs, and to keep children and young people in their community schools, where possible. This will in turn have a positive impact on attendance, reduce exclusions and</p>	<p>longer able to provide music therapy to pupils in special needs resource bases across the county. The disruption or loss of this service could cause distress and have a severe impact on the mental health of a number of pupils.</p> <p>Stopping the provision of free food waste bags (C&P 4) may make food waste recycling less accessible due to the cost of the bags and residents potentially having to travel further to access food waste bags at a cost-price. This could adversely affect residents who are less mobile as they may struggle to travel to sale locations.</p> <p>Children with more complex needs and disabilities are disproportionately impacted by the lack of suitable placements for children requiring social care support. Practice Change in Social Care (SCH 3 & 4) seeks to address this through the development of bespoke services and provision.</p>	<p>outlets at cost price to reduce the impact (C&P 4).</p> <p>Blue badge holders will continue to be able to park for free (C&P 18).</p> <p>Individual care planning for children is in place which takes into account their individual needs and personal outcomes in line with the stage of development. (SCH 3 & 4)</p> <p>There will be a renewed focus on assessment and review of care and support needs with more focus on community-based support networks and assistive technology (SCH 6, 8, 9, 10, 14, 15).</p> <p>Residential respite provision is being commissioned on an individual basis for those that need it. Individual care and support plans are in place for families to ensure their respite needs are being met. (SCH 2, 5, 7, 12 & 16).</p>

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?
	<p>provide a truly inclusive education system.</p> <p>The vulnerable learners lead supports pupils at risk of exclusion/disengagement and those who are Children Looked After (CLA)/ care experienced who often can have ALN. Increasing the capacity of this team (PCYP 10) will have a positive impact on the offer for pupils with ALN/disabilities.</p> <p>Supporting pressures in Adult Social Care (PSCH 4 & 5) will allow those experiencing physical and learning disabilities as well as ill-health, both mental and physical, to continue to receive support, to live independently and access vital services.</p> <p>Uplifting fee rates for social care providers (PSCH 1) will ensure that</p>	<p>The adult practice change proposal (SCH 6, 8, 9, 10, 14, 15) will impact negatively on adults with physical disabilities, and adults with mental health difficulties including dementia and their carers because there will be a reduction in the level of home care available and people's needs may not be met at the maximum level.</p> <p>A reduced workforce within direct care will have a negative impact on adults with physical disabilities, learning disabilities, as well as adults with mental health difficulties and dementia. (SCH 2, 5, 7, 12 & 16).</p> <p>The adult services staffing proposal (SCH 2, 5, 7, 12 & 16) includes implementing the decision to stop providing in-house residential respite care for adults with learning disabilities. This has a negative impact on families who wanted this option of respite care to remain available.</p>	<p>For social care charging increases, we will ensure that service users are means tested to determine their ability to pay.</p> <p>Where any decisions are required relating to compulsory redundancies the process will make a determination in an unbiased and un predetermined way and with due regard for the impact relating to protected characteristics.</p>

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?
	<p>disabled people with disabilities have access to appropriate and high-quality care services and will expand the offer available to them.</p> <p>People with a learning disability will have access to a range of enhanced respite options including supported holidays, Shared Lives, Direct Payments and Residential respite (SCH 2, 5, 7, 12 & 16).</p>	<p>There are proposals to increase fees and charges in Adult' Social Care, including for both non-residential fees and residential care. This will have a disproportionate impact on those adults who are reliant on care, especially those on lower incomes.</p>	
Gender reassignment	<p>At this stage proposals haven't identified a particular overall impact, either positive or negative, on people who have undergone or are considering gender reassignment.</p>	<p>At this stage proposals haven't identified a particular overall impact, either positive or negative, on people who have undergone or are considering gender reassignment.</p>	<p>None identified at this stage.</p> <p>Where any decisions are required relating to compulsory redundancies the process will make a determination in an unbiased and un predetermined way and with due regard for the impact relating to protected characteristics.</p>
Marriage or civil partnership	<p>Same-sex couples who register as civil partners have the same rights as married couples in employment and must be provided with the same benefits available to married couples, such as survivor pensions, flexible</p>	<p>At this stage proposals haven't identified a particular overall impact, either positive or negative.</p>	<p>None identified at this stage.</p>

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?
	<p>working, maternity/paternity pay and healthcare insurance.</p> <p>At this stage proposals haven't identified a particular overall impact, either positive or negative.</p>		<p>Where any decisions are required relating to compulsory redundancies the process will make a determination in an unbiased and un predetermined way and with due regard for the impact relating to protected characteristics.</p>
Pregnancy or maternity	<p>In the provision of services, goods and facilities, recreational or training facilities, a woman is protected from discrimination during the period of her pregnancy and the period of 26 weeks beginning with the day on which she gives birth.</p> <p>At this stage proposals haven't identified a particular overall impact, either positive or negative.</p>	<p>Pregnant women and parents with young children are more likely than younger age cohorts to travel to our towns by car or bus than walk or cycle. Consequently, they are more likely to be affected by increased car parking charges (C&P 18). If charges preclude such people from visiting town centres, it could result in social isolation.</p>	<p>None identified at this stage.</p> <p>Where any decisions are required relating to compulsory redundancies the process will make a determination in an unbiased and un predetermined way and with due regard for the impact relating to protected characteristics.</p>
Race	<p>At this stage proposals haven't identified a particular overall impact, either positive or negative, that will differ by race.</p>	<p>At this stage proposals haven't identified a particular overall impact, either positive or negative, that will differ by race.</p>	<p>None identified at this stage.</p> <p>Where any decisions are required relating to compulsory redundancies the process will make a determination</p>

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?
			in an unbiased and un predetermined way and with due regard for the impact relating to protected characteristics.
Religion or Belief	At this stage proposals haven't identified a particular overall impact, either positive or negative.	At this stage proposals haven't identified a particular overall impact, either positive or negative.	None identified at this stage
Sex	The council has already carried out a full pay evaluation exercise.	<p>Women make up the majority of both paid and unpaid caring roles. Any reduction in services available for adults with care and support needs will negatively impact on carers; and therefore, the impact will be felt disproportionately on women (SCH 2, 5, 7, 12 & 16 and SCH 6, 8, 9, 10, 14, 15).</p> <p>A number of proposals include a reduction on the number of jobs through the release of vacant posts. In some cases, there may be redundancies as a result of the proposals. While each departments staffing mix differs, the council's workforce is 70% female and therefore any reductions in staff numbers are likely to have a disproportionate effect on women.</p>	We will ensure that the Protection of Employment Policy is adhered to at all times. This will ensure that we are able to redeploy staff wherever possible. A tighter control procedure has been applied to job vacancies since the beginning of October with a high number of jobs being held vacant to aid the recovery position. This will help minimise any redundancies. Trades Unions are being kept informed; this began with an initial briefing at the Joint Advisory Group in November.
Sexual Orientation	At this stage proposals haven't identified a particular overall impact, either positive or negative.	At this stage proposals haven't identified a particular overall impact, either positive or negative.	None identified at this stage.

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?
			Where any decisions are required relating to compulsory redundancies the process will make a determination in an unbiased and un predetermined way and with due regard for the impact relating to protected characteristics.

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	Uplifting the budget for before school clubs (PCYP 6) will ensure that children continue to have access to a healthy breakfast before school whilst also providing affordable or free childcare for parents (those who are eligible for free	Reducing our contribution to Gwent Music (CYP 7) may mean that fewer children from low-income families are able to access funding to allow them to attend music lessons which would otherwise be unaffordable to them.	The council will provide £9k to support the hardship fund which supports low-income families to allow pupils to have access to music lessons which would otherwise be unaffordable to them (CYP 7).

	<p>school meals have free access to before school clubs).</p> <p>Many children and young people who are at risk of exclusion or are disengaging with education, and many Children Looked After (CLA) and care experienced learners, experience socio-economic disadvantage. Increasing capacity within the vulnerable learner's team (PCYP 10) will enable the authority to be more responsive in managing the needs of these learners and will ensure that supporting vulnerable learners is prioritized.</p> <p>Uplifting social care provider fees (PSCH 1) will enable the council to pay the real living wage to care workers who are typically on lower income. This is in line with the commitment made by the Welsh Government. Uplifting fees will also mean that care home providers are more likely to accept our rates, resulting in more places being made available and therefore more choice for older residents who do not have family to pay 'top-up fees'.</p>	<p>This will mean that peers in school will not have the same opportunities.</p> <p>Increases to car park charges (C&P 18) will have a disproportionate effect on those experiencing socio-economic disadvantage as they may have to reduce or cease their use of car parks, which could cause social isolation.</p> <p>Increasing the cost of concessionary home to school transport (C&P 11) may mean that children from low-income families will no longer be able to access the service.</p> <p>Uplifting the cost of garden waste collection by 10% (C&P 2) may mean that some users are no longer able to afford the service, resulting in some residents losing access.</p> <p>Real-term reductions in individual school budgets (CYP 1) will likely result in redundancies in schools, the majority of which is likely to be non-teaching staff. These individuals often work part-time and have lower income, thus will be adversely affected by redundancies.</p> <p>Increasing the cost of before school clubs (CYP 8) may result in some</p>	<p>Families will have the option to pay the cost of home to school transport across the year, rather than in one lump sum (C&P 11).</p> <p>All pupils that are entitled to free school meals will still be able to access before school clubs for free. All pupils regardless of household income will still have access to a healthy breakfast (CYP 8).</p> <p>We will work to supply food waste bags through at the council's estate and at outlets at cost price to reduce the impact (C&P 4).</p> <p>Work with the corporate parenting panel to consider ways in which the whole council can support children who are looked after and care experienced (SCH 3 & 4).</p> <p>A renewed focus on assessment and review of care and support needs will</p>
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	<p>Children who are looked after and care experienced young people often face social economic disadvantages and a paucity of support networks. Practice change in children's services (SCH 3 & 4) seeks to provide the best support for young people as they approach adulthood through the provision of appropriate accommodation, support and services.</p> <p>Uplifting foster carer fees and allowances (PSCH 2) will aid the council's aim of increasing the number of local authority foster carers in the county. This will mean that less children are placed in private placements or residential children's homes which can often be far from their familiar community.</p>	<p>families no longer being able to afford the service, meaning some children will no longer have access to the club. This could also mean that working low-income families may need to change working hours or find alternative childcare.</p> <p>Stopping the provision of free food waste bags (C&P 4) will impact negatively on households on lower income and may cause many to disengage with food waste recycling.</p> <p>Adults with care and support needs, and their carers, can be economically disadvantaged. It is also recognised that people with learning disabilities and physical disabilities can face significant barriers in accessing work and are more likely to be low-income. Any reduction in the level of care available will impact negatively on adults and their carers and may increase the risk of socio-economic disadvantage (SCH 2, 5, 7, 12 & 16 and SCH 6, 8, 9, 10, 14, 15). They may also not be able to afford to pay for any additional care and support.</p> <p>Increases to the cost of outdoor education (ML 9) may mean that some children from low-income families will no longer be able to attend the service.</p>	<p>help to ensure that home care is allocated to those who are most in need. (SCH 6, 8, 9, 10, 14, 15).</p> <p>Pupils from Monmouthshire County Council schools will still receive a discount of 13% on the cost of the outdoor adventure service. Pupils eligible for free school meals will still receive a discount of 50%. Schools will likely subsidise the cost of this service; this may mean that the rise in cost will not be passed on to families, however this remains at the discretion of individual schools (ML 9).</p> <p>Ensuring that practitioners in social care understand the impact of socio-economic disadvantage on individuals with care and support needs and have the right skills and knowledge to be able to support people in such circumstances (across social care).</p> <p>We will ensure that the Protection of Employment Policy is adhered to at all times. This will ensure that we are able</p>
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		<p>An increase in Council Tax will have a financial impact on all households on lower incomes, as any bills will form a higher proportion of their household expenditure, will feel the impact more acutely.</p> <p>There is a risk that any budget proposals that increase discretionary charges will have a disproportionate impact on people on low incomes and therefore will widen inequality.</p> <p>A number of proposals include reducing staffing, through reducing employment hours, vacant posts or possible redundancies. This will have a socio-economic impact on those council employees affected.</p>	<p>to redeploy staff wherever possible. A tighter control procedure has been applied to job vacancies since the beginning of October with a high number of jobs being held vacant to aid the recovery position. This will help minimise any redundancies. Trades Unions are being kept informed. This began with an initial briefing at the Joint Advisory Group in November.</p> <p>The Council Tax reduction scheme offers some mitigation, council tax is means tested and those who qualify are able to apply for a reduction. Single person households are eligible for a 25% reduction on council tax.</p> <p>It is important to assess and understand the impact of our proposals on those in poverty, especially if there is a cumulative impact from a number of proposals. The evidence in this paper helps assess the overall potential impact of the budget on different people within our communities and looks to establish the cumulative financial impact of the budget.</p>
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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>Policy Making Effects on the use of the Welsh language, Promoting Welsh language Treating the Welsh language no less favourably</p>	<p>Increasing the budget for the translation of public documents to the medium of Welsh (PCEO 2) will ensure that the authority can continue to comply with the Welsh Language Standards and will also enable us to increase the number of opportunities for the public to interact with public services delivered through the medium of Welsh, in line with our Welsh Language Strategy.</p> <p>All proposals will comply with the Welsh Language standards applicable to the authority.</p>	<p>None identified at this stage.</p>	<p>All signage and material arising from budget proposals will be compliant with the Welsh Language (Wales) Measure 2011 and Welsh Language Standards.</p>
<p>Operational Recruitment & Training of workforce</p>	<p>We will ensure that new vacancies are assessed and where possible advertised as 'Welsh essential' to increase opportunities for people to engage with the council through the medium of Welsh.</p>	<p>Budget proposals identify a number of potential redundancies. In some instances, these could result in a reduction in the number of Welsh speakers employed.</p>	<p>Ensure that new roles are assessed to determine Welsh language requirements. Active promotion of vacancies in Welsh language publications and websites as well as targeted promotion via LinkedIn.</p> <p>Continue to promote and fund language courses to increase the number of learners in line with the</p>

	<p>An increase in capacity and expertise in the council's Welsh language function will help ensure that all areas of work are carried out in accordance with Welsh language requirements.</p>		<p>aspirations in our Welsh Language Strategy</p>
<p>Service delivery Use of Welsh language in service delivery Promoting use of the language</p>	<p>Growing Welsh medium education through the funding of a seedling provision, as an extension of an existing Welsh-medium school in Monmouth in September 2024.</p> <p>Increases in our ability to recruit Welsh speakers will ensure increased ability for service users to use the language in their dealings with the council.</p>	<p>Budget proposals identify a number of potential redundancies. In some instances, these could result in a reduction in the number of Welsh speakers employed.</p>	<p>The expansion of Welsh-medium primary education in Monmouthshire is a key action that will enable us to achieve Welsh Ministers target of 115 pupils per cohort by 2032.</p> <p>As part of the council's Welsh Language Strategy, we will continue to increase the number of Welsh speakers in the workforce, resulting in a net increase, through recruitment and training.</p> <p>Ensure that appropriate mitigations are put in place at a service level to mitigate the loss of any individuals on our overall ability to provide services in Welsh.</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.

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>A prosperous Wales Efficient use of resources, skilled, educated people, generates wealth, provides jobs</p>	<p>A number of mandates involve redundancies, which will reduce the total number of jobs in the county.</p> <p>PML 6 aims to increase footfall in our county's markets through increasing the number of events held and providing more opportunities and support for new traders. However, hire prices will be reviewed and may increase, which could lead to fewer events taking place.</p> <p>Changes to individual school budgets (CYP 1) will likely mean that there will be less employment opportunities available in schools, including highly skilled teaching staff. Training opportunities for school staff may also be reduced as schools consider all aspects of their budgets.</p>	<p>Wherever possible, posts that are deleted will be vacant posts, thus reducing the number of redundancies necessary.</p>
<p>A resilient Wales Maintain and enhance biodiversity and ecosystems that support resilience and can adapt to change (e.g. climate change)</p>	<p>None identified at this stage.</p>	<p>None identified at this stage.</p>
<p>A healthier Wales People's physical and mental wellbeing is maximised, and health impacts are understood</p>	<p>Increasing car parking charges (C&P 18) could encourage healthier and more active travel e.g. walking and cycling.</p> <p>A reduction in leisure centre opening hours (ML 10) may mean that some people, particularly working age people, are less able to access</p>	<p>As with many of the budget proposals managers are aiming to reduce negative impacts on health, whilst ensuring that core services are able to continue, albeit with a reduced level of service, reduced hours or the seeking of grant funding to ensure services can still be delivered.</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?
	leisure centre facilities which could result in a decrease in the health of those users affected.	Increased demand, the fragility of the social care sector and the availability of care staff remains a key risk for Adult Social Care. Where staff are put at risk of redundancy, measures will be put in place to help them, such as guaranteed interviews for internal posts for suitable candidates and employment and skills support.
A Wales of cohesive communities Communities are attractive, viable, safe and well connected	Increasing car parking charges (C&P 18) may deter people from visiting town centres, especially those who do not have access to a means of transport other than driving. Several proposals result in services being able to be offered more locally, allowing people to stay in their communities (PCYP 2, PCYP 9). However, others will have a negative impact such as ML11 where youth service provision in rural communities will decrease.	ML11 proposes an alternative delivery model for youth services, which would provide support and training for community sector partners to be able to deliver youth clubs
A globally responsible Wales Taking account of impact on global well-being when considering local social, economic and environmental wellbeing	A number of proposals propose reducing the opening hours of facilities. This is likely to reduce energy bills and carbon emissions. (ML2, ML3, ML10). Uplifting the recycling and waste services budget (PC&P 1) will ensure that the council is able to continue to achieve its target of recycling 70% of waste in the county.	None identified at this stage.



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>Increasing car parking charges (C&P 18) could encourage more sustainable travel e.g. via active travel routes, resulting in less carbon emissions.</p> <p>Stopping free provision of food waste bags (C&P 4) may result in some households no longer recycling their food waste, if they do not want to pay for food waste bags or cannot afford them, meaning a higher proportion of food waste will end up in landfill.</p> <p>Increasing the cost of concessionary home to school transport (C&P 11) could mean that some families decide to opt out of the service and could instead choose to drive to school, increasing the number of journeys made.</p>	
<p>A Wales of vibrant culture and thriving Welsh language Culture, heritage and Welsh language are promoted and protected. People are encouraged to do sport, art and recreation</p>	<p>Increasing the budget for the translation of public documents to the medium of Welsh (CEO 2) will enable us to increase the number of opportunities for the public to interact with public services delivered through the medium of Welsh, in line with our Welsh Language Strategy.</p> <p>The closure of Abergavenny and Chepstow museums (ML 2) and Old Station Tintern (ML 3) for one day per week could result in less people visiting the county and its towns.</p>	<p>Any new vacancies that are part of proposals are assessed and where possible advertised as 'Welsh essential' to increase people's opportunities to engage with the council through the medium of Welsh.</p> <p>We will look to protect the level of library book spend allocated to Welsh language publications.</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>A more equal Wales People can fulfil their potential no matter what their background or circumstances</p>	<p>Many of the proposals include impacts on some protected characteristics, in particular age and disability. These impacts (positive and negative) are examined in more detail in the protected characteristics section above. There are also impacts on those on low incomes as a result of charge increases or introductions and these are examined in more detail in the socio-economic duty section above.</p> <p>Consideration will need to be given to whether redundancies will affect any particular groups of people.</p> <p>Reductions in school staff as a result of proposals for individual school budgets (CYP 1) could mean that less support is available for pupils, which may lead to some not achieving their full potential.</p> <p>Reducing our contribution to Gwent Music (CYP 7) may mean that fewer children from low-income families are able to access funding to allow them to attend music lessons which would otherwise be unaffordable to them. This will mean that peers in school will not have the same opportunities.</p> <p>Increasing the cost of before school clubs (CYP 8) may result in some families no longer being</p>	<p>All pupils that are entitled to free school meals will still be able to access before school clubs for free. All pupils regardless of household income will still have access to a healthy breakfast (CYP 8).</p> <p>The council will provide £9k to support the hardship fund which supports low-income families to allow pupils to have access to music lessons which would otherwise be unaffordable to them (CYP 7).</p> <p>Where staff are put at risk of redundancy, measures will be put in place to help them, such as guaranteed interviews for internal posts for suitable candidates, employment and skills support etc.</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>able to afford the service, meaning some children will no longer have access to the club.</p> <p>Increasing funding and capacity with ALN provision (CYP 2, 5, 8, 9, 10) will ensure that all learners, no matter their specific needs, have equal access to education and have a greater chance of remaining within their community schools.</p>	

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>Balancing short term need with long term and planning for the future</p>	<p>The requirement for short term financial savings may have an impact on the ability to deliver quality services in the long term. For a number of posts and workstreams across all directorate, but particularly in MonLife, there is an increasing reliance on grant funded posts and projects, which is inevitably only helpful in the short term.</p>	<p>Wherever possible, proposals are only reducing service levels (e.g. by reducing opening hours or staffing) rather than closing services, in order to ensure that core services can still be continued in the long term.</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>Working together with other partners to deliver objectives</p>	<p>For many of the budget proposals, partnership working is key to being able to continue delivering services. However, there are also proposals to scale back some aspects of partnership working, which could reduce the viability of some of these partnerships and service levels received.</p>	<p>Generally, proposals that scale back partnership work still continue with those collaborations, with reduced financial contributions that we are able to make.</p>
 <p>Involving those with an interest and seeking their views</p>	<p>Individually, many of the budget proposals have been subject to consultation to assess the impact on service users. For other proposals, this engagement has not yet taken place or is planned at the same time as the budget engagement process.</p> <p>Overall, these proposals will form part of the budget consultation and will be subject to a public consultation exercise.</p>	<p>Ensure that proposals and the accompanying Integrated Impact Assessments are updated as a result of any further consultation and engagement.</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>Prevention</p> <p>Putting resources into preventing problems occurring or getting worse</p>	<p>Wherever possible, proposals aim to prevent problems occurring or getting worse (e.g. PCYP 8 will increase contingency funding for schools where they may need to support a child with extremely complex or urgent needs, PSCH 2 aims to increase the number of foster carers to ensure the council can meet the long-term goals of eliminating profit from care).</p> <p>With the scale of savings that are needed, some proposals will be taking investment out of preventative work which may lead to further problems in the future. An example of this is SCH 2, 5, 7, 12, 16 reducing adult services workforce.</p>	<p>Wherever possible, posts that are already vacant are those that are being proposed to be removed, meaning that the impact of those is less. However, teams across the council are already under pressure, and not replacing vacant posts could mean the council is less able to be proactive and preventative. Increased demand, the fragility of the social care sector and the availability of care staff remains a key risk for Adult Social Care. although some of these issues are outside the Council’s direct control to address.</p>
 <p>Integration</p> <p>Considering impact on all wellbeing goals together and on other bodies</p>	<p>The council works across multiple areas and many of these proposals can have positive and potentially negative impacts on another. It is important that as individual proposals are developed, we seek to balance competing impacts, and fully consider the impacts that proposals will have on other organisations.</p>	<p>Use of this Cumulative Impact Assessment will help to identify overall impacts of proposals in an integrated way, as well as assessing each proposal individually.</p>

6. The council has agreed the need to consider the impact its decisions have 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	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. Specific proposals include an assessment of the impact on safeguarding.	Specific proposals include an assessment of the impact on safeguarding, including any potential negative impact on delivering the Council's safeguarding responsibilities.	Specific proposals include an assessment on the impact on safeguarding, including mitigation related to the potential impact on delivering the Council's safeguarding responsibilities. Safeguarding is at the heart of everything the council does. All staff are trained to a level that is appropriate to their role.
Corporate Parenting	The council has a responsibility to children who are looked after. The council has a corporate duty to consider children looked after especially and promote their welfare (in a way, as though those children were their own). Specific proposals include an assessment on the impact on corporate parenting.	Specific proposals include an assessment on the impact on corporate parenting, including any potential negative impact on delivering the Council's corporate parenting responsibilities.	Specific proposals include an assessment on the impact on corporate parenting, including mitigation related to the potential impact on delivering the Council's corporate parenting responsibilities.

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

The proposals are based upon a wide range of data and evidence, and this will be contained within the evaluations of each of the individual proposals.

Data sources include for example:

- Quantitative data such as user numbers, measuring whether changes have had a positive or negative impact on the number of people using the service, in some cases, such as preventative services less users will be a positive
- Qualitative data that gives people views of the service which includes analysis of complaints.
- Data derived from national sources such as ONS, Census and Stats Wales which allow us to measure the whole population.

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?

Where an individual budget proposal could alter a service, or the way it is delivered an Integrated Impact Assessment has been completed.

This assessment summarises the headline message from these individual assessments where proposals have been identified as having a positive or negative impact on those with protected characteristics, the socio-economic duty, and the ways of working and national well-being goals. This does not highlight every single issue but reveals some of the key impacts of budget proposals and provides scope for continual learning and improvement as proposals are developed.

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
Existing actions have been identified within individual assessments.	As per budget proposals	As per budget proposals

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 into equality and future generations considerations wherever possible.

Version No.	Decision making stage	Date considered	Brief description of any amendments made following consideration
1.0	Strategic Leadership Team and Informal Cabinet	19 th December 23	
2.0	Cabinet	17 th January 24	

Appendix 2 – Cumulative Financial Impact methodology

To model the cumulative financial impact, we have used six different household types and identified varying annual household incomes for each.

Household composition data from the Census 2021 in Monmouthshire shows for each of our households modelled:

Household 1 - 2 Adults, 2 Dependent Children, 1 Older Person - 2% (689) of all household composition households from Census 2021 were multiple family households with dependent children.

Household 2 - 2 Adults, 2 Dependent Children – 17% (7033) of all household composition households from Census 2021 were single family households (married, civil partnership or cohabiting couple) with dependent children.

Household 3 - 1 Adult, 2 Dependent Children – 6% (2281) of all household composition households from Census 2021 were single family households (lone parent) with dependent children.

Household 4 - 2 Adults – 13% (5309) of all household composition households from Census 2021 were single family households (married or civil partnership) with no children. 5% (2235) households were noted as being co-habiting couple families with no children.

Household 5 - 1 Older Person – 16% (6534) of all household composition households from Census 2021 were single person households, aged 66 years or older.

Household 6 – 2 Adults (both aged 66 and over) – Census 2021 data showed that there were over 11,000 residents in Monmouthshire that lived in a single-family household of this composition.

The full new state pension for 2024/25 is due to rise to £221.20 per week; this equates to £11,502.40 per year. The annual level of benefit cap for couples (with or without children) or single claimants with a child of qualifying age is £423.46 per week, equating to £22,020 per year⁵.

Data on income levels will continue to change as wage levels vary, the figures used provide an approximate indication. The National Living Wage is currently £10.42 per hour for those aged 23 and over. For someone working 35 hours per week, this equates to approximately £18,964.40 per year. For someone working 27 hours per week this is approximately £14,629.68 per year. This rate is due to rise to £11.44 from April 2024 for those aged 21 and over⁶. For someone working 35 hours per week, this equates to around £20,820.20 per year. For someone working 27 hours per week, this equates to approximately £16,061.76 per year. Those who are aged 18-20 will be entitled to receive £8.60 per hour, equating to approximately £15,652 per year for those who work 35 hours per week.

As at the financial year 2021-22, 48.2% of lone parents in the UK are employed part-time, and over 3 in 10 are not employed (economically inactive). Women with children are more likely to work part-time, term-time or flexible working hours, compared to fathers or those without children. 47.1% of two parent families have one parent working full-time, and the other working part-time.⁷ Average weekly hours of work for part-time workers in the UK is 16.4 hours.⁸

A person is commonly deemed to be in poverty if their household income falls below 60% of the UK median household income. The median household income in the UK is £32,300.⁹ 60% of this equates to £19,380. Median household income in Monmouthshire is £32,786.¹⁰

Fees and charges

Each of the planned increases in fees and charges identified to be used in the cumulative financial impact model are shown in the table below. This does not cover every fee and charge within the budget, these have been selected to provide an indication of potential increases for households. Full details on fees and charges are in the budget papers. This shows the Full (F) and Mitigated (M) increase in cost.

Fees and charges	Increase	Mitigation		2 Adults 2 Dependent Children 1 Older Person	2 Adults 2 Dependent Children	1 Adult 2 Dependent Children	2 Adults (both <66)	1 Older Person	2 Adults (both 66+)
Council Tax	£117.35 per household	25% single person discount. Council tax reduction scheme.	F	£117.35	£117.35	£117.35	£117.35	£117.35	£117.35
			M	£105.62	£58.68/ £105.62	£58.68	£58.68	£58.68/ £88.01	£58.68
Garden Waste	£5 per annum		F	£5.00	£5.00	£5.00	£5.00	£5.00	£5.00
			M						
Concessionary home to school transport	£44 per child		F	£88.00	£88.00	£88.00			
			M						
Residential car permit	£6 per annum		F	£6.00	£6.00	£6.00	£6.00	£6.00	£6.00
			M						
			F	£20.80	£20.80	£20.80	£20.80	£20.80	£20.80

Car parking charges	£20.80 per annum	Blue badge holders park free	M	£0	£0	£0	£0	£0	£0
Food bags	£2.50 per annum		F	£2.50	£2.50	£2.50	£2.50	£2.50	£2.50
			M						
Before school charges	£1 per child	No charge for eFSM pupils	F	£380	£380	£380			
			M	£0	£0	£0			
Outdoor education	£8.60 per day visit	50% discount for eFSM pupils	F	£8.60	£8.60	£8.60			
			M	£4.30	£4.30	£4.30			
Swimming lessons	£12 per person		F	£24.00	£24.00	£24.00			
			M						
Domiciliary social care	£3.39 per hour	£100 maximum weekly cap	F	£881.40				£881.40	£881.40
			M	£0				£0	£0
Community meals	£0.50p per meals		F	£130.00				£130.00	£260.00
			M						

The table below lists the rationale followed whilst assigning increased costs and mitigations to the households in the table above. A number of methods have been replicated based on what has been modelled during previous years. Although it's recognised that the rationale may not be applicable to all households within the county, the table is an attempt to model where certain residents may be impacted to a fuller extent than others.

Fee and Charge	Increase	Rationale for increase
Council Tax	£117.35 per household	Based on a 7.5% increase from the cost for a Band D property in 23/24. A modelled cost of £105.63 – where a household may receive 10% discount via the council tax reduction scheme. Also, a modelled increase of £58.68 – where a household may receive a 50% discount via the council tax reduction scheme (at a further discounted rate due to the income level of the household). This is an example only, the scheme is calculated on individual circumstances and the entitlement varies. Also £88.01 – where a household may receive 25% discount via the single persons council tax discount.
Car parking charges	£20.80 per annum	Increase based on the scenario of two 1 hourly stays per week.

Outdoor education	£8.60 per day visit	Based on the scenario of a single school trip during the year, where the cost isn't subsidised by the school.
Swimming lessons	£12 per person	Based on swimming lessons received by each child every month for the whole year.
Domiciliary social care	£3.39 per hour	Based on the cost of 5 hours of care per week for 52 weeks. The weekly cap of a maximum of £100 would mean that those receiving more than 7.5 hours of care at the cost charged in 2023/24 would likely be hitting the cap, therefore there would be no increase despite the increased price. Although it is recognised the cost is means tested, this has not been modelled.

¹ <https://fairbydesign.com/wp-content/uploads/2021/02/The-Inequality-of-Poverty-Full-Report.pdf>

² [CPI ANNUAL RATE 00: ALL ITEMS 2015=100 - Office for National Statistics \(ons.gov.uk\)](#)

³ Average weekly earnings in Great Britain: December 2023 [Average weekly earnings in Great Britain - Office for National Statistics \(ons.gov.uk\)](#)

⁴ <https://www.monmouthshire.gov.uk/home/counciltaxandbenefits/>

⁵ Proposed benefit and pension rates 2024/25 [Proposed benefit and pension rates 2024 to 2025 - GOV.UK \(www.gov.uk\)](#).

⁶ National Minimum Wage Rates [National Minimum Wage and National Living Wage rates - GOV.UK \(www.gov.uk\)](#).

⁷ Families and the labour market, 2021 [Families and the labour market, UK - Office for National Statistics \(ons.gov.uk\)](#).

⁸ Hours worked by part-time workers [Average actual weekly hours of work for part-time workers \(seasonally adjusted\) - Office for National Statistics \(ons.gov.uk\)](#).

⁹ Average household income UK [Average household income, UK - Office for National Statistics \(ons.gov.uk\)](#).

¹⁰ Average (median) gross weekly earnings by Welsh local areas and year [Average \(median\) gross weekly earnings by Welsh local areas and year \(£\) \(gov.wales\)](#).

Appendix 3 – Proposed Response to Welsh Government on the Provisional Settlement

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Welsh Government,
Cathays Park,
Cardiff.
CF10 3NQ

Your Ref/Eich Cyf:
Our Ref/Ein Cyf:
Date/Dyddiad:
File Ref:
The Person dealing with
this matter is/ Y
Person sy'n delio gyda'r
mater yma yw:
Tel/Ffôn:
Fax/Ffacs:
e-mail address/ cyfeiriad
e-bost

Dear Ms Melvin,

Re: Local Government Provisional Settlement 2024/25

Thank you for the opportunity to comment on the Provisional Settlement announced on 20th December 2023.

On 17th January 2023, Cabinet published its draft budget proposals for public feedback and review for a four-week period. At the meeting, Cabinet approved this response to the provisional settlement and that reflects the opinions of members.

As confirmed in your letter of 20th December the Welsh Government's funding was insufficient to shield public service budgets from inflation and rising demand. It is acknowledged however that the Welsh Government did deliver a 3.1% average increase in the local government settlement for 2024/25, in line with previous indications.

The Council's services are facing major challenges due to the cost of living crisis and is having to make hard choices in setting its budget for next year.

The Council is also having to consider raising council tax to avoid more impacts on schools and frontline services.

The Council will now seek to involve stakeholders and the public in various budget consultation events through its website and social media.

There are a number of points that we would like to constructively make in response to the consultation on the provisional settlement:

- a) Monmouthshire relies on council tax to fund its services more than any other council in Wales. Council tax will have to go up in 2024/25 because of the financial challenges facing the council.

The council welcomes the Welsh Government's funding for the scheme that helps low-income and vulnerable households pay their council tax. The council

welcomes the ability to respond to the Welsh Government's consultation on a fairer council tax system and the council tax reduction scheme.

- b) We express concern about the Welsh Government's stance on funding of pay awards for teachers and local government staff, and the potential impact this has on the Council's budget. There is no transfer into the settlement as a result of the specific grant funding for the 2023/24 teachers pay award albeit it partially funded, which adds further to the pay pressures needing to be managed in 2024/25.

We urge Welsh Government to engage with pay review bodies and to disclose the anticipated pay offers to local authorities well in advance of budget setting. The current situation leaves the Council vulnerable to further potential pay pressures next year.

- c) We express concern about the impact of the latest actuarial review of the Teachers' Pension Scheme (TPS), which would affect all local authorities in Wales. The review indicates that employer contributions are due to increase by 5 percentage points to 28.6% of pensionable pay from 1st April 2024, a 21.1% increase from the current level.

The increase in TPS contributions would result in an additional cost of approximately £1.5m for Monmouthshire and the Council is not incorporating this cost in its draft budget, as it assumes that the UK Government will fully fund the increase as it is anticipated that there will be consequential funding for Wales from the UK Government to cover the increase in TPS contributions, but the timing of this confirmation is uncertain. The document supports Welsh Government's intentions to press the UK Treasury for assurances on this matter.

- d) The Council faces challenges in meeting the needs of the most vulnerable people within Monmouthshire, as the care sector is fragile and has recruitment and retention issues. The Council appreciates the funding from Welsh Government to ensure that care workers are paid at least the Real Living Wage, but notes that the market forces are driving the wages higher than that level.

The Council urges Welsh Government to come up with a fully funded plan for social care in Wales, and to pressure UK Government to provide the necessary funding. The Council also calls for more recognition of the role and importance of social care, and more collaboration and prevention work with the NHS.

- e) We appreciate the Minister and Welsh Government listening to the calls for increasing the weekly cap on paying for non-residential care from £100 to £120. We ask Welsh Government to conclude the consultation quickly and give Councils in Wales the earliest opportunity to implement the changes, as this would help offset the increasing cost pressures within adult social care.

Welsh Government should introduce mechanisms that allow the cap to be increased annually in line with inflation and given that there are safety mechanisms in place through financial assessment for those vulnerable adults in receipt of such care.

- f) The Council is dedicated to responding to the needs of homeless people in Monmouthshire and is still facing challenges in securing temporary accommodation.

The Council is concerned about the reductions in some grants from the Welsh Government, which affect the services that prevent and address homelessness. We ask Welsh Government to reconsider its final budget proposals and provide more funding for homelessness prevention and housing support.

- g) The Eliminate agenda is a policy direction that aims to remove profit from the children in care market and improve their outcomes. However, it is not fully funded by the Welsh Government and its consequences creates operational and financial uncertainty for local authorities.

Welsh Government has only confirmed specific grant funding for the Eliminate agenda until 2024/25, while the operational pressures and ripple effects of this policy continue well beyond that. Local authorities are having to compete with other strategic priorities for capital monies from the Gwent Regional Programme Board. We ask that Welsh Government gives further consideration to the support needed to local authorities to enable the transition required.

- h) The Council will not be able to fully fund schools for all pay-related pressures, and schools will have to make efficiency savings and contribute to the wider budget challenge. These difficult decisions are at a time when schools will face significant challenges in delivering the new Curriculum for Wales and the ALN and Tribunal Act, as well as improving standards and supporting vulnerable learners.

There is also concern about the decline in school balances and the increase in the number of schools in deficit, which will require further remedial action by the Council and the schools.

- i) The Council expresses concern about the proposed reduction in the level of relief for non-domestic rate payers in Wales, especially for the retail, leisure and hospitality sectors. This might drive businesses to relocate to England, where similar reliefs will remain at 75% for 2024/25.

Challenges are faced by the council, residents and businesses alike during this cost of living crisis. Whilst appreciating the package of support that has been provided to non-domestic rate payers in recent years, it is concerned that the proposed and significant reduction in relief and the increase in the non-domestic rates multiplier by 5%, albeit it lower than the increase that would otherwise apply, is too much of a burden to sustain businesses in Monmouthshire at this time.

We urge Welsh government to reconsider the reduction in the level of relief for non-domestic rate payers and the increase in the multiplier for 2024-25, and to provide more support for businesses that represent the lifeblood of the Welsh economy. Our primary concern is that these impacts are likely to have a lasting damage on the businesses, towns and high streets in Wales.

- j) There is clear concern about the possibility of further real term reductions in public funding beyond 2024-25, and based on current indications from UK government fall well short of meeting the increasing and anticipated demands on local government and wider public services. We urge Welsh Government to press the UK Government to provide more reliable indicative funding increases over the medium term, to help local authorities with their financial planning.

It should be noted that some councils have very high levels of reserves, while Monmouthshire has very low levels of reserves and suggest that this should be taken into account in the distribution or allocation of specific grants.

- k) As a rural authority Monmouthshire is confronted by particular challenges in offering services like social care, waste collection, transport and highways across a wide area. Indeed, the council looks to recognise these difficulties by sustaining locally accessible services to combat rural isolation.

Monmouthshire calls on the Welsh Government to base funding on a fairer system, acknowledging the unique challenges rural counties face when providing services across a diverse geography.

- l) Monmouthshire agrees with the Welsh Government's aim to reduce unnecessary bureaucracy and move grants into the de-hypothecated settlement. It welcomes rationalisation of education grants and is pleased to see the draft budget outlining how the Welsh Government is simplifying and refocusing education specific grants.

Monmouthshire does reiterate the need for early notification of grant awards to help with budget planning for next year.

- m) We welcome the fact that Welsh Government is embedding climate change and the nature emergency into everything it does, and aligns with the Council's own commitments and ambitions. However, it also seeks clarification on the funding that will be available and that is needed to support the transition to net zero.

Acknowledging that Welsh Government has maintained capital funding at current year levels, this translates into a real term reduction in both general and specific grants. We raise concern about the impact of this on the Council's ability to address unfunded capital pressures and to allow us to invest in priority areas.

The Council remains concerned that the Chancellor's future plans for public spending will fall well short in meeting the growing demands and expectations on local council services in Wales. Monmouthshire and all of local government in Wales wants to continue working closely with the Minister to ensure local government finances are put on a sustainable footing and to deliver the services that our communities need.

We share common goals of reducing inequality and poverty, and addressing the climate and nature emergency. There is clear and collective acknowledgement of the challenges of the cost of living crisis and public spending constraints and we look

forward to working with Welsh Government through the social partnership that binds us together as public services.

Yours sincerely,

Councillor Ben Callard – Cabinet Member for Resources

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Appendix 4 - Indicative Capital budget 2024/25 to 2027/28

CAPITAL SCHEME	Draft Budget 2024/25	Indicative Budget 2025/26	Indicative Budget 2026/27	Indicative Budget 2027/28
Expenditure	£	£	£	£
Property Maintenance	1,653,357	1,653,357	1,653,357	1,653,357
Property Maintenance Fees	236,194	236,194	236,194	236,194
County Farms Maintenance	300,773	300,773	300,773	300,773
Upgrade School Kitchens	39,725	39,725	39,725	39,725
Asset Management Schemes	2,230,049	2,230,049	2,230,049	2,230,049
Abergavenny 3-19 school	19,456,606	4,151,797	0	0
School Development Schemes	19,456,606	4,151,797	0	0
Footway Reconstruction	190,453	190,453	190,453	190,453
Carriageway resurfacing	1,136,540	1,136,540	1,136,540	1,136,540
Reconstruction of bridges & retaining walls	449,041	449,041	449,041	449,041
Road safety & trafficman programme	129,508	129,508	129,508	129,508
Signing upgrades & disabled facilities	38,091	38,091	38,091	38,091
Safety fence upgrades	76,181	76,181	76,181	76,181
Street Lighting Defect Column Programme	171,408	171,408	171,408	171,408
Flood Alleviation Schemes	386,427	386,427	386,427	386,427
Structural Repairs - Public rights of way	118,091	118,091	118,091	118,091
Survey's and Closures - Public rights of way	90,000	90,000	90,000	90,000
Carriageway improvements	500,000	500,000	500,000	500,000
Highways OPS: Minor improvements	812,000	812,000	812,000	812,000
Ash Dieback/Dangerous Trees works	200,000	100,000	100,000	100,000
Infrastructure & Transport Schemes	4,297,740	4,197,740	4,197,740	4,197,740
Capital Region City Deal	0	730,200	730,200	730,200
Regeneration Schemes	0	730,200	730,200	730,200
Disabled Facilities Grant	900,000	900,000	900,000	900,000
Access for all - Schools	50,000	50,000	50,000	50,000
Access For All	250,000	250,000	250,000	250,000
Inclusion Schemes	1,200,000	1,200,000	1,200,000	1,200,000
ICT Desktop replacement	260,000	260,000	260,000	260,000
Network Estate replacement	50,000	50,000	50,000	50,000
SRS capital reserve contribution	61,000	61,000	61,000	61,000
Ransomware & security software	42,000	42,000	42,000	42,000
ICT Schemes	413,000	413,000	413,000	413,000
Vehicle Leasing	1,500,000	1,500,000	1,500,000	1,500,000
Vehicles Leasing	1,500,000	1,500,000	1,500,000	1,500,000
Capitalisation Directive	3,110,500	507,500	507,500	507,500
Capitalisation Directive	3,110,500	507,500	507,500	507,500
Fixed Asset Disposal Costs	50,000	50,000	50,000	50,000
Area Management	20,000	20,000	20,000	20,000
Match Funding of Grant applications	500,000	500,000	500,000	500,000
Other Schemes	570,000	570,000	570,000	570,000
Total Expenditure	32,777,896	15,500,287	11,348,490	11,348,490

Funding	£	£	£	£
Supported Borrowing	(2,433,000)	(2,433,000)	(2,433,000)	(2,433,000)
Unsupported Borrowing	(8,125,743)	(3,687,323)	(3,249,200)	(3,249,200)
Grants & Contributions	(16,347,863)	(6,211,674)	(2,498,000)	(2,498,000)
Reserve Funded	(103,000)	(103,000)	(103,000)	(103,000)
Capital Receipts	(4,268,290)	(1,565,290)	(1,565,290)	(1,565,290)
Vehicle Lease Financing	(1,500,000)	(1,500,000)	(1,500,000)	(1,500,000)
Total Funding	(32,777,896)	(15,500,287)	(11,348,490)	(11,348,490)

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SUBJECT:	Community and Corporate Plan Performance Update
MEETING:	Cabinet
DATE:	17th January 2024
DIVISIONS/WARDS AFFECTED:	All

1. PURPOSE:

- 1.1 To provide Cabinet with an update on the progress that has been made to deliver the commitments set out in the Community and Corporate Plan 2022-28.

2. RECOMMENDATIONS:

- 2.1 That Cabinet use this report as part of their continuous monitoring of how effectively the council is delivering its objectives to identify where departments are not on track to meet the targets and identify any remedial actions that may be required.
- 2.2 That Cabinet formally approve the targets for 2023/24.
- 2.3 That Cabinet reflects on the deliverability of the Community and Corporate Plan in light of the budget settlement for 2024/25 and outlook for the following years.
- 2.4 That Cabinet agrees to receive a report in the first quarter of 2024/25 setting out revised measures alongside targets for performance up to 2026/27 taking advantage of in-year work done on becoming a Marmot Region with a move towards improved measurement of outcomes rather than outputs wherever possible.

3. KEY ISSUES:

- 3.1 In April 2023, Council approved the Community & Corporate Plan 2022 -2028. The plan establishes a clear purpose to become a zero-carbon county, supporting well-being, health and dignity for everyone at every stage of life. The plan sets six objectives, also the Council's well-being objectives, for Monmouthshire to be a:
- Fair place to live where the effects of inequality and poverty have been reduced;
 - Green place to live and work with reduced carbon emissions and making a positive contribution to addressing the climate and nature emergency;
 - Thriving and ambitious place, where there are vibrant town centres and where businesses can grow and develop;
 - Safe place to live where people have a home they feel secure in;
 - Connected place where people feel part of a community and are valued;
 - Learning place where everybody has the opportunity to reach their potential.
- 3.2 These objectives are underpinned by a series of commitments and more detailed actions that will ensure that the organisation is able to deliver on its ambition. Appendix 1 provides an update on progress made during the first six months of 2023/24 on the commitments set out under 'what we want to achieve' in the Community and Corporate Plan.

- 3.3 The Community and Corporate Plan was produced against a backdrop of economic uncertainty with the council facing rising costs alongside increased demands. The ambition outlined in the document looks to the long term, aims to address many complex challenges and is focused on the well-being of current and future generations. Delivery of new commitments in its early stages which needs to be taken into account when assessing progress as improved outcomes are unlikely to be seen in the short term. In many instances the report is capturing progress against milestones that will show that whether progress is being made towards the longer-term objectives.
- 3.4 The update includes the latest available data for the performance measures identified in the Community & Corporate Plan. The 'latest' column in the data tables provided includes data for quarter 2 of 2023/24, and the 'previous' column includes data for 2022/23. Not all data is produced quarterly and where figures refer to different periods this is highlighted in the table.
- 3.5 When the plan was approved by Council, Cabinet were tasked with keeping the targets under review and to update these where necessary. This update includes the annual targets that have been established by Cabinet for the year 2023/24 and is seeking formal endorsement of these.
- 3.6 This report focusses on *progress updates* against actions and performance so far in 2023/24. A more detailed *evaluation* of outcomes and impact of this work will be undertaken at the end of the year. Each objective has been scored based on the council's self-evaluation framework using a scale of 1-6, where 1 is unsatisfactory and 6 excellent, as show in Appendix 1. This provides an in-year assessment based on the progress made so far in 2023/24; this will be re-assessed at the end of the financial year.
- 3.7 The report highlights where progress is being made and performance targets are on track to be met in 2023/24 and some areas where progress or performance is not meeting targets. Key areas for particular consideration by Cabinet include:
- A fair place to live: Level 4 (Good). We want to tackle the effects of poverty. This will take time. In the short-term we are focused on some of the things that will help alleviate the cost-of-living crisis and provide families with some stability. Universal free school meals have been rolled out in all primary schools to benefit families with young children. A total of 170,777 meals were provided throughout September and October, with 76% of pupils receiving the meals. We have supported families experiencing food insecurity, through community fridges, food clubs and Food and Fun provision which served up 8,632 healthy meals through the summer holidays. We are committed to working with and alongside communities and have demonstrated this with a participatory budgeting scheme to ensure grants received are targeted and spent effectively.
 - A green place to live: Level 3 (Adequate). We have a clear commitment to reducing our impact on the planet through refreshing the climate and nature emergency strategy, promoting the circular economy, implementing our socially responsible procurement strategy and partnering with local farmers to develop sustainable local agriculture practices. Thanks to the efforts of residents, we have recycled 72% of waste so far this year. We now have a clear understanding of the carbon we emit

as an organisation and are actively reducing this while increasing our capacity to generate renewable energy on our sites. However, we recognise that scale of change required to becoming net zero by 2030 is significant and complex and our resources are not commensurate to this challenge which reflects our scoring of this objective.

- A thriving and ambitious place: Level 4 (Good). We want to see thriving town centres and be a place where people and businesses succeed. We are developing an Economy, Employment & Skills Strategy which will set the economic ambition of the county. Local partnerships have been established with town councils and other key stakeholders to drive the development of the placemaking plans in Monmouth, Abergavenny and Magor with Undy. Welsh Government Transforming Towns funding has been secured to support the development of the plans. £6.9 million of funding has been secured for active travel which is being used to develop new and improve existing active travel routes. We have assisted 81 business with advice and support so far this year to help them on their journey.
- A safe place to live: Level 3 (Adequate). We want people to have a safe place to live and have developed a Rapid Rehousing Transition Plan to support anyone experiencing homelessness to move into a settled home as quickly as possible. Through a range of activity in this plan we have reduced the use of costly and unsuitable B&B accommodation for homeless households from 92 to 59 households in the last six months. We've also succeeded in increasing the percentage of homeless applications who are prevented from becoming homeless from 50% to 68%. The Replacement Local Development Plan (RLDP) Preferred Strategy was agreed by Council in October. As a result of the shortage of development land, phosphate levels in river and delays in the RLDP, fewer affordable homes have been provided, with 13 granted planning permission so far this year.
- A connected place where people care: Level 4 (Good). We are working towards more preventative approaches that will reduce the need for care. In the immediacy, increasing demand and the complexity of social care cases remain challenging. We have developed a micro-carers project to meet demand through small-scale local enterprises who are supporting an increasing number of people (52) in their local community. We are developing a new care home in Portskewett with 32 bedrooms providing long-term support for people living with dementia and also short-term support in the form of respite. Two children's homes have been commissioned through partnership models, one of which is providing specialised provision for young people with very complex needs. A recruitment and retention strategy for our social care workforce has been developed, with a particular focus on addressing areas where there is high demand. We continue to face a number of challenges in being able to respond to people's care and support needs as quickly as we would want.
- A learning place: Level 4 (Good). A range of approaches to reducing barriers to learning for vulnerable pupils have been developed, including a whole school approach to emotional and mental wellbeing and all schools engaging with

emotional literacy support assistants. Attendance levels are yet to return to where they were pre-pandemic, with the rate of return slower in secondary schools (88.1%) than primary schools (92.9%) and for those eligible for free school meals. Development of the new King Henry VIII all-through school in Abergavenny is progressing well. The new building will be net zero supporting our commitment to decarbonise our operations. The school will have the capacity for 1,200 secondary and 420 primary age pupils and 200 places for post-16 education.

- 3.8 New strategies are currently being developed for the council's absolute priorities of tackling the climate emergency and inequality. These will bring further detail on the things we are doing to deliver on our ambitions.
- 3.9 Appendix 2 shows the latest data on measures that are being tracked to inform the work in the plan. We want to see positive movement in these measures but we recognise that our work is only part of a much bigger picture with my partners and other agencies playing a role and so we are not able to set targets against them.
- 3.10 A dashboard providing further detail on the quantitative measures in the Community and Corporate Plan is updated quarterly on the council's intranet page the Hub. Further information on the activity being undertaken is contained in relevant service business plans. These are updated quarterly and are also available for members to view on the council's intranet.
- 3.11 An annual self-assessment of performance in 2023/24 will be produced at the end of the year in line with the performance requirements under the Local Government and Elections (Wales) Act 2021 to produce a self-assessment report and requirements under the Well-being of Future Generations Act to produce an annual report showing progress against the Council's well-being objectives.

4. EQUALITY AND FUTURE GENERATIONS EVALUATION (INCLUDES SOCIAL JUSTICE, SAFEGUARDING AND CORPORATE PARENTING)

- 4.1 An integrated impact assessment was completed on the Community and Corporate Plan. This is a performance progress report and is not seeking a decision that would have an impact on these areas. The report includes information on progress the council has made on the Future Generations Act, equalities, socio-economic duty, the Welsh Language, safeguarding and corporate parenting and social justice.

5. OPTIONS APPRAISAL:

- 5.1 Each of the programmes of activity in the Community and Corporate Plan have been considered against the other choices that could have been made; further information on the process undertaken is in the plan. Every choice we make carries an opportunity cost. Some of these commitments – such as the building of new schools – have already been approved by Council as part of an agreed policy position while others are in the early stages of development. Each new proposal brought forward to deliver against these goals will be subject to an individual decision in accordance with the constitution.

6. EVALUATION CRITERIA:

6.1 The Community and Corporate Plan sets out clearly the council's purpose. It contains specific objectives which can be measured over time. The report provides an update on performance and targets of the full measurement framework set in the plan. The decision to adjust targets over the lifetime of the plan, in response to changing circumstances, sits with Cabinet and Chief Officers.

6.2 The actions to deliver the plan are embedded in the service business plans of individual teams and the performance measures are updated on a specific dashboard. This report provides a headline progress update for Cabinet and will be made available to the Performance and Overview Scrutiny Committee. A full evaluation of progress will be produced annually as part of the authority's self-assessment carried out under the Local Government and Elections (Wales) Act 2021.

7. REASONS:

7.1 To provide cabinet with an update on progress being made so far in 2023/24 to deliver the commitments set out in the Community and Corporate Plan 2022-28.

8. RESOURCE IMPLICATIONS:

8.1 This is a progress report and there are no direct resource implications. Each of the activities in the community and corporate plan carries some resource implications and need to be considered as part of the Council's challenging financial position. Cabinet has set an expectation that the budget build for 2024/25 will recognise priorities set within the Community and Corporate Plan with reducing the impact of inequality on citizens and climate change on communities being central to all considerations.

9. CONSULTEES:

Cabinet
Strategic Leadership Team

10. BACKGROUND PAPERS:

[Community and Corporate Plan 2022-28](#)
[Community & Corporate Plan Measurement Framework](#)
[Self-Assessment Report 2022/23](#)

11. AUTHORS:

Richard Jones, Performance and Data Insight Manager
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Appendix 1 – Six-month 2023/24 Community & Corporate Plan performance report

The Community & Corporate Plan 2022-28 contains six objectives which focus on the longer-term future of the county and aim to address complex challenges, in line with the Future Generations Act.



The long-term nature of some objectives means that the effects of some activity may not be clearly demonstrable over short timescales, and some activity will have an impact over the longer term. The targets included in this progress report are reflective of where the council aspires to be in 2023/24. Informed by the evidence gathered, each objective has been assessed on a scale of 1-6 based on performance so far in 2023/24 by applying the following principles:

Level	Definition	Description
6	Excellent	Excellent or outstanding – all performance measures have achieved the target set and all actions have been delivered
5	Very Good	Major strengths – a significant majority of actions and measures are on track. No more than one or two falling short
4	Good	Important strengths with some areas for improvement – the weight of evidence shows that the successes are greater than the areas that have not been achieved
3	Adequate	Strengths just outweigh weaknesses – the evidence of success marginally outweighs areas that are not on track. Some actions are behind schedule and some measures are falling short of planned targets
2	Weak	Important weaknesses – the majority of measures and actions have not been achieved
1	Unsatisfactory	Major weakness – in most areas, performance is assessed as moving in the wrong direction and the vast majority of actions have not been delivered

Community & Corporate Plan Objective: A Fair Place to Live

Evaluation Score	
4	<p>Important strengths with some areas for improvement – the weight of evidence shows that the successes are greater than the areas that have not been achieved.</p> <p>Good progress has been made putting in place services that will help people who are struggling with the cost of living. These will help bring stability to peoples’ lives while we work with communities to develop the preventative services that will make a real difference in the longer-term such as our work with partners across Gwent to tackle health inequalities.</p>

What we want to achieve	Progress made so far
<p>Improved life chances for people regardless of income background</p>	<p>Universal free school meals have now been rolled out to all primary school children, totalling 6,064 pupils. A total of 170,777 meals were provided throughout September and October. Uptake of meals has been varied but has seen an overall increase from 64% of primary school pupils accessing free school meals in April to 76% in October.</p> <p>The council has continued to support those affected by the cost-of-living crisis through a range of methods including the Money Matters campaign which signposts residents to sources of support. The Council also worked with Mind Monmouthshire and Citizens Advice Monmouthshire to set up cost of living support drop-in sessions across the county which offer advice on ensuring people are getting all the money and benefits they are entitled to, making money go further and guidance on managing energy bills. There is also help and advice on getting back into work or more secure employment as well as emotional and wellbeing support. A cost-of-living seminar for members was held to provide an overview of current themes and issues affecting Monmouthshire as well as sources of support.</p> <p>MonLife continued to deliver fun and inclusive activities for children throughout the school holidays. Throughout August, the team successfully delivered 3,363 hours of play provision, with a total of 10,605 attendances, 2,821 of which were children eligible for free school meals. 8,816 meals were provided across all summer provision, and 413 food parcels were raised and provided to families.</p> <p>A new strategic equality plan is being developed to cover the period 2024-28 which will add further detail to the work being developed to progress this objective.</p>

Residents have better access to council services and support needed to live a healthy life

Community fridges continue to be an indirect support for those experiencing food insecurity. Originally intended to reduce food waste, community fridges are an option for families experiencing food insecurity. Community Fridges are currently operating in Monmouth, Abergavenny, Caldicot, Goytre and Chepstow, with around 480 people visit a community fridge each week, and each fridge saves around 2 tonnes of food going to landfill per month. Funding has been secured for consultancy support to help the community fridge volunteers and to look at sustainable funding options, common policies, practices and developing new fridges.

The council has also partnered with a charity called Family Action to develop a series of food clubs in Monmouthshire. These clubs operate on a membership model, whereby people pay an annual membership fee (around £1) and then are able to buy a subsidised bag of groceries each week. They will also have access to welfare advisors and financial inclusion support. Two clubs have been established by the council, one in Chepstow and another in Wyesham; these are in addition to two community-established clubs in Goytre and Abergavenny. Each club has the capacity to support 50 families, with an average of 31 grocery bags being provided each week.

Five primary schools across the county continued to provide healthy meals and activities for children during the summer holidays through Food and Fun. This is a school-based education programme, providing food and nutrition education, physical activity and healthy meals to children from disadvantaged areas during the school summer holidays. Attendances at Food and Fun continues to grow, increasing from 2,005 attendances in 22/23 to 4,316 attendances in 23/24, with schools serving up 8,632 healthy meals. Free meals were also provided in all four youth centres across the county, enabling young people to have access to healthy meals on the days the centres were open, with opportunities to take home food parcels if wanted.

Citizens are able to participate in council and community decision-making and take actions which enable them to shape their own futures

The possibility of reintroducing area committees was discussed at a Democratic Services Committee in June, with the committee concluding that Members should be able to establish an informal forum, but this would not be across the board and only when necessary, given mixed responses to area committees in the past.

To enhance the growth of volunteers, provide continuous assistance, and to ensure a high-quality volunteering experience, the council has developed the Volunteering Good Practice Guide. This interactive document aims to educate staff members responsible for volunteer support and covers a wide range of topics, starting from safe recruitment practices and recording data through Kinetic to the creation and promotion of volunteering opportunities. Additionally, upon completing the guide, participants gain access to a set of online training modules developed in collaboration with Be Community which serve as a resource for the professional development of volunteers. The MonLife team have also worked to promote volunteering opportunities, teaming up with the communications team to produce volunteers' information, stories and videos as part of The Big Help Out and Volunteers Week.

To better enable participatory budgeting funding to lead to effective engagement within communities, funds were divided into four parts; the first, a small grant scheme, You Decide, through which 75 schemes were allocated funding totalling £80k, with around 7,000 citizens involved. The second was reaching communities of interest, including supporting care leavers and young carers with £25k and diverse

communities, which included members of Monmouthshire’s Muslim and Ukraine communities, with £10k. The third was focusing on a very local area and working with that community to decide how best to spend grant funding; examples of spend includes a small community growing area and addressing food/holiday hunger. The final element included working with established community groups who had experience reaching ‘hard-to-reach’ groups; each were given £5k. Spend examples include cost of living support and family fun days.

A formal submission to become an accredited county of sanctuary has been prepared in line with the policy commitment made by council. Alongside this, the authority has enabled the creation of the county’s first Ukrainian community group in Chepstow. A new Strategic Equality Plan is being developed and will be consulted on in December and January ahead of a recommendation to Council in February. It will incorporate our contributions to national action plans on race, disability, gender and LGBTQ+.

Well-being of Future Generations Act impact

Contribution of Council goal to Future Generations Act Well-being Goals

Prosperous Wales	Resilient Wales	Healthier Wales	More equal Wales	Wales of cohesive communities	Vibrant culture and thriving Welsh Language	Globally responsible Wales
✓		✓	✓		✓	

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Well-being Objective: A Fair Place to Live

Adopting community-focused approaches promotes **collaboration** which in turn will support well-being. By working with communities, empowering people and ensuring they can access support we hope to **prevent** problems from occurring. Opportunities are plentiful in our county, so it is vital that everyone can be **involved** to maximise benefits to well-being. This should have a **long-term** benefit to individuals and communities. Our actions will have an **integrated** benefit for many aspects of the act, they will promote a Wales of cohesive communities and overall, help to create a more equal Wales.

Measure	Previous	Latest	Target for 2023/24	Comment
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Number of children receiving universal free school meals ⁱ	2,583	6,064	All primary school children	6064 is the total number of primary school pupils (excluding nursery) as of September 2023 – all primary school children now have access to free school meals.
Percentage of people successfully completing the exercise referral scheme at week 16 ⁱⁱ	48	56	50	
Percentage of people who feel they are able to influence decisions in their local area ⁱⁱⁱ	20	33	34	Latest figure is for 2021/22, and the previous figure is for 2018/19 – This was not measured as part of the National Survey for Wales 2019/20 or 2022/23.
The percentage of secondary school pupils who take part in the national Make Your Mark survey and Monmouthshire-specific ballot ^{iv}	26	71	72	Previous is figure 2021/22, latest is 2022/23. The 2021/22 figure is a result of limited ability to engage with schools due to disruption such as closures as a result of the pandemic. Monmouth comprehensive school did not take part during 2022/23.
Percentage of people who volunteer ^v	32	39	40	
Number of local employers who make disability confident employer pledge ^{vi}	35	46	50	
Percentage of the population who can speak Welsh ^{vii}	16.6	15.9	16.9	
Number of Welsh speakers employed by the council	278	278	303	

Community & Corporate Plan Objective: A Green Place to Live

Evaluation Score	
3	<p>Strengths just outweigh weaknesses – the evidence of success marginally outweighs areas that are not on track. Some actions are behind schedule and some measures are falling short of planned targets.</p> <p>We’re putting a lot of the building blocks in place. This includes new strategies for climate, food and flooding and it will take some time for us to see the full benefit of these. Meanwhile we’ve made good progress in key areas including a 9% reduction in the emissions from our operations, and a 6% increase in the amount of renewable energy we can generate from our estate and exceeding recycling targets. We are committed to becoming net zero by 2030 but recognise that the level of investment required means this is going to be challenging. We cannot be complacent, and this is reflected in the evaluation score.</p>

What we want to achieve	Progress made so far
<p>By 2030 Council operations are net zero and local communities are supported to reduce their own carbon footprint</p>	<p>The Climate Strategy is being reworked into an overarching Climate and Nature Emergency Strategy and is due to be reported in April 2024. This reworked strategy will be underpinned by four action plans to better reflect the breadth of work that is taking place: Internal decarbonisation, Biodiversity and Nature Recovery, Rivers and Oceans and Community climate change. A Climate and Nature Emergency Working Group has already been established, with two councillors from each group represented, and has been renamed the Climate and Nature Emergency Steering Group.</p> <p>The Socially Responsible Procurement Strategy 22-28 was approved by Council in June – a collaborative Socially Responsible Procurement Policy is now being developed with Cardiff City Council and is due to be completed in November 2023. This policy will allow for both councils to use collective efforts to include Economic Development colleagues and technical leads to better engage with local supply chains to promote new requirements and potentially identify supply chain voids. A number of Circular Procurement Carbon Reduction sessions have been held, hosted by WRAP Cymru, with interested stakeholders to better understand the role that procurement can play in helping to reduce carbon emissions through third party spend. A carbon reduction guidance note is in the process of being agreed – this will then be shared with interested stakeholders to capture and reduce carbon.</p> <p>Overall, carbon emissions (tCO2e) from the council’s assets and operations decreased from 48,576 (21/22) to 44,248 (22/23). There is variation in the changes within different operational and direct elements of the council’s emissions and the capture of this data requires further development. Additional expertise and capacity are being sourced to help develop trajectories and pathways to our net zero carbon by 2030 target. This will enable us to establish where we should best be focusing our resources to generate the maximum carbon savings.</p>

Costed trajectory plans are currently being developed and due to be completed by the end of the financial year. An electric vehicle charging infrastructure (EVCI) strategy is also currently being developed; research has been completed by Cenex to identify potential Electric vehicle charging infrastructure requirements and public charging locations. The strategy is due to be presented to Scrutiny in January ahead of being presented for Cabinet approval.

Benthyg Cafes in Monmouth, Abergavenny and Chepstow continue to operate. Benthyg Caldicot is not yet established due to difficulty in finding a key volunteer to support its opening. The long-term sustainability of Benthyg cafes and other circular economy projects remain an area for development due to the high turnover of volunteers, volunteers being reluctant to take on high-level responsibilities and volunteer burnout. The council has applied for SPF funding to appoint 4 Circular Economy Project Officers who will be place based to help address these issues. These officers would add resource to recruit, support, develop and retain volunteers to existing and proposed circular economy projects, and to aid in knowledge sharing between projects.

Nature recovery, improved environmental and river health

The council's Local Flood Risk Management Strategy and Plan are both currently under review. A new combined strategy document is due to be published in 2024. Dŵr Cymru has recently committed to providing phosphate stripping technology at Monmouth and Llanfoist wastewater treatments works by April 2025. This commitment will help bring forward development in the towns of Monmouth and Abergavenny.

The reworking of the Climate Emergency Strategy into the Climate and Nature Emergency Strategy has allowed for biodiversity and nature recovery to take a more prominent role. This will be supported by the updated Biodiversity & Ecosystem Service Forward Plan, the Local Nature Recovery Action Plan (priorities to be agreed by the Local Nature Partnership) and the updated Green Infrastructure Strategy. The Monmouthshire Local Nature Partnership was also relaunched and renamed in Q1. Its purpose is to develop new links across the county to celebrate, conserve and enhance our unique and rich habitat, and bring people together to share best practice and resources to maximise benefits for people and wildlife. The partnership will meet twice yearly; the first meeting took place in spring 2023.

Local Places for Nature (LPfN) further funding has been secured to roll out the Community Nature Spaces (1M) and Green Corridors projects (the latter delivered through the Gwent Green Grid programme) over 2023-25. A further £900k of UK Gov Shared Prosperity Fund (SPF) and Heritage Lottery Funding (HLF) has been secured through the Gwent Green Grid Partnership to deliver green infrastructure and nature-based solutions that supports health and well-being opportunities through collaboration and shared practice.

Sustainable local agriculture and farming practices with public services and residents

A Localism and Food Strategy is currently being developed. A members' seminar on food and localism, explaining the current context and how the council will progress, has been developed and will be delivered soon, with a draft outline of the strategy being presented to informal cabinet shortly after. A strategy group will then be established to develop the full strategy and monitor its delivery. Commitments

consuming more local and seasonal produce

to supporting rural diversification and foster thriving local food economy are included in the Economy, Employment and Skills strategy, due to be presented to Cabinet in February 2024.

The council continues to work in collaboration with interested community groups to establish clear processes for providing access to council land for food growing. Ten community-led projects were awarded small grants to run sustainable food-growing projects, nine of which were taken forward. Two training events for community groups were held with over 20 settings represented across the sessions. Three food growing and sustainability events were held in May with wide community and partner participation. A website for Monmouthshire Food Partnership is currently being developed which will act as an information portal for the county's sustainable food development activity. The council has joined the Welsh Veg for Schools phase 2 pilot which went live in September. This partnership project aims to bring agroecological Welsh vegetables from small suppliers into school meals.

A regenerative agriculture mentoring scheme has been established in partnership with ACE Monmouth, Monmouthshire Food Partnership, and world-renowned Herefordshire-based 'regen ag' consultant Ben Taylor-Davies (RegenBen). Three Monmouthshire farm businesses including one MCC County Farm tenant were selected through an open application and scoring process. Mentoring will run through 12 months to mid-to-late 2024. The project was promoted at the Usk and Monmouth shows and events are planned to take place in the next few months. A regenerative agriculture discussion group (Talk Farm Regen Monmouthshire) has also been launched, led by a local farmer with support from Sustainable Food Development officers. Two farm walks have been held and more events are planned. A WhatsApp and Facebook group provide forums for discussion and knowledge exchange.

Contribution of Council goal to Future Generations Act Well-being Goals						
Prosperous Wales	Resilient Wales	Healthier Wales	More equal Wales	Wales of cohesive communities	Vibrant culture and thriving Welsh Language	Globally responsible Wales
	✓	✓		✓		✓



Well-being Objective: A Green Place to Live

Monmouthshire is a beautiful place, with a stunning natural and built environment. We have a collective responsibility to ensure this is available for future generations to enjoy so our plans must be focused on the **long-term** and look to **prevent** problems from occurring in years to come. **Involvement** is required with partners and communities to maximise the potential of the environment within the county. Working in **collaboration** with organisations who can enhance our environment will provide expertise in aspects of our work, for example this will allow us to trial the latest technologies in renewable energies. Creating a healthy and resilient area for people to enjoy demands the **integration** of this objective as the environment within Monmouthshire forms such an important part of achieving a range of goals.

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Measure	Previous	Latest	Target for 2023/24	Comment
Carbon emissions (tCO ₂ e) from the council's assets and operations ^{viii}	48,576	44,248	40,500	Latest figure is 2022/23, previous is 2021/22. Measures and targets to be reviewed as part of the development of the decarbonisation strategy.
Capacity (MW) of renewable energy equipment installed on the council's estate	6.224	6.598	6.640	Latest figure is 2022/23, previous is 2021/22. Measures and targets to be reviewed as part of the development of the decarbonisation strategy
Number of active travel routes in development ^{ix}	16	14	16	These reflect annual figures and are linked to the funding available each year and the size and scale of projects delivered
Number of active travel routes created or enhanced	17	9 Cumulative: 26	18 Cumulative: 35	These reflect annual figures and are linked to the funding available each year and the size and scale of projects delivered.
Percentage of municipal waste sent for recycling, reuse or composting ^x	69.97	72.93	70	

The number of allotment plots created by the council and through private sites supported by the council	New measure	New measure	31	
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Community & Corporate Plan Objective: A Thriving and Ambitious Place

Evaluation Score	
4	<p>Important strengths with some areas for improvement – the weight of evidence shows that the successes are greater than the areas that have not been achieved.</p> <p>Much of the work in the recent period has been focused on developing plans to improve our places. We’ve been able to secure funding for much of this work which has led to a higher evaluation score. We’ve also begun to see shovels in the ground on some projects, in particular our active travel schemes alongside improvements against key measures..</p>

What we want to achieve	Progress made so far
<p>Vibrant town centres which bring people together and attract investment</p>	<p>Local partnerships have been established with town councils and other key stakeholders to drive and oversee the development of the placemaking plans in Monmouth, Abergavenny and Magor with Undy. Initial discussions have taken place with local stakeholders about a new placemaking plan for Caldicot. Welsh Government Transforming Towns funding has been secured to support the development of the plans, which are due to be presented for cabinet approval in October 2024. The Wye Valley Villages Plan for the Future delivery group is taking forward work around key priorities it has identified, focusing on broadband provision, traffic and road safety, sustainable transport, and the River Wye. The Lower Wye Valley Tracks and Trails project is also underway via a wide public engagement process led by the Wye Valley AONB. The intent is to develop an integrated recreational access strategy and action plan for the lower Wye Valley in Monmouthshire, reflecting the importance that was attached to the recreational network through the consultations on the Wye Valley Villages Plan.</p> <p>Development of strategic building improvement projects in Caldicot, Chepstow and Monmouth town centres is underway. Implementation will be funded by the council, Welsh Government Transforming Towns funding, and match funding from local partners. A detailed audit of town centre vacancies was undertaken in Chepstow and Monmouth – the key areas of concern – to understand factors affecting vacancy rates and how the council and partners can best support to minimise vacancies. The town centre building improvement grant scheme is being used to help bring empty/underused properties back into use. The council is also working with Usk Town Council on the development of proposals for public realm improvements in Bridge Street and Twyn Square. Proposals for public realm and active travel improvements in Monnow Street have been developed through extensive consultation and engagement with residents, businesses and stakeholders, and have been adopted for delivery by the council.</p>
<p>People of all ages and backgrounds have the skills</p>	<p>An Economy, Employment & Skills Strategy is being developed and is due to be presented for Cabinet approval in February. This will include an action plan setting the economic ambition for the county and providing a strategic framework that guides future economic development</p>

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to do well in work or start their own business

interventions. The employment team is providing support to anyone interested in starting their own business via the Business Monmouthshire project, funded by the Shared Prosperity Fund. A total of 45 potential entrepreneurs have been provided with assistance to be business ready throughout the last six months. The team have also worked to create a weekly six-step programme to support individuals into employment which was piloted in Abergavenny and Caldicot. This includes a mock job interview to help individuals improve their skills and secure employment. The team also held two job fairs in Abergavenny and Caldicot with a combined attendance of 225 attendees and 80 employers/providers.

A Monmouthshire food and drink business cluster has been developed, aiming to hold a series of events and networking opportunities to encourage collaboration and knowledge exchange among local small and micro businesses and start-ups. The programme of events has now been confirmed and announced, with booking for the first event opened in September.

Sustainable Transport and Infrastructure

A Local Transport Plan is currently being developed and is due to be presented to Public Services Scrutiny Committee before being presented to Cabinet in February. Discussions are ongoing with a provider to develop a pool car pilot scheme that will improve access to pool vehicles, reducing emissions and the cost of business mileage. Procurement is being undertaken to launch an initial scheme of 10 electric/hybrid vehicles.

Active Travel continues to expand, with £500k core funding and £6.9m funding achieved through ATF funding for financial year 23/24 to develop new and improve existing active travel routes. This has so far been used to implement quick but effective changes, including installing dropped curbs at various locations. An active travel live counter dashboard is now fully operational, with 6 live counter sites uploading information twice daily. These sites are based in designated localities for continual baseline active travel monitoring. Countryside counters have also been incorporated to provide a single source of foot and cycle traffic within MonLife. Active travel colleagues are working with colleagues in planning and other departments to ensure future LDP sites have maximum active travel potential prior to habitation.

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Well-being of Future Generations Act impact						
Contribution of Council goal to Future Generations Act Well-being Goals						
Prosperous Wales	Resilient Wales	Healthier Wales	More equal Wales	Wales of cohesive communities	Vibrant culture and thriving Welsh Language	Globally responsible Wales



Well-being Objective: A Thriving and Ambitious Place

This goal is aimed at the **long-term** viability of Monmouthshire as a thriving place to live, work and visit. The location of Monmouthshire as the gateway to South East Wales means we must embrace working with neighbouring areas to maximise opportunities. Keeping Monmouthshire thriving and well-connected promotes **integration** and impacts on the social, economic, environmental and cultural well-being of the county. This requires **collaboration** with local businesses and other organisations, and **involvement** from the local community to maximise opportunities. Considering the global well-being of Wales is also important and this goal focuses on ensuring decisions are made with future generations in mind and takes a **preventative** approach to enable the retention of young people.

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Measure	Previous	Latest	Target for 2023/24	Comment
Annual economic impact of tourism (£) ^{xi}	182.79m	285.08m	3.8% growth pa	Previous is 2021 and latest is 2022.
Number of businesses assisted during the year by the local authority and its partners	55	81	160	These reflect annual figures and are linked to the funding available each year and the size and scale of projects delivered.
Number of working age people supported into employment during the year through action by the local authority	142	77	90	These reflect annual figures and are linked to the funding available each year and the size and scale of projects delivered.
Percentage of school leavers not in education, employment or training ^{xii}	2	1.8	1.6	Previous is 2021/22, latest is 2022/23.
Percentage of care experienced young people who have completed at least three months in education, training or employment by the age of 19	Not available	72.7	74.5	Latest is 2022/23.
Percentage of local authority vehicle fleet which is ultra-low emission	8	8	9	

Community & Corporate Plan Objective: A Safe Place to Live

Evaluation Score	
3	<p>Strengths just outweigh weaknesses – the evidence of success marginally outweighs areas that are not on track. Some actions are behind schedule and some measures are falling short of planned targets.</p> <p>We’ve been able to increase the availability of accommodation and have developed new approaches and partnerships to support people. This has contributed to an 18-percentage point improvement in homeless prevention and a 35% reduction in the use of bed and breakfast accommodation.</p>

What we want to achieve	Progress made so far
<p>Increased supply of good quality affordable housing</p>	<p>The Replacement Local Development Plan (RLDP) amended Preferred Strategy was endorsed for consultation by Council in December 2022. The consultation resulted in approximately 220 responses and 650 representations on the Candidate Sites register. Of significant note, the Welsh Government Planning Division’s response was supportive. As a result of the consultation, a small number of changes were proposed, with this amended strategy being presented for scrutiny in September before being approved by Council in October. This amended strategy will form the basis for the Deposit Plan, due to be reported to Council in Spring 2024 for endorsement for public consultation. The continued delay in progressing the RLDP has meant that few affordable homes have been progressed, with just 48 units of affordable housing delivered in 22/23 and 13 granted planning permission so far this year.</p> <p>There is a risk that the Council will be unable to proceed with the Deposit RLDP if appropriate Gypsy, Roma and Traveller sites are not identified. Three sites have been identified by Cabinet following assessments by officers of council owned land. These sites will be subject to public consultation. Cabinet’s decision on which Gypsy, Roma and Traveller sites will be included in the Deposit Plan will be informed by the findings of this consultation.</p>
<p>Reduce the number of people who become homeless</p>	<p>A Rapid Rehousing Transition Plan and accompanying Action Plan were adopted by Cabinet in April, in line with requirements from Welsh Government. This plan aims to increase the prevention of homelessness and to make time spent by homeless households in temporary accommodation brief. A young person’s homeless panel has been established and work is ongoing. Attendees include the housing and housing support teams, the economy, employment and skills teams as well as colleagues from Compass – the youth homelessness project. The findings of this work will inform future planning and will help us to focus resources where they are needed.</p> <p>Through Rapid Rehousing the council has facilitated increased resources into homeless prevention, for example through additional staffing and the availability of the Homeless Prevention Fund. New arrangements have been established with partner agencies such as the DWP and</p>

Shared Benefit Service to support more people at risk of homelessness. Between April and October 2023, 165 awards were given to both households at risk of homelessness to help tackle arrears/debt and households experiencing homelessness to enable them to remain in their current accommodation or access alternatives. The Council has also built on previous initiatives to support homeless households, such as introducing Housing First, substance misuse support and support for young people with higher need through the recent expansion of the Housing First scheme with Pobl and the introduction of MoYo - dedicated housing floating support for young people. These initiatives have contributed to the increase in the percentage of homeless applications who are successfully prevented from becoming homeless from 50% at year-end 22/23 to 68.3% currently.

The council has also increased the availability of both temporary and settled homes for homeless households through a range of means including partnerships with private landlords through Monmouthshire Lettings; more social homes being allocated to homeless households; more homes through new build developments and acquisitions. This has included dedicated temporary accommodation for young people; the council has been well supported by Monmouthshire Housing, Pobl and Melin in this regard. The increased support for those at risk of homelessness combined with the increase in availability of both temporary and settled accommodation have both contributed to the reduced use of costly bed and breakfast, B&B, accommodation; the number of homeless households in bed and breakfast accommodation has decreased from 92 at year-end 22/23 to 59 currently.

A more energy efficient housing stock with a lower carbon footprint

The council's ECO4 Flexibility Eligibility Statement of Intent was published in August, setting out the eligibility criteria for the scheme which runs until 2026. The Energy Company Obligation (ECO) is a government energy efficiency scheme which aims to reduce carbon emissions and tackle fuel poverty by improving the energy efficiency of homes occupied by residents on low incomes who are vulnerable to the cold, and/or live in homes that are hard to heat. The role of the council is to assess the eligibility of applicants; a business support officer will be appointed to assist in verifying applications.

Communities in which everyone feels safe and respects each other

The extension of three Public Spaces Protection Orders (PSPOs) in Bailey Park, Abergavenny Lower and Monmouth Town were approved in September. All three PSPOs were extended by three years to October 2026. Historically, there have been issues with Anti-Social Behaviour (ASB) in these locations relating to the consumption of alcohol; PSPOs provide police with powers to deal with people in possession of alcohol who had caused, were causing or likely to cause ASB.

A Gwent regional violence against women and domestic sexual violence (VAWDASV) strategy had been developed and agreed. The strategy is now being implemented through partnership arrangements.

Well-being of Future Generations Act impact

Contribution of Council goal to Future Generations Act Well-being Goals						
Prosperous Wales	Resilient Wales	Healthier Wales	More equal Wales	Wales of cohesive communities	Vibrant culture and thriving Welsh Language	Globally responsible Wales
	✓		✓	✓		✓



Well-being Objective: A Safe Place to Live

It is important the council **collaborates** with partners and **integrates** with their plans to reduce homelessness and ensure people can stay in their own homes and communities wherever possible. **Involving** and working with partners and community members is essential to develop communities in which everyone feels safe and respects each other. The Replacement Local Development Plan has a focus on **long term** and has affordable housing and a well-connected net zero carbon development at its heart. A focus on **preventing** problems occurring is essential to creating a safe place that people are proud to call home.

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Measure	Previous	Latest	Target for 2023/24	Comment
Number of affordable homes granted planning permission in year	50	13	N/A	
Average time (months) homeless households spend in Band 1 with a homeless duty before moving on to settled/permanent accommodation	10.2	10.9	<10	
Percentage of homeless applications who are successfully prevented from becoming homeless	50	68.3	55	
Number of homeless households in bed and breakfast accommodation	92	59	75	
Number of 16- and 17-year-olds in bed and breakfast accommodation	0	2	0	
Number of homeless households in temporary accommodation	117	130	176	

Community & Corporate Plan Objective: A Connected Place Where People Care

Evaluation Score	
4	<p>Important strengths with some areas for improvement – the weight of evidence shows that the successes are greater than the areas that have not been achieved.</p> <p>We have seen improvements in a number of key measures, including reductions in the size of care packages following reablement and positive outcomes from Building Stronger Families interventions. We are prioritising those in greatest need, but increased demand and finite resources mean we cannot meet everyone’s needs in a timely way with 84% of people using adult social care reporting that they were happy with their care and support. A full evaluation was presented to Council as part of the Chief Officers Annual Report in November 2023.</p>

What we want to achieve	Progress made so far
<p>High quality social care which enables people to live their lives on their terms</p>	<p>Additional placements are being provided for vulnerable children and young people who require support. Two children’s homes have been commissioned through partnership models, one of which is providing specialised provision for young people with very complex needs. A revised children’s social services placement strategy is being developed and further opportunities to develop residential and supported accommodation placements are being progressed.</p> <p>Support is being provided to 204 children who are looked after (September 2023), of which an increasing number (17) are unaccompanied asylum-seeking children who are part of the UK wide National Transfer Scheme. The demand for appropriate placements remains high in a low supply environment at a local, regional and national level particularly for those with complex needs or disabilities. Because of this, there is a risk that children may need to be placed in non-regulated provision in emergency situations that is difficult to fully mitigate at present.</p> <p>Work continues on the development of a new care home in Portskewett that is due to open in March 2024, this will create 32 bedrooms providing long-term support for people living with dementia and also short-term support in the form of respite. The design focusses on supporting familiarity for people living with dementia and maintaining connection with the surrounding community. The approach of support provided by staff will also aim to ensure inclusion for the residents in all aspects of daily living.</p> <p>There is a focus on reviewing caseloads and triaging referrals to adult social care to ensure that those most in need are prioritised for assessment and intervention. Support is being provided to 1,595 (September 2023) adults with a care & support plan, which has decreased</p>

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from 1,651 in March 2023. On-going pressure across the social care and health system has meant that we cannot respond to people's care and support needs as in as timely a manner as we would want. There has been a slight increase to 84.2% of services users are happy with their care and support in the last six months.

A healthy and active Monmouthshire where loneliness and isolation are reduced, well-being is promoted, and people are safeguarded

MonLife have continued to focus on their mission to promote healthier lives and inspirational experiences and promote the vibrancy of Monmouthshire as a great place to be. MonLife provided a range of provision over Summer 2023 focused on physical activity and well-being. In total 10,605 sessions (attendances) were held across all summer 2023 play provision. This included the Monmouthshire Games held at all four leisure centres, providing all-day sports provision to 718 children and young people, through 3,185 sessions, across the school summer holidays, this is lower than the 3,414 session the previous summer. The programme promoted learning of new skills, developing confidence, meeting new people, and most importantly having fun through sport. 92% of children said they met a new friend, 71% said they tried a new sport and gave the games an average fun rating of 8.9/10.

A professional and passionate social care workforce

A recruitment and retention strategy for our social care workforce has been developed, with a particular focus on addressing areas where there is high demand. In September 2023 there were 32 vacancies across the social care sector which is a decrease from the 53 vacancies in March 2023. We are prioritising recruitment to essential posts in social care, although recruiting to social care roles in both adults and children's social services remains a challenge. We are contributing to the development of a Gwent workforce strategy, aligned to which we are developing a five-year Monmouthshire workforce plan.

We remain committed to progressing a place-based approach to social care. The micro-care project is supporting self-employed carers to develop their businesses as well as providing the opportunity for greater oversight and governance of self-employed care workers operating within Monmouthshire. The number of micro carers is steadily increasing, there are currently 20 carers registered (an increase from 9 previously), and these are supporting 52 people in their local community, delivering 390 hours of care and support in total each week.

Well-being of Future Generations Act impact

Contribution of Council goal to Future Generations Act Well-being Goals						
Prosperous Wales	Resilient Wales	Healthier Wales	More equal Wales	Wales of cohesive communities	Vibrant culture and thriving Welsh Language	Globally responsible Wales
		✓	✓	✓		

Well-being Objective: A Connected Place Where People Care



Adopting community-focused approaches promotes **collaboration** which in turn will support well-being. By working with communities, we hope to **prevent** problems from occurring. Opportunities are plentiful in our county, so it is vital that everyone can be **involved** to maximise benefits to well-being. This should have a **long-term** benefit to individuals and communities. Our actions will have an **integrated** benefit for many aspects of promoting a healthier Wales. They will promote a Wales of cohesive communities and overall, help to create a more equal Wales. There is also strong integration with our responsibilities under the Social Services & Well-being Act.

Measure	Previous	Latest	Target for 2023/24	Comment
Percentage of adult service users who have had the right information or advice when they needed it ^{xiii}	75	78.6	77.5	
Percentage of child assessments completed within statutory timescales	92.3	93.2	92	
Percentage of families reporting a positive outcome following a Building Stronger Families team intervention	87.5	100	88.1	
Number of new in-house foster carers recruited in the year	1	1	5	
Percentage of placements of children who are looked after by the local authority made with in-house foster carers	42.2	37.7	42.9	
Number of patients waiting for discharge from hospital for social care reasons (measured on an agreed census date each month)	15	21	14	As at a monthly Census date
Number of attendances at MonGames ^{xiv}	4,070	3,185	4,102	

Number of attendances at Food and Fun ^{xv}	2,005	4,316	3,840	
Number of attendances at Active Play ^{xvi}		200	312	
Percentage of adult service users who are happy with the care and support received ^{xvii}	83.5	84.2	90	
The percentage of packages of reablement completed during the year that mitigated the need for support / achieved a positive outcome	57.6	67.1	60	

Community & Corporate Plan Objective: A Learning Place

Evaluation Score	
4	<p>Important strengths with some areas for improvement – the weight of evidence shows that the successes are greater than the areas that have not been achieved.</p> <p>The quantitative measures we have available to demonstrate progress are limited. New approaches to pupil well-being have been developed to support pupils and families. Like elsewhere in Wales, school attendance has declined since the pandemic. We've rolled out the new curriculum for Wales and the development of the new 3-19, net zero school in Abergavenny has continued at pace. It will take time for these developments to have an effect on pupil outcomes and our judgements are informed by inspections carried out by Estyn.</p>

What we want to achieve	Progress made so far
<p>Improved school attendance and reduced levels of exclusion which remove barriers to learning for vulnerable pupils</p>	<p>A range of approaches have been developed to reduce barriers to learning for vulnerable pupils. The whole school approach to emotional and mental wellbeing is a structured approach for schools which helps them to understand how they are best placed to promote wellbeing. This has a hugely significant effect on children's attendance and achievement in school. The phased engagement of schools has been positive: currently 59% of schools engaged in the approach, an increase from 43%.</p> <p>All schools and settings are engaged with Emotional Literacy Support Assistants (ELSAs) and there currently have 60 practicing ELSAs who access regular supervision, operating across all bar one school in the county, making a positive impact on the lives of numerous pupils. Further training is planned for Spring term, following which every school will have a practicing ELSA/s.</p> <p>Over 500 staff across schools, as well as a range of service areas, have completed Trauma Informed Schools Training (Whole Staff, Senior Leads or Diploma level). Further training is available to schools this academic year. The approach focuses on understanding children/young people presenting with behaviours of concern and raising the awareness and capacity of adults supporting vulnerable pupils.</p> <p>The role of the Community Focused Schools lead is crucial in working with schools and partners to develop activities and relationships for the benefit of the whole school community. Including building relationships, signposting to support and benefits entitlements, poverty proofing schools and providing cost of living support. Work is being developed with the Education Achievement Service (EAS) on Tackling All Aspects of Poverty and developing a whole authority strategy on supporting disadvantaged learners.</p>

The benefits of the new curriculum in Wales are maximised through excellent teaching and learning

There is a risk that our schooling system struggles to adjust to the new patterns of need amongst our children and young people in the post-pandemic period. If children and young people do not feel able to attend school, we cannot provide the support and care that our schools and support services do with such compassion and expertise.

An Education Welfare lead has been appointed and, along with Education Welfare Officers hold attendance consultations with schools regularly to promote attendance and provide bespoke support to families. Since the pandemic, levels of attendance have fallen in schools and across Wales. Attendance levels in primary schools are increasing and returning towards pre-pandemic levels for all pupils, attendance across primary schools was 95.4% in 2018/19 and was 92.9% in 2022/23. The rate of recovery has been slower for eFSM pupils, attendance was 95% in 2018/19 and was 89.3% in 2022/23.

In secondary schools the overall decline in attendance during the pandemic was more significant and was even more substantial for eFSM pupils. Attendance across secondary schools was 95.1% in 2018/19 and 88.1% in 2022/23 and for eFSM pupils, attendance was 90.8% in 2018/19 and 78.7% in 2022/23. There is a wide range of reasons for non-attendance. Secondary school data shows the factors in non-attendance are complex and that an improvement in attendance will be much slower.

There has been an increase in exclusions in schools in Monmouthshire. This academic year, there have been no permanent exclusions that have been upheld in primary school and 5 in secondary schools. A new vulnerable learner lead has been appointed as part of the wider Inclusion team, and this role is offering a renewed and more focused universal offer of advice, guidance and monitoring with regards to managing exclusions, supporting learners at risk of exclusion and supporting their inclusion and admissions.

The Curriculum for Wales has been adopted in all primary schools and is being rolled out in all our secondary schools. This process will continue until the teaching of the first of the new GCSEs in 2025 and their first award in 2027. The Education Achievement Service (EAS) provide a comprehensive package of professional learning as part of a Learning Network Schools model to support schools and settings to realise the Curriculum for Wales within their context. Estyn inspections of nine primary and two secondary schools indicate that most schools have a clear vision for the curriculum.

The second year of implementation of the ten-year Welsh in Education Strategic Plan (WESP) is being undertaken. A five-year plan has been submitted to Welsh Ministers outlining more detailed targets. Progress has been made on the expansion of provision of Welsh medium education. Additional Welsh Government funding has been secured for three years to continue the immersion class in Y Ffin and extend this provision in other areas of the county. A seedling school in Monmouth town is being established, called Ysgol Gymraeg Trefynwy along with a Cylch Meithrin which will open in September 2024. Places will be available for pupils in nursery, reception, and year 1 with admission applications now being received and governors being recruited. Further progress is still to be made or not yet started on other outcomes in the plan.

A truly inclusive educational system that recognises learners' starting points, strengths and educational needs

In line with Welsh Government changes to accountability, aggregated data is not used at a local authority level to report on school performance. A challenge system is in place working with the EAS to evaluate the performance of individual school and supporting and challenging individual schools with their improvement.

A level of assurance has not been able to be obtained on the progress of schools because the council's ability (and that of the EAS) to see first-hand evidence has been restricted by the pandemic and more recently by the action short of strike. Reliance has been placed upon Estyn inspections to provide evidence of the standards in schools. The feedback from the eleven inspections across Monmouthshire since their return in 2022 shows a developing picture of strengths in provision.

A restructure has been undertaken and a broader Inclusion Team has been created that has meant that delivery of the Additional Learning Need (ALN) Strategy, which aims to build sustainable and resilient provision, is embedded as part of interconnected strategies and related toolkits, resources and policies for ALN, relationships, children looked after and reducing exclusions. The team have worked collaboratively to ensure all schools and early years settings were prepared for their new responsibilities under the Act through targeted training and regular online Q&A sessions. A framework is being developed for the management of specialist resource bases (SRB) provision which ensures a consistent, equitable approach across all settings.

Continue our programme of school modernisation

Work has progressed well with construction of the new King Henry VIII all-through school in Abergavenny. The new building will be net zero in line with our commitment to decarbonise our operations. The school replaces Deri View Primary School and King Henry VIII Comprehensive School and will have the capacity for 1,200 secondary school age pupils, 420 primary age pupils and 200 places for post 16 education. There will also be suitable accommodation for 71 pupils with complex neurodevelopmental and learning needs within the school. It is anticipated that the development of this school will reduce the number of pupils attending an out of county secondary school. The school is scheduled to open in autumn 2024.

Secondary school catchment areas have been reviewed and are in place for the current admission round. This means that young people in Usk now have improved access to be able to attend a secondary within the county. Primary catchment areas are currently being reviewed with a member workshop to held in June 2023 and details of the review being developed to be reported to cabinet.

A cluster review is underway to establish the most appropriate way to develop education in the Chepstow area. The review will look at all education aspects as well as the education estate in the area. This has been delayed due to officer capacity, proposals will be shared and discussed with members in February 2024.

Well-being of Future Generations Act impact

Contribution of Council goal to Future Generations Act Well-being Goals

Prosperous Wales	Resilient Wales	Healthier Wales	More equal Wales	Wales of cohesive communities	Vibrant culture and thriving Welsh Language	Globally responsible Wales
✓		✓	✓		✓	



Well-being Objective: A Learning Place

The long-term nature of this goal is intrinsic to its success. Working with and involving children and young people, as early as possible, to identify their needs will give them the best chance of achieving their maximum potential. Preventing problems before they start will provide our young people with the best chance to develop. Using a collaborative approach and aligning services provides a rounded resource that works in harmony for the young person. Overall, this approach integrates the needs of our young people, ensuring they have the best opportunity to achieve their goals.

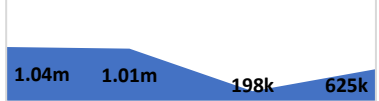
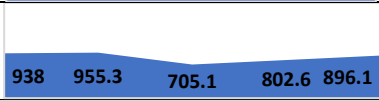



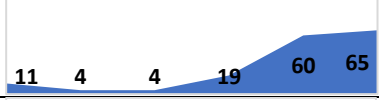
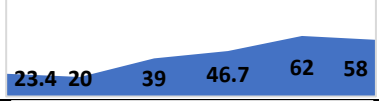


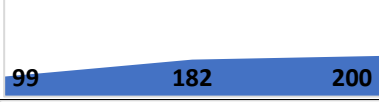

Measure	Previous	Latest	Target for 2023/24	Comment
Percentage pupil attendance at primary level (figure for those eligible for free school meals shown in brackets)	92.9% (89.3%)	94.5% (91.5%)	94.6% (92.6%)	Previous is 2022/23 academic year. Current is up to October half-term 2023/24 academic year. The most recent data indicates that primary schools have already reached the target for 2026/27. However, the period of this data capture is for the first half-term of the school year where attendance is less likely to be affected by school holidays and illness. The overall target reflects the variation normally seen across an average year. Welsh Government have not yet reintroduced statutory attendance targets for 2023/24 and local targets have not been confirmed with school leaders due to action short of strike. Target will be reviewed when local targets are set to inform the overall target.












Percentage pupil attendance at secondary level (figure those eligible for free school meals shown in brackets)	88.1% (78.7%)	89.6% (80.8%)	91.2% (82.4%)	Previous is 2022/23 academic year. Current is up to October half-term 2023/24 academic year. The most recent data capture shows that attendance is significantly below pre-pandemic levels in secondary schools. The gap between those eligible for free school meals (eFSM) and those not has increased to 8.8 pp. This is because eFSM pupils, are more likely to have other vulnerabilities which makes a return to school more difficult. Many of these pupils have a range of needs and the time taken to ensure a successful return is much longer post pandemic.
Number of permanent exclusions across primary and secondary schools	12	5	<5	
Total number of enrolments by adult learners on community education courses including Coleg Gwent franchise courses	663	560	718	Previous is 2021/22, latest is 2022/23.










Appendix 2 – Latest update on the longer-term measures in Community & Corporate Plan 2022-2028

The table below provides the latest data on measures that are being tracked to inform the work in the plan. We want to see positive movement in these measures but they are things where our input is only part of a much bigger picture and so we are not able to set targets against them.

Longer term measures in Community & Corporate Plan 2022-2028	Trend	Latest
A Fair place to live		
Percentage of children living in relative low-income families ^{xviii}		17.4
Percentage of people living in households in material deprivation ^{xix}		8
Difference in average pay between men and women working in the county		85.4
A Green place to live		
Food waste captured from the waste stream and sent to Anaerobic Digestion (tonnes)		5,062
Average annual residual waste produced per person (kilograms) ^{xx}		125.39
Average level of nitrogen dioxide pollution in the air ($\mu\text{g}/\text{m}^3$), measured at Air Quality Management Areas in Monmouthshire ^{xxi}		6
Number of properties at medium or high risk of flooding ^{xxii}	Trend data not available	1825
Percentage of the Special Area of Conservation river catchment waterbodies that fail the phosphorus targets ^{xxiii}	Trend data not available	88 for Usk 67 for Wye
A Thriving and Ambitious place		
Average hourly town centre footfall ^{xxiv}		288
Percentage of vacant town centre premises ^{xxv}		10.9

Longer term measures in Community & Corporate Plan 2022-2028	Trend	Latest
Number of rail passengers using Monmouthshire train stations ^{xxvi}		625,374
Motor vehicle traffic by local authority (million miles) ^{xxvii}		896.1
Gross disposable household income per head (£) ^{xxviii}		22,720
A Safe Place to Live		
Median house prices compared to median workplace-based earnings ^{xxix}		9.24
Number of additional units of affordable housing delivered in the year ^{xxx}		48
Rate of households unintentionally homeless and in priority need per 10,000 households		65.42
Percentage of social housing allocated to homeless households		58
Average carbon emissions per capita in Monmouthshire (tonnes) ^{xxxi}		9.1
Rate of anti-social behaviour incidents per 1,000 population		10.56
Number of rapes and sexual offences committed ^{xxxii}		200
Percentage of people feeling safe at home, walking in the local area, and when travelling ^{xxxiii}		75

Longer term measures in Community & Corporate Plan 2022-2028	Trend	Latest
Percentage of homes that have an energy efficiency rating of C or above ^{xxxiv}		50.45
The percentage of those referred to the youth offending service who subsequently re-offend		12.5
A Connected Place Where People Care		
Percentage of children supported to remain living with their family (not including children looked after)		62.6
Number of children who are rehabilitated after a period of being looked after		9
Percentage of people who are lonely ^{xxxv}		12
Percentage of people satisfied with their ability to get to/ access the facilities and services they need ^{xxxvi}		86
Percentage of people satisfied with local area as a place to live ^{xxxvii}		95
Healthy life expectancy at birth (women) ^{xxxviii}		69.3
Healthy life expectancy at birth (men) ^{xxxix}		68.7
Life expectancy at birth (women) ^{xl}		84.6
Life expectancy at birth (men) ^{xli}		81.6

Longer term measures in Community & Corporate Plan 2022-2028	Trend	Latest
Percentage of people participating in sporting activities three or more times a week ^{xliii}		43
Percentage of people who attend or participate in arts culture or heritage activities three or more times a year ^{xliiii}		79
Number of carers and young carers supported by the carers team		169
Number of job vacancies in social care workforce		32
A Learning place		
Rate of fixed term exclusions of less than 5 days per thousand pupils (days) -Primary Pupils ^{xliv}		15.9
Rate of fixed term exclusions of less than 5 days per thousand pupils (days) -Secondary Pupils		191
Rate of fixed term exclusions of more than 5 days per thousand pupils (days) -Primary Pupils		0.3
Rate of fixed term exclusions of more than 5 days per thousand pupils (days) -Secondary Pupils		5.1
Percentage of adults with qualifications at Level 4 and above of the National Qualifications Framework		52.6

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- ⁱ This measures primary school pupils who have access to Universal Free Primary Schools rather than the number of pupils who are eligible for free school meals
- ⁱⁱ The National Exercise Referral Scheme is an evidence-based health intervention incorporating physical and behavioural change to support clients to make a lifestyle change to improve both health and wellbeing
- ⁱⁱⁱ National Survey for Wales - <https://www.gov.wales/national-survey-wales>
- ^{iv} Make Your Mark: Monmouthshire's Local Ballot is an annual consultation for young people ages 11-25. See <https://www.monlife.co.uk/connect/youth-service/make-your-mark/make-your-mark-monmouthshire/> for more details
- ^v National Survey for Wales - <https://www.gov.wales/national-survey-wales>
- ^{vi} Disability Confident is a UK Government scheme designed to encourage employers to recruit and retain disabled people and those with health conditions.
- ^{vii} Measured by the Annual Population Survey for Wales. While this is not considered as accurate as the Census, it has the benefit of being updated more frequently allowing the authority to track progress.
- ^{viii} This includes both emissions from the council's operations and land-based and supply chain operations
- ^{ix} Active travel means getting about in a way that makes you physically active, like walking or cycling. It usually means short journeys, like walking to the shops or school or cycling to work.
- ^x Amount of municipal, or 'everyday' waste, sent to be recycled, reused or composted as a percentage of total waste generated. [Annual reuse/recycling/composting rates by local authority \(gov.wales\)](#)
- ^{xi} Measured using the STEAM model which is a tourism economic impact modelling process
- ^{xii} Percentage of Year 11 school leavers who are NEET. [Pupil destinations | Careers Wales \(gov.wales\)](#)
- ^{xiii} Adult Social Care Service User Questionnaire
- ^{xiv} MonGames is a skills and sports activity programme, usually run in the school holidays, aimed at children aged between 5-11
- ^{xv} This is externally grant funded so risk that this model could change or stop
- ^{xvi} Active Play is a two-hour programme designed for children aged between 5-11 where they are able to take part in a range of physical activities and also arts and crafts
- ^{xvii} Adult Social Care Service User Questionnaire
- ^{xviii} Relative low income refers to people living in households with income below 60% of the median in that year
- ^{xix} Material deprivation is a measure of living standards. A person is considered to be living in material deprivation if they are unable to access a certain number of goods or services. Further information can be found here: [Material deprivation and low income | GOV.WALES](#)
- ^{xx} [Annual residual household waste produced per person \(kilograms\) by local authority \(gov.wales\)](#)
- ^{xxi} [Air Quality Indicators, by Local Authority \(gov.wales\)](#)
- ^{xxii} Measures combined numbers at risk from rivers, tidal and surface water. Source: <https://statswales.gov.wales/Catalogue/Environment-and-Countryside/Flooding> High Risk; Greater than or equal to 1 in 30 (3.3%) chance in any given year. Data in baseline is for 2019.
Medium Risk; Less than 1 in 30 (3.3%) but greater than or equal to 1 in 100 (1%) chance in any given year for rivers and surface water flooding and less than 1 in 30 (3.3 per cent) but greater than or equal to 1 in 200 (0.5 per cent) for the sea.
Low Risk; Less than 1 in 100 (1%) for rivers and surface water flooding and 1 in 200 (0.5 per cent) for the sea but greater than or equal to 1 in 1,000 (0.1%) chance in any given year.
- ^{xxiii} Compliance Assessment of Welsh River SACs against Phosphorus Targets Report No: 489. <https://naturalresources.wales/evidence-and-data/research-and-reports/water-reports/compliance-assessment-of-welsh-river-sacs-against-phosphorus-targets/?lang=en>

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- xxiv <https://www.monmouthshire.gov.uk/planning-policy/annual-monitoring/retail/>
- xxv <https://www.monmouthshire.gov.uk/planning-policy/annual-monitoring/retail/>
- xxvi Measure of entries and exits. Source: <https://dataportal.orr.gov.uk/statistics/usage/estimates-of-station-usage>
- xxvii https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1144656/tra8902.ods
- xxviii Gross Disposable Household Income (GDHI) is the amount of money individuals or households have for spending or saving. [Gross Disposable Household Income by area and measure \(gov.wales\)](#)
- xxix [House price to workplace-based earnings ratio - Office for National Statistics \(ons.gov.uk\)](#)
- xxx This includes new leased accommodation, conversion of existing properties, acquisition of existing properties for this purpose and those brought back into use and funded through the social housing grant. It differs from planning data which is focused on new builds and those granted planning permission
- xxxi Includes territorial emissions of carbon dioxide (CO₂), methane (CH₄) and nitrous oxide (N₂O). Source: <https://www.gov.uk/government/statistics/uk-local-authority-and-regional-greenhouse-gas-emissions-national-statistics-2005-to-2020>
- xxxii Source: Gwent Police
- xxxiii National Survey for Wales - <https://www.gov.wales/national-survey-wales>
- xxxiv [Energy efficiency of Housing, England and Wales, local authority districts - Office for National Statistics \(ons.gov.uk\)](#)
- xxxv National Survey for Wales - <https://www.gov.wales/national-survey-wales>
- xxxvi [Percentage of people satisfied with their ability to get to/access facilities and services they need \(gov.wales\)](#)
- xxxvii National Survey for Wales - <https://www.gov.wales/national-survey-wales>
- xxxviii Healthy Life Expectancy is the number of years lived in self-assessed good health
- xxxix Healthy Life Expectancy is the number of years lived in self-assessed good health
- xl Source: <https://www.infobasecymru.net/IAS/themes/healthandsocialcare/generalhealth/tabular?viewId=47&geold=1&subsetId=>
- xli <https://www.infobasecymru.net/IAS/themes/healthandsocialcare/generalhealth/tabular?viewId=47&geold=1&subsetId=>
- xlii National Survey for Wales - <https://www.gov.wales/national-survey-wales>
- xliii National Survey for Wales - <https://www.gov.wales/national-survey-wales>
- xliv Exclusions are split by the length/type of exclusion, into 3 categories: i) Fixed term exclusions: 5 days or less; ii) Fixed term exclusions: over 5 days iii) Permanent exclusions. These are measured for all pupils and those eligible for free school meals. Further detail can be found at <https://www.gov.wales/sites/default/files/pdf-versions/2022/10/4/1666254621/permanent-and-fixed-term-exclusions-schools-september-2020-august-2021.pdf>



Subject: MONMOUTHSHIRE COUNTY COUNCIL'S RESPONSE TO WELSH GOVERNMENTS PHASE 2 CONSULTATION ON A FAIRER COUNCIL TAX SYSTEM

Meeting: Cabinet

Date: 17th January 2024

Divisions/Wards Affected: All

1. PURPOSE:

- 1.1 The purpose of this report is to seek endorsement of Monmouthshire County Council's response to the Welsh Governments Phase 2 consultation on a fairer council tax system.

2. RECOMMENDATIONS:

- 2.1 That Cabinet agree Monmouthshire County Council's response to the Phase 2 consultation questions set out in Appendix One.

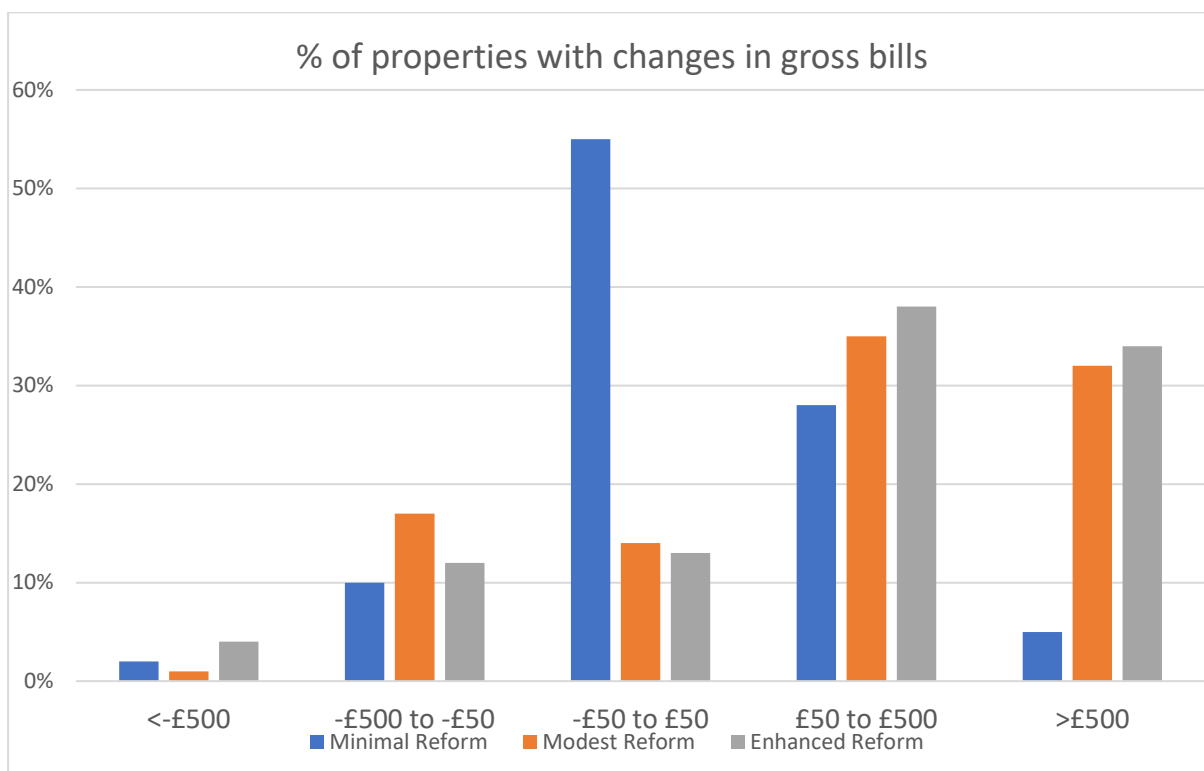
3. KEY ISSUES:

- 3.1 Welsh Government committed to reforming council tax in Wales in its 2021 Co-operation Agreement with Plaid Cymru.
- 3.2 Phase 1 consultation launched in October 2022 and sought general views on how to make council tax fairer. The link below provides a summary of the consultation responses received: <https://www.gov.wales/sites/default/files/consultations/2022-12/46262-summary-responses.pdf>
- 3.3 Phase 2 consultation launched a year later in November 2023 and seeks views on updating and reforming the council tax system in Wales, with the aim of making it fairer and more progressive.
- 3.4 The phase 2 consultation closes on 6th February 2024. Full details of the consultation can be found: <https://www.gov.wales/consultation-fairer-council-tax-phase-2-html>
- 3.5 The phase 2 consultation is seeking views on both the scale of the reform and the timelines for introducing any changes (see below for further details).

4. Scale of reform

- 4.1 The Welsh Governments consultation is seeking views on 3 approaches:

1. **Minimal change:** This approach maintains the current 9 council tax bands (A to I) and involves a revaluation exercise to update the band thresholds to reflect modern property values.
 2. **Modest reform:** As above, this approach retains the current 9 council tax bands (A to I) and updates the band thresholds to reflect modern property values. However, this also includes changes in the tax rates charged for each band.
 3. **Expanded reform:** This option is aimed at making the council tax system more progressive. It proposes to increase the number of council tax bands to 12 with 1 extra band at the bottom and 2 at the top. Tax rates also change under this model.
- 4.2 The consultation also seeks views on the timelines for change with 3 options proposed:
- Option 1: fastest pace of change.** From April 2025 for either of the 3 options above.
- Option 2: defer to the next Senedd term.** From April 2028 at the earliest for either of the 3 options above.
- Option 3: implement in stages.** Minimal/modest reform first moving to an expanded implementation as a second later stage. The timelines for which would be similar to options 1 and 2 above.
5. **Potential impact of the proposals to the county of Monmouthshire**
- 5.1 The intention of the proposed council tax reforms is to shift the current pattern of payment away from those with the least and require those with the most to make a greater contribution.
 - 5.2 In redesigning the system, Welsh Government state that they would not seek to increase the total amount of council tax raised overall from council taxpayers than is currently raised, although some taxpayers would see changes in their bills.
 - 5.3 Areas where property values are high and/or have increased by more than average since the last revaluation, of which Monmouthshire is one, would lose out from reforms to make council tax less regressive.
 - 5.4 Data provided in the Institute of Fiscal Studies Report (IFS), that accompanies the consultation papers, indicates that the factors noted in 5.2 and 5.3 above result in Monmouthshire potentially being one of the worst affected councils in Wales, should these reforms go ahead.
 - 5.5 The graph below illustrates the likely impact on households of the 3 proposed options.



5.6 The proposed reforms would also affect the amount of Revenue Support Grant the council receives. Under the proposals and depending on the approach adopted, it is estimated that the council's council tax base could increase between 3.6% and 16.6% and Revenue Support Grant reduce by between £2.6m and £12.5m.

5.7 This shift would result in the council becoming more dependent on council tax to fund budgets, which in turn would increase pressure on household budgets.

5.8 Given the potential impact to households in the County, the council is awaiting accompanying consultation for proposed changes to the Council Tax Reduction Scheme (CTRS), which is due to be released in early 2024. This, along with a transitional relief scheme, has the potential to provide support to households significantly affected by these proposals.

7. OPTIONS APPRAISAL

7.1 The council has studied the proposals and accompanying analysis by the IFS. This analysis indicates that each of the three proposed options have the potential to negatively impact households in the County.

7.2 The Council's response to the consultation found in Appendix One therefore considers the preferred options to be:

- *Approach one - minimal change.* This approach moves some way to update the current system and to reflect modern property values, whilst providing the least impact to households in the County.
- *Slower reform with minimal or expanded reform starting in 2028.* Given the potential impact of the approaches to households across Wales, the Council consider the fastest timetable to represent too much of a shock to households. If the expanded reform approach is taken, then this needs to be adopted over time as this would put strain on both households and the council's budget.

8. EVALUATION CRITERIA

- Welsh Government's consultation papers:
<https://www.gov.wales/consultation-fairer-council-tax-phase-2-html>
- Institute of Fiscal Studies (IFS) report 'Assessing the Welsh Government's consultation on reforms to Council Tax.' <https://ifs.org.uk/sites/default/files/2023-11/R287-Assessing-the-Welsh-Government%E2%80%99s-consultation-on-reforms-to-council-tax.pdf>

9. REASONS

9.1 Councils and other interested parties have been asked to respond to Welsh Government's proposals to reform council tax, as detailed in their consultation document.

10. RESOURCE IMPLICATIONS

10.1 There are no immediate financial impacts arising from the consultation.

10.2 However, as outlined in bullet points 5.6 and 5.7 above if the proposals were to go ahead, they would change the makeup of how the Councils budget is funded. The degree of this change will only be determined once a final decision is made about the level of reform to be introduced. Any changes would be introduced from 2025 at the earliest.

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

11.1 An initial impact assessment was completed by Welsh Government in December 2021 ahead of the Local Government Finance (Wales) Bill which provided a legal framework and structure for these potential reforms.

11.2 A full Equality Impact Assessment will be completed by Welsh Government following any decision on the pace and scale of changes being proposed.

12. CONSULTEES:

- Cabinet
- Strategic Leadership Team
- Chief Officer for Resources and Deputy Chief Executive
- Head of Finance

13. BACKGROUND PAPERS:

Appendix One: Monmouthshire County Councils response to the Welsh Government consultation.

14. AUTHORS:

Ruth Donovan – Assistant Head of Finance: Revenues, Systems and Exchequer

15. CONTACT DETAILS:

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A Fairer Council Tax: phase 2

Organisation (if applicable):

Monmouthshire County Council

Responses to consultations may be made public. To keep your response anonymous (including email addresses) tick the box:

Questions about Council Tax bands and tax-rates

Please read about the 3 possible approaches to designing a new Council Tax system before answering the following questions. We welcome evidence about the possible benefits for, and impacts on, households and councils. We are particularly interested in the views of people with lived experience of disadvantaged backgrounds and those who have experience working with people with protected characteristics.

Question 1

What Council Tax band are you currently in? Please choose an option, you may wish to refer to your latest Council Tax bill or [you can check your council tax band by looking up your address or postcode](#).

- Band A
- Band B
- Band C
- Band D
- Band E
- Band F
- Band G
- Band H
- Band I
- I don't pay Council Tax
- Not applicable

Question 2

Which council area do you live in?

- Isle of Anglesey / Ynys Mon
- Cyngor Gwynedd
- Conwy
- Denbighshire
- Flintshire
- Wrexham
- Powys
- Ceredigion
- Pembrokeshire
- Carmarthenshire

- Swansea
- Neath Port Talbot
- Bridgend
- Vale of Glamorgan
- Rhondda Cynon Taf
- Merthyr Tydfil
- Caerphilly
- Blaenau Gwent
- Torfaen
- Monmouthshire
- Newport
- Cardiff
- Not applicable

Question 3

The Welsh Government has shown 3 possible approaches for how to design a fairer Council Tax system. We want to ask you about your appetite for reform.

Do you think we should aim for:

- approach 1: minimal reform
- approach 2: modest reform
- approach 3: expanded reform

Or do you have other views or ideas about the approach we should take to the scale of reform (please specify)?

The council is generally in support of council tax reform. However, is concerned about the impact these proposed reforms could have on households across the County.

The accompanying modelling by the IFS indicates that Monmouthshire's council taxpayers could be adversely affected by all 3 approaches, with approach 3 having the greatest impact.

At a time of ongoing cost of living pressures, it is feared that these proposals will lead to unintended pockets of poverty. Therefore the council can only support approach 1 which moves some way to update the current system and to reflect modern property values, whilst providing the least impact to households in the county.

The main concern about approaches 2 and 3 is the scale of the changes to the tax rates per band. An alternative option could be to expand the tax bands as proposed and to scale back the proportions for the tax rate per band.

Question 4

The Welsh Government has described when the changes could be made to the Council Tax bands and tax-rates. Again, we want to ask about your appetite for reform:

Do you think we should make changes according to the:

- fastest timetable: minimal, modest or expanded reform by 1 April 2025
- slower reform: minimal modest or expanded reform starting in 2028
- staged reform: minimal or modest reform in 2025, moving to expanded reform in the next Senedd term

Or do you have other views or ideas about the approach we should take to the pace of reform (please specify)?

Given the potential impact of the approaches to households in Wales, the Council consider the fastest timetable to represent too much of a shock to households. If the expanded reform approach is taken, then this needs to be adopted over time as this would put particular strain on both households and the council's budget (which could be affected by households ability to pay any increased charges). Therefore in our view, any expanded reform needs to be introduced over time to give owners time to adjust to the new charges and for councils to plan their finances.

Welsh Government should be mindful of the current ongoing cost of living crisis and other recent economic factors e.g. rising interest rates and a slowing housing market. Whilst property values in Monmouthshire have increased over recent years, this trend may not continue. Regular revaluations would help ensure that properties are in the most appropriate council tax band.

Consideration also needs be given to the potential impact these reforms will have on possible charges across Wales for households that are also subject to a council tax premium. This could have a considerable impact for properties that are in a higher tax band in areas where a 300% council tax premium applies.

Questions about discounts, disregards and exemptions

Question 5

Do you agree there should be an overall time-limit on Exemption F to discourage properties being left empty and exempt from Council Tax for an indefinite period?

A Class F exemption is currently provided for properties that have been unoccupied since a former resident's death where the only person liable for Council Tax would be the deceased's personal representative, and no grant of probate or letters of administration has been made.

- Yes
- No

Question 6

What do you consider is a reasonable period for obtaining probate or letters of administration?

- 2 years
- 3 years
- 4 years

- Other (please specify)

This will help to bring properties back into use.

Question 7

Which title do you think should replace the term 'severely mentally impaired'?

- Option A: significant brain impairment
- Option B: significant brain condition

Question 8

Do you agree with the proposed definition to describe a person with a significant brain impairment or condition?

The definition is: "Significant (and permanent) mental condition or change that impacts on the brain's ability to function."

- Yes
- No
- Any other views (please specify)

To ensure that the terminology is the same as the title would suggest changing the definition to "*Significant (and permanent) mental impairment or change that impacts on the brain's ability to function*".

Question 9

Do you have any views on the qualifying criteria for a person with a significant brain impairment or condition to be entitled to an exemption or disregard?

The current qualifying criteria are for a person to be entitled to a qualifying benefit and to have medical certification from a registered practitioner.

- Option A: remove the requirement for a person to be entitled to a qualifying benefit in order to qualify for the exemption or disregard but retain the need for a medical certification
- Option B: where a person can provide proof of clinical diagnosis, the requirement for a person to be in receipt of a qualifying benefit could be removed at the discretion of the council
- Other (please specify)

The requirement to be entitled to a qualifying benefit should be retained as it assists in determination. However we would like to see it amended to "in receipt of".

Questions about Welsh language

Question 10

We would like to know your views on the effects that these proposals would have on the Welsh language, specifically on opportunities for people to use Welsh and on treating the Welsh language no less favourably than English.

What effects do you think there would be? How could positive effects be increased, or negative effects be mitigated?

No comment

Question 11

Please also explain how you believe the proposed policy approach could be formulated or changed so as to have positive effects or increased positive effects on opportunities for people to use the Welsh language and on treating the Welsh language no less favourably than the English language, and no adverse effects on opportunities for people to use the Welsh language and on treating the Welsh language no less favourably than the English language.

No comment

Any other views

Question 12

We have asked a number of specific questions. If you have any related points which we have not specifically addressed, please use this space to record them.

The council supports a move to more regular revaluations. This should help ensure that the amount of council tax households pay reflects the value of property they live in. Increasing the frequency of revaluations allows for changes in market conditions and will take account of property improvements on a timelier basis.

Should the decision be to move forward with approaches 2 and 3, the council would advocate for a robust transitional relief package to help support households most affected by the changes. The council is also awaiting the proposed accompanying consultation to proposed changes to the Council Tax Reduction Scheme (CTRS), as this potentially provides a further mechanism to support households significantly affected by these approaches.

The council is disappointed that alternative options for reform e.g. Land Value Tax, were not also considered as an option for future consideration.

SUBJECT: REVISED COUNTER FRAUD, CORRUPTION & BRIBERY POLICY

DIRECTORATE: Resources

MEETING: Cabinet

DATE: 17th January 2024

DIVISION/WARDS AFFECTED: All

1. PURPOSE:

To receive, consider and approve the Council's updated and revised Counter Fraud, Corruption and Bribery Policy.

2. RECOMMENDATIONS:

- 2.1 That Cabinet provides comment before approving the revised Counter Fraud, Corruption and Bribery Policy.
- 2.2 All elected / independent members of the Council and council officers to complete Counter-Fraud, Corruption & Bribery training as appropriate to their role in order to increase organisational effectiveness in preventing, detecting and responding to fraud.

3. KEY ISSUES:

- 3.1 The previous Anti Fraud, Corruption & Bribery Statement was approved by Cabinet in June 2017. In line with good practice this Policy should be reviewed and updated periodically. The revised Policy is shown at Appendix 1.
- 3.2 Monmouthshire Council is one of the largest organisations in the County. The Council controls millions of pounds of public money and takes very seriously the high expectations of the public and the degree of scrutiny to which the affairs of the Council are subject.
- 3.3 Good Corporate Governance requires that the Authority must demonstrate clearly that it is firmly committed to dealing with fraud and corruption and will deal equally with perpetrators from inside (Members and employees) and outside the Council. In addition there will be no distinction made in investigation and action between cases that generate financial benefits and those that do not.
- 3.4 Over the general refresh of the existing policy, the main areas of change to the previously approved policy statement are;
 - Inclusion of an Executive Summary
 - Definition provided of Money Laundering
 - Inclusion of a table detailing stakeholders specific responsibilities

- Inclusion of a section detailing the Councils 'Fraud Response Plan' and flow chart within Appendix 1
- Inclusion of 'Acting on Suspicions – Do's and Don'ts' as Appendix 2

3.5 The Councils Governance & Audit Committee considered the revised Counter Fraud, Corruption and Bribery Policy at their meeting on the [19th October 2023](#) and endorsed the policy for Cabinet approval.

3.6 Audit Wales have been consulted on the revised policy.

4. REASONS:

4.1 Within the Council's Annual Governance Statement (2022/23) a commitment was made to review the Councils Counter Fraud arrangements.

4.2 This policy statement embodies a series of measures designed to frustrate any attempted fraudulent or corrupt act and the steps to be taken if such action occurs.

4.3 It incorporates The Fraud Act 2006 which defines fraud through three key offences, provides a definition of corruption and takes account of The Bribery Act 2010 where there are four key offences.

4.4 The maximum sentence is 10 years imprisonment when found guilty of Fraud and/or Bribery, with the potential of an unlimited fine when found guilty of Bribery.

4.5 In July 2020 the Auditor General for Wales released a report 'Raising Our Game' - Tackling Fraud in Wales which stated that the sums lost annually in Wales to fraud are substantial. Figures could be anywhere between £100 million and £1 billion.

4.6 It was said that public sector bodies can mitigate these risks by having the right organisational culture supported by strong counter-fraud arrangements.

4.7 In relation to Policies and Training the following recommendations were made;

- R5 All public bodies need to have a comprehensive and up-to-date set of policies and procedures which together represent a cohesive strategy for identifying, managing and responding to fraud risks.
- R6 Staff working across the Welsh public sector should receive fraud-awareness training as appropriate to their role in order to increase organisational effectiveness in preventing, detecting and responding to fraud.
- R7 Cases where fraud is identified and successfully addressed should be publicised to re-enforce a robust message from the top that fraud will not be tolerated.

4.8 The updating and publicising of the revised Counter Fraud, Corruption and Bribery Policy this will help Monmouthshire County Council to have the right organisational culture with regards to counter-fraud arrangements.

- 4.9 Following approval of this revised policy by Cabinet, a training package will be developed which will need to be attended / completed by members and officers of the Council as appropriate to their role in order to increase organisational effectiveness in preventing, detecting and responding to fraud.
- 4.10 A commitment has been made to the Governance & Audit Committee that an annual risk assessment will be presented for consideration in relation to Fraud, Bribery and Corruption. The aim of this will be to focus on the fraud culture of the organisation and to provide assurance that the Council is able to demonstrate that practice follows the procedures in place.
- 4.11 Following the implementation of this revised policy, the Governance & Audit Committee have requested that periodic update reports are added to the Forward Work Programme reviewing the position of the Council in relation to compliance with the revised policy, outlining a targeted program of work that will be implemented.

5. RESOURCE IMPLICATIONS:

None

6. CONSULTEES:

Deputy Chief Executive / Chief Officer Resources
Governance Working Group
Governance & Audit Committee – 19th October 2023
Audit Wales

7. BACKGROUND PAPERS:

Fraud Act 2006
The Bribery Act 2010
Monmouthshire Anti-Fraud, Bribery & Corruption Policy 2017
Audit Wales 'Raising Our Game' - Tackling Fraud in Wales

8. AUTHOR AND CONTACT DETAILS:

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monmouthshire
sir fynwy

COUNTER FRAUD, CORRUPTION & BRIBERY POLICY



Date January 2024

Report Status Draft v5
Cabinet

Review 3 Years
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Executive Summary

The Auditor General for Wales in 2019 noted that the sums lost annually in the Welsh public sector to fraud and error are significant – and could be anywhere between £100 million and £1 billion.

Monmouthshire County Council has a zero-tolerance culture and attitude to fraud, bribery, and corruption.

Values matter to us.

They set out our expectations for ourselves, each other and the way we conduct business with organisations that we work with on your behalf. Our organisational values are:

Teamwork – Collaboration is at the heart of everything we do. We will work with you and our partners to support and inspire everyone to get involved. We will make the best of the ideas, and resources available to make sure we do the things that most positively impact our people and places.

Openness - We are open and honest. People have the chance to be involved and tell us what matters.

Flexibility - We are flexible, enabling delivery of the most effective and efficient services. This means a genuine commitment to working with everyone to embrace new ways of working.

Fairness - We provide opportunities for all people and communities to thrive. We will always try to treat everyone fairly and consistently, recognising that we will sometimes need to take positive action to overcome some of the challenges faced by people with different protected characteristics.

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.

These values provide a foundation for everyone attached to our organisation to be accountable, to be positive and to be bold in delivering on our purpose of:

Monmouthshire being a zero carbon county, supporting well-being, health and dignity for everyone at every stage of life.

This Policy provides clear guidance for councillors, staff and members of the public considering reporting concerns of fraud, bribery and corruption which may have been perpetrated against the interests of the Council and is accompanied by the response plan for action where suspicious activity is suspected or detected and/or may be reported.

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1. Introduction

- 1.1 We are committed to ensuring that we conduct our business in an open, ethical and transparent manner. As a consequence, it is essential that staff, members of the Council or Committees established by the Council, contractors and third-parties are aware of the risk of fraud, corruption, theft and other activities involving dishonesty, in all its forms.
- 1.2 Our Counter Fraud and Anti-Bribery Policies apply to all staff and other persons associated with the Council. The policies operate in the context of the Fraud Act 2006, the Bribery Act 2010, and all other related UK legislation which governs fraud, bribery and corruption.
- 1.3 Good Corporate Governance requires that the Authority must demonstrate clearly that it is firmly committed to dealing with fraud and corruption and will deal equally with perpetrators from inside (Members and employees) and outside the Council. In addition, there will be no distinction made in investigation and action between cases that generate financial benefits and those that do not. Attempted fraud is treated as seriously as accomplished fraud. This policy statement, however, will not compromise the Council's Strategic Equality Plan and Objectives, the requirements of the Human Rights Act 1998 or the Council's Regulation of Investigatory Powers Act (RIPA) Policy.
- 1.4 In all its dealings, the Council will adhere to the seven principles of public life set out in the Nolan Committee report on *Standards in Public Life*.
- 1.5 This policy statement embodies a series of measures designed to frustrate any attempted fraudulent or corrupt act and the steps to be taken if such action occurs.
- 1.6 The Council is also aware of the high degree of external scrutiny of its affairs by a variety of bodies including:
 - Public Services Ombudsman for Wales
 - Audit Wales
 - Welsh Government
 - Central Government Departments and Parliamentary Commissions
 - Her Majesty's Revenue & Customs
 - The Department of Works & Pensions
- 1.7 The Council will not tolerate fraud or corruption by its Councillors, employees, suppliers, contractors, customers or any other attacks on its resources by criminals. We will take all necessary steps to investigate all allegations of fraud or corruption and pursue sanctions available in each case, including removal from office, dismissal, prosecution and robust recovery of losses through both civil and criminal means.

2. Definitions

- 2.1. Local Government Employees have a range of powers and functions, from licensing and housing to awarding contracts for local amenities. It makes them targets for people and organisations who seek to either gain an unfair advantage or are looking to exploit information they hold.
- 2.2. There are several types of fraud and economic crime which could affect council services. Examples of these could include but are not limited to:
 - Housing Benefit Fraud
 - Council Tax Fraud or Evasion
 - Business Rate Fraud or Evasion
 - Blue Badge Misuse
 - Social Care and Direct Payments Fraud
 - Procurement Fraud
 - Misuse of Grant Funding
 - Fraudulently Obtaining Money or Services from the Authority
 - Cyber Crime

The above will be considered and their impact monitored as part of an Annual Fraud Risk Assessment (6.15). Some risks may also be considered as part of the Councils Whole Authority Strategic Risk Register.

What is Fraud?

- 2.3. [The Fraud Act \(2006\)](#) defines fraud through three key offences:
 - **Fraud by false representation** – where a person dishonestly makes a false representation and intends by making the representation, to make a gain for himself or another or to cause or expose the risk of loss to another;
 - **Fraud by failing to disclose information** – where a person has dishonestly failed to disclose to another person information which he is under a legal duty to disclose; and intends by failing to do so, to make a gain for himself or another; or to cause or expose another to the risk of loss; and
 - **Fraud by abuse of position** – where a person occupies a position in which he is expected to safeguard or not to act against the financial interests of another; dishonestly abuses that position with the intention to make a gain for himself or another or to cause or expose the risk of loss to another.
- 2.4. It also created new offences:
 - Obtaining services dishonestly
 - Possessing, making and supplying articles for use in frauds
 - Fraudulent trading applicable to non- corporate traders.
- 2.5. The maximum sentence is 10 years imprisonment.

- 2.6. The Act largely replaces the laws relating to obtaining property by deception, obtaining a pecuniary advantage and other offences that were created under the Theft Act 1978.
- 2.7. Attempted fraud is treated as seriously as accomplished fraud. At a practical level, fraud is deemed to be the deliberate intent to deprive the Council (and its associate activities) of money or goods.

What is Corruption?

- 2.8. Corruption can be defined as dishonest and illegal behaviour by people in positions of power. It threatens national security, reduces access to services, erodes public trust in institutions and impedes investment.
- 2.9. [Transparency International](#), a charity which describes itself as a “global coalition against corruption” highlights a range of examples of corruption, such as: public servants demanding or taking money or favours in exchange for services; politicians misusing public money or granting public contacts to their sponsors, friends and families; and corporations bribing officials to get lucrative deals.

What is Bribery?

- 2.10. [The Bribery Act 2010](#) identifies the criminal offence of bribery and identifies four key offences:
 - ***Bribing another person*** - A person commits an offense by offering, promising or giving a financial or other advantage to another person, directly or through an intermediary: intending that advantage to induce a person to perform improperly a Function or to reward a person for so doing (whether or not it is the same person to whom the advantage is offered) or knowing or believing that accepting the advantage would itself be improper performance of a Function;
 - ***Being bribed*** - A person commits this offence by requesting, agreeing to receive or accepting a financial or other advantage, directly or through a third party, for his or her own or someone else's benefit: that person intends that, as a consequence, there is improper performance of a Function or there is improper performance of a Function (whether as a reward, in anticipation of or as a consequence of the request, agreement or acceptance). The request, agreement or acceptance itself may be the improper performance of a Function;
 - ***Bribery of a Foreign Public Figure*** – This offence will be committed if a person offers or gives a financial or other advantage to a foreign public official with the intention of influencing the foreign public official and obtaining or retaining business, where the foreign public official was neither permitted nor required by written law to be so influenced; and
 - ***Failing to prevent Bribery*** - A company is “strictly liable” for any bribe paid by a person performing services on its behalf, unless the organisation proves that adequate anti-bribery procedures were in place.

- 2.11. A bribe can be given directly or indirectly. It does not have to be cash, nor does it have to be received: offering or requesting a bribe is sufficient to contravene the Bribery Act 2010.

What is Theft?

- 2.12. Theft is defined within [The Theft Act 1968](#) as dishonestly appropriating property belonging to another with the intention of permanently depriving the other of it. It is immaterial whether the appropriation is made with a view to gain or is made for the thief's own benefit.
- 2.13. Theft is stealing any property belonging to the Council or which has been entrusted to it (e.g. client funds), including cash, equipment, vehicles and data.

What is Money Laundering?

- 2.14. Money laundering is defined in the [Proceeds of Crime Act 2002](#) as “the process by which the proceeds of crime are converted into assets which appear to have a legitimate origin, so that they can be retained permanently or recycled into further criminal enterprises”.
- 2.15. The burden of identifying and reporting acts of money laundering rests within the Council. Any service that receives money from an external person or body is potentially vulnerable to a money laundering operation. The need for vigilance is vital and any suspicion concerning the appropriateness of a transaction should be reported and advice sought from the Head of Finance.

3. Culture

- 3.1. The culture of the Council has always been one of openness and the core values of Openness, Fairness, Flexibility, Teamwork & Kindness support this. The culture therefore supports the opposition to fraud, corruption and bribery.
- 3.2. The prevention/detection of fraud, bribery and corruption and the protection of the public purse are responsibilities of everyone, both internal and external to the organisation. There is an expectation and requirement that all individuals and organisations associated with the Council will act with integrity and that elected Members and Employees at all levels will lead by example. All aspects of this policy must be complied with and the Council will maintain a zero tolerance culture to fraud and corruption.
- 3.3. The Council's elected Members and employees play an important role in creating and maintaining this culture. They are positively encouraged to raise concerns regarding fraud and corruption, immaterial of seniority, rank or status. The public also has a role to play in this process and should inform the Council if they feel that fraud/corruption may have occurred.
- 3.4. Concerns must be raised when members, employees or organisations associated with the Council reasonably believe that one or more of the following has occurred, is in the process of occurring or is likely to occur:
- A criminal offence;
 - A failure to comply with a statutory or legal obligation;

- Improper or unauthorised use of public or other official funds;
 - A miscarriage of justice;
 - Misconduct or malpractice;
 - Deliberate concealment of any of the above
- 3.5.** Concerns must be raised, in the first instance, directly with the Supervisor/Business Unit Manager/Head Teacher/Head of Establishment who should discuss the concerns raised with the Chief Internal Auditor. If necessary, concerns can also be raised anonymously (letter, telephone) or via other routes:-
- Chief Executive, Chief Officers, Heads of Service, or the Council's Monitoring Officer, who will report such concerns to the Chief Internal Auditor;
 - Directly to the Chief Internal Auditor;
 - Where line management is suspected of fraud, directly to the Chief Officer or Chief Internal Auditor;
 - External Auditor, who depending upon the nature of the concern will liaise with the Chief Internal Auditor;
 - Trade Union Representative.
- 3.6.** This can be done in the knowledge that such concerns will be treated in the strictest confidence and be properly investigated. The officer receiving the concern must follow the flow chart included within Appendix 1 of this policy and immediately inform the Chief Internal Auditor of the allegation.
- 3.7.** The Chief Internal Auditor will maintain a record of all concerns which have been raised and what action has been subsequently taken.
- 3.8.** The Council also has a *Whistleblowing Policy* to ensure the highest possible standards of openness probity and accountability. The Council will ensure that any allegations received in any way, including by anonymous letters or telephone calls, will be taken seriously and investigated in an appropriate manner.
- 3.9.** The Council will deal firmly with those who defraud the Council or who are corrupt, or where there has been financial malpractice. There is, of course, a need to ensure that any investigation process is not misused and, therefore, any abuse (such as employees/Members raising malicious allegations) may be dealt with as a disciplinary matter (employees) or through the Standards Committee (Members).
- 3.10.** When fraud and corruption has occurred due to a breakdown in the Council's systems or procedures, Heads of Service will ensure that appropriate improvements in systems of control are implemented in order to prevent a re-occurrence.

4. Roles & Responsibilities

4.1. This Policy deals with fraud, corruption and bribery internally and externally and it applies to:

- Employees
- Elected Members
- Suppliers
- Service Users
- Volunteers
- Lay Members

Key roles and responsibilities are as follows:

Stakeholder	Specific Responsibilities
Chief Executive	Ultimately responsible for the effectiveness of the Council's arrangements for countering fraud, corruption and bribery.
Deputy Chief Executive & Chief Officer - Resources (Section 151 Officer)	Overall responsibility for ensuring an effective internal control environment exists along with the adoption and effectiveness of the Authority's arrangements for the Counter-Fraud, Corruption and Bribery policy, including compliance with the Fraud Act 2016 and the Bribery Act 2010.
Chief Officer - Law & Governance (Monitoring Officer)	To advise Councillors and Officers on ethical issues, standards and powers to ensure that the Council operates within the law and statutory Codes of Practice.
Elected Members	To comply with the Members Code of Conduct and related Council policies and procedures, to be aware of the possibility of fraud, corruption and bribery and to report any genuine concerns accordingly.
Governance & Audit Committee	To monitor on a regular basis the Council's approach to tackling fraud and corruption and promote an anti-fraud culture.
Chief Internal Auditor	Reports directly to the Deputy Chief Executive with direct access to the Chief Executive, Chair of the Governance & Audit Committee and Chair of the Cabinet. Helps the Council achieve its objectives by evaluating the effectiveness of governance, risk management and internal control arrangements and playing a key role in promoting good corporate governance.
Internal Audit	Internal Audit plays a vital preventative role in trying to ensure that systems and procedures are in place to prevent and deter fraud, bribery and corruption. Internal Audit investigates all employee cases of suspected financial irregularity, fraud or corruption, except Benefit fraud investigations (see below), in accordance with agreed procedures.

Stakeholder	Specific Responsibilities
	<p>This also includes the key co-ordination role in the National Fraud Initiative (NFI), which is a fraud prevention and detection exercise based around bulk data matching that is led by the Cabinet Office, every two years.</p>
<p>Managers</p>	<p>Manage (at all levels) the risk of fraud, corruption and bribery. To promote staff awareness and ensure that all suspected or reported irregularities are immediately referred to Internal Audit. To ensure that there are mechanisms in place within their service areas to assess the risk of fraud, corruption and bribery and to reduce these risks by implementing strong internal controls. It is vital that this group show leadership in supporting investigations into fraud and corruption and that they are responsive to implementing actions arising from this work.</p> <p>Managers are expected to create an environment in which their officers feel able to approach them with any concerns they may have about suspected irregularities</p>
<p>Employees</p>	<p>Our employees are the first line of defence against fraud, corruption and bribery. They are expected to conduct themselves in ways which are beyond reproach, above suspicion and fully accountable. Also responsible for reporting malpractice through the established 'Whistleblowing' procedures. Employees are expected to adhere to the Employee Code of Conduct Protocol and Financial and Contract Procedure Rules.</p> <p>Employees are expected always to be aware of the possibility that fraud, bribery, corruption and theft may exist in the workplace and be able to share their concerns with management. If for any reason, they feel unable to speak to their manager they must refer the matter to one of those named above in section 3.5.</p>
<p>Contractors and Third Party Organisations</p>	<p>Third party organisations, primary contractors and supply chains should have a similar culture and approach as the Council in tackling anti-fraud, bribery and corruption. Organisations should have appropriate mechanisms in place to prevent, detect, deter and investigate where necessary any concerns raised in relation to fraud and corruption. Members and officers including officers working for contractors and third party organisations should be able to raise any concerns through the mechanisms identified in section 3.5. The Council has a duty to notify the relevant organisations, Government Agencies and</p>

Stakeholder	Specific Responsibilities
	take action where appropriate to investigate any concerns raised.
Shared Revenue & Benefits Service (Torfaen & Monmouthshire County Councils)	A shared service has been established between Torfaen and Monmouthshire County Councils to manage the Revenue and Benefits Services for both authorities. They are responsible for all Council Tax Benefit investigations, in accordance with legislation and agreed codes of conduct. In cases where employees are involved they will work with Internal Audit, Human Resources and appropriate senior management to ensure that correct procedures are followed and that this policy is adhered to.
External Auditor	Independent external audit is an essential safeguard of the stewardship of public money. Audit Wales (including any associated third party external audit partners) are responsible for this through specific reviews that are designed to test (amongst other things) the adequacy of the Council's financial systems and arrangements for preventing and detecting fraud, bribery and corruption. It is not the external auditors' function to prevent fraud and irregularities, but the integrity of public funds is at all times a matter of general concern. External auditors are always alert to the possibility of fraud and irregularity and will act without undue delay if grounds for suspicion come to their notice. The external auditor has a responsibility to review the Council's arrangements for preventing and detecting fraud and irregularities, and arrangements designed to limit the opportunity for corrupt practices.
Members of the Public	This policy, although primarily aimed at those within or associated with the Council, enables concerns raised by the public to be investigated, as appropriate, by the relevant person in a proper manner.

4.2. As appropriate, arrangements will be made to encourage the exchange of information between the Council and other agencies on national and local fraud and corruption activity in relation to local authorities. These include :

- Police
- Local Authority Financial Organisations
- Internal Auditor Networks
- Audit Wales
- Other councils
- Central and local government partners;
- National Anti-Fraud Network.
- National Fraud Initiative

4.3. Both elected Members and employees must ensure that they avoid situations where there is a potential for a conflict of interest. Such situations can arise

with externalisation of services, tendering, planning and land issues etc. Effective role separation will ensure decisions made are seen to be based upon impartial advice and avoid questions about improper disclosure of confidential information.

- 4.4. In addition to Financial Procedure Rules and Contract Procedure Rules, service areas may have their own procedures to prevent and deter fraud. There may also be audit reports, which recommend methods to minimise risks and losses to the Authority. Managers and employees must be made aware of these various sources of guidance and alter their working practices accordingly.

5. Deterrence

- 5.1. There are a number of ways to deter potential fraudsters from committing or attempting fraudulent or corrupt acts, whether they are inside and/or outside of the Council, and these include:
- Publicising the fact that the Council is firmly set against fraud, corruption and bribery and states this at every appropriate opportunity e.g. due diligence questions at the selection stage of external tenders, clauses in contracts, statements on benefits claim forms, website, publications etc.
 - Acting robustly and decisively when fraud and corruption are suspected and proven e.g. the termination of contracts, dismissal, prosecution, reporting employee to their professional body etc.
 - Taking action to effect the maximum recoveries for the Council e.g. through agreement, court action, penalties, under Proceeds of Crime Act etc.
 - Having sound internal control systems, that still allow for innovation, but at the same time minimising the opportunity for fraud and corruption.
 - The operation and advertising of formal arrangements for whistleblowing.
 - Publicising instances of fraud/corruption and the resultant disciplinary/prosecution action for cases both within the Council and for other public organisations.

6. Fraud Response Plan

- 6.1. The Fraud Response Plan provides guidance to Members, staff and the public on the procedures that should be followed where a fraud is suspected or discovered. For ease of reference, Appendix 1 contains a flowchart outlining the fraud investigation process at Monmouthshire County Council. The Council relies on its employees, the public and its agencies to help prevent and detect fraud and corruption. Often employees are the first to realise there is something seriously wrong internally, as they are in positions to be able to spot any possible cases of fraud or corruption at an early stage.
- 6.2. Internal Audit play an important role in the detection of fraud, bribery and corruption. Included in their strategic plan are reviews of system controls including financial controls and specific fraud and corruption tests. They will also make spot checks and unannounced visits when necessary.
- 6.3. In addition to Internal Audit, there are numerous systems and management controls in place to deter fraud and corruption but it is often the vigilance of employees and members of the public that aids detection. The Council's

Whistleblowing Policy is intended to encourage and enable staff to raise their concerns.

- 6.4. Every effort will be made to protect an informant's anonymity, if requested. However, the Council will always encourage individuals to be identified and put their name to the allegation to add more value to the accusations and allow further investigations to be more effective. Concerns expressed anonymously can be more difficult to investigate. When considering an investigation into an anonymous complaint, the seriousness of the issues raised, the credibility of the concern and the likelihood of confirming the allegation from attributable sources will all be taken into consideration. In certain circumstances, anonymity cannot be maintained. This will be advised to the informant prior to any release of information.
- 6.5. In some cases frauds are discovered by chance or "tip-off" and arrangements are in place to enable such information to be properly dealt with.
- 6.6. The Council takes part in the National Fraud Initiative which is co-ordinated by Internal Audit.
- 6.7. The National Fraud Initiative (NFI) is an exercise that matches electronic data within and between public and private sector bodies to prevent and detect fraud. Monmouthshire County Council, the Governance & Audit Committee and Senior Management are fully committed to this exercise and will commit the appropriate resource as deemed necessary.
- 6.8. All suspected irregularities are required to be reported (verbally or in writing) to one of the officers identified at 3.5. This is essential to the policy and:
 - Ensures the consistent treatment of information regarding fraud and corruption; and
 - Facilitates a proper and thorough investigation by an experienced audit team or appropriate officer, in accordance with agreed procedures.
- 6.9. This process will apply to all the following areas:
 - a) fraud/corruption by elected Members;
 - b) internal fraud/corruption;
 - c) other fraud/corruption by Council employees;
 - d) fraud by contractors and/or partnership employees;
 - e) external fraud (the public)
- 6.10. Cases under d) and e) where necessary would be referred to the External Auditor or Police. Cases under (a) in respect to the Code of Conduct for Members will be referred to the Public Services Ombudsman for Wales in addition to the External Auditor and/or the Police. Cases under b) and c) may be dealt with under the Council's disciplinary procedures.
- 6.11. Any decision to refer a matter to the Police will require the involvement of the Deputy Chief Executive (Chief Officer – Resources), the Monitoring Officer, Chief Internal Auditor and the relevant Chief Officer / Head of Service or, in their absence of any of these Officers or their nominated representatives. In these circumstances, it will be the responsibility of the Chief Internal Auditor to call a formal meeting of these officers to discuss the appropriate course of action.

- 6.12. Depending on the nature of an allegation under b) to e), the Chief Internal Auditor will work closely with the Chief Officer and Head of Service concerned to ensure that all allegations are thoroughly investigated and reported upon.
- 6.13. The Council's Disciplinary Procedures will be used to facilitate a thorough investigation of any allegations of improper behaviour by employees. The processes as outlined in paragraph 3.8 will cover Members.
- 6.14. If the allegation relates to an information security issue, e.g. a theft, breach or exposure of MCC confidential or client confidential data, the matter must also be reported to the Head of Information, Technology & Security the Councils nominated Senior Information Risk Owner (SIRO). Further guidance on the reporting of information security issues is given in the Council's Information Security Policy.
- 6.15. Periodic risk assessments will be undertaken to evaluate the Authority's exposure to the risk of fraud, corruption and bribery and to highlight particular areas of risk within the Authority. This will be undertaken between the Deputy Chief Executive / Chief Officer – Resources, Internal Audit and Risk Management on an annual basis.
- 6.16. Section 4 of the Counter Fraud, Corruption & Bribery Policy details the roles and responsibilities of those within the fraud investigation process. In addition to these, depending on the circumstances and specialisms of the case, the Chief Internal Auditor in conjunction with the Deputy Chief Executive may commission work to be undertaken by an independent investigator.
- 6.17. Managers should gather as much information as possible such as any notes or evidence that is readily available to support the allegation. This information should be held securely to ensure evidence is not destroyed, lost or tampered with. Under no circumstances should Managers attempt to investigate the matter themselves or covertly obtain further evidence as this may adversely affect any internal investigation or Police enquiry.
- 6.18. Those with concerns should avoid discussing their suspicions with anyone other than the officer with whom they formally raised the issue. Under no circumstances should any employee attempt to investigate any matter on their own.
- 6.19. Suspected fraud will be investigated in an independent, open-minded and professional manner with the aim of protecting the interests of both the Council and the suspected individual(s).
- 6.20. Where necessary the Council will work in co-operation with other organisations such as the Police, Department for Work and Pensions, Home Office, His Majesty's Revenue and Customs, UK Border Agency, Welsh Government and other Local Authorities.
- 6.21. In accordance with the Council's Disciplinary Policy, where initial investigations reveal that there are reasonable grounds for suspicion, it may be appropriate to suspend an employee against whom an accusation has been made. Suspension should only be considered as a last resort and every effort should be made to keep an employee in work where possible. Suspension will only be appropriate where keeping the employee at work imposes a risk to the employee, other employees or service users or their presence at work will impede the investigation. This decision will be taken by the relevant Chief Officer, in consultation with advice from Human Resources. It is important to note that suspension is not a disciplinary sanction and is

without prejudice on full pay. It is essential that any period of suspension is kept as brief as possible and is continually under review.

- 6.22.** It is important from the outset of an allegation to ensure that evidence is not contaminated, lost or destroyed. The investigating officer will therefore take immediate steps to secure physical assets, including computer and any records thereon, and all other potential evidential documents. They will also ensure, in consultation with the appropriate manager, that controls are immediately introduced to prevent further loss.
- 6.23.** Investigators will try to establish, at an early stage, whether it appears that a criminal offence has taken place. If a decision has been made to refer the matter to the police (as per section 6.11), this will be completed for consistency by the Chief Internal Auditor. They will specifically request the Police to confirm whether or not continuing with the Authority's disciplinary process would prejudice any potential Police investigation.
- 6.24.** Where there is a possibility of criminal action, the police will be consulted for advice and guidance and, if necessary, asked for their assistance where interviews are required to be conducted under caution in compliance with the Police and Criminal Evidence Act (PACE) which governs the admissibility of evidence in criminal proceedings.
- 6.25.** One key difference which should be borne in mind between internal disciplinary proceedings and criminal proceedings is the burden of proof. There is no requirement under an internal disciplinary investigation for a fact to be established beyond reasonable doubt. Instead, the disciplinary investigation needs only to be satisfied, 'on a balance of probabilities', that the misconduct has been committed before taking any disciplinary action. This means that while the police or Crown Prosecution Service may decide that there is insufficient evidence to uphold a criminal conviction, the Council may still take disciplinary action against individuals.
- 6.26.** Recovery action will be undertaken in relation to all losses incurred in relation to fraud, corruption or bribery. The Council also commits to pursuing a full range of sanctions – disciplinary, regulatory, civil and criminal where instances of fraud, corruption or bribery have been proven. Where the employee holds a registration with an external agency such as Social Care Wales and the Education Workforce Council, these organisations will be notified. Likewise, if it is known that the individual holds a professional qualification, such as an accountancy qualification, the Council reserves the right to report any concerns to the applicable body.
- 6.27.** For any concerns raised and/or investigated, the council must consider how any lessons could be learned and if controls need to be strengthened to prevent recurrence. Any weakness in the system of internal control will be identified in the investigation report and recommendations will be made, advising management as to how controls can be improved to prevent any reoccurrence. The relevant service manager will be required to provide a management response to the recommendations made. This does not preclude the investigating officer recommending or managers implementing additional controls at an early stage after the allegation has been received.
- 6.28.** A summary of matters identified and concluded concerning fraud, corruption or bribery will be reported to the Council's Governance & Audit Committee on a regular, 6 monthly basis. This report will also be shared with the Senior

Leadership Team and staff at all levels within the organisation to build awareness.

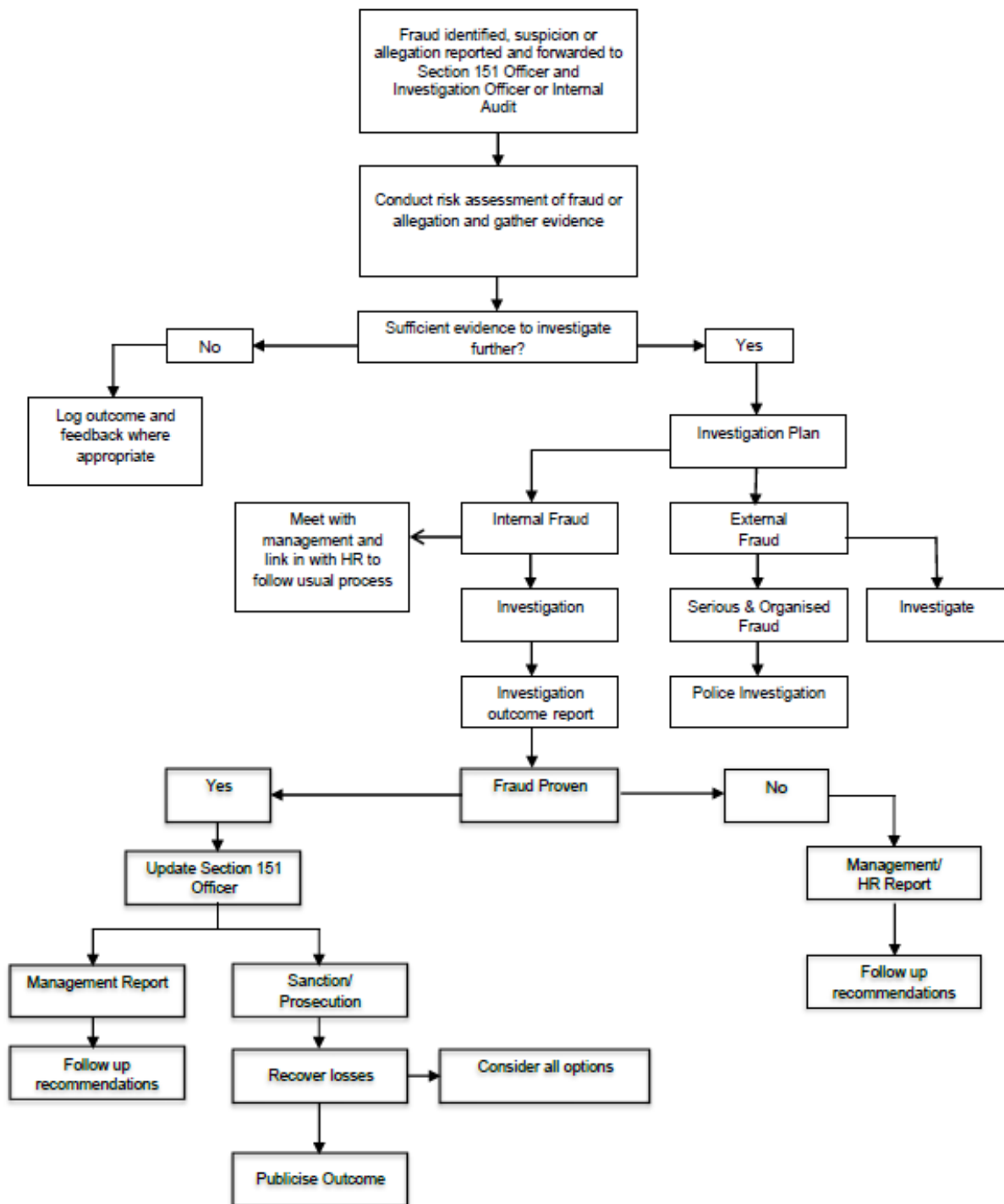
7. Awareness & Training

- 7.1. The Council recognises that the continuing success of this policy and its general credibility will depend in part on the effectiveness of training and awareness for members and employees. The policy is an integral part of the induction programme.
- 7.2. To facilitate this, the Council supports the provision of training programmes and circulation of relevant information to ensure that responsibilities and duties in this respect are regularly highlighted and reinforced. This includes the requirement for information to be provided to third parties providing services to and on behalf of the Council.
- 7.3. Specialist training in fraud and corruption issues will also be given to appropriate staff involved in investigation work.
- 7.4. The Council will publicise the Counter Fraud, Bribery and Corruption policy on the website and internal intranet along with other up to date advice and guidance on current issues.
- 7.5. Fraud awareness and anti-bribery training will be made available for all Council staff and elected members.

8. Conclusion

- 8.1. Monmouthshire County Council is committed to a zero tolerance approach in relation to fraud, corruption and bribery.
- 8.2. The Council has always prided itself on setting and maintaining high standards and a culture of openness, with core values. This policy fully supports the Council's desire to maintain an honest authority, free from fraud and corruption.
- 8.3. The Council has in place a network of systems and procedures to assist it in dealing with fraud and corruption when it occurs. It is determined that these arrangements will keep pace with any future developments in both preventative and detection techniques regarding fraudulent or corrupt activity that may affect its operation and to safeguard the interests of the Council, its customers and the residents of Monmouthshire.
- 8.4. The Council will maintain a continuous review of all these systems and procedures through Internal Audit.
- 8.5. This policy statement will be reviewed on a regular basis, with a maximum of three years between each review.

Appendix 1 – Fraud Response Plan



Appendix 2 – Acting on Suspicions – Do’s and Don’ts

DO

- **Note Your Concerns**
Record details such as your concerns, names, dates, times, details of conversations and possible witnesses. Time, date and sign your notes.
- **Retain Evidence**
Retain any evidence that may be destroyed or make a note and advise your line manager.
- **Report Your Suspicion**
Confidentiality will be respected; delays may lead to further financial loss.

DO NOT

- **Confront The Suspect or Convey Concerns to Anyone Other Than Those Authorised.**
Never attempt to question a suspect yourself; this could alert a fraudster or accuse an innocent person.
- **Try to Investigate**
Never attempt to gather evidence yourself unless it is about to be destroyed; gathering evidence must consider legal procedures in order for it to be useful. Internal Audit can investigate in accordance with legislation.
- **Be Afraid of Raising Your Concerns**
The Public Interest Disclosure Act 1998 and the Councils Whistleblowing Policy protects employees who have reasonable concerns. You will not suffer discrimination or victimisation by following the correct procedures.

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Integrated Impact Assessment document

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

<p>Name of the Officer Jan Furtek</p> <p>Phone no: 01600 730521 E-mail: janfurtek@monmouthshire.gov.uk</p>	<p>Please give a brief description of the aims of the proposal</p> <p>The policy provides an overview of the arrangements in place to develop and maintain an anti-fraud, bribery and corruption culture within Monmouthshire County Council. The policy encourages prevention, promotes detections and provides a process for reporting and investigating suspected acts of fraud.</p>
<p>Name of Service area Internal Audit</p>	<p>Date 08/01/2024</p>

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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 Anti-Fraud, Corruption & Bribery Policy will apply to all members of staff.	No negative impact identified.	n/a
Disability	The Anti-Fraud, Corruption & Bribery Policy will apply to all members of staff.	While the content of the policy will not have a negative impact on a person with a disability, as with all written control documents there may be a negative impact. Written policies may not be fully understood by those who have difficulty deciphering or reading the written word.	Training sessions will be offered across the Authority to promote an anti-fraud, corruption and bribery culture.

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	The Anti-Fraud, Corruption & Bribery Policy will apply to all members of staff.	No negative impact identified.	n/a
Marriage or civil partnership	The Anti-Fraud, Corruption & Bribery Policy will apply to all members of staff.	No negative impact identified.	n/a
Pregnancy or maternity	The Anti-Fraud, Corruption & Bribery Policy will apply to all members of staff.	No negative impact identified.	n/a
Race	The Anti-Fraud, Corruption & Bribery Policy will apply to all members of staff.	No negative impact identified.	n/a
Religion or Belief	The Anti-Fraud, Corruption & Bribery Policy will apply to all members of staff.	No negative impact identified.	n/a
Sex	The Anti-Fraud, Corruption & Bribery Policy will apply to all members of staff.	No negative impact identified.	n/a
Sexual Orientation	The Anti-Fraud, Corruption & Bribery Policy will apply to all members of staff.	No negative impact identified.	n/a

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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	The Anti-Fraud, Corruption & Bribery Policy will apply to all members of staff.	No negative impact identified.	n/a

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>Policy Making</p> <p>Effects on the use of the Welsh language,</p> <p>Promoting Welsh language</p> <p>Treating the Welsh language no less favorably</p>	<p>The Anti-Fraud, Corruption & Bribery Policy will apply to all members of staff. Those who wish to report concerns in Welsh can do so via the established means of communication with the council in Welsh by phone, email, twitter, Facebook, letters, forms, website transactions etc.</p>	<p>Policy is currently written in English until approved by Cabinet.</p>	<p>This policy has been developed with due consideration of the Welsh Language Scheme, and will need to be translated.</p>
<p>Operational</p> <p>Recruitment & Training of workforce</p>	<p>Not applicable</p>	<p>Not applicable</p>	<p>n/a</p>
<p>Service delivery</p> <p>Use of Welsh language in service delivery</p> <p>Promoting use of the language</p>	<p>The Anti-Fraud, Corruption & Bribery Policy will apply to all members of staff. Those who wish to report concerns in Welsh can do so via the established means of communication with the council in Welsh by phone, email, twitter, Facebook, letters, forms, website transactions etc.</p>	<p>Not applicable</p>	<p>n/a</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?
A prosperous Wales Efficient use of resources, skilled, educated people, generates wealth, provides jobs	The policy looks to ensure that resources are used effectively by Monmouthshire County Council and that instances of fraud, corruption or bribery are minimised and concerns dealt with appropriately.	A training package will be offered to all staff with attendance monitored.
A resilient Wales Maintain and enhance biodiversity and land, river and coastal ecosystems that support resilience and can adapt to change (e.g. climate change)	No impact.	n/a
A healthier Wales People's physical and mental wellbeing is maximized and health impacts are understood	No impact.	n/a
A Wales of cohesive communities Communities are attractive, viable, safe and well connected	No impact.	n/a
A globally responsible Wales Taking account of impact on global well-being when considering local social, economic and environmental wellbeing	No impact.	n/a
A Wales of vibrant culture and thriving Welsh language Culture, heritage and Welsh language are promoted and protected. People are encouraged to do sport, art and recreation	No impact.	n/a

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?
A more equal Wales People can fulfil their potential no matter what their background or circumstances	No impact.	n/a

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>The policy offers a long term plan for minimising the impact of fraud on the organisation along with a commitment to conducting short term (annual) fraud risk assessments.</p>	<p>Annual Fraud Risk Assessments will be reported to the Governance & Audit Committee for consideration.</p>
 <p>Collaboration</p> <p>Working together with other partners to deliver objectives</p>	<p>The policy applies to;</p> <ul style="list-style-type: none"> a) fraud/corruption by elected Members; b) internal fraud/corruption; c) other fraud/corruption by Council employees; d) fraud by contractors and/or partnership employees; e) external fraud (the public) 	<p>Publication of the policy on the Councils external website.</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>Involvement</p> <p>Involving those with an interest and seeking their views</p>	<p>The relevant stakeholders have been identified within the main policy document.</p>	<p>n/a</p>
 <p>Prevention</p> <p>Putting resources into preventing problems occurring or getting worse</p>	<p>The policy sets out how the Council will look to prevent fraud and the steps it is taking to demonstrate a zero-tolerance culture and attitude to fraud, bribery, and corruption.</p>	<p>n/a</p>
 <p>Integration</p> <p>Considering impact on all wellbeing goals together and on other bodies</p>	<p>All wellbeing goals have been considered through the revision of the policy and the impact that this has.</p>	<p>n/a</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?

	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	No impact identified.	No impact identified.	n/a
Corporate Parenting	No impact identified.	No impact identified.	n/a

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

Fraud Act 2006
 The Bribery Act 2010
 Monmouthshire Anti-Fraud, Bribery & Corruption Policy 2017
 Audit Wales 'Raising Our Game' - Tackling Fraud in Wales

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?

The policy, strategy and response plan supports the Council to discharge their responsibilities for ensuring proper financial practice and adherence to all codes of ethics, standards, safeguarding of assets and to help avoid any suspicion of impropriety.

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
Anti Fraud, Corruption & Bribery Training	2024/25 Financial Year	Chief Internal Auditor

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
11	Cabinet		

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SUBJECT:	STATUTORY CONSULTATION ON PROPOSALS TO INCREASE THE CAPACITY OF YSGOL GYMRAEG Y FENNI
MEETING:	CABINET
DATE:	17TH JANUARY 2024

1. PURPOSE:

- 1.1 The purpose of the report is to seek Members' permission to consult with stakeholders on the Council's intention to increase the capacity of Ysgol Gymraeg Y Fenni to 420 places through its relocation to the site previously occupied by the former Deri View Primary School.
- 1.2 Members will be aware of their previous commitment to relocate Ysgol Gymraeg Y Fenni to the Deri View site as part of the band B proposals that involved the establishment the 3-19 School in Abergavenny. This report is to agree the school organisation route that will allow for the relocation and associated increase in capacity.

2. RECOMMENDATIONS:

It is recommended that Members:

- 2.1 Agree to enter into a statutory consultation process as set out in the School Organisation Code (a document produced by virtue of the School Standards and Organisation (Wales) Act 2013) to obtain the views of consultees on relocating Ysgol Gymraeg Y Fenni to the former Deri View Primary site.
- 2.2 Agree and approve the attached draft consultation document (appendix 1) which proposes to relocate Ysgol Gymraeg Y Fenni to the former Deri View Primary School site which will allow for its increase in capacity to 420 places.

3. KEY ISSUES:

- 3.1 The Council is committed to giving every young person in Monmouthshire the best possible start in life as set out in the Corporate Plan. At its heart is improving the educational achievement and attainment of all children and young people in the county
- 3.2 In October 2017 Cabinet agreed the submission of the Council's Band B proposals to Welsh Government as part of the 21st Century Schools Programme. The major part of these proposals was to establish an all-through school on the King Henry VIII School site in Abergavenny.
- 3.3 However, as part of the proposals to establish the all-through school, it was acknowledged that the proposals would leave the Deri View site vacant, which would be repurposed to provide the necessary accommodation in order to meet the increasing demand for pupils wanting to learn through the medium of Welsh.
- 3.4 The duty to ensure appropriate provision of school places is not limited to our English Medium School places. The Council has a duty to ensure that its provision of places for those young people wishing to be educated through the medium of Welsh is suitable, sustainable and allows an opportunity for growth.
- 3.5 Members will be aware of the Council's commitment to the Welsh Government's national strategy Cymraeg 2050, which sets out a long-term vision for a Wales where the Welsh Language thrives. The strategy aims to increase the number of Welsh speakers to 1 million by 2050.
- 3.6 For the Council to contribute to this national target, it must deliver on its statutory duties to ensure that there is growth of the Welsh language across the county. One of the ways of us achieving this growth is to continue to develop and improve our provision of Welsh medium education and the benefits it brings. It is hoped that by doing so, there will be an increase in the demand for Welsh medium school places across the County.
- 3.7 The Council's Welsh in Education Strategic Plan (WESP) was approved by Welsh Government in June 2022 and sets out our commitments to grow the Welsh language across the county. The WESP outlines our target of having 115 learners in each primary year group being taught through the medium of Welsh by 2031.

- 3.8 The Council has so far invested significant funding into the refurbishment and extension of Ysgol Gymraeg Y Ffin (Caldicot) which is now able to offer 210 places to Welsh medium learners. Alongside this, the Council has committed to the opening of a seedling school in Monmouth with effect from September 2024. The relocation and associated increase in capacity of Ysgol Gymraeg Y Fenni is the next step in providing us with the accommodation suitable for achieving our WESP targets.
- 3.9 In addition to our strategic targets to grow Welsh medium education, the proposal is also formed in response to the support that is required at Ysgol Gymraeg Y Fenni to manage their increasing numbers on roll.
- 3.10 Ysgol Gymraeg Y Fenni was originally opened as a 210 place School, however, has evidently grown in numbers since its original opening and as at September 2023, has 241 pupils on roll (excluding the Meithrin). The Council has supported the school with this increasing demand by renting temporary accommodation to provide additional classroom space. The capacity of the school is now 317, however, it is acknowledged that a large proportion of the accommodation is temporary and does not meet our aspirations of providing excellent teaching and learning environments. There are also no further opportunities to increase the capacity on its current site.

4. EQUALITY AND FUTURE GENERATIONS EVALUATION (INCLUDES SOCIAL JUSTICE, SAFEGUARDING AND CORPORATE PARENTING)

An integrated impact assessment associated with the proposals has been completed and can be found under appendix 2. This assessment will be reviewed and updated to incorporate the feedback received during the consultation period.

5. OPTIONS APPRAISAL

- 5.1 The attached consultation document outlines 4 options for responding to our statutory requirement of growing Welsh medium education in the County:
- i) Do Nothing
 - ii) Build a new 420 place School to replace Ysgol Gymraeg Y Fenni
 - iii) Increase the capacity of the school on its current site
 - iv) Relocate Ysgol Gymraeg Y Fenni to the site previously occupied by Deri View Primary School

- 5.2 The preferred option on which we would like to consult is option 4, which is to utilise existing accommodation available at the former Deri View Primary School site in order to increase the capacity of Welsh medium education within the area to 420 places.
- 5.3 This option is not only the most financially viable but delivers excellent teaching and learning facilities and a prompt solution to relieving the accommodation pressures currently experienced on the current Ysgol Gymraeg Y Fenni site.
- 5.4 The consultation process is proposed to run over the next 7 months in line with the timescales outlined below:

Consultation stage

Statutory Consultation Period to commence on	Statutory Consultation Period concludes on	Period of consultation required
29 th January 2024	11 th March 2024	6 weeks (including 20 school days)

Post consultation stage

Stage of process	Key date
Cabinet consider the results of the consultation and determines whether to proceed with proposal	10 th April 2024
Should the Council wish to proceed, statutory notices will be published and we enter into objection period	22 nd April 2024
Closure of the objection period	21 st May 2024
Cabinet consider the objection report and determine whether or not to implement the proposal	17 th July 2024
Implementation of Proposal	April 2025

6. REASONS:

- 6.1 The Council has a statutory duty as part of the School Organisation Code 2018 to consult with appropriate stakeholders when considering any significant school reorganisation proposals.
- 6.2 The proposed change will help to address the Council's commitment to growing Welsh medium education across the County, as well as

addressing the increasing demand for School places at Ysgol Gymraeg Y Fenni.

7. RESOURCE IMPLICATIONS:

- 7.1 The Council's adopted SOP that formed the proposals to establish a new 3-19 School also identified the relocation of Ysgol Gymraeg Y Fenni to the former Deri View Primary school site. Capital funding in the region of £1million was identified and agreed during this process to support the relocation and undertake any required refurbishment works associated with this proposal.
- 7.2 The proposal would also result in an increase in capacity of Ysgol Gymraeg Y Fenni to become a provision for 420 pupils / two form entry. The school will continue to be funded in line with the adopted funding formula which will allow for the recruitment of additional staff as numbers on roll at the school increase.
- 7.3 The Council currently funds the rental of temporary accommodation located on the site of Ysgol Gymraeg Y Fenni which would be released should proposals be implemented.

8. CONSULTEES:

CYP DMT
SLT
Cabinet Member for Education

9. BACKGROUND PAPERS:

Welsh Government School Organisation Code 2018

10. AUTHOR:

Matt Jones, Access Unit Manager

11. CONTACT DETAILS:

Tel: 01633 644585

E-mail: matthewdjones@monmouthshire.gov.uk

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Integrated Impact Assessment document

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

<p>Name of the Officer Matt Jones</p> <p>Phone no:01633644508 E-mail: matthewdjones@monmouthshire.gov.uk</p>	<p>Please give a brief description of the aims of the proposal</p> <p>To consult on the relocation of Ysgol Gymraeg Y Fenni to the former Deri View Primary School site, allowing an increase in capacity to 420 places</p>
<p>Name of Service area Children and Young People</p>	<p>Date December 2023</p>

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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 school will provide additional Welsh medium education for children aged 3-11 living in Abergavenny.	Welsh medium education for children aged 12-19 is not yet available in Monmouthshire	MCC in collaboration with neighbouring authorities in Southeast Wales are looking at potential options across the region
Disability	The proposed new site will be fully accessible to allow those with disabilities to be able to access the site.	No Impact	No Impact

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	No impact	n/a	n/a
Marriage or civil partnership	No impact	n/a	n/a
Pregnancy or maternity	No impact	n/a	n/a
Race	No impact	n/a	n/a
Religion or Belief	No impact	n/a	n/a
Sex	The provision will be co-educational including boys and girls.	n/a	n/a

2023-2024
 199
 100

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?
Sexual Orientation	No impact	n/a	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 socioeconomic 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?

<p>Socio-economic Duty and Social Justice</p>	<p>It is hoped that this proposal will increase the number of Welsh speakers in Monmouthshire. Being bilingual has many advantages, for example, due to the Welsh Language (Wales) Measure 2011 the ability to speak Welsh is either an essential or desirable skill for a growing number of jobs such as health, education, leisure, childcare and retail. This is especially the case in the provision of public services where the Welsh Language Standards require local authorities, fire and rescue service and police etc to provide their services to the same standards in both Welsh and English. The expansion of Welsh medium education across Monmouthshire means that more learners will have the opportunity to become bilingual thereby giving them a real advantage in securing employment opportunities</p>	<p>Time, distance and cost of travel has been identified as a challenge for some learners, particularly those suffering from socio economic disadvantage. As a result, Welsh medium education is not a genuine option for some learners. Learners who did not start Welsh medium education in Nursery or Reception have been unable to join in later years.</p>	<p>The Local Authority plan to review the School Transport Policy to ensure that it provides learners with a genuine opportunity to have a Welsh medium education. The increase in capacity in Aberrgavenny and the development looking at secondary provision in partnership with Blaenau Gwent, Merthyr Tydfil and Powys will create potential. This will allow more choice to parents wishing to provide Welsh medium education to their children. The development of an Immersion provision within Monmouthshire means that all learners, irrespective of age or linguistic background, will be able to benefit from a Welsh medium education.</p>
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3. Policy making and the Welsh language.

<p>How does your proposal impact on the following aspects of the Council's Welsh Language Standards:</p>	<p>Describe the positive impacts of this proposal</p>	<p>Describe the negative impacts of this proposal</p>	<p>What has been/will be done to mitigate any negative impacts or better contribute to positive impacts</p>
<p>Policy Making</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>Should the proposal be agreed it will have a positive impact on the Welsh Language as we will be increasing the number of Welsh medium places. This will enable families to access Welsh medium education closer to their home. They will also have access to Welsh medium nursery and childcare. The proposal will significantly promote the Welsh language offer in Abergavenny, this links directly with the Council's ambition to support the Cymraeg 2050 strategy of 1 million Welsh speakers and also the targets set out in the Council's Welsh Language 5-year strategy 22-27 and also the targets set in the Council's Welsh in Education Strategic Plan 2232.</p> <p>The proposal allows for the opportunity to develop an immersion centre on site which will allow "late comers" to access Welsh medium education, providing further opportunities to increase the number of Welsh speakers within the county.</p>	<p>The relocation of Ysgol Gymraeg Y Fenni will not involve a move to a brand new building for WELSH Medium Education.</p> <p>There is currently no Welsh medium secondary provision in Monmouthshire so there will still be long travelling times to Ysgol Gyfun Gwynllyw in Torfaen.</p> <p>It is unlikely that there will be a negative impact on existing home to school transport arrangements, as the relocation of the school is only 0.4 miles from its existing site. However, for those residing on the border of the 1.5 miles distance criteria, their entitlement could be withdrawn.</p>	<p>The proposed new building for Ysgol Gymraeg Y Fenni will receive investment in the region of £1 million to refurbish identified areas prior to relocating.</p> <p>MCC will continue to develop its discussions and engagement with Powys County Council and Blaenau Gwent County Borough Council to secure new Welsh medium secondary provision in the north of Gwent / south Powys area to mitigate the potential negative impact of this proposal.</p> <p>The council's Welsh in Education Forum (WEF) will be kept closely informed and involved in discussions on this. The Council will continue its on-going dialogue with Torfaen County Borough Council regarding the provision at Ysgol Gyfun Gwynllyw so that Welsh medium secondary education at the school remains an attractive option for pupils who wish to</p>

			<p>receive a wholly immersive Welsh education experience.</p> <p>Home to school transport to the new site would only be withdrawn if the new site means that they reside within 1.5 miles from the home address. This is considered to be a reasonable walking distance, and is inside the criteria of 2 miles that is set by Welsh Government</p>
<p>Operational Recruitment & Training of workforce</p>	<p>The increase in Welsh medium capacity will generate the need for a greater number of Welsh Medium teachers and support staff in the Abergavenny area over time. This will create opportunities for Welsh speakers in Monmouthshire and outside of the area to be able to utilise their Welsh language skills in the work environment. Recruitment Will be easier and can be gradually.</p>	<p>There is a risk that we may not be able to secure sufficient Welsh speaking teachers / staff to fulfil the requirements of the new school.</p>	<p>In order to mitigate this risk, we will actively engage closely with our colleagues in the Welsh Government, the Education Achievement Service (EAS) and the local higher education institutes to help facilitate greater numbers of Welsh Medium teachers. We will also use all available recruitment tools at our disposal to aid the recruitment process – social media (twitter, facebook, you tube), council website, bespoke Welsh Medium recruitment sites, Linkedin etc. We will engage with our partners in the Welsh in Education Forum (WEF) to assist us in this process utilising their expertise and range of contacts</p>

<p>Service delivery</p> <p>Use of Welsh language in service delivery</p> <p>Promoting use of the language</p>	<p>Should the consultation document be agreed it will be distributed to stakeholders in both Welsh and English.</p> <p>All correspondence and communications including on social media in relation to this proposal will be bilingual as required by the Welsh Language (Wales) Measure 2011</p> <p>The consultation feedback survey will provide the opportunity for respondents to advise us of any positive or negative impacts on the Welsh Language that they feel will occur as a result of these proposals</p>	<p>There is a risk that we will not be able to recruit sufficient Welsh speaking specialist local authority staff to deliver all services in Welsh.</p>	<p>To mitigate this risk, we will actively engage closely with colleagues in the Welsh Government, and the local higher education institutes to help facilitate greater numbers of Welsh Medium staff. We will also use all available recruitment tools at our disposal to aid the recruitment process – social media (Twitter, Facebook, YouTube), council website, bespoke Welsh Medium recruitment sites, LinkedIn etc. We will engage with our partners in the Welsh Medium Education Forum (WEF) to assist us in this process utilizing their expertise and range of contacts</p>
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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!




<p>Well Being Goal</p>	<p>Does the proposal contribute to this goal? Describe the positive and negative impacts.</p>	<p>What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?</p>
<p>A prosperous Wales Efficient use of resources, skilled, educated people, generates wealth, provides jobs</p>	<p>The ability to speak Welsh is either an essential or desirable skill for a growing number of jobs such as health, education, leisure, childcare, retail, and public services. This means that more learners will have increased employment opportunities as a result of being Bilingual in Welsh and English. There will be Increased employment opportunities within the proposed new school</p>	<p>No impact</p>

<p>A resilient Wales Maintain and enhance biodiversity and land, river and coastal ecosystems that support resilience and can adapt to change (e.g. climate change)</p>	No Impact	No Impact
<p>A healthier Wales People's physical and mental wellbeing is maximized and health impacts are understood</p>	This proposal would result in more children being able to access Welsh medium provision in their community and be able to walk to school rather than being transported.	No Impact
<p>A Wales of cohesive communities Communities are attractive, viable, safe and well connected</p>	Parents seeking Welsh medium education for their children in the Abergavenny area will be able to access provision within their community. This will increase the opportunities for more learners to use the Welsh language outside of school in social settings and a range of authentic contexts.	No Impact
<p>A globally responsible Wales Taking account of impact on global well-being when considering local social, economic and environmental wellbeing</p>	No Impact	No Impact
<p>A Wales of vibrant culture and thriving Welsh language Culture, heritage and Welsh language are promoted and protected. People</p>	If the proposal is agreed The Welsh Government's strategy of One Million Welsh Speakers will be supported by the increase in the number of pupils being educated through the medium of Welsh.	No Impact
<p>Well Being Goal</p>	<p>Does the proposal contribute to this goal? Describe the positive and negative impacts.</p>	<p>What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?</p>

are encouraged to do sport, art and recreation		
A more equal Wales People can fulfil their potential no matter what their background or circumstances	The expansion of Welsh medium education in Abergavenny means that more learners will have the opportunity to become bilingual in both English and Welsh and increase their chances of securing employment as adults and fulfilling their potential.	No impact

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>	If learners are able to attend a Welsh medium primary school in their local community or within a short traveling time, they are more likely to choose and continue their education through the medium of Welsh.	No Impact
 <p>Collaboration</p> <p>Working together with other partners to deliver objectives</p>	This proposal is supported by our Welsh in Education Forum (WEF), the forum is represented by a number of key partners who are consulted with and are crucial in the delivery of our WESP targets.	No Impact
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>Involvement</p>	<p>Involving those with an interest and seeking their views</p>	<p>The school is to serve the entire Aberavenny cluster and all those affected by the proposal will be consulted with as part of the statutory consultation process. In addition, the WEF members have been actively engaged on the proposal.</p>	<p>No Impact</p>
 <p>Prevention</p>	<p>Putting resources into preventing problems occurring or getting worse</p>	<p>Currently families wanting to access Welsh medium Education may be deterred by the pressured site and temporary accommodation. This may be suppressing demand and resulting in parents not choosing Welsh medium education. Having a purpose built 420 place school for Welsh medium may resolve this issue and also stimulate demand.</p>	<p>No Impact</p>
 <p>Integration</p>	<p>Considering impact on all wellbeing goals together and on other bodies</p>	<p>Having Welsh medium provision available in the local community will have a positive impact on the health and wellbeing of pupils in Aberavenny.</p>	<p>No impact</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?

	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	Appropriate safeguarding arrangement will continue to be in place at the new site.	No impact	No Impact
Corporate Parenting	No Impact		

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

Faithful and Gould condition and suitability survey including identified backlog maintenance requirements (the Proposal document cites local backlog maintenance measures)

Data supplied by Health on the number of "live births" within the County.

Data from Planning on number of Housing Developments planned for the immediate coming years. Current numbers on school rolls and trend analysis.

Surplus places – data from MCC Access team

Planning of school places data – MCC Access team

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?

The Main benefits of the proposal is by increasing the number of Welsh medium place in Abergavenny delivered through improved teaching and learning facilities, we are likely to increase the demand for those wishing to be educated through the medium of Welsh. This will in turn increase the amount of Welsh medium places across Monmouthshire so meeting our targets within our WESP. We will also be contributing to the Welsh governments strategy of 1 million Welsh speakers by 2050.

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
N/A		

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
1	CYP DMT	08/01/24	
2	Cabinet – permission to consult	17/01/24	
3	Cabinet – consultation feedback and final decision making	July 24	

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CONSULTATION DOCUMENT

Relocation and associated increase in capacity of Ysgol
Gymraeg Y Fenni

MONMOUTHSHIRE COUNTY COUNCIL

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1. INTRODUCTION

Monmouthshire County Council (the Council) has a statutory duty to secure sufficient and suitable school places for children within the County, and in doing so ensure that resources and facilities are efficiently utilised to deliver the educational opportunities that our children deserve.

The duty to ensure appropriate provision of school places is not limited to our English Medium School places. The Council has a duty to ensure that its provision of places for those young people wishing to be educated through the medium of Welsh is suitable, sustainable and allows an opportunity for growth.

This document represents the Council's responsibilities as part of the School Organisation Code 2018 (a document produced by virtue of the School Standards and Organisation (Wales) Act 2013)¹ to consult with appropriate stakeholders when giving consideration to any significant school reorganisation proposals.

The purpose of this document is to provide information on the Council's proposal to increase the capacity of Ysgol Gymraeg Y Fenni to 420 places plus a 60 place Meithrin, delivered through its relocation to the school site previously occupied by the former Deri View Primary School.

2. CONSULTATION ARRANGEMENTS

The Council proposes ***to relocate Ysgol Gymraeg Y Fenni from its existing site to the site previously occupied by Deri View Primary School.*** The relocation of the school will enable a revised capacity from 317 places to 420 places, plus a 60 place Meithrin (Nursery).

The Council is now engaging in statutory consultation processes with all interested parties to ensure that any decision taken by the Council is an informed one.

The proposed timescales for the formal consultation process are:

Statutory Consultation Period to commence on	Statutory Consultation Period concludes on	Period of consultation required
29 th January 2024	11 th March 2024	6 weeks (including 20 school days)

2.1 FORMAL CONSULTATION PROCESS

The formal consultation process represents an opportunity for people to learn about the proposal, ask questions and make comments that will be recorded and considered when the Council determines whether or not to implement the proposal.

The Council seeks to engage with a wide range of stakeholders on the proposal outlined in this consultation document. A full list of the consultees can be found under [Appendix 3](#).

As part of the consultation process, the Council has arranged for the following sessions to engage interested parties who may wish to learn about the proposal.

Day	Date	Time	Venue
TBC	TBC	TBC	Ysgol Gymraeg Y Fenni

In addition to the above, any views, comments, or questions on the proposal can be submitted to the Council by:

- Completing the online consultation questionnaire available via www.monmouthshire.gov.uk/school-reorganisation
- Emailing strategicreview@monmouthshire.gov.uk

Completion of the questionnaire will enable us to undertake detailed analysis of the feedback we receive from consultees.

Comments must be submitted to the Authority by the consultation closing date.

Important: This consultation will not make any assumptions, so whether you are for or against the proposed changes, please take this opportunity to have your say.

If you have any questions on the proposals please contact the Access Unit on 01633 644508 or by emailing strategicreview@monmouthshire.gov.uk.

It is important to note that any unfavourable comments made during the consultation period will not be treated as objections to the proposals but will be accepted as adverse comments. Objections to the proposals can only be accepted after the consultation period has concluded and should the Council determine to proceed with the proposals by way of publishing statutory notices.

If you wish to object, you will need to do so in writing should the Council enter into a statutory objection period. If consultees submit a request during the objection period, asking for a response submitted at the consultation stage to be treated as an objection this will be accepted.

2.2 CONSULTATION WITH CHILDREN AND YOUNG PEOPLE

The views of children and young people are extremely important to the Council and therefore children and young people will be provided with opportunities to contribute to this consultation process. The Council has produced a summary version of this consultation document, which will be made accessible for all children and young people affected by this proposal.

The Council also intends to hold sessions with the school council and individual learners where this is felt to be appropriate and practicable. Consultation with children and young people will be supported by key professionals and their views captured and considered in any reports that may determine our way forward.

2.3 CONCLUSION OF THE FORMAL CONSULTATION PROCESS

Once the opportunity to respond to the proposal outlined within this consultation document has closed, the Council's Cabinet will then be provided with a consultation report analysing the views shared by consultees during the formal consultation process and determine whether or not they wish to proceed with the proposal.

If the decision is taken by the Council's Cabinet to proceed with the proposal, a statutory notice will be published. The statutory notice period will last for 28 days from the date of publication to enable consultees to express their views in the form of supporting or objecting to the proposal. A copy of the consultation report will be published at least two weeks prior to the publication of a statutory notice.

The Council's Cabinet will then consider the responses received during the statutory notice period in the form of an objection report and make the final decision as to whether to proceed with the proposal. The proposed timetable for decision making following the formal consultation process is:

Stage of process	Key date
Cabinet consider the results of the consultation and determines whether to proceed with proposal	10 th April 2024
Should the Council wish to proceed, statutory notices will be published and we enter into objection period	22 nd April 2024
Closure of the objection period	21 st May 2024
Cabinet consider the objection report and determine whether or not to implement the proposal	17 th July 2024
Implementation of Proposal	April 2025

2.4 IMPLEMENTATION OF THE PROPOSALS

Should the outcome of the statutory process outlined within this consultation document conclude that proposals are to proceed as presented, Ysgol Gymraeg Y Fenni will relocate to its new School site with its revised capacity of 420 places (plus 60 place Meithrin) with effect from April 2025.

3. BACKGROUND INFORMATION

The Council is committed to improving the educational achievement and attainment for all children and young people in the county through the provision of an inclusive education system that places the learner at the centre.

The Council strives to provide children and young people with the best possible start in life. Investing in all our children's learning and development, ensuring they have the environments, skills and support to flourish and be prepared for the work of the future and meet the demands of a rapidly changing world environment.

Through our work with schools, parents and key partners, we seek to:

- Secure equality of access to education for all children and young people
- Deliver a high quality and inclusive curriculum for all learners
- Educate our children and young people in their local communities whenever possible
- Support children and young people and their families to enable them to live a happy and fulfilling life
- Provide meaningful opportunities for learners to access support when they need it and return to their community school as soon as they are able
- Meet the needs of children and young people now and be suitably adaptable to meet changing needs in the future

The aims above link directly to our Directorate core values, which aspire to ensure that all of our children and young people will:

- **Be ready for school** - through engagement with our Early Years and Flying Start programmes.
- **Be in school** - supported by our Access and Education Welfare teams.
- **Be well behaved** - through support from our Behaviour and Inclusion teams.
- **Be well taught** - by the teachers and teaching assistants in our schools.

Over the last five years, we have made progress towards fulfilling this commitment for the majority of our children and young people. Education remains a top priority for the Council and it is committed to delivering improved performance in educational provision in line with the requirements of the Welsh Government policy and objectives.

At its meeting in October 2017, Cabinet agreed the submission of its Band B proposals to Welsh Government as part of what was then known as the 21st Century Schools Programme. The most significant part of the proposal involved the establishment of an all-through school on the King Henry VIII School site, which would involve the merger of King Henry VIII Comprehensive and Deri View Primary Schools.

However, the scheme also outlined the Council's commitment to increasing its Welsh medium provision within the area, and agreed that the above scheme would provide the opportunity to relocate Ysgol Gymraeg Y Fenni to the 420 place Deri View Primary School site, subject to statutory consultation processes.

The Statutory consultation process surrounding the new 3-19 School concluded in January 2022 where Cabinet made the decision to establish the school with effect from September 2023. The new school has now opened, albeit the primary and secondary provision is currently located on separate sites whilst we await the completion of the new school building works. It is anticipated that the primary elements of the new provision will relocate to the former King Henry VIII Comprehensive School site during the autumn term 2024, leaving the former Deri View Primary School site vacant.

The above arrangements now mean that we are able to proceed with the statutory consultation processes required to relocate Ysgol Gymraeg Y Fenni to the 420 place site, with effect from April 2025.

4. CURRENT WELSH MEDIUM PROVISION

The Council's Welsh medium offer is currently delivered through the following provision:

Primary Education

The Council currently has two Welsh medium Primary Schools, Ysgol Gymraeg Y Fenni located in the north of the county in Abergavenny, and Ysgol Gymraeg Y Ffin located in the south of the county in Caldicot. In addition to this, a new seedling school will open in Monmouth delivering Welsh medium education for those eligible to start Nursery and Reception in September 2024.

Secondary Education

The secondary Welsh medium provision is currently delivered through collaboration arrangements with our partners Torfaen County Council and Newport City Council.

For families residing within the North of the County, children wishing to continue their studies through the medium of Welsh can do so by attending their catchment school of Ysgol Gyfun Gwynllyw, Torfaen.

For families residing within the South of the County, children wishing to continue their studies through the medium of Welsh can do so by attending their catchment school of Ysgol Gyfun Gwent Is Coed, Newport.

5. THE JOURNEY SO FAR

Monmouthshire County Council fully supports and is committed to the Welsh Government's national strategy Cymraeg 2050, which introduces a long-term vision for a Wales where the Welsh Language thrives. The strategy aims to increase the number of Welsh speakers to 1 million by 2050.

The Council has invested significantly to increase the provision that is available to those seeking to be educated through the medium of Welsh:

1. Ysgol Gymraeg Y Ffin

Ysgol Gymraeg Y Ffin, located in the South of the County (Caldicot) has been subject to significant investment which has resulted in an increase in its capacity from 180 places to 210 places.

The school has also seen investment through means of building a new "community hwb" on site. The provision currently houses a Cylch Meithrin with wrap around child care facilities alongside flying start provision, all provided through the medium of Welsh. This has been a fantastic investment that has allowed the community to access the Welsh language from the very youngest of ages.

Finally, the Council has worked closely with Ysgol Gymraeg Y Ffin to establish an immersion facility on site, allowing us to deliver a period of intense Welsh language support to those young people who are considered to be "late comers" to Welsh medium provision.

2. Ysgol Gymraeg Trefynwy (Monmouth)

Welsh Government announced that they would be providing funding to support capital investments and facilitate growth in Welsh medium education and the use of the Welsh language.

Monmouthshire County Council was successful in its bid of around £3.1 million to establish a new Welsh medium seedling School with Early Years and childcare provision in Monmouth. Following a period of statutory consultation, the Council's Cabinet confirmed its decision in September 2023 to establish the provision on the site of Overmonnow Primary School. The seedling school will begin its journey by offering provision for those children eligible to start Nursery and Reception in September 2024.

3. Ysgol Gymraeg Y Fenni

Ysgol Gymraeg Y Fenni, located in the North of the County (Abergavenny) has pleasingly seen increasing numbers and as such has been supported by the Council through means of providing additional accommodation that has increased their capacity from 257 school places to 317 (plus a 60 place Meithrin) giving a total

capacity of 347. However, the increase has been delivered through means of renting temporary accommodation on the site of the current school.

The Council acknowledged that this increase in capacity would be a temporary measure whilst options for a longer term, more sustainable option could be delivered. It is felt that the proposals outlined within this consultation document will provide the school and its community with the required facilities to continue its success in growing the Welsh Language.

5. THE PROPOSAL

The proposal is to relocate Ysgol Gymraeg Y Fenni from it's current site of St Davids Road, Abergavenny, NP7 6HF to the former Deri View Primary School site of Llwynu Lane, Abergavenny, NP7 6AR. The approximate distance between the current site and the proposed site is 0.4 miles.

The proposed relocation of Ysgol Gymraeg Y Fenni will enable the capacity of the School to be increased from its current 317 places (45 per year group) to 420 places (60 per year group) with an additional 60 place Meithrin (nursery).

The new school site will also provide the opportunity to establish an immersion centre to mirror that currently offered at Ysgol Gymraeg Y Ffin, Caldicot. The immersion centre will allow a period of intense support to enable those young people considered as "late comers" to the language to be able to access Welsh medium provision alongside their peers.

5.1 REASONS FOR THE PROPOSAL

The proposals outlined within this consultation document have been formed with the follow principles in mind:

1) Our Statutory duties

Monmouthshire County Council fully supports and is committed to the Welsh Government's national strategy Cymraeg 2050, which introduces a long-term vision for a Wales where the Welsh Language thrives. The strategy aims to increase the number of Welsh speakers to 1 million by 2050.

The Council recognises that in order to contribute to this national target, it must deliver on its statutory duties to ensure that there is growth of the Welsh language across the county. One of the ways of us achieving this growth is to continue to develop and improve our provision of Welsh medium education and the benefits it brings. It is hoped that by doing so, there will be an increase in the demand for Welsh medium school places across the County.

2) Responding to existing Welsh Medium demand

Ysgol Gymraeg Y Fenni is our current Welsh medium primary school that serves the North of the County. The school was originally opened on its current site as a 210

place Primary School, with provision available for 30 children per year group. The demand for Welsh medium education across the area has since increased as shown in the table below:

Ysgol Gymraeg Y Fenni Numbers on roll (Reception – Year 6) based on January annual census returns:

2015	2016	2017	2018	2019	2020	2021	2022	2023
187	213	222	234	230	221	228	250	254

The current numbers on roll (September 2023*) are:

Reception	Yr 1	Yr 2	Yr 3	Yr 4	Yr 5	Yr 6	Total
31	36	60	26	37	21	30	241

**September 2023 numbers have been quoted as we have not yet reached the January 2024 annual census return.*

In response to this demand, the Council has worked closely with the School and its governing body to increase the capacity of the school within the limitations of its current site. The School now offers a capacity for up to 317 children and young people with year group intake number of 45. In addition to this, the school has a 60 place Meithrin. Unfortunately, the increase in capacity is delivered through temporary accommodation and is not a sustainable option to allow us to reach our aspirations outlined within the Welsh in Education Strategic Plan (WESP). In addition, there are no opportunities to further increase the capacity of the school on its current site.

3) Quality teaching and learning environments

The Council has committed to ensuring that it offers excellent teaching and learning environments to our children and young people, so that they stand the best chance of achieving excellent outcomes that will set them up for their journey through life.

As mentioned above, the Council over recent years has supported the increase in capacity at Ysgol Gymraeg Y Fenni in response to its growing demand. However, of its 317 available places, 137 places are currently delivered through the use of temporary accommodation, which the Council does not consider to be either suitable or sustainable for the delivery quality teaching and learning in the longer term.

In addition to this, the Headteacher and governing body continue to report concerns around the unsustainable pressures on facilities across the site as a result of increasing numbers on roll.

5. OPTIONS APPRAISAL

In forming its proposal the Council has undertaken a full options appraisal:

Option 1 – Do nothing and maintain the status quo. This would mean that Ysgol Gymraeg Y Fenni would remain on its current site with its current capacity.

Strengths	Weaknesses
Low Cost	The Council would not be able to grow Welsh Medium provision in the area beyond the current capacity
No disturbance for staff, children and families associated with moving sites	Would not contribute to the Welsh Governments aim of 1 million Welsh Speakers by 2050
No impact on numbers on roll for English medium schools	We would not be meeting our targets of providing excellent teaching and learning facilities as the children on site would continue to receive a large proportion of their teaching and learning through temporary accommodation
	The Council would need to continue to pay costs for the rental of temporary accommodation currently located on the school site
	We would not meet our agreed WESP targets, including increasing the number of learners being educated through the medium of Welsh.

Option 2 – Build a new 420 place Welsh medium Community Primary school to replace the existing Ysgol Gymraeg Y Fenni School on a new site in the Abergavenny area.

Strengths	Weaknesses
Would help us to achieve the targets outlined in our WESP, including increasing the number of learners being educated through the medium of Welsh.	Extremely high cost and do not have the budget to deliver a brand new school
We would be able to deliver excellent education facilities for the children currently on roll at Ysgol Gymraeg Y Fenni	There are no identified building sites available within the Abergavenny area to allow the build of a new school.

New school building could stimulate demand	There is currently a purpose build 420 place primary school with excellent teaching and learning facilities that would not be utilised
Contributes to the Welsh Governments aim of 1 million Welsh speakers by 2050	The timescales would be longer meaning Ysgol Gymraeg Y Fenni would need to remain on its current site for a significantly longer period
Would no longer be required to fund the rental of the temporary accommodation located on the Ysgol Gymraeg Y Fenni site	

Option 3 – Increase the capacity of Ysgol Gymraeg Y Fenni on its current site

Strengths	Weaknesses
Would help us to achieve the targets outlined in our WESP, including increasing the number of learners being educated through the medium of Welsh.	Extremely high cost and do not have the budget to deliver the significant building works required
Contributes to the Welsh Governments aim of 1 million Welsh speakers by 2050	The current school site is unlikely to be able to accommodate and further increase in capacity.
The school community would not need to relocate to a new site	There is currently a purpose build 420 place primary school with excellent teaching and learning facilities that would not be utilised.
	The timescales would be longer meaning Ysgol Gymraeg Y Fenni would need to remain on its current site for a significantly longer period
	It would be difficult to deliver such a project whilst the children are on site
	Temporary accommodation would be required to deliver this proposal

Option 4 – Relocate Ysgol Gymraeg Y Fenni to the site previously occupied by Deri View Primary School

Strengths	Weaknesses
The existing site is suitable to be able to accommodate 420 pupils plus 60 place Meithrin, allowing the numbers of Welsh medium learners to grow	Initial disturbance for staff and pupils through relocating to a new site
The option can be delivered within the budget available to the Council	The new site is approximately 0.4 miles away from the existing site meaning a small increase in travelling distance for some
The site already provides excellent teaching and learning facilities which will benefit	
Would help us to achieve the targets outlined in our WESP, including increasing the number of learners being educated through the medium of Welsh.	
Contributes to the Welsh Governments aim of 1 million Welsh speakers by 2050	
The increase in capacity and improved facilities can be implemented quickly (April 2025)	
We would be making excellent use of a site already equipped to allow the growth of Welsh medium education within the area	

5.1 THE PREFERRED OPTION

Our preferred option is option 4, which is to utilise existing accommodation available at the former Deri View Primary School site in order to increase the capacity of Welsh medium education within the area to 420 places.

This option is not only the most financially viable but delivers excellent teaching and learning facilities and a prompt solution to relieving the accommodation pressures currently experienced on the current Ysgol Gymraeg Y Fenni site.

5. RISKS AND COUNTER MEASURES

Risks	Counter Measures
The project will not be delivered on time and within budget	Aim to meet the programme dates to deliver on time The project does not involve major building works and the timeline for relocation has been set as a realistic target
Statutory objections are received to the proposals	Ensure thorough statutory consultation processes are followed and key stakeholders are consulted with and fully informed from the outset
Welsh medium demand in the area is not as expected and pupil numbers are low	It is very difficult to predict whether demand for places will be as expected. An appropriate promotion campaign will continue to operate in order to stimulate demand.
The majority of the funding formula is based on pupil numbers and therefore growing schools will see a delay in funding which could put the school in a deficit.	There are elements of the funding formula that offer protection to allow schools to classes of a maximum of 30 in each key stage, in addition to this there is a minimum level of funding built in for management and administration. Several of the premises costs are delegated on floor area which will allow classrooms to be resourced.
Numbers on roll in the English medium schools in the Abergavenny cluster may decline as a result of the proposal	This will be counter balanced by an increase in Welsh medium places but overall the number of places within the cluster will be the same. Should the demand for Welsh medium places increase, a review of English medium schools will be undertaken to ensure a sufficient number of places are offered across the cluster.
There may be an increase in surplus places in English medium schools within the cluster	Surplus places are monitored closely, and school reorganisation proposals implemented if necessary

6. SCHOOLS AFFECTED BY THE PROPOSAL

6.1 CURRENT NUMBERS ON ROLL

The following table shows general information on the schools affected or likely to be affected by the proposals. The Language category and the capacity has been calculated using the Welsh Government guidance “Measuring the capacity of schools in Wales” and the capacities below are based on the calculations for 2024/25 academic year.

Ysgol Gymraeg Y Fenni is the school immediately affected as it is proposed to relocate to a new site with an increased capacity of 420 places plus 60 place Meithrin (Nursery) giving a total capacity for 480 children.

School Name	Language Category	School Type	Capacity & Admission Number	Number of Nursery Places	Age Range	Pupil Numbers September 2023 (Exc Nursery)
Ysgol Gymraeg Y Fenni	WM	Community	317 / 45	60	3-11	241

The English medium schools within the cluster have been identified as schools likely to be impacted by proposals, as a desire to increase the numbers of learners accessing Welsh medium education, and in particular Ysgol Gymraeg Y Fenni in line with this consultation, is likely to result in a decrease in the numbers on roll across our English medium schools.

School Name	Language Category	School Type	Capacity & Admission Number	Number of Nursery Places	Age Range	Pupil Numbers September 2023 (Exc Nursery)
Cantref Primary School	EM	Community	210 / 30	30	3-11	210
Gilwern Primary School	EM	Community	210 / 30	n/a	4-11	212
Goytre Fawr Primary School	EM	Community	210 / 30	n/a	4-11	180
King Henry VIII 3-19 School	EM	Community	420 / 60	60	3-19	232
Llanfoist Fawr Primary School	EM	Community	210 / 30	n/a	4-11	206

Llantilio Pertholey VC Primary School	EM	Voluntary Controlled	210 / 30	n/a	4-11	196
Llanvihangel Crucorney Primary School	EM	Community	77 / 11	n/a	4-11	70
Our Lady and St Michaels RC Primary School	EM	Voluntary Aided	210 / 30	n/a	4-11	204

6.2 NUMBERS ON ROLL TRENDS

The following table shows the number of pupils on roll for the last five annual school censuses for all school affected by the proposal. The figures do not include nursery pupils or pupils on roll at Special Needs Resource bases.

School Name	January 2019	January 2020	January 2021	January 2022	January 2023
Cantref Primary School	210	210	210	209	212
Gilwern Primary School	203	220	213	211	209
Goytre Fawr Primary School	195	178	169	173	180
King Henry VIII 3-19 School	256	271	276	268	253
Llanfoist Fawr Primary School	210	210	204	202	203
Llantilio Pertholey VC Primary School	201	204	184	191	191
Llanvihangel Crucorney Primary School	68	69	71	72	65
Our Lady and St Michaels RC Primary School	179	182	187	197	212

6.2 PROJECTED NEED

The Council utilises a range of data to analyse the forecasted demand on school places across the County. Information supplied by Aneurin Bevan University Health Board (ABUHB) relating to newborn children within the County enables us to review the demand levels and ensure appropriate provision is in place for those children entering into the Primary and Secondary School system.

The information in the table below identifies the expected pupil numbers in the Abergavenny area over the next period of time. The Projected figures within this document include figures from known housing developments, however, the Council will shortly be publishing a new Local Development Plan (LDP) which will identify additional sites suitable for housing development in the area. The Council anticipates that these additional developments will increase pupil numbers over and above those published below.

6.3 PROJECTED NUMBER ON ROLL AT AFFECTED SCHOOLS

The projections included for the affected schools below have been formed on the basis of the current information that is available to us. This will include current numbers on roll, live birth information available through Health, and any known housing developments that have received planning permission.

The school numbers below are formed on the basis of a cluster projection model, which ensures that there is an appropriate number of school places at schools within the cluster to accommodate any potential oversubscription at individual schools. The projections also model a percentage of young people electing to attend Welsh Medium Education, formed on the basis of current trends, which could of course change and impact on the number attending English / Welsh Medium school(s).

The following table shows the projected numbers on roll over the next five years for Ysgol Gymraeg Y Fenni (excluding the Meithrin):

School Name	January 2024	January 2025	January 2026	January 2027	January 2028
Ysgol Gymraeg Y Fenni	241	250	268	273	284

The following table provides forecasted pupil numbers for the next five years for the schools likely to be affected by the proposals:

School Name	January 2024	January 2025	January 2026	January 2027	January 2028
Cantref Primary School	212	212	212	212	212
Gilwern Primary School	214	216	209	192	194
Goytre Fawr Primary School	181	174	168	172	167
King Henry VIII 3-19 School	250	258	259	257	262
Llanfoist Fawr Primary School	210	210	211	211	212
Llantilio Pertholey VC Primary School	199	195	195	186	191
Llanvihangel Crucorney Primary School	70	61	70	67	65
Our Lady and St Michaels RC Primary School	204	205	202	198	198

6.4 IMPACT OF PROPOSALS ON SURPLUS PLACES

The projected levels of surplus places across the cluster reflecting the increase in capacity at Ysgol Gymraeg Y Fenni are:

Total NOR	January 2024	January 2025	January 2026	January 2027	January 2028
Total expected NOR	1781	1781	1794	1768	1785
Total English medium capacity	1757	1757	1757	1757	1757
Total Welsh medium capacity	317	420	420	420	420
Total English medium surplus	217 / 12.3%	226 / 12.8%	231 / 13.1%	262 / 14.9%	256 / 14.6%

Total Welsh medium surplus	76 / 23.9%	170 / 40.4%	152 / 36.1%	147 / 35%	136 / 32.3%
Total combined surplus	293 / 14.1%	396 / 18.1%	383 / 17.6%	409 / 18.7%	392 / 18%

6.5 BUILDING CONDITION RATINGS

The table below shows the building condition rating as assessed during the most recent condition survey carried out by Monmouthshire County Council for those schools likely to be affected by the proposal:

Condition Rating	Definition
A	As new condition
B	Sound, operationally safe, and exhibiting only minor deterioration
C	Operational but major repair or replacement needed in the short to medium-term (generally 3 years)
D	Inoperable or serious risk of major failure or breakdown

Ysgol Gymraeg Y Fenni's current building condition rating is shown in the table below:

School Name	Condition rating
Ysgol Gymraeg Y Fenni (current site)	C
Ysgol Gymraeg Y Fenni (proposed site)	C*

*Please note that the published condition rating shown above for the proposed new site is the assessed rating undertaken prior to the planned maintenance and refurbishment works that are associate with this proposal. It is anticipated that the condition rating will significantly improve as a result of these planned works.

For each of the schools affected by proposals, the below table confirms their current building condition rating:

School Name	Condition rating
Cantref Primary School	A
Gilwern Primary School	C
Goytre Fawr Primary School	C
King Henry VIII 3-19 School	A
Llanfoist Fawr Primary School	B
Llantilio Pertholey VC Primary School	C
Llanvihangel Crucorney Primary School	C
Our Lady and St Michaels RC Primary School	C

7. QUALITY AND STANDARDS IN EDUCATION

The leadership team at Ysgol Gymraeg Y Fenni will receive support from both the Local Authority and the regional consortia the Education Achievement Service (EAS) to help ensure the school continues to operate effective management and teaching practices. Monmouthshire has a good track record of delivering quality primary education.

Consideration of the potential impact of the proposal on quality and standards is aligned with the Estyn Inspection framework:

Learning

The proposal will not affect the quality of learning in any of the English medium schools in the Abergavenny cluster, however. it will have a positive impact on the young people attending Ysgol Gymraeg Y Fenni as they move to a location with an improved teaching and learning environment. Ysgol Gymraeg Y Fenni will continue to receive the appropriate level of challenge and support to ensure that high-quality learning is achieved.

Wellbeing and attitudes to learning

The proposed relocation and associated increase in capacity of Ysgol Gymraeg Y Fenni is expected to have a positive impact on the Abergavenny community who

wish to be educated through the medium of Welsh. We anticipate that there will be an increase in parental choice for Ysgol Gymraeg Y Fenni because the Council will be providing more Welsh medium places in an improved teaching and learning environment. Pupil wellbeing is a priority and is monitored and reported through school self-evaluation processes and improvement plans. The proposal will not impact negatively on wellbeing and attitudes towards learning at the other affected schools.

Teaching and learning experiences

Teaching and learning experiences at Ysgol Gymraeg Y Fenni will continue to follow the Curriculum for Wales, with Welsh as the language of teaching and learning. The proposal will not impact the teaching and learning experiences at the other affected schools.

For those currently attending Ysgol Gymraeg Y Fenni, the proposals are likely to have a hugely positive impact on their teaching and learning experiences as they relocate to an improved environment with excellent teaching and learning facilities.

Care support and guidance

Ysgol Gymraeg Y Fenni will continue to be supported by the local authority and the Education Achievement Service to provide high quality care, support, and guidance. There will be no change in care support and guidance at the other affected schools.

Leadership and management

There will be no change to the quality and effectiveness of leaders and managers at the other affected schools. The school leadership team will continue to receive support and guidance from the local authority and Education Achievement Service to ensure best practice in leadership and management are adopted.

A summary of Estyn Reports for affected schools can be found under [appendix 2](#).

8. WELSH IN EDUCATION STRATEGIC PLAN

Monmouthshire's Welsh in Education Strategic Plan was approved by Welsh Government in June 2022. The increase in capacity of Ysgol Gymraeg Y Fenni will enable growth of the Welsh language within the area and will be a central element of our Welsh in Education Strategy to enable us to reach our target of having 115 learners, in each primary year group, being taught through the medium of Welsh by 2031.

The relocation of Ysgol Gymraeg Y Fenni is likely to impact positively on the number of learners opting for Welsh medium education as the accommodation and facilities offered at the new proposed site is far superior to that currently offered at the Ysgol Gymraeg Y Fenni site.

9. FINANCE

The Council's adopted SOP that formed the proposals to establish a new 3-19 School also identified the relocation of Ysgol Gymraeg Y Fenni to the former Deri View Primary school site. Capital funding in the region of £1million was identified and agreed during this process to support the relocation and undertake any required refurbishment works associated with this proposal.

The proposal would also result in an increase in capacity of Ysgol Gymraeg Y Fenni to become a provision for 420 pupils / two form entry. The school will continue to be funded in line with the adopted funding formula which will allow for the recruitment of additional staff as numbers on roll at the school increase.

10. LAND AND BUILDINGS

This consultation proposes the relocation of Ysgol Gymraeg Y Fenni from its current site to the site previously occupied by Deri View Primary School. Should proposals proceed beyond this consultation, the current Ysgol Gymraeg Y Fenni will become vacant.

There are currently no agreed plans for the future use of this site. Any agreed use of the site in future be subject to a separate consultation report.

12. STAFFING

Staff currently employed at Ysgol Gymraeg Y Fenni will transfer to the new school site should the proposals proceed to implementation. The proposals do not place existing staff at risk of redundancy.

As well as the relocation of the school site, it is proposed that the capacity of the school increases to become a provision for 420 pupils / two form entry. The school will continue to be funded in line with the adopted funding formula which will allow for the recruitment of additional staff as numbers on roll at the school increase.

13. COMMUNITY IMPACT / EQUALITY IMPACT ASSESSMENT

13.1 COMMUNITY IMPACT ASSESSMENT

Community Impact Assessments are a structured way for the Council to fully understand the implications of its decisions and whether they are detrimental or discriminatory to certain groups or sections of the community. They help the Council to consider the impact of its decisions and policies within and between communities more generally. The Community Impact Assessment process ensures that the Councils decision making process is robust and impacts on all communities within Monmouthshire are fully considered in Council business. By carrying out impact

assessments, the Council is working to promote equality for all our service users, employees and the wider community.

13.2 EQUALITY IMPACT ASSESSMENT

The Council recognises that people have different needs, requirements and goals and will work actively against all forms of discrimination by promoting good relations and mutual respect within and between our communities, residents, elected members, job applicants and workforce. The Council will also work to create equal access for everyone to our services, irrespective of ethnic origin, sex, age, marital status, sexual orientation, disability, gender reassignment, religious beliefs or non-belief's, use of Welsh language, BSL or other languages, nationality, responsibility for any dependents, or any other reason which cannot be shown to be justified.

An Equality Impact Assessments has been undertaken and can be found at www.monmouthshire.gov.uk/school-reorganisation

14. WELSH LANGUAGE IMPACT

The proposal supports all of the targets set out in the Welsh Education Strategic Plan. If the proposal were to be implemented Welsh Language provision would be expanded through offering a 420 place school capable of accommodating two forms of entry.

It is evident from the information provided above that the proposal would have a positive impact on Welsh Language provision within the area and in particular Abergavenny.

15. ADMISSION ARRANGEMENTS

Monmouthshire County Council will continue to be responsible for the admission arrangements at Ysgol Gymraeg Y Fenni, and any decisions undertaken in line with the agreed School Admission Policy.

Parents / carers will have the opportunity to complete an application online and can express up to three preferences. The Local Authority operates an equal preference scheme, which means that all preferences are considered equally in line with the Local Authority's oversubscription criteria, and not on the basis of the order in which they are listed on the application form.

15.1 CATCHMENT AREAS

Catchment Areas

There are no proposals to amend the catchment area for Ysgol Gymraeg Y Fenni as a result of these proposals. The agreed catchment areas for Ysgol Gymraeg Y Fenni, Ysgol Gymraeg Y Ffin and Ysgol Gymraeg Trefynwy can be found under [appendix 1](#).

16. HOME TO SCHOOL TRANSPORT

The proposals outlined within this document are not expected to have an impact on Home to school transport arrangements. Home to school transport will be provided to Ysgol Gymraeg Y Fenni in line with the current policy, which states pupils who attend their nearest or catchment primary school and reside more than 1.5 miles away will be eligible.

Further details of the home to school transport policy can be found on the following link:

<https://www.monmouthshire.gov.uk/school-transport-home-to-school>

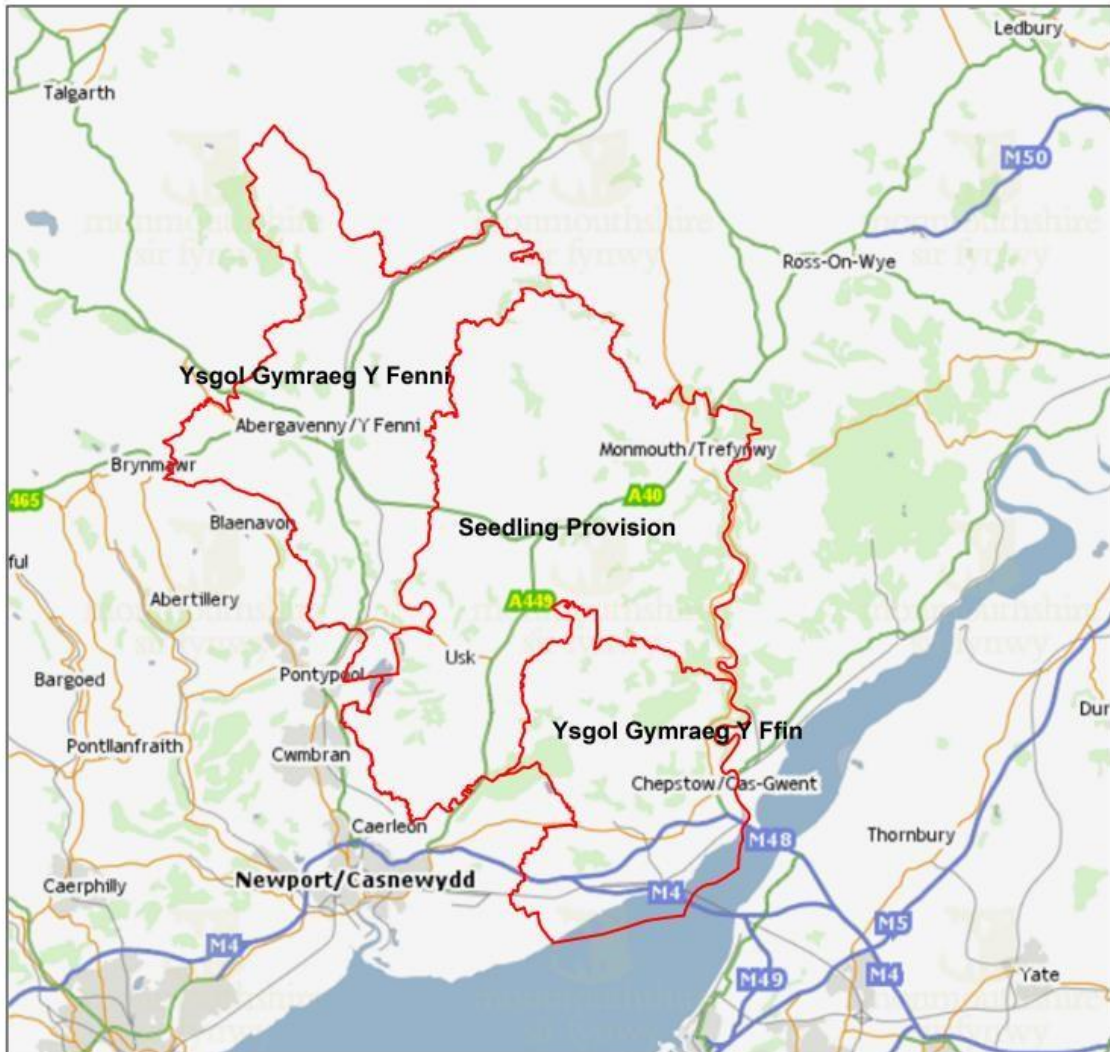
17. OTHER INFORMATION

Further Information and regular up-dates on this proposal can be found on the following webpage:

www.monmouthshire.gov.uk/school-reorganisation

Frequently asked questions will be up-loaded weekly and put onto the Monmouthshire County Council Website.

18. APPENDIX 1 - AGREED CATCHMENT AREAS



Cantref Primary School

Inspection date	Recommendations	Follow-up
2023	R1 Ensure that the curriculum is meaningful for all pupils and builds systematically and coherently across the school. R2 Ensure that pupils have regular opportunities to improve their own work.	No

Cantref Primary School has received the lowest level of support for the last five years. It has maintained standards across the school over the last nine years.

Gilwern Primary School

Inspection date	Recommendations	Follow-up
2022	R1 Improve teaching, particularly for pupils from Year 3 to Year 6 R2 Improve pupils' reading and writing skills, especially from Year 3 to Year 6 R3 Improve processes to monitor and evaluate the effectiveness of teaching. R4 Address the site safety issue that was identified during the inspection	No

Gilwern Primary School has received an enhanced level of support over the last year and as result of the progress made to address the four recommendations from the last Estyn inspection, it is no longer in Estyn follow-up.

Llanfoist Fawr Primary School

Inspection date	Recommendations	Follow-up
2023	R1 Improve self-evaluation processes across the federation. R2 Ensure that teaching is consistently good across the federation of schools. R3 Improve provision to support pupils to become independent learners. R4 Improve pupils' Welsh oracy skills.	No

Llanfoist Fawr Primary School has received the lowest level of support for the last five years. The school successfully federated with Llanvihangel Crucorney Primary School in September 2018.

Llanvihangel Crucorney Primary School

Inspection date	Recommendations	Follow-up
2023	<p>R1 Improve self-evaluation processes across the federation.</p> <p>R2 Ensure that teaching is consistently good across the federation of schools.</p> <p>R3 Improve provision to support pupils to become independent learners.</p> <p>R4 Improve pupils' Welsh oracy skills.</p>	No

Llanvihangel has received the lowest level of support for the last five years. The school successfully federated Llanfoist Fawr with Primary School in September 2018.

Our Lady and St Michael's Roman Catholic Primary School

Inspection date	Outcomes	Provision	Leadership and Management	Overall Performance		Follow-up
				Performance	Prospects for Improvement	
2016	Good	Adequate	Adequate	Adequate	Adequate	Estyn Monitoring

In the latest national categorisation for schools across Wales, Our Lady and St. Michael's Roman Catholic Primary School is in a limited support category for the second year in succession and is an improvement from an enhanced level of support in 2017/18, indicating that the school requires less support to improve standards further. Estyn removed the school from the list of schools requiring monitoring in 2017.

Llantillio Pertholey Church in Wales Primary School

Inspection date	Outcomes	Provision	Leadership and Management	Overall Performance		Follow-up
				Performance	Prospects for Improvement	
2016	Adequate	Adequate	Adequate	Adequate	Adequate	Estyn Monitoring

Llantillio Pertholey Church in Wales Primary School has received an enhanced level of support over the last three years. Estyn removed the school from the list of schools requiring monitoring in 2018.

Ysgol Gymraeg Y Fenni

Inspection date	Outcomes	Provision	Leadership and Management	Overall Performance		Follow-up
				Performance	Prospects for Improvement	
2017	Good	Good	Good	Good	Good	No

Estyn invited the school to submit an Excellent Practice Case following the inspection in 2017. In the latest national categorisation for schools across Wales, Ysgol Gymraeg Y Fenni continues to receive a low level of support.

New Inspection Framework (September 2017 onwards)

Goytre Fawr Primary School

Inspection date	Outcomes	Provision	Leadership and Management	Overall Performance		Follow-up
				Performance	Prospects for Improvement	
2019	Good	Good	Good	Good	Adequate	No

The level of support in Goytre Fawr has been low during the last five years. Estyn removed the school from the list of schools requiring monitoring in 2020.

Changes to school performance reporting means that we are unable to provide information about the academic performance of individual schools. This includes outcomes from teacher assessment and external examinations.

20. APPENDIX 3 - LIST OF CONSULTEES

- Parents, carers/guardians and staff members of schools affected by the proposal
- The governing body of any school affected by the proposal
- Pupils/Pupil Councils of schools directly affected by the proposal
- Headteachers of schools affected by the proposal
- Welsh Ministers
- All MCC Town and Community Councils
- All MCC Assembly Members representing the area served by the school
- All Members of Parliament representing MCC area
- All MCC Libraries
- Directors of Education of all bordering LAs – Blaenau Gwent, Newport, Powys, Torfaen, Herefordshire, Gloucestershire
- MCC Youth Service
- GAVO
- Monmouthshire Governors Association
- Teaching trade unions
- Support Staff trade unions
- Welsh Language Commissioner
- Welsh Ministers
- ESTYN
- RHAG
- Mudiad Meithrin
- Church in Wales Diocesan Trust, Director of Education
- Roman Catholic Diocesan Trust, Director of Education
- South East Wales Consortium
- South East Wales Education Achievement Service
- Gwent Police and Crime Commissioner
- Early Years & Childcare Partnership
- Welsh in Education Forum



PROPOSAL – *relocate and extend the capacity of Ysgol Gymraeg Y Fenni*

YOUR VIEWS

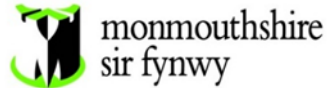
We would like your views on the above proposal. Please complete this pro-forma and return it to the address at the bottom, alternatively it can be handed in at the consultation event or there is an on-line response pro-forma available at www.monmouthshire.gov.uk/school-reorganisation

DRAFT

Access Unit, Monmouthshire County Council, County Hall, Rhadyr, Usk, NP15 1GA
or email strategicreview@monmouthshire.gov.uk.

Please tick the box if you wish to be notified of the publication of the consultation
report.

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SUBJECT:	REPURPOSING OF ACCOMMODATION IN THE COUNTY FARMS PORTFOLIO TO SUPPORT HOMELESSNESS AND OTHER POLICY OBJECTIVES
MEETING:	CABINET
DATE:	17th January 2024
DIVISION/WARDS AFFECTED:	ALL

1. PURPOSE

- 1.1 To seek approval for the repurposing of vacant cottages held within the County Farms Portfolio to support policy objectives such as alleviating pressures with homelessness and to address the reliance on unsuitable temporary accommodation.

2. RECOMMENDATIONS:

That Cabinet:

- 2.1 Agrees to the repurposing of the vacant farm cottage in Caerwent, for use as temporary accommodation for homelessness by MCC Housing subject to the necessary approvals to appropriate the cottage.
- 2.2 Agrees to the repurposing of vacant cottages held within the County Farms portfolio to support policy objectives and in particular aspirations around homelessness and children services provision.
- 2.3 That business cases will be submitted for the repurposing of other vacant cottages, for the consideration and approval via delegated authority of the Chief Officer for Resources, in consultation with the Cabinet Member for Resources.

3. KEY ISSUES:

- 3.1 This report aligns with a previous approval by Cabinet and ratification by Council on 5th July 2023 regarding property acquisitions as a response to addressing the urgent need for housing accommodation. Council's approval recognises the urgent need for housing to support policy objectives and aspirations particularly around alleviating pressures with homelessness and to address the reliance on unsuitable temporary accommodation.
- 3.2 The County Farms Portfolio holds seven cottages that do not form part of a recognised farm holding. Four cottages are currently vacant. The cottages have traditionally been held as accommodation options for tenants when they vacate their farm holding at the expiry or termination of their tenancy however, there has been minimal take up of these properties for a number of years. The cottages are no longer required for agricultural purposes and are therefore considered a suitable option as temporary accommodation to contribute towards relieving the reliance on bed & breakfast accommodation.
- 3.3 The repurposing of cottages is subject to legal due diligence for the presence of restrictive covenants that may prevent their intended use. The cottages may also require appropriation subject to how and why the land was originally acquired by the

Local Authority. Under Section 122 Local Government Act, a Local Authority has the ability to appropriate land/property belonging to the Council, that is no longer required for the purpose for which it is held, for any other purpose for which it is authorised by statute to acquire land.

- 3.4 The cottages may require some improvement works to meet current housing standards, the level of which is property specific and subject to conditional survey. Any improvement works will include where feasible, improvements to the property's energy efficiency and reduction in carbon emissions, increasing resilience to climate change and securing a sustainable future. Energy Use Intensity (EUI) targets will aim to go above and beyond building regulations wherever practicably possible. Each property is to be considered on its own merits and supported by a business case. Any works carried out would be essential in nature and of benefit to the property more generally.
- 3.5 It is a WG policy objective to ensure that any period of homelessness is as short as possible and time in temporary accommodation is minimised, moving towards a Rapid Rehousing approach to homelessness. Unfortunately, due to the lack of available 'move on' accommodation this is currently extremely challenging. At present the current average period between the Council accepting a homeless duty and being provided permanent social housing is circa 309 days, an increase from 162 days in 2020/21.

Funding Options

- 3.6 High levels of capital funding are currently available to support property purchases, Monmouthshire's Social Housing Grant (SHG) budget for 2023/24 is £9.8m, of which approximately £9m has been allocated as of October 2023. However, SHG will not be available for these properties as the grant calculation considers the rental income over a 50-year period compared to the cost of the works, these properties show a surplus over this period.
- 3.7 WG announced a new funding stream in 2022, Transitional Accommodation Capital Programme (TACP), which is available for void works to existing properties. An expression of interest was submitted for the cottage in Caerwent for TACP funding and provisionally approved for the sum of £77k. Properties funded through TACP should ideally meet Welsh Government affordable housing standards - the "Welsh Development Quality Requirements (WDQR) 2021" which require homes to be high quality, spacious, energy efficient, low carbon homes. If this is not possible Welsh Housing Quality Standards (WHQS) would be acceptable.
- 3.8 Section 106 contributions also provide an alternative source of funding towards the provision of off-site affordable housing. As of March 2023, the Council had £814,331 in Affordable Housing contributions, these must be used to deliver affordable housing in perpetuity in the Housing Market Area from which they are collected.
- 3.9 An ability to access borrowing to significantly refurbish and remodel the residential property in MCC's ownership, including cottages held within the County Farms portfolio, will derive additional accommodation to combat the temporary accommodation demand.
- 3.10 This report aligns with a previous approval by Cabinet and ratification by Council on 3rd March 2022 to establish £2M borrowing headroom to enable specific property acquisition and remodelling to alleviate homelessness.

4. EQUALITY AND FUTURE GENERATIONS EVALUATION (INCLUDES SOCIAL JUSTICE, SAFEGUARDING AND CORPORATE PARENTING):

4.1 The Equality and Future Generations Evaluation Assessment seen in Appendix One, details the following positive impacts which include:

- An opportunity to increase housing supply thereby helping local people remain in their home communities.
- A greater ability for the Council to determine the location of accommodation.
- The provision of additional housing options in terms of numbers of properties and type to assist homeless households.
- The provision of better-quality accommodation in the County for those with high homeless and support needs.
- An opportunity to improve the energy efficiency of the cottages and reduce carbon emissions, increasing resilience to climate change and securing a sustainable future.
- The development of local accommodation provision to enable the service to plan and develop in the medium to longer term planning.
- Less delays in being able to provide sustainable accommodation options.
- An opportunity to provide a settled period for applicants to access help and support nearer home.
- A positive contribution to the health and well-being of homeless households which are likely to also impact positively on Social Care clients and the Directorates priorities.

4.2 There are no negative impacts associated with this proposal.

5. OPTIONS APPRAISAL

5.1 An options appraisal has been undertaken in Table One below and can be summarised as follows:

Table One – Options Appraisal

Option	Positives	Negatives	Recommended?
Dispose of the farm cottages	The Council will be relieved of all liabilities associated with the cottages. The Council will receive a capital receipt.	Loss of suitable accommodation for use by other MCC service areas to meet key objectives.	No
Retain the farm cottages			
1.Repurpose farm cottages to meet core Council objectives	Provides suitable accommodation to contribute towards meeting policy objections, including the need for temporary accommodation and/or for Childrens Services such as	Cottages require investment to bring accommodation up to appropriate living standards. Availability of contractors to carry out improvement works, and associated costs are	Yes

<p>2. Maintain the cottages as vacant in the unlikely event they are needed for farm tenants</p>	<p>accommodation for looked after children.</p> <p>Potential to access WG funding for property improvement works including energy efficiency measures via TACP/SHG</p> <p>As MCC asset, decisions, and timescales for bringing property back into use within the gift of MCC.</p> <p>Offers an option if and when such a need arises.</p>	<p>uncertain due to current demand within the wider construction industry and volatility of materials/prices etc.</p> <p>Vacant properties fall into disrepair and carry significant costs.</p> <p>Damage to reputation for holding vacant properties when there is such a demand for housing across the County.</p>	<p>No</p>
<p>3. Let the cottages under a farm business tenancy (FBT)</p>	<p>Offers accommodation for suitable tenant under its current use.</p> <p>Generates revenue stream via rent.</p>	<p>Limited market/demand</p> <p>Reduced rent (cannot attract market rent as unable to let on the open market on AST agreement)</p> <p>Improvement works at cost to Council as WG funding unavailable.</p>	<p>No</p>
<p>4. Seek planning approval for 'other' uses such as a hostel</p>	<p>Offers alternative accommodation types that may be required in the area</p>	<p>Unlikely to obtain pp for housing under current policy.</p> <p>Majority of cottages considered too small for alternative uses.</p>	<p>No</p>

5.2 The current issues the preferred/recommended option addresses and the solutions the proposal presents when repurposing farm cottages for temporary accommodation is summarised in Table 2 below:

Table Two – Issues and Solutions

Current Issues	Solutions this proposal will present
The Council's current provision of TA is through leases with private landlords and RSLs, including extensive use of bed and breakfast accommodation.	This proposal is to repurpose Council owned vacant farm cottages to provide TA for homeless households, thereby reducing the reliance on bed and breakfast accommodation.
There is a lack of self-contained temporary accommodation, particularly for larger families.	This proposal would provide family self-contained TA.
The cottages require investment to meet current regulations and to provide modern comfortable living accommodation	The opportunity to improve the general standards of the properties, including energy efficiency measures.
The current financial implications of the current use of B & B accommodation are unsustainable.	The proposal contributes to the Council's Rapid Rehousing Transition Plan.

5.3 Risks and Mitigation

A Risk Assessment has also been undertaken and is detailed in Table Three below:

Table Three – Risk Assessment

Risk	Mitigation
Housing management issues/Anti-social behaviour.	The property will be managed directly by a Housing Options Team Accommodation Officer. Households will be provided with Housing Support.
Property maintenance and management.	The accommodation will be maintained and managed by the Housing Options Team who will manage day to day repairs and cyclical maintenance. Property Services Team will support the refurbishment and planned maintenance of the cottages.
Viability	Capital grant funding will be sought through TACP, cost modelling has been provided in the accompanying business case for the cottage in Caerwent.
Financial risks in relation to cost of refurbishment works.	Work closely with Property Services to agree the scope of works and opportunities for value engineering/savings, with due consideration for the lifespan of any improvements to ensure they are durable given the potential high turnover of tenants.
Procurement of professional Services to complete refurbishment works to required standards.	Availability of contractor and other professional services may delay the preferred programme for completion of the project. It is proposed that a contractor will be appointed via existing framework agreements or individual tender.

6. REASONS

6.1 The Council has a duty to prevent and respond to homelessness under the Housing (Wales) Act 2014.

- 6.2 The Council is expected to support and comply with Welsh Government Guidance – Coronavirus (COVID-19): Local Authority support for rough sleepers April 2020 and Phase 2 Planning Guidance for Homelessness & Housing Related Support.
- 6.3 The proposal also supports the Council to meet the Welsh Government requirement to adopt a Rapid Re-Housing approach to homelessness as per the Rapid Re-Housing Plan approved by [Cabinet – 5th April 2023](#) whilst also addressing other relevant policy documents such as [Homelessness strategy | GOV.WALES; Ending homelessness in Wales: a high level action plan 2021 to 2026 \(gov.wales\); and Homelessness accommodation provision and rough sleeping: July 2022 | GOV.WALES](#)
- 6.4 Of the seven cottages, four are currently vacant, with one being considered for re-purpose under this report. The cottages are held as options for tenant rehoming subject to a change in personal circumstances with tenants and their immediate family members (i.e., the passing of a tenant or their partner). However, such occasions are few and far between and generally not sought by the tenants due to alternative preferred housing options.
- 6.5 To contribute to the Council's Climate Emergency through improvements to the property's energy efficiency and reduction in carbon emissions, increasing resilience to climate change and securing a sustainable future.

7. FINANCIAL IMPLICATIONS

- 7.1 The accompanying business case for the cottage in Caerwent seeks to undertake specific remodelling and improvement works where the Council is unable to identify suitable providers of temporary and sustainable accommodation in the County. Borrowing is required for the property as grant funding is not available in full.
- 7.2 When comparing the total cost of this proposal to the existing option of accessing 2/3 bed B&B accommodation, this results in a net cost avoidance to the Council's revenue budget.
- 7.3 The Council's Landlord Services teams (Estates and Property Services), with the support of MCC Housing, will ensure the properties are well maintained, helping to ensure that asset values are retained. It is essential that property condition is monitored and there is a robust programme of planned maintenance and component renewal. This will ensure that the Council's accommodation is of a high standard and aligns with Welsh Government accommodation standards.
- 7.4 In summary, this report seeks to enable the Council to flexibly and promptly react to its legal duties to prevent and respond to homelessness where it is unable to identify suitable providers of temporary and sustainable accommodation in the County. It also provides an additional option to support the property acquisition strategy to address the current revenue budget deficits whilst providing an opportunity to repurpose and make better use of current Council property assets.

8. CONSULTEES

Cabinet

Senior Leadership Team

Landlord Services (Estates and Property Services)

Communities and Place Leadership Team

Housing and Communities Team

MCC Legal Services

9. BACKGROUND PAPERS:

Appendix 1 – Equality and Future Generations Evaluation

10. AUTHORS:

Nick Keyse – Acting Head of Landlord Services

Ben Thorpe – Development Surveyor

12. CONTACT DETAILS:

nicholaskeyse@monmouthshire.gov.uk / benthorpe@monmouthshire.gov.uk



<p>Name of the Officer completing the evaluation Ben Thorpe & Nick Keyse</p> <p>Phone no: 01633 644441 Email: benthorpe@monmouthshire.gov.uk & nicholaskeyse@monmouthshire.gov.uk</p>	<p>Please give a brief description of the aims of the proposal To seek the repurposing of vacant cottages held within the County farms portfolio to enable the Council to alleviate the pressures with homeless and the reliance on unsuitable temporary accommodation, i.e., Bed and Breakfast.</p>
<p>Name of Service area Landlord Services – Estates</p>	<p>Date 17th January 2024</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	<p>This proposal affects people of all ages from 16+ including older persons by virtue of making more accommodation available in Monmouthshire.</p> <p>This property will have the potential to support people of all protected characteristics</p>	None	Repurposing farm cottages is an additional housing option in Monmouthshire and will complement other housing options.

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?
Disability	Properties will be remodelled to meet WDQR guidelines, and where the construction and model of the building allows, will meet accessible standards.	As above	As above
Gender reassignment	As above	As above	As above
Marriage or civil partnership	As above	As above	As above
Pregnancy or maternity	As above	As above	As above
Race	As above	As above	As above
Religion or Belief	As above	As above	As above
Sex	As above	As above	As above

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?
Sexual Orientation	As above	As above	As above

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?

<p>Socio-economic Duty and Social Justice</p>	<p>It is recognised that homelessness is often characterised by issues such as: low income; affordability; impact of childhood trauma; substance misuse; accessing employment / training opportunities; barriers to accessing mental health and lack of independent living skills.</p> <p>The provision of temporary and sustainable accommodation therefore benefits those experiencing socio economic disadvantage. Good quality accommodation also supports wider priorities such as health and well-being, poverty, employment opportunities etc.</p>	<p>There are no negative impacts associated with this proposal.</p>	<p>It will be an on-going action to identify opportunities to strengthen homeless prevention, improve affordable housing provision and support homeless actions through social poverty actions and partnership arrangements.</p> <p>The proposal mitigates against chaotic lifestyles by seeking to provide safe and secure accommodation through which lives can be rebuilt.</p>
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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
Policy Making Effects on the use of the Welsh language, Promoting Welsh language Treating the Welsh language, no less favourably	Neutral impact	None	N/A
Operational Recruitment & Training of workforce	Neutral impact. This proposal does not involve the appointment of staff. However, on a general basis, our Housing & Communities colleagues encourage the appointment of Welsh Language speakers and offers staff Welsh Language training	None	N/A
Service delivery Use of Welsh language in service delivery Promoting use of the language	Neutral impact	None	N/A



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>A prosperous Wales Efficient use of resources, skilled, educated people, generates wealth, provides jobs</p>	<p>Positive: Positively contributes to increasing housing options in Monmouthshire. Helps to reduce the use of bed and breakfast accommodation. Any remodelling and refurbishment work required will not only need to maximise energy efficiency but will also support the local construction sector and wider economy.</p> <p>Negative: None</p>	<p>It is an on-going priority for the Council to increase the provision of self-contained temporary accommodation and reduce reliance on bed & breakfast accommodation. Homeless prevention work will continue.</p>
<p>A resilient Wales Maintain and enhance biodiversity and ecosystems that support resilience and can adapt to change (e.g., climate change)</p>	<p>Positive: N/A Negative: N/A</p>	<p>There is the option to increase the energy efficiency standards of the properties.</p>
<p>A healthier Wales People's physical and mental wellbeing is maximized, and health impacts are understood</p>	<p>Positive: Positively contributes to the health of homeless persons. Good housing supports well-being. Negative: N/A</p>	<p>The proposal will align with the Housing Support Grant programme to enable residents to access housing support and help to maintain their accommodation.</p>
<p>A Wales of cohesive communities Communities are attractive, viable, safe, and well connected</p>	<p>Positive: Positively contributes by effectively increasing housing supply thereby helping local people remain in their home communities. Repurposing farm cottages gives the Council greater ability to determine location of accommodation.</p>	<p>N/A</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?
	Negative: N/A	
A globally responsible Wales Taking account of impact on global well-being when considering local social, economic, and environmental wellbeing	Positive: Positively contributes to the health of homeless households. Any remodelling and refurbishment work required will aim to improve and maximise the energy efficiency of the properties to reduce future energy costs and loss. Negative: N/A	N/A.
A Wales of vibrant culture and thriving Welsh language Culture, heritage, and Welsh language are promoted and protected. People are encouraged to do sport, art, and recreation	Positive: N/A Negative: N/A	N/A
A more equal Wales People can fulfil their potential no matter what their background or circumstances	Positive: The proposal both strengthens the quality and availability of homeless accommodation. The Council is working towards the provision of 'homes' not temporary accommodation. This helps to increase the stability in people's lives improving opportunities in respect of personal finances; employment; training etc. Some applicants can use this. Negative: N/A	N/A

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 future</p> <p>Balancing short term need with long term and planning for the future</p>	<p>The proposal seeks to provide a short-term/temporary housing intervention option for Housing colleagues which will need to be underpinned by the potential availability of housing support and eventually Rapid Re-housing to long-term housing solutions. Some of the short-term options provide stability from which plans can be made for longer term housing needs to be met e.g., move on and permanent accommodation. The proposal is about sustainable solutions and minimising the potential to set people up to fail.</p>	<p>Other accommodation elsewhere in the County has been sourced and continues to be sourced.</p> <p>The Council is transitioning to a Rapid Rehousing Approach as required by Welsh Government</p>
 <p>Collaboration</p> <p>Working together with other partners to deliver objectives</p>	<p>This proposal is all about supporting Welsh Government to implement the emerging Phase 2 Welsh Government homeless policy and transition to a Rapid Rehousing Approach to homelessness. Homeless applicants benefiting from the proposal may receive support from housing support providers. The proposal supports Health (good accommodation contributes to well-being etc.) and Social Care (good accommodation supports families, care leavers and corporate parenting etc) and Police/Public Protection (greater options for potentially placing offenders)</p>	<p>Arrangements already exist with housing associations and private landlords and links are in place with the Police and Probation.</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>Involvement</p> <p>Involving those with an interest and seeking their views</p>	<p>Estates have and are working closely with Housing colleagues who are in support of the proposals. The Council's Housing department has met with Welsh Government about the proposal and routinely liaises with Welsh Government's Relationships Manager. The Housing Support Commissioning & Operations Manager, Estates and Finance have also been involved.</p>	<p>N/A</p>
 <p>Prevention</p> <p>Putting resources into preventing problems occurring or getting worse</p>	<p>The proposal is about strengthening and improving accommodation availability to offset the need to use inappropriate temporary accommodation and the associated expenditure.</p>	<p>Resources are already being directed towards mitigating against homelessness through trying to prevent homelessness and acquiring accommodation elsewhere 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="237 560 376 587">Integration</p> <p data-bbox="203 608 524 746">Considering impact on all wellbeing goals together and on other bodies</p>	<p data-bbox="589 312 1301 456">The proposal indirectly positively impacts on well-being e.g., potential for additional good quality accommodation supports well-being and potential additional income for empty property owners.</p>	<p data-bbox="1335 312 1391 339">N/A</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?

	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	The proposal supports households where there could be safeguarding issues by providing safe and secure temporary accommodation.	None.	N/A
Corporate Parenting	The proposal supports Corporate Parenting by potentially providing safe and secure accommodation.	None.	N/A

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

Evidence has been gathered and provided by Housing colleagues in the following ways:

- Housing Options Team service activity e.g., numbers in B & B accommodation; homeless presentations.
- Consideration of current pressures being faced by Housing Options as a result of the statutory duty to accommodate all homeless households.
- Strategic overview of the temporary accommodation available and gaps in current provision.

The legislation and good practice which have informed the policy revisions are:

- Section 123 of the Local Government Act 1972
- Section 122 Local Government Act
- Planning Policy Wales and the guidance set out in Welsh Government Circular 003/2019: Compulsory Purchase in Wales and 'The Criche Down Rules (Wales Version, 2020)'
- Housing Act 1996.
- Housing (Wales) Act 2014.

- Welsh Government's Code of Guidance for Local Authorities on the Allocation of Accommodation and Homelessness.
- The Allocation of Housing and Homelessness (Eligibility)(Wales) Regulations.
- Welsh Government Phase 2 Planning Guidance for Homelessness & Housing Related Support.
- Crime and Disorder Act 1998.
- Equalities Act 2010.
- Data Protection Act 2018.
- Welsh Government, Developing a Rapid Rehousing Transition Plan 2022-2027

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

Positive -

The positive impacts of this proposal are:

- Additional housing options in terms of numbers of properties and type to assist homeless households.
- Better quality self-contained accommodation.
- Provides a settled period for applicants to access help and support.
- A wider range of housing support.
- It contributes to the health and well-being of homeless households.
- Makes best use of Council property assets bringing vacant properties back into use.

Negative

None.

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
Continue to work alongside Housing (and Children's Services colleagues) to support their specific needs in particular homelessness prevention to prevent temporary accommodation placements wherever possible.	On-going. This is a priority to minimize the numbers of people approaching the Council who need accommodation	Estates, Housing Options Team Manager and Childrens Services Manager/Eliminate Project Lead
Consider and plan next steps and responsibilities.	On going	Strategy & Policy Officer, Homes & Communities Manager, Estates Manager, Childrens Services Manager/Eliminate Project Lead

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
1.	SLT/Cabinet Members	17 th January 2024	

Future Use of Agricultural Cottage in Llanvair Discoed

SINGLE-STAGE BUSINESS CASE

SRO:	
Project Manager:	Nick Keyse
Organisation:	MCC Estates

	Name	Date
Prepared by:	Sally Meyrick Simon Parfitt Ben Thorpe	04/12/2023
Reviewed by:	Nick Keyse	04/12/2023
Approved by:		

Future Use of Agricultural Cottage in Llanvair Discoed

1 INTRODUCTION

Estates and Housing & Communities seek approval to renovate a vacant MCC agricultural cottage in Llanvair Discoed. The cottage, the address of which has been redacted to protect the potential occupiers, has been identified as suitable as Temporary Accommodation for homeless families. Once renovated the property would need to be managed and maintained by the Council, the renovation works would need to be funded through a combination of Council borrowing and TACP Funding. Photographs of the property are available to see in **Appendix 1**.

The provision of high quality, self-contained Temporary Accommodation (TA) owned by the Council will assist to reduce the number of households in bed and breakfast accommodation and aligns with the Community and Corporate Plan's objectives of creating a 'fair place' to live.

This business case seeks approval to:

- Agree to a schedule of refurbishment works to improve the standards and energy efficiency of the accommodation to meet Welsh Housing Quality Standards where possible.
- Agree to the future use as Temporary Accommodation for homeless families.
- Estates and Housing & Communities propose to undertake the required improvements and ongoing maintenance 'in-house' through the support of Property Services and framework contractors. Alternatively, a decision can be taken to enter agreement with a Registered Social Landlord (RSL) for the ongoing maintenance.

This business case is set out within the context of an options appraisal to assess the potential options in relation to the future use of the property.

2 STRATEGIC CASE

2.1 Context

The property is a three-bedroom property located centrally in the village of Llanvair Discoed. The property is retained to support MCC tenant farmers upon expiry of their retirement tenancies or dependents of lifetime tenants following the tenant's passing. The property has been vacant for some time, and there is an increasing movement of tenant farmers and families to make alternative arrangements that would remove any necessity for the property to remain unoccupied.

The property needs renovation to bring it up to a standard suitable for TA. MCC Estates will seek competitive quotes to refurbish the property to meet Welsh Housing Quality Standards (WHQS) required for social housing. The initial refurbishment works identified include: redecoration; bathroom and kitchen replacement; energy efficiency improvements including increased insulation, low energy light fittings, new heating system and solar PV; replacement doors and windows.

This proposal is to renovate the property to provide TA for a homeless family. This proposal aligns with the priorities of Monmouthshire's Cabinet around Homelessness, Social Housing and Affordable Housing. In addition, the proposal contributes towards the Council's strategic housing priority: *"To respond to increasing levels of homelessness and work towards rapid rehousing ambitions"*.

Levels of homelessness continue to be a major concern for the Council, the use of bed and breakfast accommodation is extensive at present with a gross budget pressure of approximately £1.865m accommodated within the revenue budget for 2023/24. As of September 2023, there were 189 households in TA, including 59 households in bed and breakfast accommodation. The Council is seeing an increase in the number of families at risk of homelessness, there is a lack of suitable, self-contained accommodation for larger families within the Council's provision of TA.

2.2 Case for Change

2.2.1 Spending objectives

The key objectives for this business case are:

- To provide a good quality additional unit of self-contained TA suitable for families
- To improve the well-being of a homeless family through the provision of high quality, self-contained TA
- To respond to levels of homelessness through the provision of Council-owned accommodation
- To contribute to the Council's Rapid Rehousing Transition Plan
- To reduce revenue costs associated with the use of bed and breakfast accommodation, the average cost of accommodating a household with a three bed need in bed and breakfast accommodation is £27,793.48 per year (see **Appendix 2**)
- To start providing Council-owned TA
- To procure local businesses where possible to carry out the refurbishment works.
- To improve the general condition and energy efficiency of the Council's housing stock

2.2.2 Existing Arrangements

The Council's current provision of TA is mainly through leased privately-owned accommodation along with some owned by Registered Social Landlords. A range of accommodation is provided including bed and breakfast, shared and self-contained. The current reliance on privately-owned accommodation leads to inconsistencies in the standards of accommodation and a lack of long-term security. A number of landlords are terminating their leases as the Council is unable to compete with market rental values or selling their properties due to the additional requirements associated with the Renting Homes (Wales) Act 2016 and/or the current status of the housing market. Whilst the number of private leased properties is increasing gradually, the growth of the scheme is still not sufficient to meet the required accommodation need.

Waiting times in TA are extensive, with households taking more than 10.2 months on average to be rehoused in social housing. With such lengthy stays in TA it is essential that the accommodation provided

is affordable, safe and secure environments for people to live in, this is not consistent with bed and breakfast accommodation. The Council wishes to address this issue through increasing the provision of high quality, self-contained TA.

2.2.3 Business Needs

Where we are now	ESSENTIAL Objectives of Business Case
The Council's current provision of TA is through leases with private landlords and RSLs, including extensive use of bed and breakfast accommodation.	This proposal is to renovate a Council-owned property to provide TA for a homeless family, thereby reducing the reliance on bed and breakfast accommodation.
There is a lack of self-contained temporary accommodation	This proposal would provide one 3 bed unit of self-contained TA.
The property has been empty for some time	This would bring the property back into use and up to standards, whilst providing the opportunity to increase the energy efficiency of the property.
The current financial implications of the current use of B & B accommodation is unsustainable	The proposal contributes to the Council's Rapid Rehousing Transition Plan

2.2.4 Main Benefits / Funding and Affordability

The provision of affordable accommodation benefits Monmouthshire residents in housing need by providing safe and secure accommodation through which lives can be rebuilt, thereby improving individual's health, well-being, financial situation, employment opportunities etc. The proposal contributes indirectly towards public sectors such as health, social care, community safety and police/public protection and contributes towards wider society benefits including reducing homelessness, poverty and anti-social behavior. In addition, there is the potential to increase the energy efficiency of the property, thereby contributing to the low carbon agenda and reducing energy bills for low-income households.

It should be noted that Social Housing Grant (SHG) cannot be accessed for this property as the viability modelling shows the rental income will be greater than the outgoings over a 50-year period. WG announced a new funding stream in 2022, Transitional Accommodation Capital Programme (TACP), which is available for void works to existing properties. An expression of interest has been submitted for TACP funding which has been indicatively approved at a rate of 70% i.e. £77,040 of the total estimated works cost of £110,058.

Cost modelling has been undertaken both with and without TACP funding and is available in **Appendix 3**. This predicts there will be a slight surplus to the Council of £839.80 per annum with TACP funding or an annual revenue cost of £5,018.20 without TACP funding.

When comparing the total cost of this proposal to the existing option of placing a family in 3 bed B&B accommodation, this results in an estimated net cost avoidance to the Council's revenue budget of £28,633 per annum with TACP funding or £22,775 without funding, as illustrated in the Table below:

	With TACP funding	Without TACP funding
Indicative refurb cost	£110,058	£110,058
TACP Funding	£77,040	N/A
Annual cost to the Council	-£839.80 pa	£5,018.20 pa
Bed and breakfast costs	£27,793.48 pa	£27,793.48 pa
Net cost avoidance	£28,633.28 pa	£22,775.28 pa

2.2.5 Main Risks

Risk	Mitigation
1. Housing management issues/Anti-social behaviour	The property will be managed directly by a Housing Options Team Accommodation Officer. Households will be provided with Housing Support
2. Property maintenance and management	The accommodation would need to be maintained and managed by the Housing Options Team who will manage day to day repairs and cyclical maintenance. Property Services Team will support the refurbishment and planned maintenance of the property.
3. Viability	Cost modelling has been provided in this report. Social Housing Grant is not available to support this renovation as the rental income is higher than the costs over a 50-year period (this is the model that WG use to calculate grant funding). However, TACP funding is available and has been provisionally approved for approximately £77k.
4. Financial risks in relation to cost of refurbishment works	Work closely with Property Services to agree the scope of works and opportunities for value engineering/savings, with due consideration for the lifespan of any improvements to ensure they are durable given the potential high turnover of tenants.
5. Procurement of professional Services to complete refurbishment works to required standards	Availability of contractor and other professional services may delay the preferred programme for completion of the project. It is proposed that a contractor will be appointed via either existing MCC framework agreements or via alternative external framework providers such as the Welsh Procurement Alliance and mini competition

2.2.6 Constraints

Internal financing will be required – SHG is not available to support this renovation, however TACP funding has been provisionally approved for approximately £110k.

Housing market – Current and future conditions predicted to fall.

Construction market - Availability of contractors and building materials.

3. OPTIONS ANALYSIS

3.1 Critical Success Factors

Table 1: Summary of Options Appraisals

OPTION 1	BUSINESS AS USUAL (BAU)
Description	The cottage remains vacant
Net Costs	Minimal costs required to maintain the site, however there is the potential for significant costs if the building becomes unsafe
Advantages*	Minimal capital or revenue implications associated with this option. The property could be sold to generate a receipt, the property was valued at £350,000 in April 2022.
Disadvantages*	This option does not contribute towards the Council’s strategic housing priorities and objectives. This option does not help mitigate ongoing pressures such as bed and breakfast expenditure and the shortage of affordable accommodation. The property is likely to fall into further disrepair if left vacant.
Conclusion	It is not an option to leave vacant and under-utilised as this is a Council asset that could benefit the Council or the local community
OPTION 2	Renovate the property and use as temporary accommodation.
Description	To renovate the property to meet WHQS and use as temporary accommodation for a homeless family
Net Costs	As per 2.24 and Appendix 4
Advantages*	Contributes towards strategic priorities around addressing homelessness, reducing the reliance on bed and breakfast accommodation, provides the Council with more control over its provision of temporary accommodation
Disadvantages*	Resourcing implications as the property would need to be maintained and managed, capital funding implications e.g. the need to monitor and manage stock condition and having a programme of planned maintenance in place
Conclusion	This is the recommended option.
OPTION 3	The Council disposes of the property to generate a Capital Receipt

Description	To Market the property for disposal to generate a Capital Receipt. This would be undertaken by the Estates Development Team.
Net Costs	There would be a small fee involved with this process which would include for any costs relating to the marketing of the unit. A recent valuation report of the property estimated the property could achieve £350,000 on the Open Market.
Advantages	The advantages of disposing the property would be the Council wouldn't be required to contribute to any further improvement costs or maintenance liabilities. The receipt generated could be allocated to other needs such as 21 st Century Schools projects.
Disadvantages	The disadvantages for selling the property would be it doesn't assist the Council's objectives of providing temporary accommodation for homeless families and the Council would still incur the high costs of placing these families in Hotels and B&B's.
Conclusion	It is considered utilising the property for temporary accommodation is the preferred option as it allows the Council to reduce the costs incurred for placing the families in temporary accommodation while retaining the asset.

3.3 Recommended option

The recommended option is Option 2: To renovate the property to meet WHQS and use as temporary accommodation for a homeless family. This is recommended due to its contribution towards Council objectives and priorities and increase the provision of temporary accommodation.

4. RESOURCE IMPLICATIONS / PROCUREMENT ROUTE

It is proposed that existing framework contractors will be utilised wherever possible. Should capacity or cost be prohibitive following receipt of quotations, an invitation to tender will be issued via Sell2Wales and/or an alternative framework (e.g. SEWTAPS or WPA) to identify locally based contractors who can support the refurbishment.

There are resourcing implications associated with purchasing temporary accommodation, including:

- Housing would need to be maintained and managed, including a programme of planned maintenance.
- Void processes and works would need to be undertaken.

Subject to the determined procurement method, Property Services or a nominated project manager will oversee the proposed refurbishment works.

Appendix 1 – internal photographs of the agricultural cottage at Llanvair Discoed



Appendix 2 - Average Bed and Breakfast Costs

	Weekly Charge	Weekly Amount Covered by Housing Benefit	Weekly Cost to Council	Monthly Cost to Council	Annual Cost to Council
One bedroom	£420	£95.51	£324.23	£1,406.12	£16,859.96
Two bedroom	£490	£95.51	£394.49	£1,709.46	£20,513.48
Three bedroom	£630	£95.51	£534.49	£2,316.12	£27,793.48
Four bedroom	£770	£95.51	£674.49	£2,922.79	£35,073.48

As of 03/04/2023

Appendix 3 - Financial Case

Cost modelling with TACP

Purchase Price:	N/A
Purchase costs (surveys, land registry)	N/A
Land transaction tax	N/A
Initial refurb works	£110,058
TACP funding	£77,040
Net cost:	£33,018

	Annual Cost
Mortgage/Borrowing Costs*	2,511.00
Management & maintenance	3,000.00
Void Loss Rent	388.92
Arrears	388.92
Utilities, CT and Legal	400.00
Service Charge on leasehold	N/A
Safety - Gas, Electric, EPC	250.00
Safety - Fire testing	0.00
Furniture	0.00
Total	6,938.84
Rental Income	-7,778.64
Service Charge Income	0.00
Client Recharge	0.00
Total	-7,778.64
Grand Total	-839.80

Borrowing Costs

<i>Repayment Period</i>	<i>Rate</i>	<i>Annual Repayment</i>	<i>Capital</i>	<i>Interest</i>	<i>Total Repayment</i>
25	5.77%	2,511	1,321	1,190	62,769

Rates as of 19th October 2023

Cost modelling without TACP

Purchase Price:	N/A
Purchase costs (surveys, land registry)	N/A
Land transaction tax	N/A
Initial refurb works	£110,058
TACP funding	N/A
Net cost:	£110,058

	Annual Cost
Mortgage/Borrowing Costs*	8,369.00
Management & maintenance	3,000.00
Void Loss Rent	388.92
Arrears	388.92
Utilities, CT and Legal	400.00
Service Charge on leasehold	N/A
Safety - Gas, Electric, EPC	250.00
Safety - Fire testing	0.00
Furniture	0.00
Total	12,796.84
Rental Income	-7,778.64
Service Charge Income	0.00
Client Recharge	0.00
Total	-7,778.64
Grand Total	5,018.20

Borrowing Costs

Repayment Period	Rate	Annual Repayment	Capital	Interest	Total Repayment
25	5.77%	8,369	4,402	3,967	209,226

Rates as of 19th October 2023

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