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County Hall
Rhadyr
Usk
NP15 1GA

Tuesday, 14 November 2023

Notice of meeting

Performance and Overview Scrutiny Committee

Wednesday, 22nd November, 2023 at 10.00 am,

Please note that a pre meeting will be held 30 minutes prior to the start of the meeting for members of the committee.

AGENDA

Item No	Item	Pages
1.	Apologies for absence	
2.	Declarations of Interest	
3.	Public Open Forum Scrutiny Committee Public Open Forum ~ Guidance Our Scrutiny Committee meetings are live streamed and a link to the live stream will be available on the meeting page of the Monmouthshire County Council website If you would like to share your thoughts on any proposals being discussed by Scrutiny Committees, you can submit your representation in advance via this form Please share your views by uploading a video or audio file (maximum of 4 minutes) or; Please submit a written representation (via Microsoft Word, maximum of 500 words)	

You will need to register for a [My Monmouthshire account](#) in order to submit the representation or use your log in, if you have registered previously.

The deadline for submitting representations to the Council is 5pm three clear working days in advance of the meeting.

If representations received exceed 30 minutes, a selection of these based on theme will be shared at the Scrutiny Committee meeting. All representations received will be made available to councillors prior to the meeting.

If you would like to attend one of our meetings to speak under the Public Open Forum at the meeting, you will need to give three working days' notice by contacting Scrutiny@monmouthshire.gov.uk.

The amount of time afforded to each member of the public to speak is at the chair's discretion, but to enable us to accommodate multiple speakers, we ask that contributions be no longer than 3 minutes.

If you would like to suggest future topics for scrutiny by one of our Scrutiny Committees, please do so by emailing Scrutiny@monmouthshire.gov.uk

4.	Month 5 Budget Monitoring	1 - 48
	To scrutinise the budgetary position (revenue and capital) for services falling within the committee's remit at Month 5.	
5.	Strategic Risk Register	49 - 80
	To agree any future risks for scrutiny.	
6.	LDP Annual Monitoring Report	81 - 238
	To scrutinise prior to Cabinet Member sign off for dispatch to Welsh Government.	
7.	Schools Funding Formula	239 - 262
	To scrutinise the funding formula prior to Cabinet's decision.	
8.	Performance and Overview Scrutiny Committee Forward Work Programme and Action List	263 - 268
9.	Council and Cabinet Work Plan	269 - 286
10.	To confirm the minutes of the meeting held on 24th October 2023	287 - 290
11.	Next Meeting: 29th November 2023 (Special) and 30th January 2024	

Paul Matthews

Chief Executive

MONMOUTHSHIRE COUNTY COUNCIL
CYNGOR SIR FYNWY

THE CONSTITUTION OF THE COMMITTEE IS AS FOLLOWS:

County Councillor Jill Bond, West End;, Welsh Labour/Llafur Cymru
County Councillor Alistair Neill, Gobion Fawr;, Welsh Conservative Party
County Councillor Paul Pavia, Mount Pleasant;, Welsh Conservative Party
County Councillor Peter Strong, Rogiet;, Welsh Labour/Llafur Cymru
County Councillor Ann Webb, St Arvans;, Welsh Conservative Party
County Councillor Laura Wright, Grofield;, Welsh Labour/Llafur Cymru
Janice Watkins
County Councillor Rachel Buckler, Devauden;, Welsh Conservative Party
County Councillor Catherine Fookes, Town;, Welsh Labour/Llafur Cymru
County Councillor Meirion Howells, Llanbadoc & Usk;, Independent

Public Information

Access to paper copies of agendas and reports

A copy of this agenda and relevant reports can be made available to members of the public attending a meeting by requesting a copy from Democratic Services on 01633 644219. Please note that we must receive 24 hours notice prior to the meeting in order to provide you with a hard copy of this agenda.

Welsh Language

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

Aims and Values of Monmouthshire County Council

Our purpose

Building Sustainable and Resilient Communities

Objectives we are working towards

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

Our Values

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

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

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

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

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

Role of the Pre-meeting

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

Questions for the Meeting

Scrutinising Performance

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

Scrutinising Policy

1. Who does the policy affect ~ directly and indirectly? Who will benefit most/least?
2. What is the view of service users/stakeholders? What consultation has been undertaken? Did the consultation process comply with the Gunning Principles? Do stakeholders believe it will achieve the desired outcome?
3. What is the view of the community as a whole - the ‘taxpayer’ perspective?
4. What methods were used to consult with stakeholders? Did the process enable all those with a stake to have their say?
5. What practice and options have been considered in developing/reviewing this policy? What evidence is there to inform what works? Does the policy relate to an area where there is a lack of published research or other evidence?
6. Does the policy relate to an area where there are known inequalities?
7. Does this policy align to our corporate objectives, as defined in our corporate plan? Does it adhere to our Welsh Language Standards?

8. Have all relevant sustainable development, equalities and safeguarding implications
9. been taken into consideration? For example, what are the procedures that need to be in place to protect children?
- 10.
11. How much will this cost to implement and what funding source has been identified?
- 12.
13. How will performance of the policy be measured and the impact evaluated

General Questions:

Empowering Communities

- How are we involving local communities and empowering them to design and deliver services to suit local need?
- Do we have regular discussions with communities about service priorities and what level of service the council can afford to provide in the future?
- Is the service working with citizens to explain the role of different partners in delivering the service, and managing expectations?
- Is there a framework and proportionate process in place for collective performance assessment, including from a citizen's perspective, and do you have accountability arrangements to support this?
- Has an Equality Impact Assessment been carried out? If so, can the Leader and Cabinet/Senior Officers provide members with copies and a detailed explanation of the EQIA conducted in respect of these proposals?
- Can the Leader and Cabinet/Senior Officers assure members that these proposals comply with Equality and Human Rights legislation? Do the proposals comply with the Local Authority's Strategic Equality Plan?

Service Demands

- How will policy and legislative change affect how the council operates?
- Have we considered the demographics of our council and how this will impact on service delivery and funding in the future?
- Have you identified and considered the long-term trends that might affect your service area, what impact these trends could have on your service/your service could have on these trends, and what is being done in response?

Financial Planning

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

Making savings and generating income

- Do we have the right structures in place to ensure that our efficiency, improvement and transformational approaches are working together to maximise savings?

- How are we maximising income?
- Have we compared other council's policies to maximise income and fully considered the implications on service users?
- Do we have a workforce plan that takes into account capacity, costs, and skills of the actual versus desired workforce?

Questions to ask within a year of the decision:

- Were the intended outcomes of the proposal achieved or were there other results?
- Were the impacts confined to the group you initially thought would be affected i.e. older people, or were others affected e.g. people with disabilities, parents with young children?
- Is the decision still the right decision or do adjustments need to be made?

Questions for the Committee to conclude...

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

- (i) Investigate the issue in more detail?
- (ii) Obtain further information from other witnesses – Executive Member, independent expert, members of the local community, service users, regulatory bodies...

Agree further actions to be undertaken within a timescale/future monitoring report...

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SUBJECT: 2023/24 REVENUE BUDGET – MONTH 5 UPDATE
MEETING: PERFORMANCE & OVERVIEW SCRUTINY COMMITTEE
DATE: 22nd November 2023
DIVISION/WARDS AFFECTED: ALL

1. PURPOSE:

- 1.1 To provide Committee with an update of the progress of the Councils revenue budget for the 2023/24 financial year, as forecast at the end of Month 5 (August).

RECOMMENDATIONS TO PERFORMANCE AND OVERVIEW SCRUTINY COMMITTEE

- i. That the Performance and Overview Scrutiny Committee scrutinise the revenue budget forecast for the 2023/24 financial year, as prepared based on information available at the end of Month 5 (August).
- ii. That the Committee as part of their role assesses whether effective budget monitoring is in place; the extent to which budgets are spent within the agreed budget and policy framework, including the reasonableness of the explanation for variances and; consider the achievement of progress in meeting budget savings targets.

2. RECOMMENDATIONS TO CABINET:

- 3.1 That Cabinet note the overall revenue budget deficit forecast at month 5 of £124k.
- 3.2 That Cabinet endorse the budget recovery action as outlined in **Appendix 3**, that has been enacted as a direct result of Cabinet's request at their July 2023 meeting for immediate mitigating budget recovery action following signalling of early budget pressure.
- 3.3 That Cabinet note the budgetary risks that are inbuilt into the month 5 forecast, namely;

- The volatility of demand for high-cost services, particularly in Adults & Childrens Social Care and Homelessness;
- Continuing negotiation around national pay agreements which will further impact forecasts if it results in an award over and above the current offer;
- The risk of further non-delivery of the £10m of budgeted savings targets, with services currently forecasting 83.6% delivery;
- The severely limited reserve cover available to the Council;
- The continued pressure on both UK and Welsh Government budgets, and wider challenging economic environment;
- The potential shortfall in funding of the increased responsibilities transferred to Councils, particularly within Universal Free School Meals and Homelessness that have the potential to further impact forecasts.

3.4 That in light of the severity of the current financial position and the risk that this presents to the ongoing financial sustainability of the Council, that all possible budget mitigation actions continue to be instigated by services such as to limit the call on severely limited reserve balances.

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3.5 That Cabinet note the forecast draw on schools delegated balances as outlined in **Appendix 1** of this report of £3.663m, with school balances forecast to reduce to £594k by the end of the financial year with eleven schools forecast to be in a deficit balance.

3. KEY ISSUES:

Context

3.1 Councils across the UK are facing financial challenges on an unprecedented scale. It is widely acknowledged that local government funding over recent years has not kept pace with increased service demand, the additional responsibilities being transferred, and inflationary pressures.

3.2 Our 2022/23 revenue budget culminated in an over spend of £3.5m which required funding from earmarked reserves to cover the additional expenditure incurred following acute pressures experienced within Adult's and Children's services, Homelessness, and Additional learning needs.

- 3.3 The 2023/24 budget set in March 2023 accommodated additional costs of delivering services of £26m or 14%. Whilst income and funding increased by 9% (£16m) to meet some of these costs, the Council needed to find savings of 5% (£10m) from services.
- 3.4 The budget when set highlighted a number of known budgetary risks that sat outside of the core budget, some of which have now materialised and have resulted in further pressures being reported.
- 3.5 The first half of 2023/24 has seen continuing financial headwinds which are having a severe impact upon the service operating environment:
- Inflation has not fallen as quickly as economic projections predicted and is placing a significant additional financial burden upon service delivery;
 - Interest rates have risen sharply to combat inflation, significantly above recent economic forecasts;
 - The cost of living crisis continues to have a significant impact on our communities, and will be further exacerbated by the UK economy likely to enter recession during the year, and the recent sharp interest rate rises that will impact housing costs as we move through the year;
 - The Council continues to deal with a shortage of staff resources due to the ongoing tight labour market that requires more costly temporary solutions to be used;
 - Supply chain issues continue which requires more costly alternative or expedited arrangements;
 - The wider and longer lasting impact of the pandemic continues to impact the Council, particularly in the areas of Homelessness, Children's services, Adult social care and Children's additional learning needs.
- 3.6 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.
- 3.7 Cabinet received an early financial update for the year at their 26th July 2023 meeting which highlighted significant early pressure on the Council's budget of around £6m. As part of a package of measures to tackle this, Cabinet approved the use of £2.5m of useable revenue reserves to increase the Council's overall level of inflation contingency. This equated to the amount of reserves that were originally anticipated to be required to support the 2022/23 budget outturn position, but were not ultimately called upon. When set alongside a further unbudgeted grant assumption of £1m, this left a remaining forecast budget pressure of £2.6m.
- 3.8 Cabinet therefore requested that the Strategic Leadership Team engage in immediate mitigating action and develop a structured approach to tackling the remaining forecast deficit through budget recovery action.

Revenue budget forecast

Table 1: Budget forecast at Month 5

Directorate	Shortfall in saving target £000's	In-year budget Pressures / Savings £000's	Total budget pressure at Month 5 £000's
Social Care & Health	1,113	1,863	2,976
Children & Young People	105	658	763
Communities & Place	294	1,548	1,842
Monlife	37	307	344
Chief Executives Units	0	13	13
People & Governance	0	191	191
Resources	115	(124)	(9)
Corporate, Treasury & Financing	0	(2,850)	(2,850)
Service budget deficit	1,664	1,605	3,269

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Unbudgeted grant assumption for remainder of year	(1,000)
Budget recovery action	(2,145)
Remaining budget deficit at Month 5	124

Service budget deficit

- 3.9 A service budget deficit of £3.269m is forecast at month 5, which is a combination of a shortfall in services being able to meet their budgeted savings targets of £1.664m, alongside in-year net budget pressures for the year of £1.605m.
- 3.10 It is important to note that the total service deficit forecast for the year is mitigated by revenue reserves totalling £5.5m, £3m of which were approved as part of the original budget, and an additional contribution of £2.5m that was approved by Cabinet at their meeting on the 26th July 2023. Further mitigation is provided by utilising £3m of capital receipts to meet revenue expenditure under regulation.

3.11 **In-year service pressures and savings:** *Appendix 1* to this report details all service pressures and savings that have developed since the budget was set in March 2023. At a summary level these primarily relate to the following areas:

Table 2: Service budget pressures and savings

Pressure / Saving	Value £000's	Summary
Neighbourhood Services	812	The recycling market remains volatile and delays in rolling out polyprop reusable bags due to depot infrastructure and vehicle issues is adding to pressure. Income targets on trade waste and grounds maintenance remain challenging.
Fleet Maintenance	318	Fuel and parts inflation remain high, supply chain issues for replacement parts is leading to the outsourcing of repairs to external contractors. Downtime of vehicles is also driving up hire costs.
Housing/Homelessness	636	B&B accommodation costs remain high despite a reduction in the number of rooms in use, as room rates have increased. This is exacerbated by being unable to claim full housing benefit subsidy. Further costs have been incurred to rectify damage caused by tenants in hostel and leased accommodation.
Passenger Transport	153	An increase in costs due to retender of some contracts, and a bus operator removing a service route which has to be covered by MCC.
Adults care services	2,734	Negotiated Care provider fees are £1.5m more than budgeted following significant hikes in rates in the current market. A further pressure of £1.1m from an increase in care home placements together with an increase in the average cost of placements. A shortfall of £1m against budgeted savings targets. This is offset by under spends of £900k in the My Day My Life, and Care at Home vacancies.
ALN Transport & Recoupment	643	Transport contracts pressure of £650k. Change in ALN formula for schools - all out of county recoupment for mainstream schools will be delegated to schools £358k. Reduction in number of pupils in out of county schools has resulted in a saving of £378k
MonLife Income / Contact centre	339	Borough Theatre £210k and Attractions £86k, both due to lower than budgeted visitor levels. Contact centre £54k due to delays in implementing a restructure and cover for long term sickness.
Democratic Services	160	Members costs have increased as a result of pay awards, higher than anticipated take up of the superannuation scheme, and an increase in co-opted members.
Pay inflation - non-teaching	960	Estimated pressure over and above base budget based upon the employer's current pay offer of a flat rate £1,925
Other variances	224	A number of smaller over spends within services

Treasury costs	(250)	Estimated saving as a result of interest rate rises pausing and higher than expected cash balances.
Council Tax	(460)	The Council tax base is currently slightly above budgeted levels and CTRS caseloads is running slightly below historical levels.
Inflation contingency budget	(3,000)	Full use of the reserve backed contingency budget is forecast
Total	3,269	

3.12 **Budgeted savings targets:** Of the above budget pressures of £3.269m, there is a shortfall of £1.664m or 16.4% currently forecast against the service savings targets that were set as part of the original budget for 2023/24. Full details can be found at **Appendix 2** to this report, however the main variances are as follows:

Table 3: Progress against budgeted savings targets

Savings proposals by Directorate	Budgeted Saving	Month 5 Forecast	Variance	Variance	Comment
	£000	£000	£000	%	
Social Care & Health	(3,349)	(2,236)	1,113	33.2%	Adult's services - £1.1m shortfall against £2.0m target due to the complexity and level of demand for care needs restricting progress, some savings being dependent upon third party negotiation, and challenges resourcing some of the service change required.
Children & Young People	(1,809)	(1,704)	105	5.8%	Not possible to meet target of increased ALN recoupment income following changes agreed in the ALN formula for schools
Communities & Place	(2,513)	(2,219)	294	11.7%	£177k shortfall in meeting energy reduction targets following a delay in resourcing the team £100k shortfall in mileage reductions following delays in the roll out of the pool car scheme and other initiatives intended to reduce business mileage £17k shortfall as we are unable to change the licencing arrangements for schools and community transport due to the number of vehicles we are operating
Monlife	(930)	(893)	37	4.0%	A delay in progressing some staffing reductions
Chief Executives Unit	(39)	(39)	0	0.0%	
People & Governance	(86)	(86)	0	0.0%	

Resources	(991)	(876)	115	11.6%	Property estate rationalisation has not progressed as quickly as anticipated
Corporate Costs & Levies	(433)	(433)	0	0.0%	
Totals	(10,150)	(8,486)	1,664	16.4%	

Unbudgeted grant assumption

- 3.13 The overall month 5 forecast includes an assumption that a further £1m of unbudgeted grant will be awarded during the remainder of the year, and that this award will allow for core Council expenditure to be met from the additional grant.
- 3.14 Whilst this assumption is in line with trends over recent years, as the year progresses this assumption comes with a higher degree of risk following indications of the in-year pressures on the Welsh Government budget. On the 18th October 2023 Welsh Government published a package of budget changes that looks to prioritise and support the NHS and Transport budget in Wales for the remainder of the year. Whilst Local Government budgets have been protected as part of these changes, it is clear that funding priorities remain with the NHS and Transport.
- 3.15 The Chancellor's Autumn Statement on the 22nd of November will provide further information on the level of further support, if any, that maybe provided by way on consequential funding to Welsh Government for the remainder of the year.

Budget recovery action

- 3.16 Following the signalling of significant budgetary pressure early in the financial year, Cabinet required the Strategic Leadership Team to engage in immediate budget recovery action.
- 3.17 Full details of the budget recovery action totalling £2.145m that has been enacted can be found at **Appendix 3** to this report. At a summary level the action taken revolves around the following mitigations:

Table 4: Budget recovery action

Type	Children & Young People	Social Care, Health & Safeguarding	Communities & Place	MonLife	People & Governance	Chief Executives Unit	Resources	Total
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Increase Grant / Income	138	60	86	139			75	498
Freeze vacant posts	24	75	259	89	60	17	55	579
Expenditure reduction		11	131	48	3	8	48	249
Service reduction / change				56				56
Service reserve funding	270			30				300
Transfer of cost to Capital			407		8	40	9	464
Total	432	146	883	362	71	65	187	2,145

3.18 Whilst the recovery action identified falls short of the original £2.6m target, there has been a favourable movement in service budget positions since the early budget forecast was presented, that now results in an overall remaining forecast budget deficit of £124k at month 5.

Remaining budgetary risks

3.19 There remain key specific budgetary risks presenting for the remainder of this financial year and beyond, that have the ability to further impact upon our financial sustainability as a Council:

- **Homelessness presentations** continue to be volatile and a return to higher numbers during the winter period could lead to above forecast use of costly Bed & Breakfast or temporary housing solutions despite the strategies engaged to reduce this;
- **Pay agreements** - The current employers pay offer for non-teaching staff is for a flat rate £1,925 and which is the subject of continued negotiation. Any agreement reached that is above this level would result in a further budgetary pressure over and above current forecasts.
- There remains a risk that **further non-delivery of budgeted savings** targets in the current difficult operating environment will impact on both 2023/24 and the medium-term if alternative strategies to deliver savings cannot be found;
- **Limited reserve cover** – we started the year with £15.4m in useable revenue reserves which has since reduced to £12.9m after allowing for the in-year use of £2.5m. When allowing for the minimum recommend prudent level to be held in the Council fund reserve for emergency use of £7.9m, this leaves only £5m of useable revenue reserves available. All banked capital receipts have currently been committed to this years or future budgets.
- **National picture** – there is continued pressure on both UK and Welsh Government budgets resulting from the wider economic environment. This has the potential to impact upon levels of further budget consequential funding;
- Significant **increased responsibilities** have been transferred to Councils which are not currently being fully funded through the Welsh Government settlement or through specific grants. For 2023/24 this focusses primarily on increased responsibilities around Homelessness where Monmouthshire has significant specific local factors that impact cost, and the rollout of universal free school

meals where inflationary pressures mean costs are significantly above funding levels. Whilst it is hoped that this pressure will be recognised with further funding during the remainder of the year, this remains a key budgetary risk area.

Financial implications and future focus

- 3.20 The continuing financial headwinds, increasing demand for services, funding uncertainty, and the need for service savings now totalling £12m to be delivered within a challenging operating environment present tangible ongoing budget risks for the year.
- 3.21 When this is considered alongside a significant budget gap to be resolved for 2024/25, and a challenging funding outlook in the medium term, there remains a severe risk to the financial sustainability of the Council in the near term.
- 3.22 There is therefore a requirement for all services to bear down on avoidable cost and identify further income opportunities wherever possible for the remainder of the year, in order to limit the call on severely limited useable revenue reserves.
- 3.23 A targeted vacancy freeze has been enacted by the Senior Leadership Team with vacancy needs firstly being evaluated by senior management teams and considered for authorisation by the Chief Executive.
- 3.24 More regular financial monitoring arrangements continue for the remainder of the year. This has been formalised through the establishment of a Financial Management Board who will focus on high budget risk areas and in regularly assessing the progress being made against budgeted service savings, and the additional budget recovery action.
- 3.25 As we move towards the next formal monitoring period at Month 6, work will continue to deliver on the structured approach to tackling the underlying budget pressures, which will continue to explore all available options open to the Council. This will include vacancy management, the potential for further or alternative savings, consideration of a pause in capital expenditure, and a more targeted review of grant funding opportunities and income generation.

4 RESOURCE IMPLICATIONS:

The report itself covers the resource implications of the entirety of the revenue budget activity during the year. There are no further resource implications as a result of the recommendations in this report.

5 EQUALITY AND FUTURE GENERATIONS EVALUATION (INCLUDES SOCIAL JUSTICE, SAFEGUARDING AND CORPORATE PARENTING):

5.1 This report provides Members with an update on the early progress being made against the revenue budget of the Authority and carries no decisions. There are therefore no equality and future generations' implications directly arising from this report.

CONSULTEES:

Senior Leadership Team
Cabinet

BACKGROUND PAPERS:

Appendix 1 – Detailed service commentaries
Appendix 2 – Progress against budgeted savings
Appendix 3 – Budget recovery action

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Overall Revenue Position

Table 1: Council Fund 2023/24 Forecast Outturn Summary Statement at Month 5

Service Area	Original Budget 2023/24	Budget Adjustments	Revised Annual Budget	Forecast Outturn	Forecast (Under) / Over Spend @ Month 5
	'000's	'000's	'000's	'000's	'000's
Social Care, Health & Safeguarding	63,735	(90)	63,644	66,620	2,976
Children & Young People	62,420	30	62,449	63,212	763
Communities & Place	26,427	(1,110)	25,317	27,159	1,842
MonLife	8,188	(12)	8,176	8,519	344
Chief Executives Unit	3,009	(4)	3,006	3,019	13
People & Governance	2,715	(2)	2,713	2,904	191
Resources	7,017	1,189	8,206	8,197	(9)
Corporate Costs & Levies	29,344	2,500	31,845	29,706	(2,139)
Net Cost of Services	202,854	2,501	205,355	209,336	3,981
Appropriations	5,661	(2,501)	3,160	2,908	(252)
Expenditure to be Financed	208,515	0	208,515	212,244	3,729
Financing	(208,515)	0	(208,515)	(208,975)	(460)
Net General Fund (Surplus) / Deficit	0	0	0	3,269	3,269

Unbudgeted grant assumption for remainder of year	(1,000)
Budget recovery plan	(2,145)
Net budget pressure at Month 5	124

Table 2: Council Fund 2023/24 Outturn Detailed Statement

Service Area	Original Budget 2023/24	Budget Adjustments	Revised Annual Budget	Forecast Outturn	Forecast (Under) / Over Spend @ Month 5
	'000's	'000's	'000's	'000's	'000's
Adult Services	38,246	34	38,280	41,014	2,734
Children Services	22,209	(26)	22,183	22,424	241
Public Protection	1,790	(4)	1,786	1,849	63
SCH Support	1,489	(94)	1,396	1,334	(62)
Social Care, Health & Safeguarding	63,735	(90)	63,644	66,620	2,976
Emergency Planning	170	(0)	170	169	(1)
Individual Schools Budget	50,423	30	50,453	50,588	134
Resources	1,140	(1)	1,139	1,125	(14)
Standards	10,686	1	10,687	11,331	643
Children & Young People	62,420	30	62,449	63,212	763
Enterprise, Housing & Community Animation	4,564	(882)	3,682	4,303	621
Facilities & Fleet Management	10,805	(194)	10,610	11,105	495
Neighbourhood Services	9,306	(24)	9,282	10,094	812
Placemaking, Highways & Flood	1,752	(9)	1,743	1,657	(86)
Communities & Place	26,427	(1,110)	25,317	27,159	1,842
Communications	203	(0)	203	208	5
Countryside & Culture	1,157	0	1,157	1,157	(0)
Finance & Business Development	4,170	(10)	4,160	4,499	339
Leisure, Youth & Outdoor Adventure	2,658	(2)	2,656	2,656	0
MonLife	8,188	(12)	8,176	8,519	344
Policy, Scrutiny & Customer Service	1,236	(3)	1,234	1,279	46
People	1,773	(1)	1,772	1,740	(32)
Chief Executives	3,009	(4)	3,006	3,019	13
Democratic Services	1,634	(1)	1,633	1,793	160
Legal and Land Charges	1,022	(1)	1,021	1,048	27
People	59	0	59	63	4
People & Governance	2,715	(2)	2,713	2,904	191
Commercial, Corporate & landlord Services	1,597	(4)	1,593	1,700	108
Corporate Health & Safety	77	(0)	77	77	0
Finance	2,505	1,074	3,579	3,462	(117)
Information Communication Technology	2,837	119	2,957	2,957	(0)
Resources	7,017	1,189	8,206	8,197	(9)
Precepts & Levies	24,578	0	24,578	24,578	(0)
Coroner's	171	0	171	189	18
Archives	213	0	213	213	(0)
Corporate Management	355	0	355	239	(116)
Non Distributed Costs (NDC)	757	0	757	757	0
Strategic Initiatives	1,642	2,500	4,142	2,102	(2,040)

Insurance	1,628	0	1,628	1,628	(0)
Corporate Costs & Levies	29,344	2,500	31,845	29,706	(2,139)
Net Cost of Services	202,854	2,501	205,355	209,336	3,981
Interest & Investment Income	(925)	0	(925)	(1,036)	(111)
Interest Payable & Similar Charges	6,953	0	6,953	6,964	11
Charges Required under Regulation	6,800	0	6,800	6,924	124
Other Investment Income	0	0	0	(24)	(24)
Borrowing Cost Recoupment	(3,658)	0	(3,658)	(3,910)	(252)
Contributions to Reserves	63	0	63	63	0
Contributions from reserves	(3,572)	(1,316)	(4,888)	(4,888)	0
Contribution from Council Fund	0	(1,185)	(1,185)	(1,185)	0
Appropriations	5,661	(2,501)	3,160	2,908	(252)
Expenditure to be Financed	208,515	(0)	208,515	212,244	3,729
General Government Grants	(91,451)	0	(91,451)	(91,451)	0
Non Domestic Rates	(31,224)	0	(31,224)	(31,224)	0
Council tax	(93,642)	0	(93,642)	(93,842)	(200)
Council Tax Benefit Support	7,802	0	7,802	7,542	(260)
Financing	(208,515)	0	(208,515)	(208,975)	(459)
Net General Fund (Surplus) / Deficit	0	0	0	3,269	3,269

DIRECTORATE – DIVISION VARIANCE COMMENTS

SOCIAL CARE, HEALTH & SAFEGUARDING	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	2,976	0	0	0

The Social Care directorate continues to make in-roads into its identified savings targets; however, a number of key areas, particularly within Adults services, remain challenging to deliver. The service continues to deal with high demand and complexity of people's needs making the balance between reducing costs and ensuring that people are safe, and their basic needs are met a challenging one. To assist with this increased oversight of spend is in place across the system.

It is pleasing to note that the work within Children's services placement planning is showing good outcomes, and that the overall numbers of children coming into care continues to remain stable with a slight downward trend over the last 3 years. Similarly, within Adults service effective negotiations with care providers have allowed costs associated with fees and charges to be controlled.

There are a number of key risks within the service which can have an impact of cost including the insufficiency of children's placements. [The numbers of Unaccompanied Asylum Seeking Children entering the county has increased significantly which whilst cost neutral in itself puts renewed pressure on placements and on wider resources.] Additionally the service is benefitting from a number of WG grants, some of which are known to be short-term and others of which remain uncertain with regards to how long they might be available. Services supported by grants are deeply integrated into the core delivery of the service and contribute heavily to managing demand and supporting the delivery of savings.

ADULT SERVICES	Month 5	Month 6	Month 9	Outturn
Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	2,734	0	0	0

There is a £2.73M over spend in adults.

Progress against savings mandates remains challenging, particularly with regard to the reduction of care at home hours. Following an initial review pilot process in the central area, initial savings associated with the reduction of care packages was identified as £80K. The work to reduce and change the care packages with individuals is underway and the review process that was established is now extending out across the service based on the work. To monitor this we are tracking the total number of people in receipt of care at home against the total number of care hours delivered. It is also positive to note that the numbers of unmet need care at home hours has continued to show overall reductions.

We continue to show a deficit against saving mandates associated with CHC. Some recent cases have been successfully pursued with health which has allowed us to generate £140K of savings against a target of £550K.

The main pressures are down to the £1.5M provider fee increases. At the beginning of the year this was calculated at £2M; however, after extensive fair fee negotiations with provider agencies we were able to reduce this by £0.5M.

A further pressure of £1.1M has arisen through continued increase in care home placements together with an increase in the average cost of care home placements. A gatekeeping panel has been established to provide oversight to all requests for high-cost care packages including residential placements. Residential placements are now used in situations where the cost of care at home would exceed the cost of a residential placement, contributing to the continued rise in residential placements.

The over spend has been assisted by £900K under spends within My Day My Life and Care at Home vacancies, and the £1.1M Social Care Workforce and Sustainability Grant, leading to the true underlying over spend more in the region of £5M, coupled with debt for care charges still running high at £1.757M.

Budget recovery measures are being enacted including increasing the oversight of all new packages of care against tightened eligibility criteria.

CHILDREN SERVICES

Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	241	0	0	0

Children's services have been able to capitalise on their progression planning activity with individual children, bringing children into placements that are closer to home and more in keeping with their care and support needs and longer-term personal outcomes. This has including supporting some children to return home, or, for older children, into more independent settings. Additional family support services have been put in place to support this endeavour – with the service benefitting from WG grants to achieve this.

The £241K over spend within children's service is largely due to the increased cost of new placements and demand.

The service continues to have an over-reliance on agency staff working in critical areas of the service particularly child-protection. The service is reviewing all agency assignments and accelerating agency exit plans wherever possible to contribute to budget recovery measures. The service is working in accordance with the All-Wales pledge in order to control the costs associated with agency-worker fees.

PUBLIC PROTECTION

Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'s	63	0	0	0

The deficit results from the SCH2a saving mandate not being delivered, as a consequence of the Head of Public Protection post being retained. A vacant EHO post has been deleted which partly offsets this budget pressure.

SCH SUPPORT

Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	(62)	0	0	0

Due to vacancy savings within the directorate finance team.

CHILDREN & YOUNG PEOPLE DIRECTORATE

	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	763	0	0	0

CHILDREN & YOUNG PEOPLE DIRECTOR'S COMMENTARY:

The Directorate's Month 5 position is an overspend of £762,846. This overspend is largely due to ALN Transport (£650k) and a reduction in ALN Recoupment (£358k).

We have partly been able to offset our overspend by successfully developing our in County ALN provision, which has resulted in a reduction of the number of ALN pupils attending Out of County or Independent placements.

All opportunities to make savings are being reviewed. This includes the cost of ALN Transport and any vacancies that may occur in the Directorate.

Emergency Planning

Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'s	(1)	0	0	0

Individual Schools Budget

Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	134	0	0	0

The overspend is largely due to an increase in transport costs and we are working with the PTU to try and minimise these costs going forward:

- £56k Post-16 Transport
- £20k Bus to Caldicot School
- £12k Llandenny to Usk Transport

A further overspend has been due to the 2022-23 Pay Award, which has caused the SRS costs to increase for all schools. This pressure was not known at the time of agreeing the Service Level Agreements (SLA's) and so it could not be passed onto the schools:

- £46k SRS Charges

Resources

Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	(14)	0	0	0

The under spend of £14k is due to receiving a grant, which has subsequently been utilised to offset the ALN Licence costs.

Standards

Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	643	0	0	0

The over spend of £643k is due to the following:

- £650k ALN Transport – forecast revised based on Q1 actuals and September actuals, and following re-tender where costs have significantly increased.
- £358k reduction in ALN Recoupment – with the recent changes in ALN formula for schools, all out of county recoupment for mainstream schools will be delegated to support pupils.
- £59k Breakfast clubs – increase in catering costs and reduction in income
- £16k - ALN Administration Service – unable to currently make the employee related savings

Offset by:

- -£378k saving on ALN Out of County – reduction in number of pupils in out of county schools has resulted in a saving

- -£55k saving in independent schools – reduction in the number of pupils requiring places
- -£7k saving in Education Psychology – due to staff savings

COMMUNITIES & PLACE DIRECTORATE	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	1,842	0	0	0

COMMUNITIES & PLACE DIRECTOR'S COMMENTARY:

Enterprise, Housing & Community Animation				
Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	621	0	0	0

Enterprise & Community Animation is forecasting a £621k over spend at month 5, this is mainly due to: -

- **Enterprise Mgt** - £52k over spend – Our partner contribution towards City Deal has increased over and above available budget by £13k, on top of this senior management costs have exceeded budget due to the inability to make vacancy factor savings and an over spend in subscription and software costs.
- **Housing** - £636k over spend, this can be broken down into these main areas: -
 - **Homelessness** – £428k over spend:

The cost of providing B&B accommodation remains high, even though we have reduced the number of rooms in use (67 as at M5) room rates have increased resulting in the total cost remaining constant. We are projecting to spend £2.512m on B&Bs this year with an additional £624k on ancillary spend including security and damage repairs. The majority of this cost will be offset by Housing Prevention grant of £467k and Housing Benefit of £1.683m, but leaves a £128k shortfall. The service also benefited from a significant budget uplift as part of the 23-24 MTFP.

There is a further related over spend of £300k relating to B&B placements for which we are unable to claim full housing benefit subsidy. The cost of providing the accommodation remains constant due to an uplift in room rates, which means the gap between what we pay and what we can claim back is significant creating a budget pressure. Work is ongoing to find alternative accommodation options which may result in fewer placements in later months, however there is currently no certainty that this will mitigate demand and reduce the pressure on the budget.

This is a volatile area where accommodation demands can fluctuate month by month and officers are continually reviewing placement options to try and limit costs.

- **Shared Housing & Private Leasing** - £215k over spend – We are seeing significant increases in maintenance costs across our hostel and leased accommodation to rectify damage caused by tenants. This was also an issue in 22-23 but it was covered by additional HPG grant that we do not have this year.
- **Strategic Services** – £7k under spend – Staff under spend due to savings from a vacancy.
- **Business Growth & Enterprise** – £85k under spend – Under spend as a result of staff savings due to core costs in Economic development being funded by grant and staff vacancy savings in the Strategic Operations Team due to the delay in the restructure that has only just been agreed.
- **Procurement** – £18k over spend – Software & system costs have increased above available budget.

Facilities & Fleet Management

Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	495	0	0	0

Facilities, Fleet & De-carbonisation are forecasting a £495k over spend, due to-

- **Schools Catering** – Break-even - We have now fully rolled out the universal free school meal to all primary pupils. This has resulted in a significant jump in expenditure due to the need for additional staff, materials and equipment to cope with the uplift in meal numbers and has resulted in costs **exceeding budget by £215k**. WG are currently paying us £2.90 per meal but this isn't sufficient to cover costs. This is an issue across Wales and WG are reviewing the meal rate and we will know in the autumn of the updated meal rate so we are currently assuming that this shortfall will be fully funded. Given the overall Welsh Government budget challenges this year there is a degree of risk that further funding will not materialise and we will have to cover the shortfall.
- **Passenger Transport** – £153k over spend – We are predicting a £353k over spend in external operator costs, this is due to a number of factors:
 - We had to re-issue 11 contracts due to the unfortunate death of one of our operators and as a consequence of market forces these contracts were priced at a premium.
 - We had to commission 18 more contracts due to late applications from parents pushing up pupil numbers resulting in the need for extra transport.
 - A bus operator removing a service route which had to be covered by MCC.
 These costs have been part offset by a £29k under spend in internal commissioning mainly due to hire income and £170k of bus operator grant income.
- **Regional Transport Team** - £37k under spend – Staff under spend as we have been able to use capitalisation directive to fund core service cost.
- **Car Salary Sacrifice Scheme** – £12k over spend - the number of members in the scheme has reduced in recent years to a point where the actual savings being made have fallen below budgeted levels.
- **Fleet maintenance** - £318k over spend – Fuel and parts inflation remain high driving costs up, in addition we are also experiencing supply chain issues for replacement parts meaning in some instances we have to outsource repairs to external contractors to ensure vehicles are back on the road as quickly as possible. Downtime of vehicles is also driving up hire costs as we have to cover vehicles that are off the road.
- **Building Cleaning & Public Conveniences** - £31k under spend – mainly down to part year staff vacancy savings.
- **Solar Farm & Sustainability** - £77k under spend – due to improved income mainly from our

PV installations caused by the increased market rates for energy.

- **De-Carbonisation Team** - £155k over spend - staff savings of £122k have been offset by the inability to achieve the full corporate energy target by £177k and the total mileage saving of £100k.

Neighbourhood Services

Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	812	0	0	0

Neighbourhood Services are forecasting to over spend by £812k, this is due to-

- **Highways, Swtra & Streetlighting** – Break-even – currently all areas are reporting a balanced budget. The Highways budget can be affected by adverse weather during the winter months with the possibility of snow events or additional gritting, but the service will look to amend its programme accordingly to ensure there is no over spend.
- **Waste & Street Scene** - £812k over spend – this can be broken down into 2 main areas:
 - **Waste Services** - £765k over spend – The recycling market remains volatile and delays in rolling out polyprop reusable bags due to depot infrastructure and vehicles is adding to pressure. Income target for green waste service have been achieved but income targets on trade waste remain challenging.
 - **Grounds Maintenance** - £48k over spend - The income targets are challenging with many customers looking to reduce costs of grounds maintenance. Costs associated with materials and equipment are above inflation and placing further pressure on budgets despite budget mandates being achieved.

Placemaking, Highways & Flood

Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	(86)	0	0	0

Placemaking, Highways & Flood is forecasting to under spend by £86k, this is as a result of -

- **Planning & Building Control** – £84k over spend – the downturn in the economy has affected income where applications are down in both Planning and Building Control – in addition we have incurred additional IT costs for essential server upgrades (£8k) and the ongoing digital update to the microfiche system (£30k).
- **Planning Policy & LDP** – Reporting a balanced budget.
- **Car Parks & Civil Parking Enforcement** - £72k over spend – we are forecasting a shortfall in income across the service of £85k. PCN fines are down due to staff absence, pay & display income is down due to the new car parks at Severn Tunnel and Wyebridge street not bringing in expected levels and we are also seeing a reduction in the issue of parking permits. We are also forecasting an increase in professional services fees, card payment fees, machine maintenance fees and software costs (total £30k), these have been offset by under spends on rates (£22k) and staff savings from part vacant posts (£21k).

Highways management & flooding - £209k under spend – Early forecasts indicate that fee income across the department will exceed budgets particularly in Road Closure & inspection fees and SABs fees, in addition staff costs have under spent due to part year staff vacancy savings.

MONLIFE DIRECTORATE	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	344	0	0	0

The Monlife directorate is forecasting to over spend by £344k, with the primary areas of pressure being the Borough Theatre, Attractions, Markets, and the Contact Centre. The the Borough Theatre has only reopened this year and is still recovering from the covid pandemic. This year's adverse weather has been detrimental to income delivery at our attractions, our Markets have not returned to pre covid levels and the contact centre remains under pressure due to increased demand and software updates. Monlife are looking at each business unit assessing the best options for future sustainability and the tactics needed to improve performance in these areas.

(MonLife) Communications

Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	5	0	0	0

Central communications are predicted to over spend by £5k due to higher than anticipated software and subscription costs.

(Monlife) Finance & Business Development

Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	339	0	0	0

Finance and Business Development are predicted to over spend by £339k, the primary areas of significant pressure are:

Borough Theatre which is predicted to over spend by £210k due to lower than anticipated income levels, the section is still recovering, and full growth is not expected for another 12months. The service is looking at any grant opportunities that can reduce this over spend in the short term.

Attractions which are predicted to over spend by £86k due to lower-than-expected income. Visitor numbers to all our attractions have been significantly impacted by the adverse weather conditions, the section will look to reduce further costs and look at any opportunities for further income generation, this is limited as the service approaches season closure.

Contact Centre which is predicted to over spend by £54k due to higher than anticipated staffing levels to cover long term sick, delays in implementing restructure which impacted forecast savings, failure to meet employee related savings along with inflation on existing essential contracts.

(Monlife) Leisure, Youth & Outdoor Adventure

Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	0	0	0	0

Leisure, Youth & Outdoor Adventure are predicted to balance, with the over spend in outdoor adventure and youth being mitigated by higher than anticipated income at Monmouth Leisure Centre and higher than budgeted grant in sports development.

This remains an area of concern and requires close monitoring due to the significant income targets and the effect of the cost-of-living crisis on disposable income and future memberships.

CHIEF EXECUTIVE'S UNIT DIRECTORATE	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	14	0	0	0

HEAD OF POLICY, PERFORMANCE AND SCRUTINY COMMENTARY:

Chief Executives is forecasting to over spend by £14k.

Policy, Scrutiny & Customer Experience				
Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	46	0	0	0

Policy, Scrutiny & Customer Experience is forecasting to over spend by £46k, the outturn position is made up of a number of under and over spends across the directorate with the main variances being :-

- **Corporate** - £45k over spend – Mainly staffing over spend due to increase in a senior officer's banding after a restructure which has no budget, the full cost of CEO's PA which only had budget for a part time post, and the inability to meet vacancy factor savings.
- **Equalities & Welsh Language** - £19k under spend – Currently projecting a £69k under spend in staffing due to the delay in filling the Equalities officer post, this has been mostly offset by a £49k over spend in Welsh language costs due to the volume of external translation expected this year.
- **Levies, Subscriptions & Donations** - £20k over spend – membership subscriptions to external bodies such as the WLGA and LGA have increased over and above available budget.
- **Scrutiny** - £8k over spend – staffing costs are exceeding budget mainly own to inability to make vacancy factor savings.
- **Policy & Partnerships** – £8k under spend – net under spend mainly due to staff vacancy savings in the anti-social behaviour team.

People (CEO)				
Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	(32)	0	0	0

People Services is forecasting to under spend by £32k, the main variances are as follows:

- **Payroll & System support** - £31k over spend – The service is currently in the process of changing the recruitment system and have exceeded budget due to the overlap costs of changing from one system to the other, some of these costs have been offset by staff savings due to vacancies that are being held at present until we have a better understanding of future resource need.
- **People Management** - £55k over spend – Staff costs have exceeded budget by £85k mainly as a result of the employment of 2 temporary staff to help with the implementation of the new HR system plus the inability to meet the vacancy factor saving. This has been offset by an increase in income as SLA recharges have exceeded budget.
- **Occupational Health** - £11k under spend – service demand is down resulting is an under spend against budget.
- **Corporate Training** - £108k under spend – Mainly as a result of staff vacancies (3) within the unit, one of which is the Head of Workforce planning & Development - the delay in filling this post has generated a sizeable in-year saving.

PEOPLE & GOVERNANCE DIRECTORATE				
	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	191	0	0	0

PEOPLE & GOVERNANCE DIRECTOR'S COMMENTARY:

People & Governance is forecasting to over spend by £191k, primarily due to an increase in members costs, alongside income shortfalls in Legal and land charges.

Every effort is being made to identify mitigating savings to recover the overall position, with £65k currently identified as part of the wider budget recovery plan. This includes looking at all uncommitted expenditure, the potential to capitalise system costs, and holding vacant posts open.

Democratic Services

Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	160	0	0	0

Democratic Services is forecasting to over spend by £160k, this is due to:

- **Members** - £147k over spend – the cost of elected members has increased over budget this year and is down to a number of factors. The members pay award was agreed at 4.75% for 23-24, this is over the 4.25% built into the budget so has caused a small pressure. The number of co-opted members has increased and the projected cost for these is anticipated to be £28k over previous years. We have seen a higher uptake in members joining the Superannuation scheme than in previous years and this has increased staff oncosts over available budget. There is a vacancy factor saving built into the budget, this will not be achieved this year causing a pressure.

Democratic Services - £13k over spend – this is mainly due to an increase in the cost of our ModGov support within the committee section offset by improved grant in Electoral Management

Legal and Land Charges

Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'s	27	0	0	0

Legal and Land charges is forecasting a £27k over spend:

- **Legal** - £13k over spend – staff savings generated by the gap in filling the Head of Governance post have been offset by a projected under recovery of income due to the inability this year to charge core staff costs to capital projects.
- **Land Charges** - £14k over spend – Search fees have been impacted by the downturn in the housing market resulting in a budget pressure in income, in addition an essential server upgrade has meant that we have a £3k over spend in supplies & services, this has been part offset by a saving in staffing due to a vacant post.

People

Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	4	0	0	0

- **Organisational Development** - £4k over spend – Staff over spend due to the inability to meet vacancy factor saving.

RESOURCES DIRECTORATE

Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	(9)	0	0	0

At month 5 the Resources directorate is forecasting to under spend by £9k, primarily due to pressures within the corporate & commercial landlord budget, which is offset by savings within finance.

The performance in being able to deliver budgeted savings has deteriorated by £80k since the early forecast produced and presented to Cabinet in late July, specifically in relation to a delay in property rationalisation savings being realised.

Commercial investments continue to fall short of budgeted net income targets though this expects to improve as lettings are secured through the last half of the financial year.

The directorate is playing its part in supporting the wider budget recovery plan in ceasing non-essential expenditure and holding vacancies, the savings for which feature in the forecast to the extent that they have not subsequently been identified as a result of the budget recovery plan. Further out performance against budget has been achieved through increased income being achieved from county farms, industrial units and cemeteries which is pleasing to see at this stage of the financial year.

Finally, the budget recovery plan sees the directorate bringing forward a further £187k of savings and that relates to additional funding and income being secured, further savings from posts being held vacant and managed reductions in supplies and services. The scope to introduce significant levels of savings at this stage of the year is very constrained. However, work will continue to secure further savings and any such savings will be reported in future reporting periods.

Finance

Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	(117)	0	0	0

Finance is forecasting to under spend by £117k, this is mainly due to -

- **Revenues:**
 - **Council Tax** - £3k over spend – due to a £16k residual budget pressure from the Finance restructure and potentially reduced summons income. Partially offset by one off administration grant income for Welsh Government Retail Relief scheme.
 - **Debtors and Charity relief** – Break-even.
- **Finance** - £153k under spend – Staff savings due to vacancies as service is awaiting a restructure.
- **Audit** – Break-even.
- **Systems & Exchequer** – £28k over spend - due to additional costs for the Revenues & Benefits system.

Future Monmouthshire

Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	0	0	0	0

Future Monmouthshire is forecasting to return a balanced budget.

Information, Communication & Technology

Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	0	0	0	0

ICT is forecasting to return a balanced budget.

Commercial & Corporate Landlord

Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	107	0	0	0

Commercial & Corporate Landlord services is forecasting over spend by £107k, due to :-

- **Investment Properties** - £158k over spend, due to –
 - **Newport Leisure Park** - £47k over spend – NLP is expected to generate a £290k surplus after loan repayments, however this falls short of the £337k budget target for 23-24. The £47K shortfall relates to unbudgeted rates on vacant units and rent-free periods for new tenants reducing turnover in 23-24. In 24-25 we will see these unexpected expenses reduce and income increase as the rent-free period ends.
 - **Castlegate Business Park** - £111k over spend – Castlegate is forecasting to over spend by £111k, this relates to the unbudgeted utility costs associated with our vacant units, the section continues to work on improving the vacancy rate which will help reduce this over spend by year end.
- **Landlord Services** - £74k over spend – The budget includes a £215k saving from the rationalisation of our property portfolio – currently we are only estimating to find £50k this financial year. This over spend has been part offset by improved rental income and a one-off grant to cover the Ukrainian welcome centre.
- **Shared Accommodation** - £21k under spend – Staff savings due to a vacant cleaner post and improved income.
- **County Farms** - £29k under spend – Lettings have improved resulting in increased rental income.
- **Industrial Units** - £24k under spend – Rental income has increased above budget due to a number of new lettings.
- **Cemeteries** - £50k under spend. Burial income is projected to come in higher than budget.
- **Property Services** - Break-Even – Potential pressure within accommodation is being managed by under spends in other areas of the service.

CORPORATE COSTS & LEVIES DIRECTORATE	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	0	0	0	0
Precepts & Levies				
Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	0	0	0	0
No variance forecast at month 5.				
Coroners Services				
Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	18	0	0	0
Coroner's Service are forecasting an over spend due to the urgent restructuring of the service as required by the Chief Coroner of England and Wales.				
Corporate Management				
Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	(116)	0	0	0
Increased income due to favourable rateable value adjustments on Council owned properties.				

Non-Distributed Costs				
Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	0	0	0	0
No Forecast variance at Month 5				
Strategic Initiatives				
Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	(2,040)	0	0	0
Unallocated reserve funded budgets that are mitigating the overall over spend within the Authority.				
Insurance				
Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	0	0	0	0
The Council has been out to tender for its insurance cover which resulted in premiums payable for 2023/24 being slightly less than anticipated and reflective of a very competitive insurance market. Additional premiums can arise during the year if further assets are acquired by the authority and require insurance cover.				
APPROPRIATIONS DIRECTORATE				
Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	(251)	0	0	0
Interest & Investment Income				
Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	(111)	0	0	0
The performance of investments in money market funds and DMO deposits continue to improve with raising interest rates.				
Interest Payable & Similar Charges				
Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	12	0	0	0
Interest payable remains near target despite raising interest rates. The budget has been helped by a lower-than-expected temporary loan requirements combined with forward starting loans locking into beneficial rates. A Lender Option Borrower Option (LOBO) loan has also been repaid early reducing in year interest.				
Charges Required Under Regulation				
Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	124	0	0	0
This budget covers the statutory amount the Council is obliged to set aside to fund future loan repayments (Minimum revenue provision – MRP) and the forecast is slightly higher than the £6.7m budget due to higher spend than anticipated in the 2022/23 capital programme that was funded from borrowing (MRP costs start the year after the corresponding expenditure).				
Other Investment Income				

Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	(24)	0	0	0
Unexpected one-off income related to discharge of SRS business capital advance.				
Borrowing Cost Recoupment				
Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	(252)	0	0	0
This budget represents a technical accounting adjustment where borrowing costs relating to the purchase of capital assets is repatriated from service budgets to ensure that the full life cost of assets is borne by the end user. The variance to budget relates to vehicles purchased at the end of 2022/23 which were originally anticipated to be financed through a sale and leaseback arrangement, however following an options appraisal were found to be more cost effective to be purchased outright and financed from borrowing. An insurance settlement has also been made on a vehicle and as such additional borrowing charges recouped from the service.				
FINANCING DIRECTORATE				
Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	0	0	0	0
Council Tax Benefit Support				
Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	(260)	0	0	0
Caseload activity is currently running slightly below budgeted historical numbers.				
Council Tax				
Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	(200)	0	0	0
The tax base is increasing slightly as we progress through the year which reflects new housing developments within the County becoming occupied.				
General Government Grants				
Outturn Forecast	Month 5	Month 6	Month 9	Outturn
Deficit / (Surplus) £'000s	0	0	0	0
Income received to budget.				

2. SCHOOL BALANCES

- 2.1. A Board of Governors who are responsible for managing the school's finances directly governs each of the Authority's Schools. However, the Authority also holds a key responsibility for monitoring the overall financial performance of schools. Below is a table showing the forecast Schools' balances position based on month 5 projections for each Educational Cluster.
- 2.2. The LA and Governing Body have not formally agreed a 2023-24 budget for Chepstow Comprehensive. This will be agreed at the Governing Body Meeting in October.

Council Fund Outturn 2023/24 – School Balances Summary outturn position	(A) Opening Reserves (Surplus) / Deficit Position 2023/24	(B) Draw / (Contribution) from / (to) School Balances @ Month 5	(C) Draw / (Contribution) from / (to) School Balances @ Month 6	(D) Draw / (Contribution) from / (to) School Balances @ Month 9	(E) Draw/ (Contribution) to Reserves at Outturn	(A+B) Forecast 2023/24 Reserves
	£000's	£'000	£'000	£'000	£'000	£'000
Cluster						
Abergavenny	(1,598)	1,059	0	0	0	(540)
Caldicot	(1,151)	915	0	0	0	(236)
Chepstow	(112)	180	0	0	0	69
Monmouth	(1,425)	1,032	0	0	0	(393)
Special	29	478	0	0	0	506
Total	(4,257)	3,663	0	0	0	(594)

- 2.3. At Month 5, the forecast anticipated draw on reserves is £3,663,351, against a budgeted draw on reserves of £3,344,722. This will result in a forecast surplus balance of £593,885 at year-end. Grants awarded to schools at 2020/21 and 2021/22 year-ends resulted in a large increase in overall school balances and schools developed grant investment plans in line with the terms and conditions of these grants, hence the large draw on reserves during 2022/23 and 2023/24.

- 2.4. The movement of individual schools forecast to be in deficit at the end of the year is shown below:

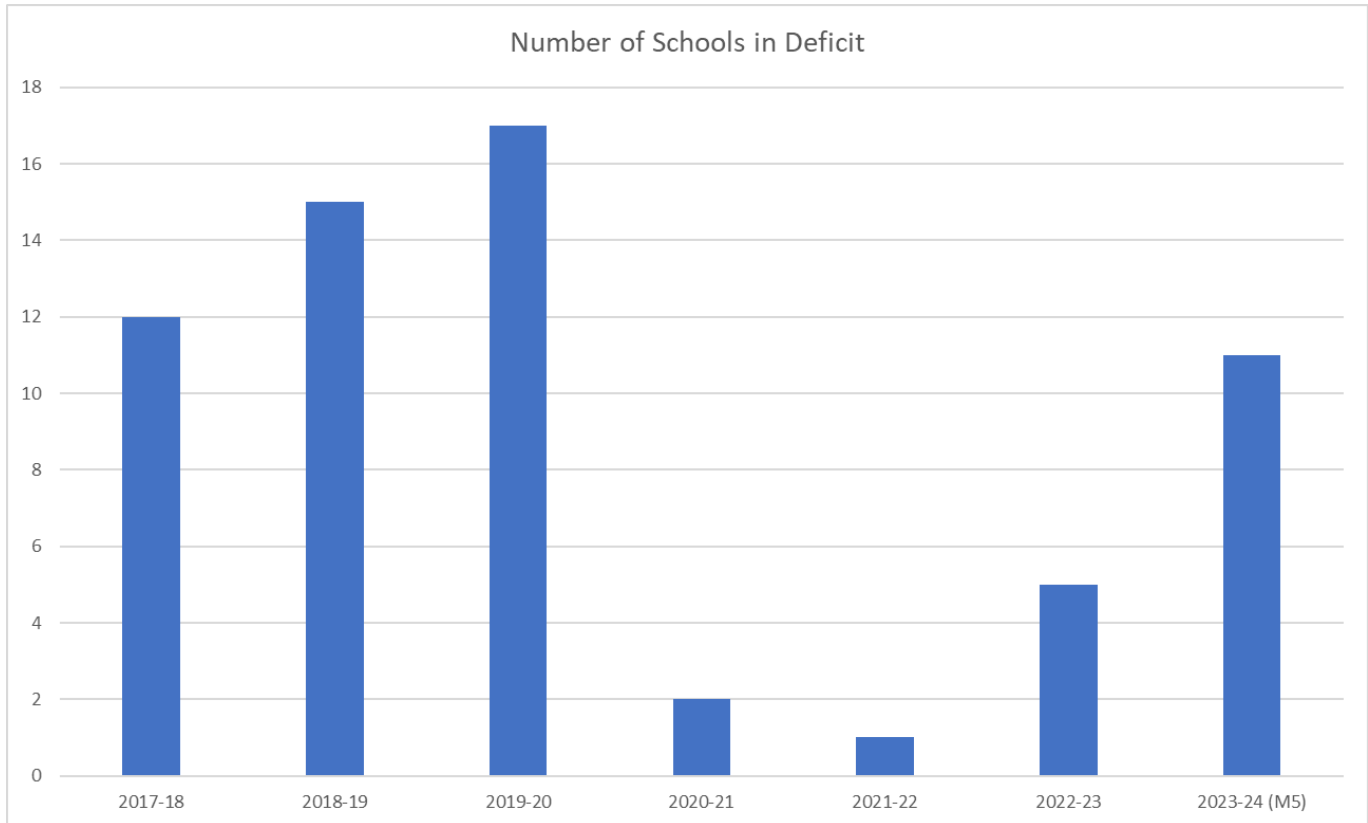
Start of year	Month 5	Month 6	Month 9	End of year
Total: 5	Total: 11	Total: 0	Total: 0	Total: 0
Chepstow Comprehensive	Chepstow Comprehensive			
Llandogo	Llandogo			

Pupil Referral Service	Pupil Referral Service			
The Dell	The Dell			
Our Lady & St Michael's RC Primary School (VA)				
	Deri View			
	Ysgol y Fenni			
	Caldicot School			
	Archbishop Rowan Williams			
	Ysgol Y Ffin			
	Osbaston			
	Overmonnow			

- 2.5. There isn't a consistent picture of schools' balances. There has been a fluctuating trend for some time with some schools showing a continuing reduction in schools balances, which is of concern, and others a more stable trend. As previously advised, grants awarded to schools at 2020/21 and 2021/22 year-ends resulted in a large increase in overall school balances, which has somewhat masked structural budget deficits across some schools.
- 2.6. The projected return of eleven schools into deficit balance by the end of the year is disappointing and points to inherent structural budget deficits remaining in some cases.
- 2.7. All schools that do register a deficit balance at the end of a financial year are required to bring forward budget recovery plans. These recovery plans will be confirmed with both the Local Education Authority and each School's Governing Body. Once finalised the schools with significant deficits will be monitored by the Cabinet member for both Children and Young People and Resources on a termly basis.

Financial Year-end	Net level of School Balances (Surplus) / Deficit in £000's
2014-15	(1,140)
2015-16	(1,156)
2016-17	(269)
2017-18	(175)
2018-19	232
2019-20	435
2020-21	(3,418)
2021-22	(6,956)
2022-23	(4,257)
2023-24 (forecast)	(594)

2.8. The increase in school balances during 2020/21 and 2021/22 resulted in a reduction in the number of schools in deficit, as illustrated in the following table. Unfortunately, the current projection is a return of eleven schools into deficit balance by the end of the year:



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Budget savings progress

Savings proposals by Directorate	Budgeted Saving	Month 5 Forecast	Variance		Comment
	£000	£000	£000		
Social Care & Health	(3,349)	(2,236)	1,113	33.2%	
Children & Young People	(1,809)	(1,704)	105	5.8%	
Communities & Place	(2,513)	(2,219)	294	11.7%	
Monlife	(930)	(893)	37	4.0%	
Chief Executives Units	(39)	(39)	0	0.0%	
People & Governance	(86)	(86)	0	0.0%	
Resources	(991)	(876)	115	11.6%	
Corporate Costs & Levies	(433)	(433)	0	0.0%	
Totals	(10,150)	(8,486)	1,664	16.4%	

Ref	Social Care & Health	Budgeted Saving	Month 5 Forecast	Variance	Comment
		£000	£000	£000	
SCH3	Children's Services - Placement and Practice Change - re-evaluating our current processes and systems post-covid in order to clearly define at what points we make essential decisions in regard to when a child is placed within a High-Cost Placement	(748)	(1,152)	(404)	Care planning for High Cost and Solo Placements is in place with HOS oversight and sign off. This is allowing children to progress to alternative placements where this is in keeping with their care and support needs and their longer term personal outcomes.
SCH5	Staffing reductions to Adult Services - The proposal is to create savings by reducing the core workforce across the statutory teams in adults' services.	(308)	(162)	146	A monitoring framework has been established and a "totaliser" set up to track, record and account for all the identified staff savings throughout the year.
SCH4	Children's Service Redesign/Staffing - (i) Family Time Service Development, (ii) Review of Structures and Service Operating costs	(421)	(72)	349	Additional Family Contact Sessional workers are in place providing cost avoidance activity where intensive family supervision is required (previously the service was reliant on commissioned services). Weekly Workforce Meeting of Children Service Leadership Team is overseeing the reduction of the use of agency social workers, which is progressing positively.
SCH10	Adults - Care hours, block commissioning, Mileage - Reduce amount of direct care in the region of 10% whilst rebalancing in house/external provision	(400)	0	400	Various workstreams underway to right size care packages but challenges associated with identifying the resource required to undertake the work. A Review pilot in Monmouth to right size packages and Nevill Hall to discharge people with minimal care requirements, and establishment of a weekly QALG (Quality Assurance Group) to right size care package and ensure cost efficiency. However current data tells us that overall, once care reductions and new demand has been accounted for, the impact is one of increasing spend in this area.
F&Cs	Fees and charges increases - in line with inflation for SCH directorate	(415)	(415)	0	All agreed Fees and Charges for 2023/24 have been implemented
SCH9	Practice and Process Change Adults - For people with high support needs	(250)	0	250	SCH7 and 9 are merged together as they are both looking into the same operational areas and are mainly focussing around practice change and the effective application of CHC around the Adult care spectrum. At present we have one LD cases which has entered into the final level 3 dispute stage and we continue to challenge ABuHB with estimate costs of £250K.
SCH7	Learning disabilities - Remodelling of learning disability and mental health teams that will involve a decrease in team management hours.	(300)	(31)	269	
SCH8	Adult services - Direct payment saving	(200)	(200)	0	10% levy has been applied to all Direct Payment care packages
SCH2a	Staff restructuring within the Public protection service.	(103)	(28)	75	There was an inherent risk of moving forward on the proposal for removal of the Head for PP and we will look throughout the year at any mitigation where possible
SCH12b	Transformation Team structure - reduction in core workforce	(61)	(58)	3	Saving met practically in full

Service savings progress

	Savings proposals by Directorate	Budgeted Saving	Month 5 Forecast	Variance	Comment
		£000	£000	£000	
SCH11	Reduction in Adult partnership arrangements for Gwent service delivery models - Shared lives, Emergency duty, Frailty, Regional partnership team	(60)	(35)	25	Savings to date represent a 50% reduction in the RPT contribution.
SCH13	Monmouthshire & Torfaen YOS – Accommodation Change, Reduction in Staffing, Reallocation of Duties	(44)	(44)	0	YOS partnership budget has been realigned accordingly so SCH achieved the saving in its partner in year contribution
SCH12a	Transformation Team structure - vacant and temporary posts	(39)	(39)	0	Savings met 100%. : Removal of counselling development fund (£8,000) Reduce commissioned training. (£6,729) Reduce professional accredited professional and leadership training commissioned (£10,000) Review business support functions - vacant post (£14,000) £2914.00 from S040 vacant post Mandate SCH12a/b £100,000.00
SCH Totals		(3,349)	(2,236)	1,113	

Ref	Children & Young People	Budgeted Saving	Month 5 Forecast	Variance	Comment
		£000	£000	£000	
CYP13	Schools - A reduction in the budget delegated to schools of 2.8% after making full provision for pay and energy increases.	(1,450)	(1,450)	0	This saving has been made in full. The ISB has been reduced to reflect this.
CYP8	Increase ALN recoupment income - additional places and increased charges to cover pay awards.	(100)	0	100	With the recent changes in the ALN formula for schools, all out of county recoupment for mainstream schools will be delegated to schools to support pupils. Therefore, any additional income generated through additional places will be delegated to the schools.
CYP12	Gwent Music - partial withdrawal of subsidy from the service.	(61)	(61)	0	This saving has been agreed with Gwent Music and will be made in full
CYP11	Grant funding to support Education Psychology staff budget	(81)	(81)	0	Grant funding in place to fund post so saving will be made without loss of post
CYP10	Reduce contribution to Education Achievement service - To reduce MCC's core contribution by 10%	(40)	(40)	0	This has been agreed with the EAS and the saving will be made in full
CYP6	Grant funding to support the Additional Learning Needs Admin Team	(30)	(30)	0	Grant funding in place to fund post so saving will be made without loss of post
CYP15	Support Services staff savings through restructure	(25)	(25)	0	Savings will be made through restructure
CYP7	Additional Learning Needs Equipment - To cease funding for ALN specialist equipment that is funded centrally for pupils placed in our schools.	(22)	(17)	5	Funding has been made available for a pupil in one of our mainstream schools
CYP Totals		(1,809)	(1,704)	105	

Ref	Communities & Place	Budgeted Saving	Month 5 Forecast	Variance	Comment
		£000	£000	£000	
DeCarb1	Decarbonisation - Reducing energy consumption across the Council's estate	(532)	(355)	177	Potential Risk - only estimating 2 thirds achievable at present - Decarbonisation team is not yet in place resulting in a delay in implementing the energy reduction strategies highlighted in the saving mandate. In addition April and May was colder than expected so we are expecting heating bills to be up.
DeCarb1	Commercial & Landlord Services - Solar farm export tariff income	(150)	(150)	0	Achievable - budget uplifted to reflect 22-23 activity, no indication that this will not be the case in 23-24 so saving should be achieved in full.

	Savings proposals by Directorate	Budgeted Saving	Month 5 Forecast	Variance		Comment
		£000	£000	£000		
C&P28	Highways Development & Car Parks - Increasing car park & permit charges.	(280)	(280)	0		Achievable - car park prices have been increased across authority, if activity remains the same as 22-23 then saving will be achieved in full.
22/23 Decision	Neighbourhood Services - Recycling & Waste - Increase garden waste charges to achieve a full cost recovery model and increase annual charge based on inflation	(250)	(250)	0		Achievable - Prices were uplifted as part of cabinet report in Jan - no notable reduction in uptake so assume saving will be made in full.
TRAN1+2	Fleet Maintenance - Reduction in operating fleet and corporate mileage reduction.	(160)	(60)	100		Fleet reduction of £60k on course to be achieved. Mileage - 50% achievable - roll-out of pool car scheme and other initiatives has been slower than anticipated so cannot forecast that any of this saving will be found in 23-24.
F&Cs	Uplift in fees & charges not covered by a standalone mandate	(155)	(155)	0		Achievable - Services have uplifted fees as per 23-24 MTFP - if activity remains the same then saving will be achieved across directorate.
C&P27	Highways Development & Car Parks - To increase the income target for road closures	(149)	(149)	0		Achievable - budget uplifted to reflect 22-23 activity - no indication that this will not be achieved in 23-24.
C&P4	Neighbourhood Services - To reduce the revenue budget for street lighting maintenance taking account of the reduction in energy usage and reduced maintenance requirements of recently renewed columns, LED lamps and traffic light renewals	(142)	(142)	0		Achievable - Energy and maintenance saving reflects actual reduction in 22-23, no indication that these savings will not re-occur in 23-24.
C&P6	Neighbourhood Services - Reduction of grounds maintenance services	(90)	(90)	0		Achievable - Mowing schedules have been reduced and sweeping structure changed so saving should be achieved in full.
C&P6	Neighbourhood Services - Grounds Maintenance and Cleansing - Uplift of charges for external contracts	(120)	(120)	0		Achievable - Pricing schedule has been updated to reflect new rates.
C&P3	Neighbourhood Services - Service savings and staff reduction.	(80)	(80)	0		Achievable - Re-use shop has increased opening hours so saving should be achieved, black bag sorting has been employed at sites so we should see a reduction in overall tipping costs.
C&P17,18,21+24	Highways & Flood Mgt - Reduction in staffing costs in the Highways and Flood Management service area	(74)	(74)	0		Achievable - Posts have been removed from structure so saving should be made in full.
PTU1	Passenger Transport Commissioning - New acceptable routes are implemented to reduce transport requirements based on current transport policy	(70)	(70)	0		Potential risk - The majority of the routes will be tendered in June so we will have a clearer picture in July. We are trying to increase the number of passengers travelling by public buses, but I think that will be limited by the uncertainties around bus grant funding. They are working on the costs for active travel to reduce transport demand and we do expect to see savings.
C&P34+35	Planning, Policy & Building Control - To reduce revenue budget for the service area by reducing the professional and specialist fees, and photocopying and postage budget.	(59)	(59)	0		Achievable - budgets were reduced to reflect activity - no indication that this will change, achieved in full.
22/23 Decision	Housing - A proposed restructure of the Housing Sustainable Living Team	(50)	(50)	0		Achieved - Post has been removed from structure
22/23 Decision	Flexible Funding - Restructure Management Team to reduce core costs	(50)	(50)	0		Achieved - Post has been removed from structure

	Savings proposals by Directorate	Budgeted Saving	Month 5 Forecast	Variance	Comment
		£000	£000	£000	
C&P7	Neighbourhood Services - Savings from Siltbuster recycling plant.	(30)	(30)	0	Achievable - recycling plant is operational and contracted rebate payments have been received, saving will be achieved in full.
PTU7	Passenger Transport - Terminate the Mission Software and revert back to CTX which is a lower cost	(30)	(30)	0	Achievable - Change has been made, savings should be achieved in full.
C&P12	Housing - to build on the foundations of the well-established Careline Service to ensure it continues to be fit for future purpose.	(25)	(25)	0	Part Achieved - All clients have been written to and given notice of a price rise of £0.50 pw. Due to the increased charge being implemented wef 1st June 2023, it is not projected that the price increase will achieve the mandate target. Assuming no reduction of clients leaving the service due to the price increase, the additional projected income is £17,995. An agreed proposal to remodel the Careline service to a broader Assistive Technology model in order to align with Social Care requirements is making positive progress, including the appointment of a Digital Coach. A joint action plan focused on staff training and development has been established and is being implemented. One off grant funding acquired from Social Care Wales to support the Assistive Technology proposal. An arising risk is Call Monitoring Centre charges have increased for 22/23
PTU4	Schools & Community Transport - Changing the licensing arrangements	(17)	0	17	Unachievable - This will not materialise as we have not been able to proceed with the operators licence as we are only allowed to run 10 public bus / grass route vehicles on it and we have more than that.
	C&P Totals	(2,513)	(2,219)	294	

Ref	Monlife	Budgeted Saving	Month 5 Forecast	Variance	Comment
		£000	£000	£000	
ML 3 & 4	Finance & Business Support Restructure	(104)	(104)	0	Restructure complete - Post deleted from structure savings will be fully achieved
ML22	Gilwern Outdoor Adventure Services Redesign - Increase income through new business, new ways of working and engaging further with Monmouthshire internal services to provide cost avoidance for CYP and Social Services.	(100)	(100)	0	Early indications of continued growth along with the services final outturn position indicates that this saving should be fully achievable in 23-24, there is still significant uncertainty around winter bookings and our re-engage program which are both essential in achieving the necessary income targets, we will continue to monitor this close and report any variances.
F&Cs	Uplift in fees & charges not covered by a standalone mandate	(83)	(83)	0	Fee's updated 01st April 2023 - Early indications this will be achievable.
ML 7,8,9 & 21	Attractions Service Redesign	(65)	(65)	0	Redesign is underway savings will be fully achieved in 23-24
ML1	Green Infrastructure Grants - To fully utilise Shared Prosperity Fund (SPF), Local Places for Nature and related grants / project funding	(45)	(45)	0	The service has received notification of successful bids, these will allow this saving to be fully achieved in 23-24.
ML5	Removal of vacant Project Officer post	(45)	(45)	0	Post deleted savings will be fully achieved
ML14	Youth Services - Seeking to maintain service delivery at reduced core costs by increases reliance on external grants, an internal restructure of priorities, programmes and delivery.	(25)	(25)	0	A joined up approach to funding through the delivery of sports development youth and play should provide the necessary opportunities to maximise external income opportunities and deliver this saving in 23-24.

Service savings progress

	Savings proposals by Directorate	Budgeted Saving	Month 5 Forecast	Variance	Comment
		£000	£000	£000	
ML19	Old station Tintern Miniature Train Track - Complete the necessary repair and maintenance on the miniature train track through an initial one-off capital investment of £45k, this will allow us to re-open this much-loved attraction and increase our income generation.	(25)	(25)	0	The season has just reopened early indications indicate we are on target to achieve the additional income
ML10	Collections Management - Remove 0.40 FTE from the Collections Management Post, currently vacant within the structure.	(21)	(21)	0	Post removed savings will be fully achieved
ML13	Sports Development - To increase income generation through external grants, seeking to maintain service delivery at reduced core costs but increase service reliance on alternative external grants.	(20)	(20)	0	This income will be fully achieved in 23-24
ML2	Countryside Access Grant Project cost recovery - To fully utilise the full cost recover model when recovering project management costs, ensuring our recovery rates maximise the rate allowed by grant providers.	(20)	(20)	0	In progress early indications indicate that the additional income will be fully achieved in 23-24.
ML11	Visitor charging at some heritage exhibitions/activities and events	(20)	(20)	0	Program is being developed, income should be fully achievable in 23-24.
ML18	Recharge Project Officers against Grant - Ensuring full cost recovery of officer's time against grants.	(20)	(20)	0	Additional grants awarded to MONLIFE will allow this income to be fully achieved in 23-24.
ML12	Sale of Caterpod	(10)	(10)	0	In the process of arranging the sale of the caterpod will be complete in 23-24.
ML15	Caldicot Fitness Equipment Maintenance - Reduce Caldicot LC maintenance contract to reflect the ageing equipment and seek a local accredited supplier to maintain	(10)	(10)	0	Contract negotiations underway, this saving should be fully achieved in 23-24.
ML17	Commercial contributions and Sponsorships	(10)	(10)	0	This will be achieved in 23-24.
ML6	Reducing the Marketing supplies and services budget	(5)	(5)	0	This saving will be fully achieved in 23-24
CEO1-5	Community Hubs - Reduce staffing levels at community hubs in order to reduce costs while keeping all hubs open with reduced service levels.	(135)	(135)	0	Achievable - improvement from M2, an updated assessment has been made and it is now predicted that this saving will be fully found within the available budget.
CEO08	Community Hubs & Libraries - Reduce the budget for library books by 50% from £90,000 to £45,000.	(45)	(45)	0	Achievable - budget removed, purchases will be limited to new figure.
CEO10	Community Education - Increase income by growing learner base	(10)	(10)	0	Achievable - Early indication is that this will be achieved.
CEO11&13	Contact Centre - To reduce staffing levels in the contact centre by 2.5 FTE	(112)	(75)	37	Full year saving won't be achieved due to timing of redundancies.
	MonLife Totals	(930)	(893)	37	

Ref	Chief Executive's Unit	Budgeted Saving	Month 5 Forecast	Variance	Comment
		£000	£000	£000	
CEO14	Performance & Data - Remove data scientist post	(39)	(39)	0	Achievable - Post removed from structure
	CEO Totals	(39)	(39)	0	

	Savings proposals by Directorate	Budgeted Saving	Month 5 Forecast	Variance	Comment
		£000	£000	£000	
Ref	People & Governance	Budgeted Saving	Month 5 Forecast	Variance	Comment
		£000	£000	£000	
PG2	P&G income - The below proposals seek to increase income in Comms and Land Charges and a small software cost reduction in payroll.	(80)	(80)	0	Achievable - no indication so far that this will not be achieved.
F&Cs	Uplift in fees & charges not covered by a standalone mandate	(6)	(6)	0	Achievable - Services have uplifted fees as per 23-24 MTFP - if activity remains the same then saving will be achieved across directorate.
	PG Totals	(86)	(86)	0	

Ref	Resources	Budgeted Saving	Month 5 Forecast	Variance	Comment
		£000	£000	£000	
RES8	Landlord services - Reduce Corporate Building (Reactive and Planned) Maintenance revenue budget	(300)	(300)	0	Achievable - budget will be monitored to ensure all qualifying repairs will be charged to the capital programme (where funding has been made available) - assume saving will be made in full.
RES24	Landlord services - To review the property estate and to explore options for further rationalisation	(215)	(100)	115	Latest assumption is that due to delays in decisions only £100k will be achievable this financial year.
RES12	ICT - Mobile Phone Contract Saving	(149)	(149)	0	Budget has been distributed to services
RES12	Revenues, Systems & Exchequer - Remove budget earmarked for a discretionary business rate relief scheme	(126)	(126)	0	Achievable - budget has been removed.
RES23	Landlord services - Vacant development surveyor post being held - or funded by capital programme as required	(45)	(45)	0	Achievable - Post has been removed from structure.
RES14	SRS Contribution & PSBA Line Savings	(62)	(62)	0	Achievable - SRS contribution has been reduced in line with SRS figures, assume achievable.
F&Cs	Uplift in fees & charges not covered by a standalone mandate	(19)	(19)	0	Achievable - Services have uplifted fees as per 23-24 MTFP - if activity remains the same then saving will be achieved across directorate.
RES7	Landlord services - Explore alternative reception solutions at County Hall to remove front of house staffing needs	(19)	(19)	0	Achievable - Staffing reduction to kick in from July, saving should be achieved in full.
RES11	Digital Design & Innovation - Automate Starters & Leavers Process	(13)	(13)	0	Achievable - Awaiting SRS but assume it will be made in full.
RES23	ICT - Restructure of the Information Security and Technology Team	(13)	(13)	0	Achievable - adjustments to team structure have been made.
RES20	Revenues, Systems & Exchequer - Increase use of purchase cards to increase e-payment rebate	(10)	(10)	0	Achievable - The rebate for 2022/23 has been confirmed as £10,164.44.
RES21	Revenues, Systems & Exchequer - Reduce budget allocated for finance system upgrades	(10)	(10)	0	Achievable - System development costs will be managed in line with budget. Therefore barring any emergencies or unexpected costs, expect to achieve this saving.
RES22	Revenues, Systems & Exchequer - Shared Revenues & Benefits service potential savings through automation and increased use of self service facilities (Citizens Access).	(10)	(10)	0	Achievable - Expect to achieve this saving following changes to operating practices within the Shared Service
	Resources Totals	(991)	(876)	115	

	Savings proposals by Directorate	Budgeted Saving	Month 5 Forecast	Variance	Comment
		£000	£000	£000	
Ref	Corporate Costs & Levies	Budgeted Saving	Month 5 Forecast	Variance	Comment
		£000	£000	£000	
Capex1	Extend capitalisation direction	(358)	(358)	0	Additional qualifying expenditure identified and will be funded via capital receipts as per budget
CORP2	Insurance - reduction in self insured costs and professional fees/ICT costs	(75)	(75)	0	Saving in professional fees/ICT costs to be achieved in full (£25k). Self insured costs (£50k saving) - This budget covers insurance excesses payable on claims or costs agreed outside of insurance and not met from the service (i.e. where costs in total fall below any excess). This is a highly volatile budget based on claims incidence and operating environment (i.e. adverse weather conditions). However long term trends have seen some modest reduction in costs payable and this trend is expected to continue through 2023/24.
	Corporate Costs & Levies Totals	(433)	(433)	0	

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Directorate	Budget recovery £000's
Social Care, Health & Safeguarding	146
Children & Young People	432
Communities & Place	883
MonLife	362
Chief Executives Unit	65
People & Governance	71
Resources	187
Total	2,145

Type of action	Children & Young People	Social Care & Health	Communities & Place	MonLife	People & Governance	CEO	Resources	Total
Increase Grant / Income	138	60	86	139			75	498
Freeze vacant posts	24	75	259	89	60	17	55	579
Expenditure reduction		11	131	48	3	8	48	249
Service reduction / change				56				56
Service reserve funding	270			30				300
Transfer cost to Capital			407		8	40	9	464
Total	432	146	883	362	71	65	187	2,145

Children & Young People

Ref	Service	Proposal	Amount	Recovery method	Details
			£000's	<i>i.e. Not filling vacant post, reduction in supplies or services, additional income, curtailing service, etc.</i>	<i>A brief description of the proposal including any risks to being able to deliver</i>
CYP1	Support Services	To use grants to displace current salary costs, to be used in line with the current grant terms	85	Grant funding	CYP have a number of grants for capital (3 - 19) early years and capital project management. The work is currently being completed by CYP staff within their existing work.
CYP2	Most Team	Hold vacancy open	5	Vacant post	Post vacant from Christmas does not need to be filled. Team will be restructured to pick up workload
CYP3	PV	The reserve relates to income from the PV solar panels on some schools.	150	Release reserve	The reserve has been building up a large number of years, the original proposal was to use this reserve to help schools fund energy efficient devices. The funding of this has been superseded with other funding streams and therefore the reserve can be released
CYP4	PV	The reserve relates to income from the PV solar panels on some schools.	120	Release reserve	This is as above but it is the forecast revenue stream for Q2 - 4 in the current year. There is a risk that the income will not be generated which is why this is medium risk but it is based on past income.
CYP5	Most team	To use grants to displace current salary costs, to be used in line with the current grant terms	53	Grant funded	The ALN capital grant terms allows any work contributing to improving ALN provision through the medium of Welsh to be charged to the grant. The proposal is to charge the salary costs for the Welsh speaking specialist teacher who works with pupils with ALN in both Welsh medium primary schools. The return to Welsh government will be made at the end of the financial year and there is a small risk this may not be approved expenditure, which is why the risk is medium.
CYP6	Support Services	Vacancy in Support Services not being filled.	19	Vacant post	The vacancy is in the school and student access admissions team, the post is temporary to cover a secondment, the post has been advertised twice and no one has been appointed, work will be redistributed to cover this post.
Total proposals			432		

Social Care, Health & Safeguarding

Ref	Service	Proposal	Amount	Recovery method	Details
			£000's	<i>i.e. Not filling vacant post, reduction in supplies or services, additional income, curtailing service, etc.</i>	<i>A brief description of the proposal including any risks to being able to deliver</i>
SCH1	Adult	Hold identified vacancies	45	Vacant posts	Hold back vacancies to provide additional savings over and above what has already been included in the month 5 forecast
SCH2	Adult	10% reduction in workforce costs	11	Reduction in workforce costs	Limit off site meetings etc to reduce office based/management staff mileage costs
SCH3	Adult	Winter resilience funding	60	Use one off Winter Resilience money to reduce the current overspend	This is subject to agreement through RPB (likely to be achieved)
SCH4	Children	Hold identified vacancies	30	Vacant posts	Hold back vacancies to provide additional savings over and above what has already been included in the month 5 forecast
Total proposals			146		

Communities & Place

Ref	Service	Proposal	Amount £000's	Recovery method <i>i.e. Not filling vacant post, reduction in supplies or services, additional income, curtailing service, etc.</i>	Details <i>A brief description of the proposal including any risks to being able to deliver</i>
C&P1	Waste Services	Use spare capital budget to fund qualifying spend sat within revenue budget	188	Passporting costs to capital	Waste services has a capital budget that it uses to help fund box and vehicle replacement - this can be used to fund qualifying spend that sits within revenue account.
C&P2	Street Lighting	Passport qualifying maintenance spend to capital	50	Passporting costs to capital	Certain revenue repairs can be classed as capital - we can push these costs to the street lighting capital budget - potential risk around having enough capital budget to fund larger replacement scheme such as traffic light systems etc...
C&P3	Highways Operations	Reduce the number of sweepers/vactors currently on hire	50	Curtailing Spend	£50k in year £150k full year saving but currently funded through capital so would continue this work and reduce revenue maintenance works - risk of double counting with C&P9
C&P4	Fleet Maintenance	Pay for fuel tanks from Capital	23	Passporting costs to capital	Transport depot had to purchase new fuel tanks after a health and safety review - this is capital in nature and shouldn't be funded from revenue - relies on there being spare capital funding to accommodate.
C&P5	Fleet Maintenance	Passport qualifying parts & maintenance spend to capital	120	Passporting costs to capital	As with Street Lighting certain revenue repairs can be classed as capital - we can push these costs to the capital budget.
C&P6	Fleet Maintenance	Curtailment of non-essential spend	29	Reduction in Supplies & Services	Freeze on all non-essential spend between now an year end. No risk
C&P7	Fleet Maintenance	Remove Council Car	3	Curtailing Spend	Removal of council car to save on leasing costs (potential for sale proceeds from number plate). £3k in-year saving if decision made now, £8k full year saving in 24-25
C&P8	Fleet Maintenance	Continue review of vehicle fleet (owned & hired) to drive out efficiencies.	10	Curtailing Spend	Implement a governance structure within fleet maintenance to ensure all assets are used efficiently and unnecessary hire costs and damage costs are eliminated.
C&P9	Schools Catering	Curtailment of non-essential spend (outside of above)	4	Reduction in Supplies & Services	Freeze on all non-essential spend between now an year end. No risk
C&P10	Building Cleaning	Curtailment of non-essential spend	5	Reduction in Supplies & Services	Freeze on all non-essential spend between now an year end. No risk
C&P11	Building Control	Use of capitalisation direction	8	Passporting costs to capital	Server Upgrades could be capitalised.
C&P12	Planning	Freezing system development spend relating to the digitising of the Microfiche system.	30	Curtailing System development	Planning have been implementing a digital replacement for the microfiche system, the freeze will not affect the service but will delay the roll-out to the full digitisation of documentation.
C&P13	Car Parks	Withdraw Free Xmas Parking	20	Additional Income	The authority does not continue the offer of free xmas parking.
C&P14	Procurement	Use of capitalisation direction	18	Passporting costs to capital	Software implementation costs - can be capitalised as part of joint procurement SLA.
C&P15	Economic Development & Youth Enterprise	Explore opportunities to use grant funding to cover core costs	66	Additional Income	Reallocation of SPF funding will allow for further core costs to be funded by grant
C&P16	Service Wide	Freezing of all Non-exempt posts	259	Not Filling Vacant Posts	This is the maximum level of saving that would be achieved if all current vacancies were frozen until end of year. There is potential that some of the post on the lists will be deemed essential so this figure will drop.
Total proposals			883		

People & Governance

Ref	Service	Proposal	Amount	Recovery method	Details
			£000's	<i>i.e. Not filling vacant post, reduction in supplies or services, additional income, curtailing service, etc.</i>	<i>A brief description of the proposal including any risks to being able to deliver</i>
PG1	Land Charges	Use of capitalisation direction	8	Passporting costs to capital	Server Upgrades could be capitalised.
PG2	Legal	Reduce training spend	3	Reduction in Supplies & Services	Curtail spend for only essential training requirements
PG3	Vacancy Freeze	Freezing of all Non-exempt posts	60	Not Filling Vacant Posts	This is the maximum level of saving that would be achieved if all current vacancies were frozen until end of year. There is potential that some of the post on the lists will be deemed essential so this figure will drop.
Total proposals			71		

Chief Executives Unit

Ref	Service	Proposal	Amount	Recovery method	Details
			£000's	<i>i.e. Not filling vacant post, reduction in supplies or services, additional income, curtailing service, etc.</i>	<i>A brief description of the proposal including any risks to being able to deliver</i>
CEO1	People Services	Reduce training spend	3	Reduction in Supplies & Services	Curtail spend for only essential training requirements
CEO2	GIS	Use of capitalisation direction	40	Passporting costs to capital	Staff costs associated with transformational support. Depends on available funding.
CEO3	Payroll	Learning Management System Implementation	5.0	Remove contingency budget attached to the roll-out of the Learning Management System	If problems arise during implementation, and require additional costs it will result in overspend or non-delivery of the project
CEO4	HR	Removal of discretionary counselling sessions for staff	0.3	Reduction in service offer	Risks - Negative impact on well-being for a small number of staff who would have accessed counselling over and above our standard 6 week offer. The standard offer is unaffected
CEO5	Vacancy Freeze	Freezing of all Non-exempt posts	17.0	Not Filling Vacant Posts	This is the maximum level of saving that would be achieved if all current vacancies were frozen until end of year. There is potential that some of the post on the lists will be deemed essential so this figure will drop.
Total proposals			65		

Resources

Ref	Service	Proposal	Amount	Recovery method	Details
			£000's	i.e. Not filling vacant post, reduction in supplies or services, additional income,	A brief description of the proposal including any risks to being able to deliver
RES1	Cyber Security Team	Curtail training spend	3.5	Reduction in Supplies & Services	Cyber security is a partnership between MCC, Police, Torfaen & Blaenau Gwent - all essential training has been undertaken for this year so we can freeze any further spend - this will not impact IT security.
RES2	Revenues & Financial System support	Curtail system development spend	29	Curtailling System development	Freezing any further spend on system development
RES3	Revenues & Financial System support	Use of capitalisation direction	9	Passporting costs to capital	Uplift in staff costs associated with transformational support. Depends on available funding.
RES4	Revenues & Financial System support	Vacancy Freeze	9	Not filling vacant post	Not fill cashiers post. This will leave the service running at a minimum, therefore there may be times when we will be unable to provide a full service.
RES5	Revenues & Financial System support	Curtail Non-pay spend	7	Reduction in Supplies & Services	Managed reduction in non-pay spend.
RES6	Revenues & Financial System support	One off Admin Grant & Ukraine grant	40	Additional Income	New burden funding for administering the Energy scheme on behalf of UKG & Ukraine grant for WG
RES7	Service Wide	Freezing of all Non-exempt posts	46	Not Filling Vacant Posts	This is the maximum level of saving that would be achieved if all current vacancies were frozen until end of year. There is potential that some of the post on the lists will be deemed essential so this figure will drop.
RES8	Audit	Agency support freeze	8	Curtailling spend on agency support cover	Curtailling spend on additional agency support for Audit - we can freeze the additional 20 days that was built into M5 forecast. Support was put in place by the request of Audit & Governance cte so curtailling spend will impact on service outputs.
RES9	Landlord Services	Increase in income from commercial and community assets	20	Additional Income	-Industrial portfolio – uplifts on renewals at OPF, Castleway, Raglan -Grazing Licenses – new lettings and agreement renewals -Income for new lettings at Hanbury House, Mon Market Hall -County Farm – uplifts and back rent
RES10	Landlord Services	Investment Assets - Castlegate Business Park	2	Additional Income	Marketing launch of the new flexible working space. Predict income based on additional lettings from New Year.
RES11	Landlord Services	Investment Assets - Castlegate Business Park - Potential for Housing to relocate the storage for homelessness belongings from external supplier to units in Castlegate	13	Additional Income	Income generation in Investments and reduced cost in Housing - this idea is currently being explored to see if space is suitable. Figure will need updating once way forward has been finalised.
Total proposals			187		

Ref	Service	Proposal	Amount	Recovery method	Details
			£000's	i.e. Not filling vacant post, reduction in supplies or services, additional income, curtailing service, etc.	A brief description of the proposal including any risks to being able to deliver
ML1	Borough Theatre	Secondment Theatre Manager to SPF Project	30	Secondment - Utilising approved grant funding	To propose that the current post advertised for Youth Arts Project manager be delivered in house through support from the theatre manager and youth service. The SPF bid is a tri-partner bid with Danceblast and Melville theatre. This project needs a dedicated member of staff to lead the project and deliver on the project outcomes. Risks are that it is a specialist project that does require a degree of arts/theatre knowledge however this can be supported by the manager. Tri partners may not agree to post being delivered in house as all agreed post spec and that it would go out externally. Not having a dedicated person to lead this project could mean that the project outcomes are not met in time; consistent contact for partners; stakeholders and young people attending the project.
ML2	Borough Theatre/Museums	Creative Cultures Grant	8	Charge core staffing to grant	Grant funding has allocated funding towards staffing time so no impact on resources or delivery
ML3	Volunteering	Event Budget	2	Face to face volunteering event cancelled	No expenditure in year so far, budget is allocated to marketing materials and celebration event for volunteers annually. Risk is that volunteers feel unappreciated this year with no event to attend.
ML4	Museums	Reserve - Funding core staff	30	Museums fund raising reserve allocated against core museums staff	No risk to allocating this money. Would have allowed creation of more exhibitions for 24/25 however will look to grant funding to continue work across sites
ML5	Attractions	Business Support	8	Do not fill vacant post	Current no spend will create less traffic through business support in the interim - will be able to support for a period of time through attractions business support
ML6	Heritage and Attractions	Reduce Enhancements and Overtime	5	Change Park Rangers - Monday to Friday only and reduce overtime	Currently season coming to close so less activity and for the next 6 months park rangers can do their hours within the working week. Odd couple of events we have in they will ensure that they do litter picks/support site staff. Risks - need posts to resume normal duties from April 1st as site has full programme for 24/25 and require staffing for 7 days a week.
ML7	Markets	Freeze Markets Manager Post	19	4 Month freeze Market managers post	
ML8	Communications	Secondment of Head of Communications	29	Secondment of Head of Communications to Welsh Government	Replacement cover required from November 2023 to June 2024 when Abby will be back in role, to deliver: communications, engagement and marketing strategic direction across all Monmouthshire CC channels. Lead required for any potentially tricky complex/reputational risks presented over the coming months. Key initiatives in plan include: in year budget position communications, communications, engagement and marketing around the 2024-2025 budget engagement process, general election communications and promoting democracy and any new campaigns planned to generate income. Strategic delivery of on-going improvement work to Monmouthshire.gov.uk linking in with the customer strategy and digital programme office. Management of: the long term plan, the tactical weekly plan (particularly around the social media schedule and various 'days'), the Team (4 FTE), on-going communications campaigns (hub, compass and Digital Cwtch), managing film requests. Key objectives to be delivered: •Set the strategic, long term agenda and plan for communications, marketing and engagement. Provide the long term focus and 'annual plan on a page', monitor progress and suggest continual improvements based on insight. •Lead the strategic, delivery of marketing and engagement campaigns across all channels. •Deliver on-going improvements based on data and evidence. Test new channels (inc. digital) to increase engagement. •Protect the reputation of Monmouthshire County Council through all communications. Provide focus to deliver a communications response to emerging, emergency situations, •Demonstrate excellent stakeholder engagement skills, working in partnership with members, stakeholders, colleagues and partners to deliver success. •Grow communications reach across all channels. •Identify opportunities to generate income and optimise budget. •Line manage the team and manage the tactical, monthly communications plan and schedule.
ML9	Monlife Communications	Pause spending on Museums signage	4	Reduction in Supplies and services spend	
ML10	Monlife Communications	Reduce spending on clothing and Uniform	4	Reduction in Supplies and services spend	
ML11	Leisure Services	Reduce Chepstow Café Opening Hours	5	Reduce opening hours to maximise return	The reduction of opening hours has been based on 12 month trends. We will launch the new opening hours, in-line we key programmes and footfall throughout the day and at weekends. We have benefitted from multiskilled staff working across our catering provision, therefore, any staff affected will be assigned to other areas of the business, i.e. delivery of swimming lessons, lifeguarding, etc.
ML12	Outdoor Adventure	Sell surplus equipment	10	Sell surplus equipment - Feb potential the best opportunity to maximise return	Our outdoor equipment is ageing and a number of items, for high footfall commercial usage, is deemed end of life. However, there is a resale market for this type of equipment as the specification is generally much higher than you can purchase from a retailer, i.e. Aldi for paddles, etc. The items are likely to be sold individually or in small amounts and towards the end of the financial year, where the outdoor market starts to move into the more busier period.

Ref	Service	Proposal	Amount	Recovery method	Details
			£000's	<i>i.e. Not filling vacant post, reduction in supplies or services, additional income, curtailing service, etc.</i>	<i>A brief description of the proposal including any risks to being able to deliver</i>
ML13	Destinations Management	Freeze implementation of destination management plan	15	Reduced external consultancy cost - delaying development of destination management plan	Removal from current cabinet work programme as existing small team do not have the resources to achieve this without consultancy support. Diminishes the Council's credibility as a leader of the strategic direction of tourism with destination stakeholders. Longer term lack of focus and priorities for destination partners / awareness of potential opportunities / best prospects and more limited access to funding.
ML14	Countryside	Reducing all non essential service spend	15	Maximising supplies & services against grant	Deferred spend on plans and projects. Risks include lack of up to date guidance, therefore impact on the quality of development proposals and thence added pressure on ecology and development management colleagues in assessing proposals and seeking to achieve quality outcomes.
ML15	Countryside	Freeze GGGP Business Support Post	17	Freeze vacancy Business Support Post	Adds pressure on existing staff to provide for the ongoing business support requirements
ML16	Countryside	GGGP - Simplified Costs	21	Extension of grant - allowed full recovery of business support post	No risk
ML17	Countryside	Rights of way	15	Reduction in Supplies and services spend	Includes deferring spend on maintenance issues, maximising spend on grants and not pursuing public path orders in the public interest where advertising costs etc. cannot be recovered (i.e. only processing orders in the landowners interest where costs recovery is possible). This will delay resolving rights of way issues. Deferring maintenance issues unless health and safety priorities is likely to lead to increased future costs
ML18	Active Travel	Officer Recharge PS	70	Charge core staff to grant	No expected risk at this stage due to grant allocation. Consideration may need to go to colleagues in highways and potential increased % being proposed to be claimed back for project managers involved.
ML19	Community Education	Freeze Community Learning Lead Tutor Post	45	Freeze Vacancy	This is a vacancy we have re-entered the market to recruit to, however this post plays an important quality assurance role in complying with our delivery standards for our franchise grant from Coleg Gwent and supporting role to all our tutor staff (franchise and direct grants) to ensure compliance with teaching standards, associated monitoring, reporting, curriculum design and professional peer support.
ML20	Community Hubs	Reduction in rates across hubs	10	Reduction in building costs	No risk.
		Total proposals	362		

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SUBJECT:	Strategic Risk Assessment
MEETING:	Performance and Overview Scrutiny Committee
DATE:	22nd November 2023
DIVISIONS/WARDS AFFECTED:	All

1. PURPOSE:

- 1.1 To provide members with an overview of the current strategic risks facing the authority.

2. RECOMMENDATIONS:

- 2.1 That members scrutinise, on an on-going basis, the risk assessment and responsibility holders to ensure that strategic risks have been appropriately identified and risk is being appropriately managed.
- 2.2 That members use the risk assessment to inform the future work programme of the committee and brief chairs of other committees where issues are of relevance to their work.

3. KEY ISSUES:

- 3.1 The strategic risk assessment ensures that:
- Strategic risks are identified and monitored by the authority
 - Risk controls are appropriate and proportionate
 - Senior managers and elected members systematically review the strategic risks facing the authority.
- 3.2 The Strategic Risk Assessment, in appendix 1, is continually updated based on the latest evidence. This is in line with the council's strategic risk management policy; a summary of this is provided in Appendix 2.
- 3.3 Strategic risks covered by the assessment are those which affect the council as a whole. The assessments focus is typically on key risks which could significantly jeopardise the council's ability to achieve its objectives, statutory plans and/or provide operational services as planned. The risk assessment also only covers high and medium level strategic risks. Lower level or operational risks are not registered unless they are projected to escalate within the three years covered. The strategic risk assessment should continue to focus on medium term risks to service delivery.
- 3.4 The strategic risk assessment is a detailed document. Any significant changes or updates made to each risk can be found in the 'key changes' column in the summary table at the start of the full Strategic Risk Register. Some of the more significant recent changes are:
- An adjustment to risk 1 identifying that following the approval of the Community and Corporate Plan providing clarity of the Council's priorities, there remains a risk to the council's ability to deliver all the commitments in the plan as a result of the current financial position and wider economic climate and a further risk (1b) to timely and appropriate decision making.
 - An update to risk 2 on the Council's financial sustainability reflecting the risk of the initial modelled budget shortfall of £14.4 million in the Council's budget for financial year 2024/25.
 - An adjustment to the nature of the risk and mitigation actions to risk 9 related to educational attainment. The change reflects the progress made in mitigating the risk of implementing the

new national curriculum on learning and the continued risk of delayed impacts of the pandemic on learning through reduced attendance levels and worsening behaviours in schools;

- A re-definition of risk 10 related to the Replacement Local Development Plan into four parts (10 a, b, c and d), to ensure the risks of the council not progressing with the Replacement Local Development Plan are clearly captured and mitigating action identified;
- A reduction in the risk level for risk 13 related to homelessness following the progress made in delivering the mitigating action on the Rapid Rehousing Transition Plan;
- The addition of risk 14 to identify the risk of a material reduction in public bus services which may occur as a result of diminished funding for bus operators from Welsh Government.
- The addition of risk 15 to identify the risk of increased legal challenge to council decisions and service delivery through legislative routes.

3.5 The council continues to operate in a dynamic environment and has controls in place to assess, manage and mitigate, as far as possible, a variety of risks to service delivery. The strategic risk register will regularly evolve and adapt in line with this. The up-to-date register is accessible on the council's intranet so members are able to utilise it at any point in the year to re-prioritise their work plans as appropriate.

3.6 The Risk Management Policy and Guidance is currently under review and will be informed by the findings of an internal audit review into the council's risk management arrangements which is currently being undertaken. Ahead of this, following feedback from committees 'numerical' scores have been added to the risk matrix, as shown in appendix 2. This aims to demonstrate changes more clearly in risk levels following an assessment of risk likelihood and impact.

3.7 The assessment is one part of the Council's risk management arrangements. Risk is managed through a variety of processes, for example, through teams' service plans, through Emergency Management Plans and business continuity arrangements, specific project and programme management arrangements, health and safety procedures and insurance arrangements.

3.8 In line with the Well-being of Future Generations Act, identification and mitigation of longer-term risks that will impact on well-being at a community level but will have a lesser impact on the medium-term delivery of council services, is an area for continued development. Through working with the Public Service Board, we are developing our understanding of future risks and opportunities and how we respond to them in Monmouthshire. The Monmouthshire Well-being Assessment, identifies a number of issues that pose a challenge or opportunity for well-being in the county.

3.9 An overview of the strategic risk register will be presented to Governance and Audit Committee on the 4th December to provide members with the opportunity to assure themselves that a robust risk management system is in place. The full strategic risk register will be presented to Cabinet on the 13th December for review.

4. REASONS:

4.1 To provide timely, relevant information on strategic risks as part of the performance management framework for ensuring the authority is well run and able to contribute to achieving the Council's purpose.

5. AUTHORS:

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Monmouthshire County Council Whole Authority Strategic Risk Assessment

Ref	Potential Risk	Risk Level (score) – Pre mitigation	Risk Level (score) – Post mitigation	Key changes
Risks to resources				
1	It will not be possible to deliver all of the commitments in the Community and Corporate Plan leading to slower than desired progress towards our purpose as a result of a tightening financial position	2023/24 – High (12) 2024/25 – High (12) 2025/26 – High (12)	2023/24 – Medium (8) 2024/25 – Medium (8) 2025/26 – Medium (8)	The Community and Corporate Plan was endorsed by Council in April 2023. The enabling strategies, which facilitate the delivery of the commitments set out in the plan, are currently under development and are due to be completed this Winter. Following agreement on the council’s future objectives, the focus of this risk has been amended to the risk of not being able to deliver all priorities set out in the Community and Corporate Plan as a result of the current financial position.
1b	A small working political majority makes it harder to ensure timely and appropriate decision making which results in delays and uncertainty in some projects	2023/24 – High (12) 2024/25 – High (12) 2025/26 – High (12)	2023/24 – Medium (9) 2024/25 – Medium (9) 2025/26 – Medium (9)	This is a new risk added to the strategic risk register, to ensure that that the risk to the speed at which the council is able to make decisions and implement change as a result of the slim majority is assessed and managed.
2	Some services will become financially unsustainable in the short to medium term in their current form due to increasing demand and continuing financial pressures	2023/24 – High (16) 2024/25 – High (16) 2025/26 – High (16)	2023/24 – High (12) 2024/25 – High (12) 2025/26 – High (12)	The risk and associated mitigating action has been updated to capture the current in year 2023/24 budget forecast and recovery plan developed and the 2024/25 budget setting process and timetable, with initial budget modelling highlighting a shortfall of £14.4m. Given the current economic climate and financial situation the council faces, this risk score has increased from 12 to 16 pre-mitigation.
3	The authority is unable to maintain key infrastructure and meet other identified pressures due to insufficient capital funding availability	2023/24 – High (12) 2024/25 – High (12) 2025/26 – High (12)	2023/24 – High (12) 2024/25 – High (12) 2025/26 – High (12)	The risk has been updated with the 2022/23 capital expenditure outturn position. This showed a net underspend of £94,000 against budget, primarily due to overspends of £621k in enabling service transformation and £180k in the refurbishment of borough theatre being offset by underspends in various schemes which were instead funded by grants or the release of budgets.
4	Increases in the number of people exiting the labour market, a UK skills shortage and wage inflation will impact recruitment, retainment and workforce planning and affect the delivery of Council services	2023/24 – High (16) 2024/25 – High (16) 2025/26 – High (16)	2023/24 – Medium (8) 2024/25 – Medium (8) 2025/26 – Medium (8)	The development of a revised people strategy aligned to the community and corporate plan is a significant mitigating action for this risk. The progress in developing the strategy has been updated.
5	Loss or corruption of data due to cyber-attack or data mismanagement, which will compromise the delivery of essential council services	2023/24 – High (12) 2024/25 – High (12) 2025/26 – High (12)	2023/24 – Medium (8) 2034/25 – Medium (8) 2025/26 – Medium (8)	A range of mitigation action continue to be undertaken to mitigate this risk.
Risks to service delivery				
6	Significant harm to a child or adult may occur due to a specific failure of safeguarding arrangements	2023/24 – Medium (8) 2024/25 – Medium (8) 2025/26 – Medium (8)	2023/24 – Medium (8) 2024/25 – Medium (8) 2025/26 – Medium (8)	The nature of the risk has been updated reflecting the increased complexity in safeguarding presentations and increased vulnerability within communities. The 2023/24 annual Safeguarding Evaluation report is currently being completed and will be reported to Council in December 2023. The strategic risk will be updated further in line with the findings of this evaluation.
7	Risk of harm if we are unable to meet the care and support needs of some vulnerable children due to an increase in demand and complexity of cases	2023/24 – High (12) 2024/25 – High (12) 2025/25 – High (12)	2023/24 – High (12) 2024/25 – High (12) 2025/26 – High (12)	The risk and progress with mitigating actions has been updated reflecting risks related to increased complexity of demand in children’s services, the insufficiency of placements for children who are looked after and associated ongoing financial pressures.
8	Risk of harm if we are unable to meet the care and support needs of some vulnerable adults due to an increase in demand and complexity of cases	2023/24 – High (16) 2024/25 – High (16) 2025/26 – High (16)	2023/24 – High (12) 2024/25 – High (12) 2025/26 – High (12)	The risk has been updated reflecting the on-going pressure across the social care and health system, together with workforce shortages in some areas. Progress with mitigating actions has been updated

Ref	Potential Risk	Risk Level (score) – Pre mitigation	Risk Level (score) – Post mitigation	Key changes
				including recruitment campaigns, care at home and the micro- carers project.
9	High absence rates, particularly among those eligible for free school meals, and worsening behaviours in schools as a result of the continuation of trends that first emerged during the pandemic will result in a worsening of educational attainment	2023/24 – High (16) 2024/25 – High (12) 2025/26 – High (12)	2023/24 – High (16) 2024/25 – High (12) 2025/26 – High (12)	The nature of the risk and mitigation actions have been updated. The change reflects the progress made in mitigating the risk of implementing the new national curriculum on learning and the continued risk of delayed impacts of the pandemic on learning through reduced attendance levels and worsening behaviours in schools
Risks to policy priorities				
10	a) The council is unable to proceed with the Deposit Replacement Local Development Plan due to a failure to identify and agree suitable Gypsy, Roma and Traveller sites b) The council does not support the Deposit Replacement Local Development Plan c) Delays to the adoption of a Replacement Local Development Plan (RLDP) inhibits our ability to take forward key policy objectives such as job creation and affordable housing development d) High phosphate levels in the rivers Usk and Wye limit development opportunities within a significant proportion of the county	2023/24 – High (12) 2024/25 – High (12) 2025/26 – High (12)	2023/24 – High (12) 2024/25 – High (12) 2025/26 – High (12)	The risk has been updated reflecting the latest evidence and progress with the Replacement Local Development Plan preferred strategy. The risk has been amended to include further risks related to being unable to proceed with the Deposit Plan due to a failure to identify and agree suitable Gypsy, Roma and Traveller sites and the council the council not supporting the deposit plan.
11	a) The council is unable to deliver its commitment to decarbonise its operations in sufficient time to achieve net zero by 2030 because our resources are not commensurate with the scale and complexity of the challenge b) The Council is unable to deliver services as a result of the increasing frequency of climate-related emergencies such as floods or extreme heatwaves that increase the demand for emergency responses and can cause damage to infrastructure and the closure of facilities	2023/24 – High (16) 2024/25 – High (16) 2025/26 – High (16)	2023/24 – High (16) 2024/25 – High (16) 2025/26 – High (16)	The post-mitigation risk level has been increased from 12 to 16 to reflect the increasing likelihood that the Council will struggle to become net-zero by 2030 because its resources are not commensurate with the scale and complexity of the challenge. Updates on the process for development of the council's plan to become net zero have been provided.
12	The rising cost of living tips more families into crisis requiring public service interventions which diverts resources from other policy priorities	2023/24 – High (12) 2024/25 – High (12) 2025/26 – High (12)	2023/24 – High (12) 2024/25 – High (12) 2025/26 – Medium (8)	The risk has been updated to assess continuing financial pressures that is resulting in an increasing number of families requiring additional public service support. The risk level has been increased from medium to high post-mitigation for 2024/25 and from medium to high for 2025/26 pre-mitigation and from low to medium post-mitigation.
13	Residents are unable to secure or retain suitable accommodation, leading to rising homelessness and outward migration as a result of failures in the housing market	2023/24 – High (12) 2024/25 – High (12) 2025/26 – High (12)	2023/24 – Medium (8) 2024/25 – Medium (8) 2025/26 – Medium (8)	The progress with mitigating actions has been updated. The Rapid Rehousing Transition Plan is contributing towards falls in people needing to make a homeless application and has also increased the availability of both temporary and settled homes for homeless households, both contributing to the decreased use of B&B accommodation.
14	A reduction in public bus services as a result of a reduction in funding makes it harder for people to access key services across the county	2023/24 – High (12) 2024/25 – High (12) 2025/26 – High (12)	2023/24 – High (12) 2024/25 – High (12) 2025/26 – High (12)	A new risk of the possible reduction in public bus services has been identified. The scheme currently in place to support bus operators, the Bus Transition Fund, will likely be spent by December as a result of operators claiming substantially more than envisaged. This would leave a shortfall of £150k to be addressed in Q4 of 23/24, with the authority having to step in to support services.
15	Increased legal challenge to council decisions and service delivery resulting in delays, increased costs and reputational harm.	2023/24 – Medium (9) 2024/25 – Medium (9)	2023/24 – Medium (6) 2024/25 – Medium (6)	A new risk has been identified on the risk of delays to council decision making as a result of legal challenges.

Ref	Potential Risk	Risk Level (score) – Pre mitigation	Risk Level (score) – Post mitigation	Key changes
		2025/26 – Medium (9)	2025/26 – Medium (6)	

Risks to resources

Ref & Status	1	Risk	Potential Risk that: It will not be possible to deliver all of the commitments in the Community and Corporate Plan leading to slower than desired progress towards our purpose as a result of a tightening financial position						
Risk Owner and cabinet Member responsible	Paul Matthews (Chief Executive) & Cllr Mary-Ann Brocklesby (Leader)		Scrutiny Committee	All			Strategic objective	All	
Reason why Identified									
<p>The Well-being of Future Generations Act requires us to plan on a decadal and generational basis. We updated our medium-term Community and Corporate Plan following the election of a new Council in May 2022 to align to the aspirations of the new administration. This will inform the development of a medium-term financial plan. The publication of three-year indicative budget settlements will aid this process but higher levels of inflation and pay awards above present assumptions make planning for the longer term difficult. A replacement Local Development Plan is currently being developed and other medium-term strategies such as the Climate Emergency Strategy will be updated. The global outlook has changed the world considerably since 2020, and we must consider the longer-term impact on future generations, and plan for these accordingly. The council's key enabling strategies that facilitate the delivery of our Community and Corporate Plan are currently being updated to reflect new and emerging priorities.</p> <p>The authority is likely to face significant budget pressures as the UK Government begins to repay the debt accrued to meet the costs of the pandemic. Alongside this, it is expected that the NHS will continue to consume an increasing proportion of public sector expenditure. Both adult and children's social care are facing acute pressures with escalating demand, increasing complexity and workforce shortages all contributing. While there is pressure to free-up hospital beds, the care system does not have the capacity to accommodate this, meaning that more resources will be drawn into these acute settings.</p> <p>These issues are compounded by workforce shortages and low levels of pay compared to other sectors. In Monmouthshire, high property prices make it difficult for staff to remain in or relocate to the area.</p> <p>Housing shortages are contributing to increasing levels of homelessness with limited affordable accommodation to meet the 2,400 applicants registered as in need on the Housing Register. This is compounded by the National Development Framework, which will limit the development of housing that is affordable for the key workers of the future. Limited housing growth will also have an impact on future council tax receipts, which the county is dependent on as it receives the lowest settlement of any local authority in Wales meaning that more must come from council tax or commercial income streams. The funding formula does not take adequate account of the relative higher costs of providing services in rural areas where public services cannot be easily centralised to generate economies of scale.</p> <p>An additional challenge that poses a threat to the long-term viability is climate change with increasing frequency of adverse weather events. The county of Monmouthshire has one of the highest carbon footprints in Wales with an older housing stock, which will be costly to decarbonise. The geography also means that decarbonising council operations will be more challenging than in urban areas.</p>									
Risk Level (Pre-mitigation)					Risk Level (Post-mitigation)				
Year	Likelihood	Impact	Risk Level	Risk Score	Year	Likelihood	Impact	Risk Level	Risk Score
2023/24	Likely	Major	High	12	2023/24	Possible	Major	Medium	8
2024/25	Likely	Major	High	12	2024/25	Possible	Major	Medium	8
2025/26	Likely	Major	High	12	2025/26	Possible	Major	Medium	8
Mitigating Actions									
Mitigating Action		Responsibility Holder		Timescale		Mitigation action progress			
Ensure affordability and deliverability of the commitments set out in the Community and Corporate Plan in the context of the wider economic climate		Strategic Leadership Team		Ongoing		The Community and Corporate Plan was endorsed by Council in April 2023. It is recognised that our resources are affected by external financial pressures such as rising inflation and borrowing costs. Cabinet will ensure that the commitments in the community and corporate plan are kept under review and, if necessary, reprioritised in response to changing financial circumstances to ensure that the commitments remain affordable.			
Engage with communities to understand challenges and opportunities from their perspective including participation of residents and service users		Strategic Leadership Team		Ongoing		The Council has undertaken a range of assessment and research to understand well-being in the county including the well-being assessment, population needs assessment, and research for the Replacement Local Development Plan (RLDP). These were used to inform the new Community and Corporate Plan, alongside information generated by cross-party working groups held in July and August 2022.			
						A month-long consultation period on the 23/24 budget proposals took place at the beginning of 2023, where residents and local businesses were encouraged to engage and share their views. A range of events were held, both face to face and virtually, to ensure all residents had the ability to participate.			

			<p>Feedback from the events was carefully considered and resulted in a number of changes being made to the draft budget proposals and some savings being reversed.</p> <p>The contemporary policy challenges that we need to meet, working with our communities, are complex and evolving. These include transitioning to net zero, tackling the determinants of health inequality, making sure our children do well, and social care reform. We need to ensure that our understanding of these in the county remains up-to-date and current to inform our priorities. There is a need to develop our thinking and ideas as we plan for the longer term. The involvement and participation of and engagement with Monmouthshire's community groups, public service partners, service users and residents will be strengthened to help further understand experiences in the County, and to ensure programmes are bold and ambitious.</p>
Strengthen medium to long term strategic financial planning as part of the Medium-Term Financial Plan and adapt to reflect the global uncertainty on public finances.	Deputy CEX/Chief Officer, Resources	December 2023	The Medium-Term Financial Strategy (MTFS) will be presented to Council in December. The Medium-Term Financial Plan (MTFP) will follow which will outline a more specific delivery plan. It is important that both the MTFS and MTFP have regard to the cause and impact on meeting the well-being objectives and wider ambition of the Council set out in the Community and Corporate Plan.
Review and update enabling strategies following the adoption of a new Community and Corporate Plan and learning from the pandemic to ensure alignment of resources with the organisations policy priorities.	Deputy CEX/Chief Officer, Resources	Winter 2023/24	The enabling strategies will be reviewed to ensure they are fit for purpose and support the new policy aims and objectives set out in the Community and Corporate Plan.

Ref & Status	1b	Risk	Potential Risk that: A small working political majority makes it harder to ensure timely and appropriate decision making which results in delays and uncertainty in some projects						
Risk Owner and cabinet Member responsible		Paul Matthews (Chief Executive) & Cllr Mary-Ann Brocklesby (Leader)		Scrutiny Committee	All	Strategic objective	All		
Reason why Identified									
The local elections of May 2022 resulted in no political party having overall control of the Council. The Labour party was the largest party and formed a new cabinet without an overall majority. The lack of a majority Council has resulted in a politically unstable council, which has had a significant effect on the speed of the organisation's decision making and the ability to implement policy change. A coalition agreement has subsequently been reached between the Labour party and the Green party which provides a slim political majority of one councillor. The democratic process has seen some decisions recently be subject to call-in which can cause uncertainty in some projects.									
Risk Level (Pre-mitigation)					Risk Level (Post-mitigation)				
Year	Likelihood	Impact	Risk Level	Risk Score	Year	Likelihood	Impact	Risk Level	Risk Score
2023/24	Almost certain	Substantial	High	12	2023/24	Likely	Substantial	Medium	9
2024/25	Almost certain	Substantial	High	12	2024/25	Likely	Substantial	Medium	9
2025/26	Almost certain	Substantial	High	12	2025/26	Likely	Substantial	Medium	9
Mitigating Actions									
Mitigating Action			Responsibility Holder	Timescale	Mitigation action progress				
Undertake pre-decision scrutiny on relevant decisions			Chief Officer Law & Governance and Chief Officer People, Performance & Partnerships	Ongoing	Each scrutiny committee has an established forward plan. This is shared regularly with department management teams to seek their input on items that will require scrutiny. A number of special meetings have been held to ensure decisions are scrutinised in advance of decisions. There is a need to improve the timeliness of completion of the forward plan to ensure appropriate time can be allocated by scrutiny committees to forthcoming decisions.				
Utilise members seminars and scrutiny workshops to engage and involve all councillors in the development of policy			Chief Officer Law & Governance and Chief Officer People, Performance & Partnerships	Ongoing	Members seminars are being used to share developments and involve councillors on significant forthcoming decisions. Recent seminars include on the Replacement Local Development Plan (RLDP) and Culture Strategy. Scrutiny workshops are being held to seek councillors involvement in the development of proposals, these include the review of primary school catchments and Gypsy and Traveller needs assessment.				
Maintain a fully populated forward work planner of Cabinet and Council business			Chief Officer Law & Governance	Ongoing	An established forward work planner for cabinet and Council business is available to all councillors and is a standing item on the agenda of scrutiny committees to inform their own work programme. There is a need to improve the timeliness of completion of the forward plan to ensure all interested parties are sighted as early as possible on planned decisions being brought forward.				

Ref & Status	2	Risk	Potential Risk that: Some services will become financially unsustainable in the short to medium term in their current form due to increasing demand and continuing financial pressures						
Risk Owner and cabinet Member responsible	Peter Davies (Deputy Chief Executive) and Cllr Rachel Garrick & Cllr Ben Callard (Cabinet Members for Resources)		Scrutiny Committee	All			Strategic objective	All	
Reason why Identified									
<p>After several years of taking significant resource out of the budget, the means of achieving further savings is increasingly more challenging. Pressures on the budget have remained and continue to increase in terms of demographic growth, demand on services and expectations, and pay and pension increases. Specific areas with pressures include children with additional learning needs, children's services and specifically looked after children, adult social care, homelessness and passenger transport.</p> <p>Councils are facing financial challenges on an unprecedented scale. Costs and demand have increased significantly in recent years and local authority budgets have not kept pace. The 2022/23 budget culminated in an overspend of £3.5m following acute pressures experienced within Adult's and Children's services, Homelessness and Education. The 2023/24 budget set in March 2023 accommodated additional costs of delivering services of £26m or 14%. Whilst income and funding increased by 9% (£16m) to meet some of these costs, the Council needed to find savings of 5% (£10m) from services. The first few months of 2023/24 has seen continuing financial pressures which are having a severe impact upon service operation, including a slow decline in inflation, sharp rises in interest rates, the cost-of-living crisis which is having a significant impact on our communities and supply chain issues which requires more costly alternatives. All of these factors puts pressure on the Council to deliver in a high-demand, high-cost environment.</p> <p>The pandemic has significantly affected the council's medium-term financial planning. This needs to be developed, reflecting realistic and accurate funding requirements, to allow a structured and planned approach to service delivery in the medium term, in line with corporate priorities. Current modelling predicts a continuously increasing budget deficit, despite a higher than expected increase in Welsh Government funding, with a shortfall of £35million predicted in 2027/28. The Council has a legal duty to set a balanced budget and therefore any budget shortfalls will need to be met through a combination of pressures being mitigated, additional savings and income or reserve contributions. This will be particularly challenging set against the backdrop of an ambitious Corporate and Community Plan being implemented.</p> <p>There is not a consistent picture of schools' balances. There has been a fluctuating trend with some schools showing a continuing reduction in schools balances, which is of concern, and others a more stable trend. However, grants awarded to schools at 2020/21- and 2021/22-year ends have resulted in a large increase in overall school balances. At 2022/23 year end, five schools were in deficit, compared to nine forecast to be in deficit at Month 9. Several schools continue to carry structural budget deficits which will need close monitoring as we move into a difficult budget year for schools in 2023/24.</p>									
Risk Level (Pre-mitigation)					Risk Level (Post-mitigation)				
Year	Likelihood	Impact	Risk Level	Risk Score	Year	Likelihood	Impact	Risk Level	Risk Score
2023/24	Almost certain	Major	High	16	2023/24	Likely	Major	High	12
2024/25	Almost certain	Major	High	16	2024/25	Likely	Major	High	12
2025/26	Almost certain	Major	High	16	2025/26	Likely	Major	High	12
Mitigating Actions									
Mitigating Action		Responsibility Holder		Timescale	Mitigation action progress				
Ensure that services deliver within budget, deliver savings targets and continue to identify, review and challenge pressures.		Deputy CEX/Chief Officer, Resources		Ongoing	<p>Councils are facing financial challenges on an unprecedented scale. It is widely acknowledged that local government funding over recent years has not kept pace with increased service demand, the additional responsibilities being transferred to Councils, and inflationary pressures. The 2022/23 revenue budget culminated in an overspend of £3.5m which required funding from earmarked reserves to cover the additional expenditure incurred following acute pressures experienced within Adult's and Children's services, Homelessness, and Education. The 2023/24 budget set in March 2023 accommodated additional costs of delivering services of £26m or 14%. Whilst income and funding increased by 9% (£16m) to meet some of these costs, the Council needed to find savings of 5% (£10m) from services.</p> <p>A 2023/24 early revenue budget update indicates £4.221m of service pressures, the largest coming from care provider service fees within Adult's and Children's services, ALN transport & recoupment, pay inflation and homelessness. This is coupled with a shortfall of £1.896m against savings targets set as part of the 2023/24 budget. Whilst it isn't unusual to see an over spend being forecast early in the financial year and for an improving position to develop as the year progresses, continuing financial headwinds, increasing demand for services, and the need for service savings of £10m to be delivered within this operating environment present tangible ongoing risks.</p>				

			<p>In light of developing financial pressure, Cabinet recently approved the budgeted use of £2.5m of useable reserves to increase the Council's overall level of inflation contingency budget for 2023/24 to a total of £3m. The use of a further £2.5m equates to the amount of reserves that were originally anticipated to be required to support the 2022/23 budget outturn position, but were not ultimately called upon.</p> <p>Work continues to implement a structured approach to tackle in year 2023/24 budget pressures which look to explore all available options open to the Council. This includes a review of vacancies being held, the potential for further or alternative savings, mitigation of pressures, and a more targeted review of unbudgeted grant funding and income.</p>
Develop a set of budget proposals for 2024/25	Deputy CEX/Chief Officer, Resources	March 2024	<p>A budget setting process and timetable paper taken to Cabinet highlights a modelled budget shortfall of £14.4 million for the 24/25 financial year, taking into account the current economic climate, service demand pressure and latest intelligence on likely funding levels. This report notes that the budget will reflect the priorities set in the approved Community and Corporate Plan. Central themes of reducing the impact of inequality on citizens and climate change on communities will hold primacy. Some things may need to be reprofiled into later years of the council term to ensure the organisation remains financially sustainable.</p> <p>The budget setting timetable, contained within the report, indicates work that has already been done, including budget workshops with SLT/Cabinet/Groups/Officers and producing high level pressure & savings mandates for Cabinet Scrutiny. Draft revenue & capital budget proposals are due to be complete by January 2024, ahead of scrutiny by various committees and public consultation in January and February. Final proposals will be presented to Council on the 29th February.</p>
Strengthen medium to long term strategic financial planning as part of the Medium-term financial plan, that is based on realistic evidence and planned scenarios, to guide our budget setting in line with agreed strategic objectives and responsiveness to challenges, such as the cost-of-living.	Deputy CEX/Chief Officer, Resources	December 2023	<p>The Medium-Term Financial Strategy (MTFS) will be presented to Council in December. The Medium-Term Financial Plan (MTFP) will follow which will outline a more specific delivery plan. It is important that both the MTFS and MTFP have regard to the cause and impact on meeting the well-being objectives and wider ambition of the Council set out in the Community and Corporate Plan.</p>
Develop and implement a commercial strategy aligned to the Community and Corporate Plan	Deputy CEX/Chief Officer, Resources	Timescales as per strategy	<p>The Council has developed and is implementing a Commercial Strategy, which has generated income to support services and developed an approach to commercialising assets and creating a commercial culture and ethos. The strategy needs to be reviewed to align with the new Corporate and Community Plan, to assess progress and set the strategic focus.</p> <p>In 2022/23 investment properties overspent by £290k due to bad debt provision for a tenant in Newport Leisure Park who has gone into administration and higher than anticipated energy costs on vacant units at Castlegate Business Park. These three vacant units were filled during this year, however the rent-free period which forms part of any new rental agreement means that the section has fallen short of its income targets. The rent-free period is now complete and in 23-24 will see a full year of rental income increasing the income generated next year by £134k.</p>
Progress the Delegation Agreement with Cardiff Council, for the discharge and provision of council strategic and operational procurement services	Head of Enterprise and Community Animation	Timescales as per strategy	<p>The authority has entered into a collaboration with Cardiff Council, for mutual benefit, in the discharge and provision of the council's procurement services. The arrangements provide increased capacity and expertise to strengthen the council's procurement arrangements, such as in the use of data, to lead to better informed business decisions and business alignment. The effectiveness and impact of the arrangements will need to be assessed on an ongoing basis.</p> <p>The council's Socially Responsible Procurement Strategy 2023-28 and delivery plan were approved by Cabinet in June 2023. This strategy ensures that our procurement processes are aligned with our objectives outlined in the Community and Corporate Plan, and sets out our key procurement objectives, which include contributing to reducing the Council's carbon emissions to Net Zero by 2030 and making procurement spend more accessible to local small businesses and the third sector.</p>

Continue to work closely with schools to ensure their financial plans are as robust as possible to minimise any impact, whilst continuing to improve standards for our young people.	Finance Manager – Children & Young People	Ongoing	<p>Collective School Balances at the beginning of the 2022/23 financial year amounted to £6.956m surplus. The majority of the surplus balance brought forward into 2022/23 was due to several grants being awarded to schools at 2021-22 year-end, including Revenue Maintenance, Winter of Wellbeing, ALN New System, Recruit Recover & Raise Standards, Attendance Support & Community Schools, RISG and LA Education Grant.</p> <p>The Month 9 forecast anticipated a draw on reserves of £4.652m. Between then and year-end, additional income including EAS income and Ukraine funding not included in school forecasts were received by schools, as well as some schools not investing as planned. This resulted in the draw on reserves being reduced to just under £2.7m.</p> <p>Five schools were in a deficit by the end of 2022/23, which points to structural budget deficits remaining in some cases, or a lack of planning for budgetary risks in the current economic environment. Whilst the current climate is severely challenging, school balances are designed to provide a level of financial resilience to mitigate and smooth such risks and are not expected to fund ongoing day-to-day expenditure. Officers will continue to work closely with those schools of concern and look to aid the return to a more sustainable budget plan over the medium term.</p>
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Ref & Status	3	Risk	Potential Risk that: The authority is unable to maintain key infrastructure and meet other identified pressures due to insufficient capital funding availability			
Risk Owner and cabinet Member responsible	Peter Davies (Deputy Chief Executive) and Cllr Rachel Garrick & Cllr Ben Callard (Cabinet Members for Resources)	Scrutiny Committee	Performance and Overview Scrutiny Committee	Strategic objective	All	

Reason why Identified

Underlying the Capital Strategy is the recognition that the financial resources available to meet council priorities are constrained by the level of one-off reserves and capital receipts that the Council holds and the level of capital grant funding from Welsh Government and other funding bodies, and the extent to which the Council is able to entertain further prudential borrowing. The core capital programme has been impacted in recent years in order to enable the Band A new schools programme to be funded, which has now successfully concluded. Subsequent to a Council decision having been secured the 3-19 school in Abergavenny has progressed into contract and is in its construction phase, supported under the Welsh Government Band B programme.

There remain a considerable number of pressures that sit outside any potential to fund them within the Capital MTFP, and this has significant risk associated with it. These include property and highways infrastructure, DDA work, and public rights of way. In addition to this, there are various schemes/proposals (e.g. Monlife, tranche C Future schools, climate emergency response, any enhanced DFG spending etc.) that could also have a capital consequence, but in advance of quantifying those or having Member consideration of these items, they are also excluded from current capital MTFP. In the event of emergency pressures, resources will have to be diverted. Projects, such as the Cardiff Capital Region City Deal, also require significant capital investment to realise the outcomes.

The timing of capital receipts always remains uncertain due to market conditions. Future investment in capital schemes is in part dependent on future success of achieving capital receipts and there are risks attached to some receipts materialising. There is a risk associated with relying on the use of capital receipts in the same year that they come into the council and the potential for this to have significant revenue pressures should receipts be delayed and temporary borrowing be required. Significant further capital receipts are now not forecast and until such time as the outcome of the Replacement Local Development Plan is known and for which the Council has put forward a number of strategic sites in its ownership.

Risk Level (Pre-mitigation)					Risk Level (Post-mitigation)				
Year	Likelihood	Impact	Risk Level	Risk Score	Year	Likelihood	Impact	Risk Level	Risk Score
2023/24	Likely	Major	High	12	2023/24	Likely	Major	High	12
2024/25	Likely	Major	High	12	2024/25	Likely	Major	High	12
2025/26	Likely	Major	High	12	2025/26	Likely	Major	High	12

Mitigating Actions

Mitigating Action	Responsibility Holder	Timescale	Mitigation action progress
Regularly review assumptions as part of the capital MTFP taking account of any new information that is relevant and the consequential impact on the revenue MTFP.	Deputy CEX/Chief Officer, Resources	Ongoing	<p>The MTFP model was reviewed and updated as part of the budget process for 2023/24 to reflect the impact of the current economic situation, the revised demands and assumptions that this brings, together with aligning with the policy objectives of the new Cabinet.</p> <p>The value of Capital receipts forecast after 2022/23 drops off quite considerably which is reflective of the replacement local development plan (RDLP) not proceeding as quickly as envisaged in the original delivery</p>

			<p>agreement. This will have a substantial impact on the balance of receipts available to fund future capital investment demands. It is therefore important that reliance on capital receipts used to support capitalisation direction (to fund one-off revenue costs eligible to be met from capital resources) is seen as a short-term measure only.</p> <p>The Council has strengthened its scrutiny and challenge of the Capital Programme through the established Capital and asset management working group (CAMWG). The process in place looks to ensure that projects are prudent, affordable and will deliver tangible benefits to core policy objectives over the long term. The Capital Programme will be reviewed and reconsidered during the budgetary process to ensure that the revenue implications of capital expenditure are accurately reflected in the revenue MTFP and that the capital expenditure plans of the Council remain affordable, prudent and sustainable.</p>
Continue to monitor the Capital budget	Deputy CEX/Chief Officer, Resources	Ongoing	<p>The 2022/23 capital expenditure outturns showed a net underspend of £94,000 against budget, primarily due to overspends of £621k in enabling service transformation and £180k in the refurbishment of borough theatre being offset by underspends in various schemes which were instead funded by grants or the release of budgets.</p> <p>102 capital schemes have required slippage into 2023/24 totalling £33,098,000, representing 42% of the total budget for the year. Whilst delays in progressing capital schemes can be expected due to varying external influencing factors, the large number of schemes requiring slippage, along with the explanations given by budget holders, point to more underlying issues such as unrealistic profiling of budgets and a lack of resourcing to manage the volume of schemes being planned.</p> <p>£3.415m more capital receipts are forecast to be available over the medium term than forecast at Month 9, following under spends within the capital programme; additional grant being secured for existing schemes, or; where capital receipts forecast over the medium have increased. Whilst positive, there remains a need for caution over committing any further receipts to either capital investment or increasing the level of capitalisation direction given the level of unbanked receipts contained within the forward projections.</p>
Further refinement of priority assessments in the property and infrastructure budgets to ensure all pressures have been considered and ranked.	Head of Commercial and Integrated Landlord Services & Head of Placemaking, Housing, Highways and Flood	Ongoing	<p>A programme of property condition surveys are currently being undertaken by external consultants; these will be used to inform prioritisation of capital maintenance spend. A programme of Health and safety surveys is currently being commissioned. Independent condition assessments of key highways infrastructure are completed as required depending on condition. These inform prioritisation of available capital budget.</p> <p>A review of the pressures and associated risks is being undertaken to inform the capital budget process. A previous review in 20/21 had concluded that further feasibility studies and technical assessments needed to be undertaken on specific infrastructure assets, funded from existing highways infrastructure capital budgets. The results of these studies and assessments will inform the capital MTFP and pressures that will need to be accommodated and funded therein in future financial years. The Capital and Asset Management Working Group will review this feed into the budget process for next year and across the MTFP. In tandem with this, the Capital and Asset Management working group will investigate the impact of significant construction price inflation on materials such as steel, wood, plaster, etc.</p>
Deliver the Asset Management Plan to manage the Council's land and property portfolio	Head of Commercial and Integrated Landlord Services	Timescales as per plan	The Asset Management strategy is being implemented and actions from the plan have been integrated into the relevant business plans for ongoing monitoring and progress reporting. The strategy is currently being updated to align with the commitments set out in the Community and Corporate Plan, and will also consider the findings from the Audit Wales Springing forward review on asset management.
Help sustain Council Services and enhance the asset base by investing in commercial property assets in order to increase the net rental income stream for the Council in line with the asset investment policy	Head of Commercial and Integrated Landlord Services	Ongoing – see Asset Management strategy	<p>The Commercial Strategy seeks to enhance income generation, develop an approach to commercialising assets and create a commercial culture and ethos. The strategy has a short-, medium- and long-term view and aims to provide a framework, with defined objectives, for new commercial projects and for the delivery of future commercial activity.</p> <p>The council has continually assessed its commercial risk appetite and exposure, and the updates are issued to the Investment Committee on investment performance and mitigating action being taken. The commercial risk appetite was adjusted in light of the pandemic and uncertainties in the investment and property market at this</p>

			time. Going forward, there will need to be a focus on a commercial approach being taken to enable the policy aims and ambitions of the council to be delivered.
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Ref & Status	4	Risk	Potential Risk that: Increases in the number of people exiting the labour market, a UK skills shortage and wage inflation will impact recruitment, retainment and workforce planning and affect the delivery of Council services						
Risk Owner and cabinet Member responsible	Matthew Gatehouse (Chief Officer People, Performance & Partnerships) & Cllr Rachel Garrick & Cllr Ben Callard (Cabinet Members for Resources)		Scrutiny Committee	Performance and Overview Scrutiny Committee	Strategic objective	All			
Reason why Identified									
There is a global skills shortage, and the impact is being felt in several sectors that Monmouthshire County Council is either a part of or competes with for talent. Some services have identified challenges with recruitment; Social Care, Operations and Facilities are all facing difficulties, which is affecting service provision.									
There is a continuing risk that staff well-being could be impacted by a range of factors from work related pressures such as staff in some areas are facing considerably increased workloads to meet increasing demand, to personal home-based factors such as financial strains due to the rising of cost of living.									
Risk Level (Pre-mitigation)					Risk Level (Post-mitigation)				
Year	Likelihood	Impact	Risk Level	Risk Score	Year	Likelihood	Impact	Risk Level	Risk Score
2023/24	Almost certain	Major	High	16	2023/24	Possible	Major	Medium	8
2024/25	Almost certain	Major	High	16	2024/25	Possible	Major	Medium	8
2025/26	Almost certain	Major	High	16	2025/26	Possible	Major	Medium	8
Mitigating Actions									
Mitigating Action		Responsibility Holder		Timescale		Mitigation action progress			
Recruit and retain staff more effectively		Chief Officer People, Performance & Partnerships		Ongoing		<p>Recruitment issues are being reflected nationally within some sectors, and the council is not exempt from this. Positions within Social Care, Operations and Facilities, for example, are seeing a dramatic reduction in applicants, and this is impacting on service provision. Solutions for the national recruitment issues do not sit solely with local authorities. However, HR and managers within the council are working together to try to reduce the recruitment problem and determine ways of lessening its impact on services.</p> <p>The People team have put arrangements in place to strengthen recruitment procedures, such as adapting the recruitment process, whilst still maintaining safeguarding and safety requirements, promotion of opportunities and recruitment of graduates, apprentices and work experience. This has led to successful recruitment campaigns in some service areas. The Communications Team are promoting positions in a variety of ways to reach a broader audience, using drives such as 'Job of the Week'. The Leaders Q&A sessions are encouraging discussion between service areas to promote networking and sharing ideas.</p> <p>Recruitment arrangements need development to meet remaining challenges. An e-recruitment system is being implemented to support the development of recruitment as a genuine talent acquisition process. This will benefit recruiting managers who want speed, simplicity and agility.</p> <p>HR staff sit on various local government groups and are collaborating with partner organisations to identify commonalities and information sharing. This is being fed into Welsh Government to inform their decision-making and to influence their response to the issue.</p>			
Develop the support mechanisms to support staff wellbeing		Head of HR		Ongoing		The Digital 'Cwtch' continues, although less frequently, along with a People Leaders Q&A session. The people services team has developed a People Leaders Support Site which enables 'live' discussion/news feed, enabling direct support and a shared learning platform for managers and head-teachers.			

			Staff well-being is affected by a range of factors, including additional work pressure and demand, personal factors and societal factors. Learning from, and building on, arrangements from the pandemic, staff well-being needs continual support. The use of networks and communication digitally, surveys and feedback loops to senior managers, has extended the reach of contact with the workforce. This has also created the conditions for a wider system of self-supportive networks sharing practice, ideas and support.
Embed workforce planning into team management processes to ensure the right skills, expertise and knowledge are available for future changes	Chief Officer People, Performance & Partnerships	Ongoing	<p>The ability of the organisation to plan the workforce it needs to meet current and future demands, and to implement this, requires development, especially given recruitment and national skill challenges. A team with a specific focus on workforce planning and development in the Council has been established, incorporating recruitment, retention, Apprenticeship, Graduate and Internship and training. We have introduced the Apprentice Graduate and Intern Strategy (AGI) to support and increase the number of opportunities across the council. Work continues on this as an integral part of strategic workforce planning. The team is working with service areas to strengthen workforce planning arrangements. A revised people strategy is being developed to align to the community and corporate plan and take account of latest evidence. This will also consider the findings from the Audit Wales Springing forward review on workforce.</p> <p>The development and retention of existing staff is an essential component of workforce planning. A learning management system was procured in the Summer of 2022 and is being implemented in a phased roll-out which commenced in April 2023.</p>
Adopt a qualitative approach to ensuring professional development, wellbeing and information flow is taking place for those that want or need it	HR Manager	Ongoing	<p>The staff appraisal process, Check In-Check Out, needs to evolve to meet the varying needs of the organisation based on learning that a one-size-fits-all approach is not effective for the varying services the council delivers.</p> <p>Arrangements are being developed to ensure there is meaningful staff/line manager engagement and communication by right. Colleagues need to be given the 'right' to seek meaningful 1-1s on a regular basis, and there needs to be a focus on improving the skills of line managers to enable a variety of different approaches to the process so that performance development is realistically achieved. There is also a need to ensure feedback loops are in place to evaluate whether this is happening effectively, and to determine if they are informed by other enabling arrangements such as Service Business Plans, and staff training and development needs.</p>

Ref & Status	5	Risk	Potential Risk that: Loss or corruption of data due to cyber-attack or data mismanagement, which will compromise the delivery of essential council services						
Risk Owner and cabinet Member responsible	Sian Hayward (Head of Information, Technology & Security) and Cllr Rachel Garrick & Cllr Ben Callard (Cabinet Members for Resources)		Scrutiny Committee	Performance and Overview Scrutiny Committee	Strategic objective	All			
Reason why Identified									
There have been a number of high-profile cases across both public and private organisations where cyber-attacks and data breaches have compromised service delivery and financial loss. These attacks occur due to insecure infrastructure or staff who are not cyber literate and may inadvertently introduce attacks through their personal actions. Cyber security can also be compromised through a lack of structured governance arrangements, risk assessments and planning.									
Digital working has increased in the last two years bringing an increase in the potential for loss of data through cyber incidents.									
Risk Level (Pre-mitigation)					Risk Level (Post-mitigation)				
Year	Likelihood	Impact	Risk Level	Risk Score	Year	Likelihood	Impact	Risk Level	Risk Score
2023/24	Likely	Major	High	12	2023/24	Possible	Major	Medium	8
2024/25	Likely	Major	High	12	2024/25	Possible	Major	Medium	8
2025/26	Likely	Major	High	12	2025/26	Possible	Major	Medium	8
Mitigating Actions									
Mitigating Action		Responsibility Holder		Timescale		Mitigation action progress			
Ensure robust arrangements are in place to safeguard the organisation's data and systems from cyber-attack		Cyber security service		Ongoing		The Council recognises that total elimination of cyber-attack is not possible, but we will ensure robust arrangements are in place to safeguard data and systems from cyber-attack via: Physical barriers to the network, staff awareness, training and culture and structured governance, risk analysis and business continuity planning.			

			<p>Significant investments in ICT infrastructure and software have been undertaken, which will mitigate against the likelihood of a cyber-attack.</p> <p>An operational risk register, which is exempt from publication under the Data Protection Act, is maintained by the Information Security Team, the SRS Security Team and MCC.</p> <p>A cyber security report was taken to Governance and Audit Committee in January 2023 to provide assurance to the committee that the arrangements in place are robust.</p>
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Risks to service delivery

Ref & Status	6	Risk	Potential Risk that: Significant harm to a child or adult may occur due to a specific failure of safeguarding arrangements						
Risk Owner and cabinet Member responsible	Will Mclean (Chief Officer Children & Young people) & Jane Rodgers (Chief Officer Social Care, Safeguarding & Health), Cllr Ian Chandler (Cabinet Member for Social Care, Safeguarding and Accessible Health Services)		Scrutiny Committee	People Scrutiny Committee		Strategic objective	A Connected Place Where People Care		
Reason why Identified									
<p>The Council and its partners must maintain a consistent focus on safeguarding vulnerable people in order to both prevent and reduce the likelihood of harm, and to respond effectively to reduce risks if harm occurs.</p> <p>The consequences of the pandemic and the current economic and social pressures on families generates pressure within the social care and health system with more complex presentations and increased vulnerability within communities. This demand pressure, alongside ongoing social care workforce recruitment and retention challenges, impacts on the council’s ability to protect children and adults who are at risk.</p> <p>Care Inspectorate Wales (CIW) conducted an assurance check in February 2021 and reported broadly positive findings under the four principles of the Social Services and Well-being (Wales) Act 2014: People – Voice and Control, Prevention, Well-being, Partnerships and Integration. A further CIW Performance Evaluation Inspection of Adults social services was undertaken in July 2022, which includes performance of Adults Safeguarding. This found that <i>“The local authority responds to immediate safeguarding concerns. Through reading social care records, we saw evidence of professionals in the safeguarding team working effectively with colleagues from the local health board and the police, as well as wider local authority teams, to protect adults at risk”</i>. Areas for improvement included further work to embed the threshold for safeguarding concerns and to ensure that statutory timescales for undertaken enquiries are met.</p>									
Risk Level (Pre-mitigation)					Risk Level (Post-mitigation)				
Year	Likelihood	Impact	Risk Level	Risk Score	Year	Likelihood	Impact	Risk Level	Risk Score
2023/24	Possible	Major	Medium	8	2023/24	Possible	Major	Medium	8
2024/25	Possible	Major	Medium	8	2024/25	Possible	Major	Medium	8
2025/26	Possible	Major	Medium	8	2025/26	Possible	Major	Medium	8
Mitigating Actions									
Mitigating Action		Responsibility Holder		Timescale	Mitigation action progress				
Continually monitor and evaluate safeguarding processes and practice and ensure good accountability for safeguarding. Ensure that where actions are identified from self-evaluation processes that these are implemented.		Safeguarding & quality assurance service manager		Ongoing	<p>Progress against the council’s safeguarding priorities is evaluated annually and the priorities reflect the cornerstones for keeping people safe in Monmouthshire, as set out in the Corporate Safeguarding Policy.</p> <p>The last Annual Safeguarding Evaluation Report was presented to Council in October 2022. The report evaluates the progress of Monmouthshire County Council’s key safeguarding priorities during 2021/2022, highlighting progress, identifying risks and setting out actions and priorities for 2022 - 2023. This evaluation report forms an integral part of the improvement of safeguarding practice across the Council and drives the work of the Whole Authority Safeguarding Group. The updated 22/23 report will be presented to Council in December 2023.</p> <p>A safeguarding ‘self-assessment’ is undertaken on a two-year rolling programme, on a directorate basis via the Safeguarding Assessment Framework for Evaluation (SAFE). The key development has seen directorates sharing the outcomes of their SAFEs through a work-shop approach, using real case studies from their service areas to demonstrate safeguarding in action.</p>				

<p>Drive the strategic agenda and the associated programme of activities for safeguarding through the Whole Authority Safeguarding Group (WASG).</p>	<p>Chief Officer, Social Care, Health & Safeguarding</p>	<p>Ongoing</p>	<p>The Whole Authority Safeguarding Group (WASG) meets bi-monthly, chaired by the Statutory Director (Chief Officer). Every directorate has a representative on the group, and minutes are retained for each meeting. The WASG continues to provide leadership, direction, oversight, support and challenge to strengthen safeguarding activity in the Council.</p>
<p>Ensure that robust systems are in place within the authority to respond to any concerns regarding child protection and protection of adults at risk.</p>	<p>Chief Officer, Social Care, Health & Safeguarding</p>	<p>Ongoing</p>	<p>The continued upward trend in demand within both children's and adult's services puts services under immense pressure. Children's services remain committed to promoting good practice around child protection and safeguarding through an on-going programme of service and practice development. There is a joint safeguarding hub in place to manage children and adults safeguarding referrals which assures a high level of multi-agency engagement and timely decision making. Children's services promotes good practice in child protection and safeguarding through strengths based practice and risk assessments, and staff members receive appropriate training and support to carry out their duties. Family support services across all tiers of need and vulnerability are in place.</p> <p>Adult safeguarding referrals remain in an upward trend, although have recently stabilised. CIW carried out an assurance check in February 2021, and the report specifically identified positive working practices within the safeguarding arena. They did, however, identify some areas for improvement, specifically in relation to the number of adult safeguarding enquiries completed within seven days, and improved management oversight in the adult safeguarding records viewed. The CIW Performance Evaluation undertaken in July 2022 found that there has been an increase in the proportion of adults safeguarding enquiries completed in seven days during 2021/22, but that further improvement in timeliness is needed.</p> <p>The outcomes from the inspection report related to Adult safeguarding arrangements will be addressed and monitored via an action plan. CIW will monitor progress through its ongoing performance review activity with the local authority.</p> <p>Safeguarding reports for children and adults are produced on a 6-monthly basis. This has shown room for improvement in our collation of child protection data including the timeliness of core group meetings. The number of Looked After Children has risen substantially in recent years but has recently stabilised, although it remains higher than the average rate of children who are looked after across Wales last year. As a result, significant demand on Children's Services remains.</p> <p>Safeguarding reports for children and adults are produced on a 6-monthly basis. This has shown room for improvement in meeting our timescales within the statutory framework. The number of children on the child protection register fluctuates, and at year-end 22/23 was 113. The number of Looked After Children has risen substantially in recent years but has recently stabilised, although it remains higher than the average rate of children who are looked after across Wales last year. As a result, significant demand on Children's Services remains.</p>
<p>As a statutory partner of the regional safeguarding boards, continue to work with other statutory partners to ensure that there are effective multi-agency safeguarding arrangements and that they are working well.</p> <p>Share learning and development in safeguarding.</p> <p>Implement the recommendations and learning from any Domestic Homicide review, adult practice review or child practice review that is undertaken under the safeguarding board.</p>	<p>Chief Officer, Social Care, Health & Safeguarding</p>	<p>Ongoing</p>	<p>There continues to be full representation at all levels of the work of the regional safeguarding board. There is strong engagement in regional approaches to addressing the risks of sexual and criminal exploitation of children; Modern Day Slavery; Violence Against Women Domestic Abuse; Sexual Violence (VAWDASV); and Contest (PREVENT anti radicalisation).</p> <p>The Monmouthshire Exploitation Group (MEG) has been implemented, with representation from the Safeguarding Unit, Public Protection, Partnerships, Police, Gwent Missing Children's Team, Education and community-based teams. This group has overseen the development of a Monmouthshire Protocol for responding to Modern Day Slavery and Exploitation.</p> <p>The Council's safeguarding unit supports quarterly safeguarding learning networks to share learning and developments in safeguarding across agencies.</p>

Ref & Status	7	Risk	Potential: Risk of harm if we are unable to meet the care and support needs of some vulnerable children due to an increase in demand and complexity of cases						
Risk Owner and cabinet Member responsible	Jane Rodgers (Chief Officer Social Care, Safeguarding & Health), Cllr Ian Chandler (Cabinet Member for Social Care, Safeguarding and Accessible Health Services)		Scrutiny Committee	People Scrutiny Committee		Strategic objective	A Connected Place Where People Care		
Reason why Identified									
<p>The council is supporting 204 children who are looked after (September 2023). The number has stabilised in recent years, although it remains higher than the average of children who are looked after across Wales. The number of unaccompanied asylum-seeking children (UASC) being looked after by the local authority is increasing and is currently 17.</p> <p>The 2022/23 budget for Children's services was £17.8m. Despite receiving an additional £1m in grant funding to support the development of services to support the eliminate agenda, there was an overspend at outturn of £4.147m. This was mainly as a result of increased demand very high-cost placements for children who are looked after. The workforce position within children's services also remains challenging, with increasing reliance on employing agency workers which has a significant impact on the budget.</p> <p>There is an insufficiency of placements for children who are looked after at a local, regional and national level, particularly those with complex needs or disabilities. Because of this, there is a risk that we may need to place children in unregistered provision in emergency situations. This is likely to be exacerbated by the Welsh Government's policy commitment to eliminate profit from the care of looked after children which could lead to instability within the market. This creates an on-going risk for the council that is difficult to fully mitigate at present.</p>									
Risk Level (Pre-mitigation)					Risk Level (Post-mitigation)				
Year	Likelihood	Impact	Risk Level	Risk Score	Year	Likelihood	Impact	Risk Level	Risk Score
2023/24	Likely	Major	High	12	2023/24	Likely	Major	High	12
2024/25	Likely	Major	High	12	2024/25	Likely	Major	High	12
2025/26	Likely	Major	High	12	2025/26	Likely	Major	High	12
Mitigating Actions									
Mitigating Action			Responsibility Holder	Timescale	Mitigation action progress				
Continue to implement the fostering strategy on the recruitment, retention and skills development of in house fostering.			Head of Children's Services	Ongoing	<p>Where Monmouthshire children are not able to remain with their families, providing in-house fostering services is always our first choice. However, there is an insufficiency of in-house carers in Monmouthshire, particularly carers who are able to provide more specialist care or look after sibling groups; in 22/23, there was 1 generic foster carer approved at panel, and so far in 23/24, a further 1 generic foster carers has been approved. This creates an over-reliance on private and independent providers where the right placement for a child cannot be assured.</p> <p>The council is working with Foster Wales to run active campaigns to increase the rates of in-house foster carers to provide accommodation and support to children requiring it. The team is focused on ensuring that prospective foster carers are responded to and supported from the point of enquiry, through the rigorous assessment process and onto approval and first placement. To encourage our fosters carers to continue in their valuable roles, we are working at a local and regional level to ensure that our on-going offer to foster carers – both financial and practical – is as good as it can be.</p>				
The service continues to strengthen its preventative offer to support children living safely at home, with their families and communities, and continues to review and monitor the Children Looked after population in line with Welsh Government expectations around reduction			Head of Children's services	Ongoing	<p>The council is supporting 204 children who are looked after (September 2023). The number has risen substantially in recent years but has recently stabilised, although it remains higher than the average of children who are looked after across Wales.</p> <p>There is a coherent approach to early help and prevention to support families. This allows families to receive support at the right level of intensity to enable parents to provide their children with the safety, nurture and care then need. Services are in place to support the rehabilitation of children following periods of being looked after e.g. Building Stronger Families; to provide medium-term holistic support to families making sustainable change e.g. Achieving Change Together Team; and to provide a therapeutic response to parents and carers in supporting children with trauma presentations e.g. MyST.</p>				

			Over the next year, family support will be further strengthened to provide intensive community supervision and support to children. The focus remains on practice development and the importance of relationships - how we work with families to support their strengths, manage risks and achieve good outcomes, reducing the need for children to be looked. An additional focus over next period will be to increase resilience within Child Protection services as we continue to work with increased levels of risk and vulnerability within the community.
Develop and expand the Children's Services Commissioning Strategy in response to the intention to eliminate profit from children's social care	Head of Children's services	Five years	<p>We have a commissioning strategy in place to help us understand our placement requirements moving forward. This is aligned with Welsh Government's ambition to eliminate profit from children's care. Two children's homes have been commissioned this year through partnership models, one of which was a specialised provision for children with very complex needs. Further opportunities to develop residential and supported accommodation placements are in place.</p> <p>Work is underway to develop further residential placement opportunities for children who are looked after. The commissioning strategy includes increasing the numbers of in-house carers and the expansion of residential and supported accommodation options within the county. There are huge challenges with this work particularly around workforce, resources and the time it takes to develop provision. Whilst we continue to take steps to prevent children coming into care and reduce the numbers of children in care, the demand for appropriate placements remains high in a low supply environment.</p>

Ref & Status	8	Risk	Potential: Risk of harm if we are unable to meet the care and support needs of some vulnerable adults due to an increase in demand and complexity of cases						
Risk Owner and cabinet Member responsible	Jane Rodgers (Chief Officer Social Care, Safeguarding & Health), Cllr Ian Chandler (Cabinet Member for Social Care, Safeguarding and Accessible Health Services)		Scrutiny Committee	People Scrutiny Committee	Strategic objective	A Connected Place Where People Care			
Reason why Identified									
Referrals to Adult's Services have increased over recent years, and services are facing unprecedented pressure as a result. There are waiting lists in place for social care assessments and some people are having to wait for services to meet their assessed needs, particularly care at home/domiciliary care. Monmouthshire has specific challenges in providing sufficient home care due to rurality and demographics. Demand following the pandemic and the increase in acute respiratory illnesses, together with the aging demographic has increased the complexity of presenting need, and services are under immense pressure as a result, which is causing delays in service provision.									
The fragility of the social care sector and the availability of care staff remains a key risk. Difficulties in recruiting and retaining staff in care posts has exacerbated the pressure, and this is being impacted by, and impacting upon, hospital discharge protocols. The current financial context for both health and social care places restrictions on the ways in which services can respond to need.									
Risk Level (Pre-mitigation)					Risk Level (Post-mitigation)				
Year	Likelihood	Impact	Risk Level	Risk Score	Year	Likelihood	Impact	Risk Level	Risk Score
2023/24	Almost certain	Major	High	16	2023/24	Likely	Major	High	12
2024/25	Almost certain	Major	High	16	2024/25	Likely	Major	High	12
2025/26	Almost certain	Major	High	16	2025/26	Likely	Major	High	12
Mitigating Actions									
Mitigating Action		Responsibility Holder		Timescale	Mitigation action progress				
Work with Welsh Government to recruit and retain care staff		Chief Officer, Social Care & Health		Ongoing	<p>Recruitment and retention of care staff has been a considerable concern for some time. In terms of ensuring that we have the sufficient workforce, particularly in key posts around direct care, mental health, team leader posts and occupational therapy, this is an on-going endeavour. The perceptions of working in social care tend to be negative; however, we are to trying to counteract these negative perceptions and demonstrate the opportunities, career progression, work life balance and job satisfaction that people experience who work within the sector. Attraction and recruitment of people into the social care sector continues to be a challenge.</p> <p>We were successful in securing a grant from social Care Wales to film a video to challenge these perceptions and support the recruitment of people into the sector. The impact of this video saw a 700% increase of applications within a 1 month period. We have developed a recruitment and retention strategy for our social</p>				

			care workforce, with a particular focus on addressing areas where there is high demand. At March 2023 the number of vacancies across the social care sector was 56; this has decreased to 20 in October 2023.
Work to address the difficulties in the health and social care system through the Regional Partnership Board and its sub-groups.	Chief Officer, Social Care & Health Head of Adult Services	Ongoing	There are on- going regional partnership meetings to identify and address difficulties across health and social care. These include Gwent Adult Service Partnership, and at a local level the Integrated Services Partnership Board. At a local and regional level, grant money received via the Regional Partnership Board is used to best effect to meet population needs and respond to demand pressure in areas such as hospital discharge and winter planning.
Monitor requests for Domiciliary Care to ensure demand is being met and delays are minimised	Chief Officer, Social Care & Health	Ongoing	On-going pressure across the social care and health system, together with workforce shortages in some areas, has meant that we continue to face a number of challenges in being able to respond to people's care and support needs as timely as we would want. All referrals are triaged at point of referral to ensure that those in most need are prioritised for assessment and intervention. Access to care and support is not always timely; the number of hours of unmet care needs reached nearly 1,200 hours per week earlier in the year; this has subsequently been reduced to 804 hours at the end of March 2023. We are undertaking case reviews and applying the principles of the Social Services and Well-being Act to ensure a strengths-based approach looking at individual, family and community based support where appropriate. We are working to ensure that for both in-house and providers services, home care runs are coordinated as efficiently as possible.
Implement a 'place-based' approach to create sustainability in care at home services	Chief Officer, Social Care & Health	Ongoing	The Council remains committed to developing a more sustainable care at home sector for the future. A place-based approach is being progressed that encompasses all aspects of the community, including third sector, housing, education, residential settings and the community itself. This also needs to allow those wishing to live independently the opportunity to shape their own support to meet their own goals and desires. A micro-carer pilot was launched in April 2022. A micro carer is a self-employed care worker that provides flexible, personalised support and care to citizens who live in their local area. The micro-carer project supports the 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. In the first year 9 micro carers have been entered on to the micro care directory and are now delivering care and support. There are currently 21 people being supported by micro-carers in their local community, delivering 161 hours of care and support in total each week.
Ensure the long-term sustainability of social care providers	Chief Officer, Social Care & Health & Head of Public Protection	Ongoing	It is vital that social care providers are able to provide care and support after the period of the pandemic and as such the council has a role in ensuring their financial sustainability through fair fee negotiations and supporting with recruitment and training. We build positive relationships with our local providers and intervene and provide support where difficulties emerge. We have effective contract monitoring in place, based on partnership approaches.

Ref & Status	9	Risk	Potential Risk that: High absence rates, particularly among vulnerable pupils, including those eligible for free school meals, and the increase in episodes of behaviours that challenge in schools as a result of the continuation of trends that first emerged during the pandemic will result in a worsening of educational attainment			
Risk Owner and cabinet Member responsible	Will Mclean (Chief Officer Children & Young People) & Cllr Martyn Groucutt (Cabinet member for Education)	Scrutiny Committee	People Scrutiny Committee	Strategic objective	A Learning Place	
Reason why Identified						
The pandemic caused widespread disruption to learning, with a significant effect on both teachers and learners. Vulnerable learners have been particularly affected, with the gap in attainment between vulnerable pupils, including those eligible for free school meals, and those without vulnerabilities widening. longer-term effects of the pandemic on pupil well-being and attendance have emerged. 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.						

The new curriculum was rolled out from 2022. The disruption resulting from the covid-19 pandemic may impact on the ability of some schools to fully and effectively implement the curriculum and this will need to be monitored throughout the remainder of the academic year. Given the external pressures of the new curriculum and the wider aspects of the reform agenda, such as the introduction of the ALN Act, some schools may not return to levels of teaching and learning that were seen prior to the pandemic as quickly as necessary. This also recognises that there will be significant pressures on schools to support accelerated learning and wellbeing provision.

There is an increasing demand for support for children with additional learning needs. There are also challenges in meeting the demand for Welsh Medium education provision in the future.

Estyn's report into Local Government Education Services in Monmouthshire County Council was published in April 2020. The report concluded that the authority's education service does not give cause for significant concern. There are four recommendations for development:

- Improve outcomes for pupils eligible for free school meals;
- Further strengthen the focus on increasing the number of pupils achieving excellent standards;
- Articulate a clear strategy for SEN provision;
- Strengthen the use of information gathered through self-evaluation to better inform improvement planning

Risk Level (Pre-mitigation)					Risk Level (Post-mitigation)				
Year	Likelihood	Impact	Risk Level	Risk Score	Year	Likelihood	Impact	Risk Level	Risk Score
2023/24	Almost certain	Major	High	16	2023/24	Almost certain	Major	High	16
2024/25	Likely	Major	High	12	2024/25	Likely	Major	High	12
2025/26	Likely	Major	High	12	2025/26	Likely	Major	High	12
Mitigating Actions									
Mitigating Action		Responsibility Holder		Timescale	Mitigation action progress				
Continue to support schools through the ongoing and evolving demands of the pandemic		EAS & MCC		Ongoing	September 2022 saw the return to school without COVID management requirements. This enabled schools to focus on the delivery of the new curriculum and excellent teaching and learning. Estyn has returned to a full inspection cycle and three Monmouthshire schools were inspected in the summer term of the academic year 2021/22. Two of those schools was placed into a statutory category, one requiring Special Measures, and the other Significant Improvement. These schools will now be subject to an extensive monitoring process to ensure that its recovery is robust and sustainable.				
Work with Education Welfare Services to ensure that pupils attend school regularly and are able to access excellent teaching and learning.		Head of Achievement and Attainment		Ongoing	Attendance is still a legacy of the pandemic and an issue in schools. Education Welfare Officers are working with vulnerable pupils to bring them back into the educational setting, where possible. There are varying reasons for pupil absence, so a different approach is being adopted for different cohorts, and the Education team are working with multiple agencies to ensure these children and young people return to school. The teams are focused on the appropriate interventions for learners but there has also been work undertaken to provide additional depth and breadth to our understanding of the full range of reason for absence such as those reasons that are emotionally based.				
Support learners' wellbeing through excellent teaching and learning and through wider school-based activity		Head of Achievement and Attainment Head of Inclusion		Ongoing	It is vital that all Monmouthshire settings understand that the principal means of supporting wellbeing in school is through excellent and engaging teaching and learning for all learners. There will be times and areas where this has to be supported and developed by other interventions. 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 our schools has been positive: we currently have 43% of schools working with the team.				
Ensure the agreed arrangements with the Education Achievement Service (EAS) continue to challenge and support schools		EAS & Chief Officer, Children and Young People		Ongoing	Working with the local authority, EAS continue to provide ongoing challenge, monitoring and evaluation work in schools with a continued particular focus on vulnerable learners. All schools will continue to be provided with a bespoke support package that compliments the priorities identified within their own School Development Plans (SDPs) in line with the levels of support they require. There is a degree of flexibility within the deployment model to allow for in-year changes in circumstances and to allow for changes in light of the pandemic. Schools have prioritised the wellbeing of all pupils as a pre-requisite for effective learning. This includes the development of a flexible approach to curriculum delivery, suitable for use in a range of contexts, and additional support to close the gap, to recover and to raise standards for priority groups.				

Develop and implement plans to address the recommendations in Estyn's report into Local Government Education Services	EAS & MCC	Ongoing	<p>Monmouthshire County Council underwent an Estyn inspection in February 2020 and ordinarily, would focus on meeting the report's recommendations. The themes from the inspection included pursuing excellence, creating an holistic vision and strategy for learners with additional learning needs, securing better outcomes for our learners eligible for free school meals (FSM) and improving the way we use data in our evaluations. Draft ALN and FSM strategies have been scrutinised by Children and Young People Select Committee and continue to be developed in response to the impact of COVID-19. We also continue to develop leadership across our schools and create better learning environments for all our learners.</p> <p>The action plan to address the recommendations from the Estyn inspection is being implemented. Recent Estyn reports indicate that learners eligible for free school meals are making good progress in their learning. The restructure and creation of a broader Inclusion Team has meant that the articulation of an ALN strategy will now form part of a broader umbrella suite of interconnected strategies and related toolkits/resources/policies. The Inclusion Team is developing this currently. Evaluation sits at the heart of understanding how well our service works and the impact that we are having on our learners' progress and the effectiveness of the services we run. The recently adopted Community and Corporate Plan now provides a clear framework for action and evaluation of services to ensure that we are working most effectively in the areas of need.</p> <p>It is harder to form an overall view against our Estyn recommendations due to their areas of focus: progression of FSM learners and excellent standards requiring more extensive access to schools to understand and evidence their progress.</p>
Ensure that the Additional Learning Needs review delivers sustainable, adequate and appropriate support to pupils with Additional Learning Needs	Head of Achievement and Attainment	Ongoing	<p>The new ALN Strategy identifies four distinct and ambitious work streams, all of which aim to build sustainable and resilient provision and are now embedded in the business plans of the ALN and Educational Psychology Services. The Emotionally Based School Avoidance (EBSA) cross-directorate initiative has been developed as part a whole school, whole authority approach to promoting attendance and well-being in Monmouthshire schools. The Education Psychology Service's training platform has continued to be developed, which provides information on support for well-being, as well as other key issues.</p> <p>The ALN team have been a key part of the regional preparations and developments for the new ALN and Tribunal Act legislation, which was implemented in September 2021. In preparation for the implementation of the Act, all Monmouthshire ALN Coordinators have been provided with an extensive range of training through the regional ALN transformation initiative, and Headteachers have been kept up to date with developments associated with ALN implementation through head teacher meetings and targeted communications.</p> <p>Our model of specialist provision places specialist resource bases (SRBs) at the heart of identified mainstream schools. There is a need to ensure the quality of ALN provision in SRBs is consistent across the county. We are prioritising the development of a framework for the management of SRB provisions which ensures a consistent, equitable approach across all settings. There remains increased demand for specialist provision places. We are developing our forecasting of complex ALN needs to help inform provision required to meet need.</p>
Continue to monitor the implementation of the new school curriculum	EAS & Chief Officer, Children and Young People	Ongoing	<p>The new curriculum was implemented in September 2022, which was a significant challenge. The position of schools in implementing the new curriculum was varied; some were in a strong position as they had undertaken significant work prior to the pandemic; others less so and will require additional support and time to bring them up to speed. For those schools that have been unable to move forward at pace, there is bespoke support available, and a framework around them to continue the move forward at their own pace. Schools will have support from their school improvement partner or their school-to-school link. School development planning guidance has been provided to help with strategic planning over the next year, and there is a national professional learning programme for senior leaders, headteachers and middle leaders. Professional learning support is also available for Teaching Assistants. Estyn inspections of nine primary and two secondary schools indicate that most schools have a clear vision for the curriculum.</p> <p>The Council and EAS continue to work with schools in ensuring that they are successfully implementing the new curriculum and meeting the needs of students. The authority has commissioned from the EAS a county</p>

			wide review of teaching of learning in all schools. Around 50% has been completed but progress has slowed due to industrial action. EAS and the council continue to monitor the progress schools are making towards the implementation of the curriculum and identify those who may need additional support.
Deliver the Welsh Education Strategic Plan (WESP) in collaboration with neighbouring authorities	Head of Achievement and Attainment	Timescales as per WESP	The agreed WESP is a long-term planning tool, which sets our direction for the next 10 years. It is an ambitious plan and interfaces clearly and closely with the local authority five-year Welsh language strategy, which is currently being reviewed. Despite the short timescale, progress has been made in many areas. This includes the expansion of provision of Welsh medium education. The refurbishment of Ysgol Gymraeg Y Ffin to increase the capacity of the school to 210 places from Reception to year 6 is complete. We have secured additional Welsh Government funding for three years to continue the Immersion class in Y Ffin and extend this provision in other areas of the county. We are consulting on a seedling school in Monmouth town, with the plan for it and Cylch Meithrin opening in Monmouth town in September 2024. Progress in other areas of the plan is limited and, in a few, work is to commence during the next financial year.
Continue to improve the quality of self-evaluation in the Children and Young People (CYP) directorate.	Chief Officer Children & Young People	Ongoing	The Chief Officer's report provides an assessment of performance in the Children & Young People directorate. It captures the emergence from the pandemic and the challenges that remain for the local authority. It also assesses performance in line with the emergent Corporate Priorities of the newly elected administration. An evaluation of the progress of CYP in meeting the wellbeing objectives of the Council formed part of the Self-assessment Report which was presented to Council in October 2023.

Risks to policy priorities

Ref & Status	10	Risk	Potential Risk that:			
			<p>a) The council is unable to proceed with the Deposit Replacement Local Development Plan due to a failure to identify and agree suitable Gypsy, Roma and Traveller sites</p> <p>b) The council does not support the Deposit Replacement Local Development Plan</p> <p>c) Delays to the adoption of a Replacement Local Development Plan (RLDP) inhibits our ability to take forward key policy objectives such as job creation and affordable housing development</p> <p>d) High phosphate levels in the rivers Usk and Wye limit development opportunities within a significant proportion of the county</p>			
Risk Owner and cabinet Member responsible		Mark Hand (Head of Placemaking, Regeneration, Highways and Flooding) and Cllr Paul Griffiths (Cabinet member for Planning and Economic Development)	Scrutiny Committee	Place Scrutiny Committee	Strategic objective	A Safe Place to Live A Thriving and Ambitious Place
Reason why Identified						
The current Local Development Plan ran until 31st December 2021; it will remain the principal development plan for decision-making purposes until the adoption of the Replacement Local Development Plan (RLDP). This does not change the urgent need for the council to make timely progress on its RLDP and to adopt it as soon as realistically possible to address key issues and challenges, including rebalancing our demography and responding to the climate emergency, and to meet the future needs of the county.						
Factors contributing to the delays include:						
<ul style="list-style-type: none"> The Covid-19 pandemic delayed progress of the Replacement Local Development Plan (RLDP) by interrupting programmed public engagement. Updated evidence, for example the Welsh Government published the corrected 2018-based population and household projections in August 2020. This new data resulted in the need to revisit the Growth and Spatial Options and Preferred Strategy stages of the RLDP process in 2021. Welsh Government challenged the level of development in the June 2021 Preferred Strategy on the basis that it is not consistent with Future Wales: the National Plan 2040, which identifies that new housing development, essential services and facilities, advanced manufacturing, transport and digital infrastructure should be in Newport, Cardiff and the Valleys. A revised preferred strategy was therefore required. High levels of phosphates in the rivers Wye and Usk have resulted in Natural Resources Wales placing restrictions on development that can take place within the catchment area. Local elections and the need to ensure the RLDP direction of travel aligns with the new Administration's priorities. Delays to the council identifying and agreeing appropriate Gypsy, Roma and Traveller sites 						

- Multiple organisations and funding mechanisms beyond the Council’s remit are involved in delivering infrastructure improvements

The Council is now proceeding with a new Preferred Strategy that responds to the Welsh Government objection and unresolved water quality constraint in the upper River Wye catchment. A revised Delivery Agreement has therefore been prepared which sets out an amended timetable for Plan preparation. The revised timetable shows that the adoption of the RLDP is anticipated in Summer 2025. This unavoidable delay will impact on the Council’s ability to address the identified issues and objectives until the RLDP is adopted and puts pressure on the deliverability of the housing and employment figures over the Plan period, with more reliance on delivery towards the end of the Plan.

There are a range of issues and challenges the RLDP will need to address:

- The delivery of affordable housing continues to be a concern. There are a significant number of households on the Councils waiting list, and there are limited remaining opportunities within the current LDP to deliver affordable homes because most strategic sites have been delivered and the remaining few cannot currently proceed due to phosphates.
- There is a recognised lack of suitable employment land in the northern part of the County (Abergavenny and Monmouth in particular). Delays to the RLDP mean that new allocations to attract investors or retain growing businesses will not be available. There may be some scope for employment sites to come forward adjacent to settlement boundaries outside of the current LDP allocations but in parts of the county these are affected by phosphate restrictions.
- The RLDP will identify areas with potential for renewable energy. A delay to the RLDP will have limited impact in this regard because renewable energy schemes such as solar farms can come forward for consideration via the existing LDP and under national planning policy.
- There is a need to ensure the RLDP’s growth ambition is matched by infrastructure delivery, much of which is delivered by other bodies. This alignment is required to ensure sustainable development to support future economic, social, environmental and cultural well-being.

Risk Level (Pre-mitigation)					Risk Level (Post-mitigation)				
Year	Likelihood	Impact	Risk Level	Risk Score	Year	Likelihood	Impact	Risk Level	Risk Score
2023/24	Likely	Major	High	12	2023/24	Likely	Major	High	12
2024/25	Likely	Major	High	12	2024/25	Likely	Major	High	12
2025/26	Likely	Major	High	12	2025/26	Likely	Major	High	12

Mitigating Actions

Mitigating Action	Responsibility Holder	Timescale	Mitigation action progress
Prepare a replacement Local Development Plan to address the county’s issues/challenges, including in relation to the provision of housing (market and affordable) and employment opportunities, and to facilitate the identification and allocation of additional housing land and appropriate employment land, with associated infrastructure.	Head of Placemaking, Regeneration, Highways and Flooding Head of Planning	Summer 2025	<p>A Preferred Strategy was subject to statutory public consultation and engagement for 8 weeks during July – August 2021. The Second Call for Candidate Sites commenced alongside the Preferred Strategy consultation. Approximately 450 responses were received to the Preferred Strategy consultation. Approximately 150 candidate sites proposed for development were submitted, together with 8 candidate sites for protection.</p> <p>Following the consultation/engagement on the Preferred Strategy, a number of challenges arose which have impacted on the progression of the RLDP and require further consideration, including the Welsh Government objection to the Preferred Strategy level of growth and phosphate water quality issues in the Rivers Wye and Usk.</p> <p>In response, an amended Preferred Strategy was endorsed by Council in December 2022 for consultation in December 2022 and January 2023. The amended Preferred Strategy has regard to the above challenges, whilst also ensuring that the RLDP delivers on the Council’s objectives and addresses the core issues of delivering much needed affordable housing at pace and scale, responding to the climate and nature emergency by delivering zero carbon ready new homes for our communities, and ensuring our communities are socially and economically sustainable by attracting and retaining younger people to rebalance our ageing demographic. This strategy also provides the strategic direction for the development and use of land in Monmouthshire (excluding the area within the Brecon Beacons National Park) over the Plan period 2018 to 2033 and identifies how much sustainable growth is needed and where this growth will broadly be located.</p> <p>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 presented for Council approval 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.</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 for consultation by Cabinet following assessments by officers of council owned land. These sites are now subject to six weeks of 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>Work with partner organisations to identify and implement solutions to phosphate pollution in the Rivers Usk and Wye</p>	<p>Head of Placemaking, Regeneration, Highways and Flooding</p> <p>Head of Planning</p>	Ongoing	<p>Natural Resources Wales (NRW) announcement of water quality (phosphate) issues in Riverine Special Areas of Conservation, including the River Wye and River Usk, has significant implications for the progression and implementation of the RLDP. The Preferred Strategy that we consulted on in July-August 2021 directed future growth to key sustainable settlements (including Abergavenny and Monmouth) within these affected catchment areas over the plan period (2018-2033). The council is proactively liaising/working with various organisations, including NRW, Welsh Water and Welsh Government, and local authorities and the development industry, to seek solutions/a way forward with this issue.</p> <p>Without a solution to phosphate levels, the RLDP Preferred Strategy is unable to deliver the Council's objectives, including the delivery of new affordable homes, in those settlements in the phosphate affected upper River Wye catchment. At the time of preparing the Preferred Strategy, there is no identified strategic solutions to the treatment of phosphates in the upper River Wye catchment area during the Plan period, this shortcoming is unavoidable. In contrast, strategic solutions are being developed to enable the treatment of phosphates in the River Usk catchment area. This will enable sustainable growth within the most sustainable settlements within the River Usk catchment area over the Plan period. The southern part of the County where the rivers are tidal remain unaffected by this constraint.</p> <p>If a strategic solution to the phosphate issue is secured in the Monmouth Wastewater Treatment Works during the Plan period, three named existing Monmouth sites are identified in the amended Preferred Strategy which, along with windfall sites within settlement boundaries, could be developed.</p> <p>In March 2022, a Motion for the Rivers and Ocean was declared, followed by a draft action plan in September which outlined the steps the Council will take to protect our rivers and ocean. The plan outlines exactly how the Council will work with partners and organisations to tackle the issues currently preventing development in both the river Wye and Usk catchments and how it will work proactively to seek solutions to river pollution. It has recently been restructured to ensure clarity on where we lead, where we are partners and where we lobby. The updated action plan will be presented to Place Scrutiny in January.</p> <p>One of the challenges in tackling this issue has been learning our role. The principle causes of the phosphate issues are largely out of the council's direct control and arise outside the county – around 66-70% of the problem is as a result of agriculture based upstream from Monmouthshire, where we have no legislative control. Given the council's limited control of the issue, we have focused on working with partner organisations such as Welsh Government, National Resources Wales and Dŵr Cymru to influence and collaborate on finding an effective solution.</p>
<p>Ensure RLDP growth ambition is met by essential infrastructure</p>	<p>Head of Placemaking, Regeneration, Highways and Flooding</p> <p>Head of Decarbonisation, Transport and Support Services</p> <p>Head of Enterprise and Community Animation</p>	February 2024/ ongoing	<p>Close working is being undertaken on infrastructure between the Local Planning Authority and colleagues in the Local Education Authority, Aneurin Bevan University Health Board, Highways Authority, Passenger Transport Unit, Active Travel Team, SUDs Approval Body and Green Infrastructure team.</p> <p>A Local Transport Plan will be presented for scrutiny in November 2023 before being presented to Cabinet in February 2024.</p> <p>An Employment, Economy & Skills Strategy will be presented for scrutiny in November 2023 before being presented to Cabinet in February 2024.</p>

- a) The council is unable to deliver its commitment to decarbonise its operations in sufficient time to achieve net zero by 2030 because our resources are not commensurate with the scale and complexity of the challenge
- b) The Council is unable to deliver services as a result of the increasing frequency of climate-related emergencies such as floods or extreme heatwaves that increase the demand for emergency responses and can cause damage to infrastructure and the closure of facilities

Risk Owner and cabinet Member responsible	Strategic Leadership Team & Cllr Catrin Maby (Cabinet member for Climate Change and the Environment)	Scrutiny Committee	Place Scrutiny Committee	Strategic objective	A Green Place to Live
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Reason why Identified

Tackling climate change and moving to a low carbon economy is one of the biggest challenges facing our society. Rising temperatures and more extreme weather events bring increased risks to our communities and are causing long-term and potentially irreversible damage to our planet’s eco-systems, with significant local impacts such as flooding and loss of species. If we are to stand a chance of slowing the rise in the Earth’s temperature, we need to act now. In 2019, councillors were unanimous in declaring a climate emergency. The council will strive to reduce its own emissions and work with communities and local businesses to help them reduce their emissions. This will require engagement, community involvement and commitments from third parties. Current modelling predicts a continuously increasing Council budget deficit, with many pressures on the Council’s budget. The council’s medium-term financial planning needs to be developed, reflecting realistic and accurate funding requirements, to allow a structured and planned approach to service delivery in the medium term, in line with corporate priorities.

When considering climate change, it is important to consider both how Monmouthshire is contributing to climate change, but also how resilient the county is to the likely impacts of climate change. Extreme weather, such as flooding and the record high temperatures in Summer 2022, can impact significantly on infrastructure, homes and businesses, along with disruption to community life and public services, particularly critical public services people rely on such as care services.

Risk Level (Pre-mitigation)					Risk Level (Post-mitigation)				
Year	Likelihood	Impact	Risk Level	Risk Score	Year	Likelihood	Impact	Risk Level	Risk Score
2023/24	Almost certain	Major	High	16	2023/24	Almost certain	Major	High	16
2024/25	Almost certain	Major	High	16	2024/25	Almost certain	Major	High	16
2025/26	Almost certain	Major	High	16	2025/26	Almost certain	Major	High	16

Mitigating Actions

Mitigating Action	Responsibility Holder	Timescale	Mitigation action progress
Deliver the Monmouthshire County Council Climate Emergency Strategy	Head of Decarbonisation, Transport and Support Services	Timescales as per strategy	<p>The climate emergency action plan was updated in 2021, informed by extensive community engagement and the latest evidence, including the impact of the coronavirus pandemic, ensuring actions remain up to date. We have made good progress on some of the actions in the plan.</p> <p>We have developed baseline carbon emissions data for 2019/20, and reported emissions to Welsh Government in 2020/21, 2021/22 and 2022/23, but there is not yet enough detailed understanding about the extent to which some of the actions in the plan reduce emissions to understand the precise impact some of the work we are undertaking is having. This makes it difficult to ensure activity and resources are focused in the right areas. We are sourcing additional expertise and capacity to help develop trajectories and pathways to the 2030 net zero carbon target. This will enable us to establish where we should best be focusing our resources to generate the maximum carbon savings. A carbon footprint data baseline assessment will be completed. Costed trajectory plans are currently underway which will be completed by the end of the financial year.</p> <p>Work to reduce carbon emissions at a regional level continues through the work of the Gwent Public Service Board (PSB) who have identified climate and environment as one of their two key priorities. This work is strengthened through the development of a Gwent PSB Wellbeing Plan which was approved by Council in June 2023 before being approved by the Gwent PSB. In addition, there is also collaboration across the Cardiff Capital Region to reduce carbon emissions, including the development of Local Area Energy Plans.</p> <p>A new Community and Corporate Plan was approved by Council in April 2023 which has set updated well-being objectives for the Council. The Climate Emergency Strategy is being reworked into an overarching Climate and Nature Emergency Strategy to align with the new Community and Corporate Plan, and is due to be completed by Autumn 2023. This reworked strategy will be underpinned by 4 action plans to better reflect the breadth of work that is taking place: Internal decarbonisation, Biodiversity and Nature Recovery, Rivers and Oceans and</p>

			Community climate change. A mechanism to evaluate delivery of these outcomes will be established, including performance metrics where relevant.
Prepare and adapt for the impact of climate change.	Strategic Leadership Team	Ongoing	<p>In recent years, council services have considered what the potential risks to their services are, in order to start thinking about how to adapt to these risks. In 2021, some services updated these Climate Change Risk Assessments to allow service areas to better understand their necessary adaptation requirements. We are in discussion with Welsh Government to better understand their expectations around climate adaptation. We are also part of broader assessments of climate risk being carried out by the Cardiff Capital Region as part of their Carbon Disclosure Project commitments.</p> <p>The Replacement Local Development Plan has a key role to play in making sure our communities are sustainable and resilient to the impacts of climate change. Changes to national planning policy on flooding are still awaited, but officers intend to take a precautionary approach, avoiding all built development on greenfield sites at known flood risk. Welsh Government has produced The National Strategy for Flood and Coastal Erosion Risk Management in Wales, and in response, Monmouthshire is currently reviewing our Local Flood Risk Management Strategy and Flood Risk Management Plan; a new combined strategy document will be produced in 2024.</p> <p>Much of the work to coordinate emergency responses is organised through the Gwent Local Resilience Forum (LRF). We will continue to work with partners on the LRF to make sure that we are prepared for severe weather events.</p> <p>As part the reworking of the Climate Emergency Strategy, climate adaptation, which includes preparing and adapting for the impact of climate change, will be embedded across each of the 4 action plans. Some of the actions within this include developing the management of green infrastructure to improve climate resilience; increasing urban tree canopy, including new street trees and in car parks to provide a cooling effect; and continuing to promote and support council services with business continuity and emergency response strategies.</p>

Ref & Status	12	Risk	Potential Risk that: The rising cost of living tips more families into crisis requiring public service interventions which diverts resources from other policy priorities						
Risk Owner and cabinet Member responsible	Frances O’Brien (Chief Officer Communities and Place) & Cllr Angela Sandles (Cabinet member for Equalities and Engagement)		Scrutiny Committee	People Scrutiny Committee		Strategic objective	All		
Reason why Identified									
<p>Monmouthshire is a beautiful county, blessed with strong communities and a competitive local economy. However, the county’s relative affluence compared to much of Wales, when viewed through the lens of aggregated data, masks the day-to-day reality and lived experience of those citizens who are experiencing poverty, financial hardship and who do so in the context of the considerable financial inequality that exists within the county. 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 Monmouthshire’s particular challenge and one that we are determined to understand and address.</p> <p>For families on lower incomes the rising cost of living, including higher energy prices and cost of fuel, rising food prices and high inflation – risks adding additional financial pressures to households. This also follows financial challenges experienced through the pandemic. This is causing significant pressures and is resulting in an increasing number of families requiring additional public service support from services such as housing support, Mental health, health, debt advice and customer contact and support services. Many of these services have already seen increasing demands and complexity support required through the pandemic. The cost-of living will also impact Council staff, including costs for working, which could impact staff well-being and capacity to deliver services.</p>									
Risk Level (Pre-mitigation)					Risk Level (Post-mitigation)				
Year	Likelihood	Impact	Risk Level	Risk Score	Year	Likelihood	Impact	Risk Level	Risk Score
2023/24	Likely	Major	High	12	2023/24	Likely	Major	High	12
2024/25	Likely	Major	High	12	2024/25	Likely	Major	High	12
2025/26	Likely	Major	High	12	2025/26	Possible	Major	Medium	8
Mitigating Actions									

Mitigating Action	Responsibility Holder	Timescale	Mitigation action progress
Undertake data modelling to identify communities at greatest risk and use this to target pro-active responses such as commissioning of services	Head of Enterprise & Community Animation and Chief Officer People, Performance & Partnerships	Ongoing	We have undertaken extensive data analysis and qualitative research furthering understanding of inequality at a local level and how this affects people's lives. Close working with partners is being undertaken to help understand the situation and act accordingly (e.g. the number of food bank parcels issued, referrals for housing support, nature or queries to Citizens Advice, use of Register Social Landlords hardship funds).
To implement the discretionary Cost of Living Support Scheme	Head of Enterprise & Community Animation	Ongoing	<p>In July 2022, Cabinet agreed a Monmouthshire discretionary Cost of Living Support Scheme to distribute £498,551 of funding to support those most impacted by the Cost-of-Living crisis. The scheme has been designed following engagement with national and local partners, and stakeholders and comprises of direct payments and targeted resilience support in the county. This is in addition to the mandatory Welsh Government scheme, which provided funding to local authorities to provide a one-off £150 cost-of-living payment to all households in properties in Council Tax bands A to D, and to households in all Council Tax bands who receive support through our Council Tax Reduction Scheme.</p> <p>The Council is also delivering a range of activities to support residents including the Money Matters campaign which signposts to sources of support and further delivery of the campaign to staff in schools and other projects related to the costs of the school day. The Council also teamed up with Mind Monmouthshire and Citizens Advice Monmouthshire to set up cost of living support drop-in sessions at schools and leisure centres across the county. These sessions are available to all, including residents and colleagues, and 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. They also provide help and advice on getting back into work or more secure employment as well as emotional and wellbeing support.</p>
Work in partnership with community fridges to identify individuals and families in need of further support.	Head of Enterprise & Community Animation	Ongoing	<p>Community Fridges are citizen-led projects that seek to prevent food waste and to stop fresh food going to landfill. The food is accessible to the whole community with no means-testing. Whilst their ethos is primarily environmental, their presence in a community does have the ability to reduce the amount of money spent on essential outgoings for poorer families.</p> <p>Community Fridges are currently operating in Monmouth, Abergavenny, Caldicot, Goytre and Chepstow, with around 480 people visit a community fridge each week, with each fridge saving around 2 tonnes of food going to landfill per month. We have secured funding for consultancy support to help the community fridge volunteers and to look at sustainable funding options, common policies, practices and developing new fridges.</p> <p>There is a risk that community fridges support residents who otherwise would have reached the foodbanks, which require a referral process and can trigger more extensive support which may be required. We are working alongside the community fridges to sensitively support frequent users to connect with appropriate support, particularly through the Housing Gateway.</p>
Work with the Gwent PSB to use the Marmot Principles as the framework for action to reduce inequalities across Gwent	Chief Executive	Ongoing	Gwent Public Services Board (PSB) has formally agreed to become a 'Marmot Region', and to work in partnership with the Institute of Health Equity (IHE) to use the social determinants of health approach as the basis for the response to well-being and health inequalities in Gwent. The Gwent PSB have adopted the eight Marmot Principles as the framework for action to reduce inequalities across Gwent as part of the Gwent PSB Well-being Plan.

Ref & Status	13	Risk	Potential Risk that: Residents are unable to secure or retain suitable accommodation, leading to rising homelessness and outward migration as a result of failures in the housing market			
Risk Owner and cabinet Member responsible	Frances O'Brien (Chief Officer Communities and Place), Matthew Gatehouse (Chief Officer People, Performance & Partnerships) and Cllr Angela Sandles (Cabinet member for Equalities and Engagement)	Scrutiny Committee	People Scrutiny Committee	Strategic objective	A Safe Place to Live A Fair Place to Live	

Reason why Identified

The Council is currently experiencing significant challenges and risks in relation to homelessness. Initially due to the pandemic, Welsh Government required Councils to avoid people sleeping rough, then made the subsequent decision to transition homeless services with the aim of homeless becoming rare, brief and unrepeatable, together with an improvement in the quality of homeless accommodation. Welsh Government homeless policy changes through the Phase 2 Planning Guidance for Homelessness and Housing Support, whilst positive, has created challenges. Although homeless presentations have remained broadly consistent, the impact of Welsh Government policy has seen a significant increase in demand for homeless accommodation. This in turn has impacted significantly on the Housing Options Team operationally in respect the need to identify alternative accommodation, which largely has relied on B & B, re-housing households, housing management and placement break downs. This has also created placement and staffing challenges.

There are problems regarding the availability of temporary, supported and permanent accommodation, the type and quality of accommodation and the range of housing support available necessary to meet current and emerging homeless need. Further challenges are also being experienced in respect of acquiring existing accommodation and repurposing properties due to the buoyant market in Monmouthshire and constraints relating to funding eligibility and Planning. There are also delays in the construction of new homes due to labour and supply chain problems, and phosphates issues in the north of the county.

The Renting Homes Act, which came into force from 1 December 2022, has made significant change the way all landlords in Wales rent their properties. There is a risk this could impact on the private rented sector in the County and reduce the availability of rental properties, further decreasing housing availability and increasing accommodation challenges in the County. The Council is anecdotally seeing evidence of landlords leaving the market.

Monmouthshire has welcomed more refugees from Ukraine, in absolute terms, than any area in Wales apart from Cardiff. Hosts have opened their homes and all these refugees will need alternative accommodation when these temporary arrangements come to an end. In addition, many of those who have come through the Welsh Government Super Sponsor Scheme have found jobs and placed children in local schools, but are now struggling to find suitable accommodation and are faced with unaffordable rent prices in the private sector. A shortage of move-on accommodation combined with uncertainty over long-term funding will challenge our ability to provide suitable long-term accommodation for fleeing the war in Ukraine.

The widening of asylum dispersal from 2022 will put further pressure on the housing market as the council plays its part in assisting the Home Office to move asylum seekers from hotels and other unsuitable accommodation in line with aspirations for Monmouthshire to become a county of sanctuary.

Risk Level (Pre-mitigation)					Risk Level (Post-mitigation)				
Year	Likelihood	Impact	Risk Level	Risk Score	Year	Likelihood	Impact	Risk Level	Risk Score
2023/24	Likely	Major	High	12	2023/24	Possible	Major	Medium	8
2024/25	Likely	Major	High	12	2024/25	Possible	Major	Medium	8
2025/26	Likely	Major	High	12	2025/26	Possible	Major	Medium	8

Mitigating Actions

Mitigating Action	Responsibility Holder	Timescale	Mitigation action progress
Implement systems to meet the requirements of the new Phase 2 Homeless Transition Plan	Head of Enterprise & Community Animation	As per Homeless Transition Plan	<p>Welsh Government has released the Phase 2 Planning Guidance for Homelessness and Housing Related Support, which sets out their future homeless policy intentions. The core of the policy is rapid rehousing and to provide long-term accommodation with support if needed. The necessity to provide temporary accommodation continues to increase, and many applicants need specialist accommodation and housing support, which largely is not available in Monmouthshire.</p> <p>The Council's Phase 2 Homeless Transition Plan, seeks to address the identified issues listed above, and help to transform homeless services in Monmouthshire. We have worked with housing association partners to make additional social housing available for homeless households, and the proportion has increased from 47% in 2021/22 to 62% in 2022/23. Whilst positive, there is concern how much scope there is to allocate further social housing to homeless applicants without being overly detrimental to other housing need groups. We have remodelled housing support to include high-need accommodation for young people, dedicated substance misuse support, temporary accommodation support and re-settlement support. We have also expanded private sector accommodation under the Monmouthshire Lettings Service.</p> <p>There remain challenges that need to be addressed including the lack of temporary, supported and permanent accommodation, and the need to introduce either new support schemes or expand existing schemes for homeless applicants, particularly in respect of young people and those with mental health and substance misuse needs. Support is needed for those households in temporary accommodation, which there are currently 117.</p> <p>A Rapid Re-Housing Transition plan was taken to People Scrutiny in February, before being approved and adopted by Cabinet in April. This sets out the Council's five-year plan to prevent homelessness, increase accommodation and focus support, and includes active buy-in from wider agencies involving homelessness, for</p>

			example, the role of Health and Social Care is extremely important in homeless prevention and helping people (such as young people and those with mental health issues) maintain their existing accommodation.
Deliver the Housing Support Programme Strategy 2022-26 and action Plan	Head of Enterprise & Community Animation	As per Homeless Transition Plan	In July 2022 Cabinet approved the Housing Support Programme Strategy 2022-26. The document provides a single strategic view of the Council's approach to homelessness prevention, housing support service delivery, statutory homelessness functions (delivered by the Housing Options Team) funded through the revenue settlement and non-statutory preventative services funded through the Housing Support Grant (HSG) programme. The Council has and will continue to engage closely with Welsh Government in respect of the Council's HSG annual funding allocation, which at present is insufficient to meet identified support needs in the County.
Develop suitable accommodation for homeless people, including long-term housing for all those accommodated in temporary housing and specialist provision for those with additional needs	Head of Enterprise & Community Animation	As per Homeless Transition Plan	<p>A Rapid Rehousing Transition Plan was approved by Cabinet this year, which includes a detailed action plan setting out how the council will address the challenges it faces around homelessness and homeless accommodation. A young person's homeless panel has been established and work has been ongoing for six months. 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 influence work moving forward and will help us to focus resources where we are told 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 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 homelessness, 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.</p> <p>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 homeless combined with the increase in availability of both temporary and settled accommodation have both contributed to the reduced use of costly B&B accommodation.</p>
Prepare an RLDP to address the county's issues/challenges, including in relation to the provision of housing (market and affordable) and employment opportunities, and to facilitate the identification and allocation of additional housing land and appropriate employment land, with associated infrastructure.	Head of Placemaking, Regeneration, Highways and Flooding Head of Planning	Ongoing	Detailed update provided as in risk 10.
Work with Welsh Government, local sponsors and landlords to identify a range of accommodation to accommodate Ukrainian refugees.	Chief Officer People, Performance & Partnerships	Ongoing	The authority has been successful helping those fleeing the war in Ukraine to find properties in the area. This task has been made easier by the presence of a pool of local residents who have continued to provide accommodation and informal support under the Homes for Ukraine Scheme. Eighteen months after the schemes inception, there are presently 54 active hosts with many of these lasting beyond the initial 6 month commitment. In addition to making public appeals for hosts and accommodation, the Council is using Homes for Ukraine expressions of interest provided by Welsh Government to identify new host sponsors and Monmouthshire Lettings to engage with private landlords and identify self-contained accommodation as well as working with refugees to help them find their own accommodation with the help of financial contributions to rent and paying their bonds where they lack the financial means to do this.
Work with national providers and the Home Office to identify suitable accommodation for those fleeing persecution and ensure	Chief Officer People, Performance & Partnerships	December 2023	The Home Office has now made all local authorities Asylum Dispersal Areas. This has broadened the responsibility for accommodating asylum seekers in Wales which had previously been shouldered by a small number of authorities. At present the Home Office's chosen accommodation provider has been unable to

that appropriate support services, including trauma informed support, are available.			secure any suitable sites in Monmouthshire. Officers have regular meetings with the Wales Strategic Migration Partnership, Home Office and Clearsprings Ready Homes
			In September 2023 Council passed a motion committing the authority to formally becoming a county of sanctuary and we are presently working towards awarded criteria. This involves providing evidence that we are: Learning about what it means to be seeking sanctuary, both in general and specifically; Taking positive action to embed concepts of welcome, safety and inclusion. To take steps to ensure this progress remains sustainable; Sharing our vision, achievements, what we have learned, and good practice with other local authorities, the local community and beyond. The responsible cabinet member will continue to be briefed on progress in these areas of work to ensure the Council is doing everything it can to assist those fleeing war and persecution and ensuring that this is done in line with our commitments to community safety and cohesion.

Ref & Status	14	Risk	Potential Risk that: A reduction in public bus services as a result of a reduction in funding makes it harder for people to access key services across the county						
Risk Owner and cabinet Member responsible	Frances O'Brien (Chief Officer Communities and Place) and Cllr Catrin Maby (Cabinet member for Climate Change and the Environment)		Scrutiny Committee	Place Scrutiny Committee		Strategic objective	A Fair Place to Live A Green Place to Live A Thriving and Ambitious Place		
Reason why Identified									
Following a collapse in passenger numbers during the pandemic, the Welsh Government stepped in to provide support to bus operators through the Bus Emergency Scheme (BES). This scheme has now been replaced with the Bus Transition Fund, however operators are claiming substantially more than envisaged. This means that the fund will be spent by December 2023, leaving a funding shortfall of £150,000 for January-March 2024. From April 2024 the affordability of the existing network is unknown at this stage. There is a risk of a material reduction in public bus services as operators would cease to operate due to financial viability, or move to more profitable commercial or out of county routes, or home to school transport costs could escalate.									
Monmouthshire is a rural county where isolation can be exacerbated when people have limited access to affordable transport. A significant reduction in public bus services could result in the isolation of some members of our community, particularly those who are reliant on public transport to access key services. An effective public transportation system is also key to reducing the county's carbon emissions, which are relatively high per person, and becoming a greener place to live.									
Risk Level (Pre-mitigation)					Risk Level (Post-mitigation)				
Year	Likelihood	Impact	Risk Level	Risk Score	Year	Likelihood	Impact	Risk Level	Risk Score
2023/24	Almost certain	Substantial	High	12	2023/24	Almost certain	Substantial	High	12
2024/25	Almost certain	Substantial	High	12	2024/25	Almost certain	Substantial	High	12
2025/26	Almost certain	Substantial	High	12	2025/26	Almost certain	Substantial	High	12
Mitigating Actions									
Mitigating Action			Responsibility Holder	Timescale	Mitigation action progress				
Lobby Welsh Government for the funding shortfall in 23/24			Cllr Catrin Maby and Head of Decarbonisation & Transport	November 2023	A letter is being drafted outlining the position and concerns in Monmouthshire.				
Reviewing our networks and looking to enhance the demand responsive provision			Public Transport Planning Manager	Ongoing	A Review has commenced. The review is currently analysing patronage figures to assess which services will continue to receive public bus subsidy.				
Carry out tendering of bus services within the county			Public Transport Planning Manager	January 2024	Services are due to going out for tender on 13 th November at the same time as Newport and Torfaen.				

Ref & Status	15	Risk	Potential Risk of: An increase in the number of legal challenges to decisions resulting in delays and increased costs						
Risk Owner and cabinet Member responsible	James Williams (Chief Officer Law and Governance) & Cllr Mary-Ann Brocklesby (Leader)		Scrutiny Committee	All		Strategic objective	All		
Reason why Identified									

The Council has seen an increase in legal challenges in recent years. As plans are developed to address the financial challenges faced by the Council there is a risk that those challenges increase in frequency. These legal challenges expose the Council to legal and reputational risk, as well as taking increased time and cost to address.

Risk Level (Pre-mitigation)					Risk Level (Post-mitigation)				
Year	Likelihood	Impact	Risk Level	Risk Score	Year	Likelihood	Impact	Risk Level	Risk Score
2023/24	Likely	Substantial	Medium	9	2023/24	Possible	Substantial	Medium	6
2024/25	Likely	Substantial	Medium	9	2024/25	Possible	Substantial	Medium	6
2025/26	Likely	Substantial	Medium	9	2025/26	Possible	Substantial	Medium	6
Mitigating Actions									
Mitigating Action			Responsibility Holder	Timescale	Mitigation action progress				
Impact assesses service changes and policy decisions			Chief Officer People, Performance & Partnerships	Ongoing	An established Integrated Impact Assessment template and guidance is in place and is completed for all decisions that require an assessment. These assessments are challenged by a panel of policy officers prior to decision. There is a need to ensure impacts are assessed at the start and throughout the development of changes and policy to ensure any appropriate mitigation can be undertaken.				

Appendix 2: Strategic Risk Management Policy – Summary

This sets out the Council’s policy and approach to strategic risk management. A copy of the full policy and guidance is available to staff and members on the council’s intranet the Hub (Finance & Performance Management section – risk assessment)

Risk Management is the process of identifying risks, evaluating their potential consequences and determining the most effective methods of controlling them or responding to them. Strategic risks are those which affect the Council as a whole. Typically these will be key risks which could significantly jeopardise the Council’s ability to achieve its objectives, statutory plans and/or provide operational services as planned.

The Council is committed to the effective management of risk. As a large public sector organisation, it is exposed to a wide range of risks and threats in delivering key services to communities. Within the Council the purpose of risk management is to:

- preserve and protect the Council’s assets, reputation and staff
- promote corporate governance and aid good management in controlling and managing risks
- support successful delivery of strategic aims, objectives and outcomes
- improve business performance and better anticipate calculated risks where these are likely in delivering improvements
- avoid unnecessary liabilities, costs and failures

The Council seeks to ensure that risk management is effective from strategic to individual services and employees. Therefore, all employees and councillors are responsible for ensuring there are good levels of internal control and risk management throughout the Council in order that the Council’s specified outcomes are achieved.

The Council uses a ‘traffic light’ system of Red/Amber/Green associated with High/Medium/Low to categorise risk levels. This is determined using the risk matrix below.

High risk	The risk is highly likely to occur and the impact will be major. Management action/control evaluation and improvement is required coupled with continued pro-active monitoring
Medium risk	The risk is unlikely to result in a major issue, however, if it did the impact would be significant or serious . This risk is relatively less significant than a High risk however it needs to be closely monitored within timely management action/controls to ensure it does not escalate.
Low risk	The risk is very unlikely to occur and the impact will be minor or moderate at worst. Risk will be managed by seeking control improvements where practical and / or monitoring and reviewing at regular intervals

Risks are also given a score. Scores of 1-4 are low risks, scores of 6-9 are medium risks and scores 12-16 are high risk. Providing a score as well as a risk level allows the variations within risk levels to be more clearly stated.

Major (4)	Low (4)	Medium (8)	High (12)	High (16)
Substantial (3)	Low (3)	Medium (6)	Medium (9)	High (12)
Moderate (2)	Low (2)	Low (4)	Medium (6)	Medium (8)
Minor (1)	Low (1)	Low (2)	Low (3)	Low (4)
	Unlikely (1)	Possible (2)	Likely (3)	Almost certain (4)

SUBJECT: MONMOUTHSHIRE LOCAL DEVELOPMENT PLAN ANNUAL MONITORING REPORT
MEETING: PERFORMANCE AND OVERVIEW SCRUTINY COMMITTEE
DATE: 22nd NOVEMBER 2023
DIVISION/WARDS AFFECTED: ALL

1 PURPOSE

- 1.1 The purpose of this report is to consider the extent to which the current Local Development Plan 2011-2021 (LDP) is delivering against its objectives and monitoring indicators, as set out in the ninth Annual Monitoring Report (AMR), attached at **Appendix 1**. Although work has already commenced on a new LDP, there is a statutory requirement to continue to monitor the current LDP's performance. In addition, this monitoring report will help inform and shape the Replacement LDP (RLDP) by reflecting on what is working and what is not.

2. RECOMMENDATION

- 2.1 That the Performance and Overview Scrutiny Committee scrutinises the ninth Local Development Plan Annual Monitoring Report and comments accordingly.
- 2.2 That the Performance and Overview Scrutiny Committee recommends that the Cabinet Member for Sustainable Economy, Deputy Leader, endorses the ninth Local Development Plan Annual Monitoring Report for submission to the Welsh Government.

3. KEY ISSUES

Background – Adopted Monmouthshire LDP

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

The Annual Monitoring Report

- 3.2 The AMR provides the basis for monitoring the effectiveness of the LDP and ultimately determines whether any revisions to the Plan are necessary. It aims to demonstrate the extent to which the LDP strategy and objectives are being achieved and whether the Plan's policies are functioning effectively. It also allows the Council to assess the impact the LDP is having on the social, economic and environmental well-being of the County and identifies any significant contextual changes that may influence plan implementation or review/revision.
- 3.3 This is the ninth AMR to be prepared since the adoption of the Monmouthshire LDP and is based on the period 1st April 2022 – 31st March 2023. The Adopted LDP covers the period 2011 – 2021, with 10 years' worth of housing delivery monitoring reached in March 2021 and reported in the 2020-21 AMR. However, as set out in the Minister for Housing and Local Government's letter of September 2020 which clarified the provisions in the Planning Wales Act 2015 relating to Local Plan expiry dates, plans

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

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

LDP Monitoring Framework

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

Key Findings

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

- Progress continues to be made towards the implementation of the LDP allocations, with 343 dwelling completions recorded during the monitoring period, 211 (61.5%) of which were on LDP allocated sites.
- All seven LDP allocated strategic housing sites have planning permission, with Vinegar Hill, Undy having gained planning permission during the monitoring period. Four of these sites are under construction (Fairfield Mabey, Chepstow; Crick Road, Portskewett; Rockfield Farm, Undy; Vinegar Hill, Undy) and two are complete (Sudbrook Paper Mill and Deri Farm, Abergavenny). One site is partially complete (Wonastow Road, Monmouth), with the remaining phase at Drewen Farm currently engaged in pre-application discussions following a strategic phosphate solution being secured in Monmouth by 31st March 2025 that would enable this site to come forward.
- Two planning permissions for 5 or more dwellings triggered the delivery of on-site affordable housing (100% affordable housing scheme in Chepstow for 8 homes, and Vinegar Hill, Undy 39 affordable homes (policy compliant at 25%)).
- Although data shows that 97% of existing office space and 99% of industrial space is occupied, the County has a total of 40.16 hectares of undeveloped employment land available, indicating that sufficient employment land is maintained to meet the identified take up rate. Work on the RLDP is exploring why the remaining employment sites have not yet come forward, and will consider whether or not they should be de-allocated or if alternative interventions would secure their delivery.
- There has been good progress in terms of employment permissions within the County, with 10 permissions granted for a range of B use class employment uses on allocated employment sites (SAE1), protected employment sites (SAE2) and sites elsewhere in the County. This included the permission at the allocated employment site at Wales One, Magor for the development of a storage and distribution warehouse with ancillary offices (B2, B8 and B1) totalling 3.84ha which is currently under construction.

- No applications were granted during the monitoring period that related to the loss of B uses on allocated (SAE1) or protected employment sites (SAE2).
- The Council approved 9 tourism related applications, relating to 5 holiday lets proposals and 4 glamping facilities. The Sustainable Tourism Accommodation Supplementary Planning Guidance [SPG] (November 2017) has helped clarify our general support for this important sector of our economy.
- No applications were granted planning permission contrary to TAN15 requirements in either Zone C1 or C2 floodplain over the monitoring period.
- Nine applications have been approved incorporating on-site renewable energy, including included the installation of ground mounted solar panels/ solar arrays at various locations, EV charging, air source heat pumps and solar panels at new homes in Little Mill and a One Planet Development at Tintern.
- Ample land remains available for potential waste management sites and there has been no reduction in the minerals land bank.

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

- Dwelling permissions during 2022/23 (229 dwellings) were higher than recorded in the previous two monitoring periods. The increase is predominantly due to the LDP allocated site at Vinegar Hill Undy gaining permission for 155 homes. Of the 229 dwelling permissions, 179 (78.2%) related to market homes and 50 (21.8%) affordable homes. Nevertheless, dwelling permissions are likely to decline as the majority of LDP allocated sites have planning permission and the LDP has reached the end of the Plan period. This highlights the importance of progressing the RLDP at pace. In addition, the introduction of the measures in January 2021 to control phosphate levels in the River Usk and River Wye Catchment areas, which cover a large proportion of the County, has impacted on our ability to grant planning permissions in a significant proportion of the County. Officers and Cabinet Members are working with stakeholders to deliver solutions to this challenge with significant recent progress.
- All of the County's central shopping areas (CSA), with the exception of Monmouth, recorded vacancy rates below the GB High Street vacancy rate (13.9%, first 6 months of 2023, Local Data Company). However, comparison with 2021 vacancy rates indicates that all the centres, with the exception of Usk, recorded an increase in vacancy rates in September/October 2023.

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

- Housing delivery records covering the 10-year plan period 2011 - 2021 set out that the Plan had delivered a shortfall of 1,500 homes (33.3%) when compared to the 10-year Plan requirement of 4,500 dwellings. However, in more recent AMRs the % under delivery has steadily declined as the strategic sites have come forward. This shortfall is largely attributable to the lead in period of the strategic housing sites, many of which continue to deliver homes now which contributes to the RLDP housing delivery: it is worth noting that approximately 1,000 homes have planning permission and are due to be built in the near future. The impact of phosphates restrictions is also affecting site completions and therefore completions.

- 48 affordable homes were completed during the monitoring period accounting for 14% of total completions recorded (343). This is well below the LDP target of 96 affordable homes per annum. Housing delivery records covering the 10-year plan period 2011 - 2021 set out that the Plan has delivered 658 affordable homes during the Plan period compared to a target of 960 affordable homes (a shortfall of 302 affordable homes). Proportionately, this shortfall is almost identical to the shortfall in total housing delivery. This shortfall is largely attributable to the lead-in period of the strategic housing sites, many of which continue to deliver homes now which contributes to the RLDP housing delivery. In other words, many of the affordable homes are being provided but later than anticipated: there are approximately 280 affordable homes with consent and due to be built in the near future. The impact of phosphates restrictions continues to affect site commencements and therefore completions. This reduced trend of affordable housing delivery is therefore anticipated to continue in the short-term awaiting progress on the RLDP. This is a matter of concern given the estimated annual need for 468 affordable homes in the County¹.
- Vacancy rates in the Central Shopping Area of Monmouth have risen for the fourth consecutive year. The vacancy rate stood at 18.2% in September 2023 which is an increase from 15.5% recorded in 2021.

Contextual Information

- 3.9 Section Three of the AMR provides an analysis of the relevant contextual material that has been published during the current monitoring period at a national, regional and local level, along with general economic trends.

Supplementary Planning Guidance (SPG)

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

Sustainability Appraisal (SA) Monitoring

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

Conclusions and Recommendations

- 3.12 Section Seven sets out the conclusions and recommendations of the ninth AMR. Overall, the 2022-23 AMR indicates that good progress continues to be made in implementing many of the Plan's policies and that overall, the strategy remains sound. However, three key policy indicator targets are not progressing as intended. While progress has been made in relation to the Plan's Strategic Housing Sites, cumulative housing completions and affordable housing delivery rates for the Plan period are significantly lower than the Plan requirement and remain a matter of concern if Monmouthshire's housing needs are to be met. However, this is due to a time-lag in site delivery rather than an issue with the sites not happening at all: it is worth noting that approx. 1,00 homes (including 280 affordable homes) have planning permission and are due to be built in the near future. In addition, the vacancy rates in Monmouth's Central Shopping Area have increased for four consecutive years and are above the GB High Street vacancy rate of 13.9% (June 2023, Local Data Company).

¹ MCC Local Housing Market Housing Assessment (LHMA), 2020. An updated LHMA is being prepared to inform the RLDP.

- 3.13 All seven LDP strategic housing allocations now have planning permission² and will continue to play an important role in housing delivery and completion rates in the short term. However, dwelling permissions are likely to decline over the next few years until the RLDP is adopted, which is cause for concern. Similar concerns are shared with the level of affordable housing secured and completed during the monitoring period. These issues are reflective of a combination of the LDP strategic sites already having permission, the LDP having reached the end of the Plan period and the restrictions on development as a result of phosphates constraints.
- 3.14 Phosphate water quality issues in the River Usk and Wye Catchments continue to have implications for the ongoing delivery of development in the County. The Council is committed to seeking solutions to the phosphate issue and is in proactive discussions with the key organisation, including NRW, Welsh Government, DCWW and the development industry, to seek viable and timely solutions in the affected settlements. Of note, DCWW has recently committed to prioritising improvement works at the Llanfoist WwTW serving Abergavenny (benefitting the River Usk catchment), and Monmouth WwTW (benefitting the River Wye catchment). These improvements are currently subject to design and regulatory approval, however, there is a firm commitment that these will be completed by 31st March 2025. This investment will significantly reduce the amount of phosphates entering the water environment from the treatment works, providing environmental improvement and capacity for new development (housing, commercial, retail, agricultural) to proceed, supporting the long-term sustainability of towns and communities while safeguarding water quality. Nevertheless, the short-term implications on the delivery of new homes raises concerns.
- 3.16 With regard to the consecutive increased vacancy rates in the central shopping area of Monmouth, it is worthy of note that the rise in vacancy rates has predominantly been experienced in the primary shopping frontages. This may, in part reflect the continued impact of the Covid-19 pandemic on high streets across the UK, particularly given the loss of some national chains from the town centre, such as Peacocks and M&Co.
- 3.17 It is recognised that high street vitality plays a key role in the character and attractiveness of our market towns. The Council is delivering a number of initiatives to support the vitality of town centres. These include proposals for public realm and active travel improvements in Monnow Street, for which it is anticipated that a bid will be submitted for WG Transforming Towns funding. The proposals reflect the substantial and growing body of evidence that investment in high quality public realm which prioritises active travel modes is not only positive in terms of safety, health and wellbeing, but also delivers economic benefits in terms of, for example, higher footfall and lower vacancy rates.
- 3.18 A detailed ongoing audit of vacancies in Monmouth suggests that a number of the units in Monnow Street that are currently vacant or were at the time that the data cited in this report were gathered, are likely to become occupied in the near future. Work with landlords, businesses and agents is ongoing to further address the vacancy rate, including through grants to support refurbishment of empty or underused units, and proposals for meanwhile uses. The forthcoming Placemaking Plan to be developed in partnership with Monmouth Town Council is also expected to consider this issue.
- 3.19 The cost of living and energy costs crises pose additional threats to businesses as costs increase and customer spending decreases and this challenge will require

² SAH4 Wonastow Road, Monmouth site is partially complete, with the remaining phase at Drewen Farm currently engaged in pre-application enquiries following the announcement by Dwr Cymru Welsh Water that there is a strategic phosphate solution for Monmouth which is due to be installed by 31st March 2025.

careful consideration going forwards in terms of regeneration projects and future policy. The RLDP provides an opportunity to review high street planning policies to fit the needs of the future.

Next Steps

- 3.20 These issues reinforce the need to progress with the RLDP to provide a continued policy framework and mechanism for addressing the County's housing and affordability issues. In light of the concerns with housing delivery and associated outcomes, the progression of the RLDP remains a key priority of the Council. In October 2023 Council endorsed updates to the Preferred Strategy following the statutory consultation/engagement in December 2022 - January 2023. Work is currently progressing on the preparation of the Deposit Plan which is anticipated to be subject to statutory consultation/engagement in late Spring 2024.

4 SUSTAINABLE DEVELOPMENT AND EQUALITY IMPLICATIONS

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

Sustainable Development

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

Safeguarding and Corporate Parenting

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

5. OPTIONS APPRAISAL

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

6. RESOURCE IMPLICATIONS

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

7. CONSULTEES

- Performance and Overview Scrutiny Committee, via meeting on 22nd November 2023.

8. BACKGROUND PAPERS

European Legislation:

- European Strategic Environment Assessment Directive 2001/42/EC.
- Strategic Environmental Assessment Regulations 2004.
- The Conservation of Habitats and Species Regulations 2010 (as amended 2011).

National Legislation and Guidance:

- Planning (Wales) Act 2015
- Planning and Compulsory Purchase Act 2004.
- Town and Country Planning (Local Development Plan) (Wales) Regulations 2005
- Town and Country Planning (Local Development Plan) (Wales) (Amendment) Regulations 2015
- Development Plans Manual Edition 3, Welsh Government, March 2020
- Planning Policy Wales (Edition 11), Welsh Government, February 2021
- Future Wales: The National Plan 2040, Welsh Government, February 2021
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Monmouthshire LDP:

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11. APPENDICES

Appendix 1: LDP Annual Monitoring Report 2022-23

Appendix 2: Equality and Future Generations Evaluation.

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Monmouthshire County Council



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sir fynwy**

Adopted Local Development Plan 2011-2021

Annual Monitoring Report

Monitoring Period 1st April 2022-31st March 2023

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

Annual Monitoring Report

Monitoring Period 1st April 2022 – 31st March 2023

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1 Executive Summary

- 1.1 The Monmouthshire Local Development Plan (LDP) was adopted on 27 February 2014. As part of the statutory development plan process the Council is required to prepare an Annual Monitoring Report (AMR).
- 1.2 The AMR provides the basis for monitoring the effectiveness of the LDP and ultimately determines whether any revisions to the Plan are necessary. It aims to demonstrate the extent to which the LDP strategy and objectives are being achieved and whether the Plan's policies are functioning effectively. It also allows the Council to assess the impact the LDP is having on the social, economic, cultural and environmental well-being of the County and identifies any significant contextual changes that may influence Plan implementation or review.
- 1.3 This is the ninth AMR to be prepared since the adoption of the Monmouthshire LDP and is based on the period 1 April 2022 – 31 March 2023. The Adopted LDP covers the 10-year plan period 2011 – 2021, with 10 years' worth of completions monitoring reached in March 2021. However, as set out in the Minister for Housing and Local Government's letter of September 2020, clarifying the provisions in the Planning Wales Act 2015 relating to Local Plan expiry dates, plans adopted prior to 4th January 2016 will remain the LDP for determining planning applications until replaced by a further LDP. Although the Council has already commenced work on a new LDP, this monitoring report will help inform and shape the Replacement LDP by reflecting on what is working and what is not.

Key Findings of the Eighth Annual Monitoring Process 2020-2021

Contextual Information

- 1.4 Section 3 provides a summary of the relevant contextual material that has been published during the current monitoring period. This includes national legislation and relevant plans, policies and strategies at the national, regional and local level, along with general economic trends which have occurred since the LDP's adoption. In the main, the implications of the contextual changes will take place over the longer term and as part of the Replacement Local Development Plan (RLDP). Of note during this monitoring period, the publication of an updated Welsh Government Technical Advice Note (TAN) 15 Development, Flooding and Coastal Erosion has been further delayed and is now expected in 2024. In the meantime, the updated draft TAN15 remains the policy basis for the preparation of the RLDP as advised in a Ministerial letter issued on 15th December 2021¹.
- 1.5

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

Local Development Plan Monitoring – Policy Analysis

- 1.6 Section 5 of the AMR provides a detailed assessment of how the Plan’s strategic policies and associated supporting policies are performing against the identified key monitoring targets and outcomes and whether the LDP strategy and objectives are being delivered. This has enabled the Council to make an informed judgement of the Plan’s progress in delivering the targets/monitoring outcomes and policies during this monitoring period. The table below provides a visual overview of the effectiveness of policies during the current monitoring period based on the traffic light rating used in the assessment.
- 1.7 Overall, the Plan is working effectively with the majority of the monitoring targets being achieved, a slight increase to 61 from last year’s 57 green rating. There has been a slight decrease in the number of indicators that have not achieved the target this year, but there is an appropriate justification, and no concerns are raised (23 compared to last year’s 26). Red ratings recorded during the current monitoring period remained at 3 for the third consecutive year. Further commentary is provided below.

Targets / monitoring outcomes* are being achieved	61
Targets / monitoring outcomes* are not currently being achieved but there are no concerns over the implementation of the policy	23
Targets / monitoring outcomes* are not being achieved with subsequent concerns over the implementation of policy	3
No conclusion can be drawn due to limited data availability or no applicable data during the monitoring period	5

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

Key AMR Findings

- 1.8 The results of the monitoring process demonstrate that many of the indicator targets and monitoring outcomes are being achieved (green traffic light rating), indicating that the relevant Plan policies are performing as intended. The analysis also indicates that various policy indicators are not being achieved but with no corresponding concerns over policy implementation, as detailed in Section 5 (amber traffic light rating). Further investigation has determined that there are justified reasons for the performance recorded and this is not representative of any fundamental issue with the implementation of the policy framework or strategy at this time. Of particular note over this monitoring period:
- All seven LDP allocated strategic housing sites have planning permission, with Vinegar Hill, Undy having gained planning permission during the monitoring period. Four of these sites are under construction (Fairfield Mabey, Chepstow; Crick Road, Portskewett; Rockfield Farm, Undy; Vinegar Hill, Undy) and two are

complete (Sudbrook Paper Mill and Deri Farm, Abergavenny). One site is partially complete (Wonastow Road, Monmouth), with the remaining phase at Drewen Farm is currently engaged in pre-application enquiries following the announcement by Dwr Cymru Welsh Water that there is a strategic phosphate solution for Monmouth which is due to be installed by 31st March 2025.

- Progress continues to be made towards the implementation of the LDP allocations, with 343 dwelling completions recorded during the monitoring period, 211 (61.5%) of which were on LDP allocated sites. Large windfall sites accounted for 21% of completions (71 units) and small sites accounted for the remaining 17.5% (61 units).
- Dwelling permissions during 2022-23 (229 dwellings) were higher than recorded in the previous two monitoring periods. The increase is predominantly due to the LDP allocated site at Vinegar Hill Undy gaining permission for 155 homes. Of the 229 dwelling permissions, 179 (78.2%) related to market homes and 50 (21.8%) were affordable homes. Nevertheless, dwelling permissions are likely to decline as the majority of LDP allocated sites already have planning permission and the LDP has reached the end of the Plan period. This highlights the importance of progressing the RLDP at pace. In addition, the introduction of the measures in January 2021 to control phosphate levels in the River Usk and River Wye Catchment areas, which cover a large proportion of the County, has impacted on our ability to grant planning permissions in a significant proportion of the County. Strategic Phosphate solutions have been secured for the primary settlements of Monmouth and Abergavenny and Officers and Cabinet Members are working with stakeholders to deliver both engineered and nature solutions to this challenge in other rural areas.
- The number of dwellings permitted in the main towns is significantly lower than previous monitoring periods, accounting for 18.8% of residential permissions. Again, this reflects LDP Strategic Sites in the main towns already having planning permissions and the impact of the phosphate restrictions on development.
- Two new planning permissions for 5 or more dwellings during the monitoring period triggered the delivery of on-site affordable homes, comprising a 100% affordable housing scheme in Chepstow for 8 homes, and Vinegar Hill, Undy 39 affordable homes (policy compliant at 25%).
- Some progress has been made on two Main Village allocated sites, with 9 affordable homes completed at SAH11(ii) Well Lane, Devauden and 4 affordable homes at SAH11(ix)(a) Land rear of Carpenters Arms, Llanishen under construction.
- The County has a total of 40.16 hectares of employment land available, indicating that sufficient employment land is maintained to meet the identified take up rate. Work on the RLDP is exploring why the remaining employment sites have not yet come forward and will consider whether or not they should be de-allocated or if alternative interventions would secure their delivery.
- There has been progress in terms of employment permissions within the County, with 10 permissions granted for a range of B use class employment uses on

allocated (SAE1), protected employment sites (SAE2) and sites elsewhere in the County. This included the allocated employment site at Wales One, Magor (development of an industrial storage and distribution warehouse with ancillary offices (B2, B8 and B1) totalling 3.84ha which is currently under construction.

- The Council approved proposals for a total of 9 tourism facilities, including holiday lets and glamping accommodation. The Sustainable Tourism Accommodation Supplementary Planning Guidance [SPG] (November 2017) has helped clarify our general support for this important sector of our economy.
- All of the County's central shopping areas (CSA), with the exception of Monmouth, were below the GB High Street vacancy rate (13.9%, first 6 months of 2023, Local Data Company). However, comparison with 2021 vacancy rates indicates that all of the centres, with the exception of Usk, recorded an increase in vacancy rates in September/October 2023.
- The proportion of A1 retail uses within the towns' Primary Shopping Frontages generally accord with the thresholds identified in the Primary Shopping Frontages SPG.
- Eighteen planning applications were approved for community and recreation uses during the monitoring period. These included the redevelopment of King Henry VIII Comprehensive School in Abergavenny, the change of use from disused railway line to shared use walking and cycling route at Caldicot and an extension to existing facilities at Caldicot leisure centre.
- Over half of development permitted (56.2% /20.6ha) was on brownfield land, which is an increase from the previous few monitoring periods. A large proportion of brownfield land permitted (55%) was in association with the redevelopment of King Henry VIII School in Abergavenny. A range of other developments were permitted on brownfield land including residential, community, commercial, employment and retail uses.
- Nine applications have been approved incorporating on-site renewable energy, including included the installation of ground mounted solar panels/ solar arrays at various locations, EV charging, air source heat pumps & solar panels at new homes in Little Mill and a One Planet Development at Tintern.

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

Strategy and Housing

- Housing delivery records covering the 10-year plan period 2011 - 2021 set out that the Plan had delivered a shortfall of 1,500 homes (33.3%) when compared to the 10-year Plan requirement of 4,500 dwellings. However, in more recent AMRs the % under delivery has steadily declined as the strategic sites have come forward. This shortfall is largely attributable to the lead in period of the strategic housing sites, many of which continue to deliver homes now which contributes to the RLDP housing delivery: it is worth noting that 1,008 homes have planning permission and are due to be built in the near future. The impact of phosphates restrictions is

also now affecting site commencements and therefore completions. During this monitoring period, 343 dwellings were completed. Given the importance attached to the supply of housing land, a full review of the LDP commenced in 2017 and culminated with the publication of the Final Review Report in March 2018. The latest position on the RLDP is discussed below in the recommendations section.

Affordable Housing

- 48 affordable homes were completed during the monitoring period accounting for 14% of total completions recorded (343). This is well below the LDP target of 96 affordable homes per annum. Housing delivery records covering the 10-year plan period 2011 - 2021 set out that the Plan has delivered 658 affordable homes compared to a target of 960 affordable homes (a shortfall of 302 affordable homes). Proportionately, this shortfall is almost identical to the shortfall in total housing delivery. This shortfall is largely attributable to the lead in period of the strategic housing sites, many of which continue to deliver homes now which contributes to the RLDP housing delivery: it is worth noting that there are 280 affordable homes with consent and due to be built in the near future. The impact of phosphates restrictions is also now affecting site commencements and therefore completions. This reduced trend of affordable housing delivery is therefore anticipated to continue in the short-term awaiting progress on the RLDP. This is a matter of concern given the estimated annual need for 468 affordable homes in the County².

Retail and Community Facilities

- As increased vacancy rates have occurred for four consecutive years in the Monmouth Central Shopping Area, the trigger for this indicator has been met. The vacancy rate stood at 18.2% in September 2023 which is an increase from the 15.5% recorded in 2021.

Sustainability Appraisal (SA) Monitoring

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

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

- The annual objective level of nitrogen dioxide was not exceeded in 2022/23. For the sixth year running there was no exceedance in Usk.
- Monmouthshire sits within three groundwater bodies, the Usk Devonian Old Red Sandstone (ORS), Wye Secondary Devonian ORS and Usk and Wye southern

² MCC Local Housing Market Assessment (LHMA), 2020. An updated LHMA is being prepared to inform the RLDP.

Carboniferous Limestone. All three groundwater bodies had good status for quantity as per the Water Watch Wales for the Cycle 3 (2021) data.

- The latest waste data published for 2021-2022 suggests that 71% of Monmouthshire's total household waste was recycled or composted. This has increased since the previous AMR which indicated 62% was recycled or composted.
- No agricultural land at Grade 3a and above has been lost to major development over the monitoring period.
- The Monmouthshire STEAM report (2022) identified the total annual tourism expenditure as £285.08 Million over the 2022 period. This compared to £182.79 Million over the 2021 period, equates to a 56% increase. This is a significant increase since the previous period and reflects the recovery since the impact of the COVID-19 pandemic on the tourism and hospitality industries. Compared to £244.99 Million over the 2019 period, equates to a 3.7% increase post COVID-19 pandemic.

Conclusions and Recommendations

1.12 Overall, the 2022-23 AMR indicates that good progress continues to be made in implementing many of the Plan's policies and that overall, the strategy remains sound. However, while progress has been made in relation to the Plan's Strategic Housing Sites, cumulative dwelling completion rates for the Plan period are lower than the Plan requirement and remain a matter of concern if Monmouthshire's housing needs are to be met. However, this is due to a time-lag in site delivery rather than an issue with the sites not happening at all.

1.13 All seven LDP strategic housing allocations now have planning permission³ and will continue to play an important role in housing delivery and completion rates in the short term. However, as a consequence of this and given that the LDP has reached the end of the Plan period, dwelling permissions are likely to decline over the next few years which is cause for concern. Analysis of anticipated completions indicates that completion rates are estimated to remain stable for a couple of years and then forecast to reduce the lower levels (238 units in 2025/26, 290 units in 2026/27 and 222 units in 2027/28). These forecasts do not however, include any contribution from the emerging RLDP which will improve housing land supply as the plan progresses to adoption. In the meantime, however, the time lag between the two plans is an area of concern for its implications on housing delivery in the County.

1.14 Similar concerns are shared with the level of affordable housing secured and completed during the monitoring period. This again is considered to be reflective of a combination of the strategic sites gaining planning permission and being built out and restrictions on

³ SAH4 Wonastow Road, Monmouth site is partially complete, with the remaining phase at Drewen Farm currently engaged in pre-application enquiries following the announcement by Dwr Cymru Welsh Water that there is a strategic phosphate solution for Monmouth which is due to be installed by 31st March 2025.

development due to phosphates constraints. Of note, two new planning permissions were approved during the monitoring period that triggered delivery of on-site affordable housing. Some progress has also been made on a couple of Main Village sites with 9 affordable dwellings completed at SAH11(ii) Well Lane, Devauden and 4 affordable dwellings at SAH11(ix)(a) Land rear of Carpenters Arms, Llanishen are under construction.

- 1.15 As can be seen from the analysis throughout Section 5, phosphate water quality issues in the River Usk and Wye Catchments continues to have implications for the ongoing delivery of development in the County. The Council is committed to seeking solutions to the phosphate issue and is in proactive discussions with the key organisation, including NRW, Welsh Government, DCWW and the development industry, to seek viable and timely solutions in the affected settlements. Of note, DCWW has committed to prioritising improvement works at the Llanfoist WwTW serving Abergavenny (benefitting the River Usk catchment), and Monmouth WwTW (benefitting the River Wye catchment). These improvements are currently subject to design and regulatory approval however there is a firm commitment that these improvements will be completed by 31st March 2025. This investment will significantly reduce the amount of phosphates entering the water environment from the treatment works, providing environmental improvement and capacity for new development (housing, commercial, retail, agricultural) to proceed, supporting the long-term sustainability of towns and communities while safeguarding water quality. Nevertheless, the short-term implications on the delivery of new homes raises concerns.
- 1.16 These issues reinforce the need to progress with the RLDP to provide a continued policy framework and mechanism for addressing the County's housing and affordability issues. In light of the concerns with housing delivery and associated outcomes, the progression of the RLDP remains a key priority of the Council. In December 2022 Council endorsed a revised Preferred Strategy to be issued for statutory consultation/engagement in December 2022 - January 2023 and agreed a RLDP Revised Delivery Agreement which amended the project timetable for Plan preparation. The revised Preferred Strategy responded to a number of challenges that arose following stakeholder consultation and engagement on the previous Preferred Strategy in Summer 2021, namely the Welsh Government objection to the level of growth set out in that Preferred Strategy and water quality issues in the Rivers Wye and Usk. Work is currently progressing on the preparation of the Deposit Plan which is anticipated to be subject to statutory consultation/engagement in late Spring 2024.
- 1.17 With regard to the consecutive increased vacancy rates in the central shopping area of Monmouth, it is worthy of note that the rise in vacancy rates has predominantly been experienced in the primary shopping frontages. This may, in part reflect the continued impact of the Covid-19 pandemic on high streets across the UK, particularly given the loss of some national chains from the town centre, such as Peacocks and M&Co.

- 1.18 WG guidance⁴ published in response to the Covid-19 pandemic recognises that whilst retail development should continue to be focussed in town centres, retail and commercial centres should be enabled to operate as flexibly as possible. This will ensure that going forward retail and commercial centres are hubs of social and economic activity and the focal point for a diverse range of services and cultural activities/functions, which support the needs of local communities. This approach should enable the planning system to be responsive, flexible and pragmatic to assist with the recovery from Covid-19.
- 1.19 The Council through its Regeneration team submitted a funding bid to secure a share of Central Government’s ‘Levelling Up Fund’ to make improvements to Market Hall and Shire Hall, two key buildings in the town centre as well as improvements to Monnow Street and Blestium Street. A ‘Levelling Up Fund’ bid was also submitted for the acquisition of 7-43 Newport Road, Caldicot, public realm improvements to Caldicot town centre and refurbishment of Caldicot Wellbeing Centre. Unfortunately, our bids for round two of Levelling Up Funding round 2 (LUF2) were unsuccessful. The Council is awaiting an announcement on the parameters and timescales for LUF3.
- 1.19 Although, with the exception of Monmouth, high street vacancy rates are below the GB average (13.9% first 6 months of 2023, Local Data Company), it is recognised that high street vitality plays a key role in the character and attractiveness of our market towns. The Council is delivering a number of initiatives to support the vitality of town centres. These include proposals for public realm and active travel improvements in Monnow Street, for which it is anticipated that a bid will be submitted for WG Transforming Towns funding. The proposals reflect the substantial and growing body of evidence that investment in high quality public realm which prioritises active travel modes is not only positive in terms of safety, health and wellbeing, but also delivers economic benefits in terms of, for example, higher footfall and lower vacancy rates.
- 1.20 A detailed ongoing audit of vacancies in Monmouth suggests that a number of the units in Monnow Street that are currently vacant or were at the time that the data cited in this report were gathered, are likely to become occupied in the near future. Work with landlords, businesses and agents is ongoing to further address the vacancy rate, including through grants to support refurbishment of empty or underused units, and proposals for meanwhile uses. The forthcoming Placemaking Plan to be developed in partnership with Monmouth Town Council is also expected to consider this issue.
- 1.21 The cost of living and energy costs crises pose additional threats to businesses as costs increase and customer spending decreases and this challenge will require careful

⁴ Building Better Places - The Planning System Delivering Resilient and Brighter Futures: Placemaking and the Covid-19 recovery (WG, July 2020) - <https://gov.wales/planning-policy-covid-19-recovery> ; Welsh Government letter regarding temporary permitted development rights in town centres, 30 March 2021 - <https://gov.wales/coronavirus-covid-19-new-temporary-permitted-development-rights-support-economic-recovery-html>

consideration going forwards in terms of regeneration projects and future policy. The RLDP provides an opportunity to review high street planning policies to fit the needs of the future.

1.22 Accordingly, the AMR recommends the following:

1. Continue to progress work on the Deposit RLDP.
2. Continue to work with the relevant organisations to secure solutions to the phosphate water quality issues in the Usk and Wye Riverine SACs.
3. Continue to work with other Council departments and other stakeholders to explore options for increasing affordable housing delivery.
4. Submit the ninth AMR to the Welsh Government and publish the AMR on the Council's website.
5. Continue to monitor the Plan through the preparation of successive AMRs.

2 Introduction

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

Adoption of the Monmouthshire Local Development Plan

- 2.3 Under the Planning and Compulsory Purchase Act (2004) and associated Regulations, local planning authorities (LPAs) are required to produce a LDP. The Monmouthshire Local Development Plan was formally adopted by Monmouthshire County Council on 27 February 2014. The LDP provides the land use framework which forms the basis on which decisions about future development in the County, including planning applications, are based.
- 2.4 This is the ninth AMR to be prepared since the adoption of the Monmouthshire LDP and is based on the period 1 April 2022 – 31 March 2023.

Status of Adopted LDP

- 2.5 A Welsh Government letter dated 24th September 2020 clarified that the provisions in the Planning Wales Act 2015 regarding the period to which a plan has effect do not apply to LDPs adopted prior to 2016. Plans adopted prior to 4th January 2016, including the adopted Monmouthshire LDP, will remain the LDP for determining planning applications until replaced by a further LDP. This is welcomed clarification and ensures a policy framework remains in place while the RLDP progresses and the existing LDP allocations that have yet to gain planning permission can progress through the policies of the Adopted Plan, providing a policy framework for continued economic development and windfall opportunities.⁵

⁵ Local Development Plan (LDP) end dates: letter to local authorities <https://gov.wales/local-development-plan-ldp-end-dates-letter-local-authorities>

The Requirement for Monitoring

Planning and Compulsory Purchase Act 2004

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

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

- 2.8 The Town and Country Planning (Local Development Plan) (Wales) Regulations have been amended to simplify certain aspects of the local development plan procedures; however, these do not affect the LDP monitoring process. Under Regulation 37 the AMR is required to:

- Identify policies that are not being implemented;
And for each policy:
- Identify the reasons why the policy is not being implemented;
- Identify the steps (if any) that are intended to be taken to enable the policy to be implemented;
- Explore whether a revision to the plan to replace or amend the policy is required.
- Monitor the delivery of housing against the LDPs proposed housing trajectory.

Local Development Plan Manual (Edition 3, March 2020)

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

Monmouthshire LDP Monitoring Framework

- 2.10 A Monitoring Framework is provided in Chapter Eight of the LDP comprising a series of 51 indicators, with corresponding targets and triggers for further action, in relation to the Plan's strategic policies. It also indicates the linkages between the Plan themes, objectives, strategic policies and other Plan policies. The indicators were developed

in accordance with the above Welsh Government Regulations and guidance on monitoring. The Monitoring Framework forms the basis of the AMR.

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

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

AMR Format and Content

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

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

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

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

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

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

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

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

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

Future Monitoring

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

LDP Review

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

Replacement Local Development Plan

- 2.17 Following a number of delays incurred to the Plan preparation process, in December 2022 Council endorsed a revised Preferred Strategy to be issued for statutory consultation/engagement in December 2022 - January 2023 and agreed a RLDP Revised Delivery Agreement which amended the project timetable for Plan preparation. Work is currently progressing on the preparation of the Deposit Plan which is anticipated to be subject to statutory consultation/engagement in late Spring 2024.

3 Contextual Information

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

National Planning Policy

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

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

Regional Context

Strategic Development Plans (SDP)

- 3.4 The Planning (Wales) Act provides a legal framework for the preparation of Strategic Development Plans. This will allow larger than local issues such as housing demand, search areas for strategic employment sites and supporting transport infrastructure, which cut across a number of local planning authorities, to be considered and planned for in an integrated way. SDPs will address cross-boundary issues at a regional level and must be in general conformity with Future Wales.
- 3.5 On 29th January 2018 the Cardiff Capital Region Cabinet agreed that work should commence on a Strategic Development Plan (SDP) for the region which includes

Monmouthshire. An SDP Project Group⁶ was established tasked with progressing key options for the SDP, including SDP boundary, governance, timescale and scope. After this, The Local Government and Elections (Wales) Act (2021) mandated the preparation of a Strategic Development Plan (SDP) in each of the four regions in Wales through a Corporate Joint Committee (CJC). The Act received Royal Assent on 20 January 2021.

- 3.6 The Town and Country Planning (Strategic Development Plan) (Wales) Regulations 2021 came into force 28 February 2022 prior to all four CJs having the ability to exercise their strategic planning function from the 30 June 2022. The process of preparing an SDP broadly mirrors that of the LDP process. When adopted, SDPs will form part of the development plan hierarchy and will have to be in general conformity with the NDF 'Future Wales: The National Plan 2040'. Future progress on the SDP and any subsequent implications for the RLDP will be reported in future AMRs.

Cardiff Capital Region and City Deal

- 3.7 The Cardiff Capital Region (CCR) is made up of an area of South East Wales, consisting of the ten local authorities, including Monmouthshire. These local authorities are working collaboratively to seek to tackle issues that affect the whole of the region, such as worklessness and poor transportation links, with the aim of working together and collaborating on projects and plans for the area. The Authorities forming the Capital Region are progressing the City Deal to fund projects aimed at boosting the competitiveness of the region over the next 20 years. The CCR City Deal will help boost economic growth by improving transport links, increasing skills, helping people into work and giving businesses the support, they need to grow. It will also establish strong governance across the region through the Cardiff Capital Region Joint Cabinet. A five-year Strategic Business Plan to leverage maximum economic and social benefits was agreed in May 2018 by all 10 local authority partners. This investment represents a significant opportunity for Monmouthshire and for the region.
- 3.8 There are currently a number of approved projects within Monmouthshire and whilst some are region wide there are two specific to the County:
- CCR investment money is to support the development of cool plasma sterilisation and decontamination technology at Creo Medical.
 - Severn Tunnel Junction Park and Ride - creation of an additional 150-200 space car park on the south side of Severn Tunnel Junction station and reconfiguration of the existing station car park to include additional bike & ride spaces, safer walking & cycling access, a revamped bus-rail interchange.

⁶ SDP Project Group comprises heads of planning and planning policy managers from the 10 local planning authorities in South East Wales.

- 3.9 The progress of the Cardiff Capital Region agenda, City Deal Bids and any subsequent implications for the LDP will be given further consideration in subsequent AMRs where appropriate.

Local Context

Monmouthshire Well-being Assessment and Plan

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

Monmouthshire 21st Century Schools

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

Climate and Nature Emergency

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

energy, transport, green spaces, waste and procurement. An update on progress against each of the actions in the plan was published in June 2021 with the majority of actions progressing as planned or showing some progress.

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

General Economic Trends

Economic Activity

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

Economically Active – In Employment

	Monmouthshire	Wales
April 2011-March 2012	73.8%	66.7%
April 2012-March 2013	74.2%	67.6%
April 2013-March 2014	73.0%	69.5%
April 2014-March 2015	74.5%	69.3%
April 2015-March 2016	78.8%	71.1%
April 2016-March 2017	76.5%	71.4%
April 2017-March 2018	78.0%	72.7%
April 2018-March 2019	77.7%	73.1%
April 2019-March 2020	79.5%	73.7%
April 2020-March 2021	78.3%	72.2%
April 2021-March 2022	77.8%	73.6%
April 2022-March 2023	77.0%	73.6%

Source: Nomis (Annual Population Survey, August 2022)

Economically Active – Unemployed

	Monmouthshire	Wales
April 2011-March 2012	5.1%	8.4%
April 2012-March 2013	5.6%	8.3%
April 2013-March 2014	5.1%	7.4%
April 2014-March 2015	4.9%	6.8%
April 2015-March 2016	3.3%	5.4%

	Monmouthshire	Wales
April 2016-March 2017	2.9%	4.4%
April 2017-March 2018	3.5%	4.9%
April 2018-March 2019	3.0%	4.5%
April 2019-March 2020	2.7%	3.7%
April 2020-March 2021	2.9%	4.0%
April 2021-March 2022	2.9%	3.8%
April 2022-March 2023	2.4%	3.4%

Source: Nomis (Annual Population Survey, August 2022)

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

	Monmouthshire	Wales
2011	£560.3	£455.1
2012	£530.7	£454.9
2013	£579.5	£475.3
2014	£582.1	£480.0
2015	£610.5	£487.6
2016	£619.4	£499.2
2017	£619.6	£505.9
2018	£638.5	£518.6
2019	£649.6	£540.7
2020	£642.90	£541.70
2021	£688.80	£570.60
2022	£714.80	£603.50

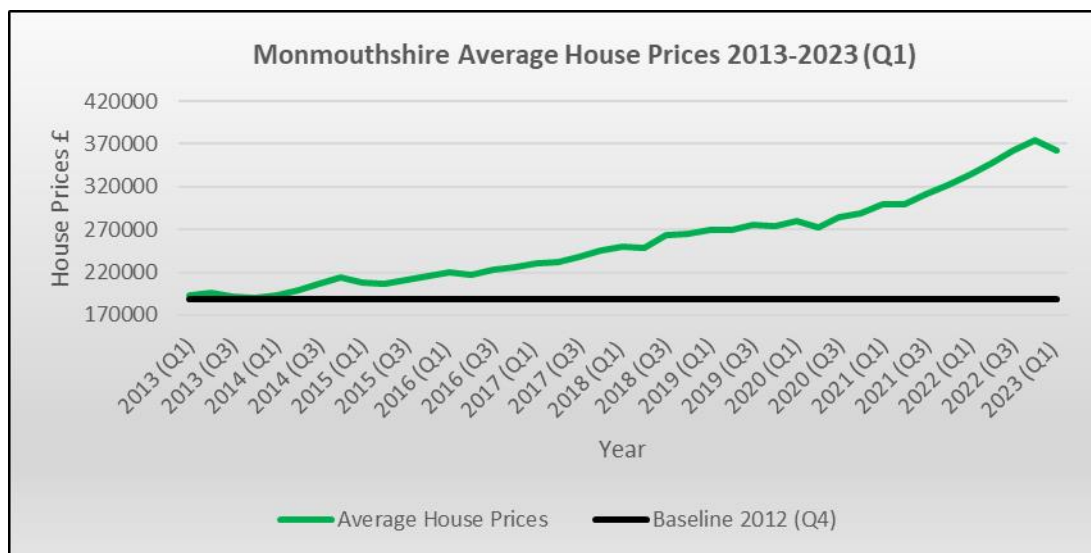
Source: Nomis (Annual Survey of Hours and Earnings, July 2022)

- 3.16 There appears to have been a recovery in earnings during the monitoring period, following a marginal decline in Monmouthshire during the last monitoring period. With average earnings in Monmouthshire increasing by 7.1% compared to 5.3% for Wales as a whole. This decline may well have been as a result of the lockdowns associated with the Covid-19 pandemic. Evidence continues to suggest that the income for economically active women who are resident within the County is significantly lower than that of men within the same category. It is unlikely that this is something that the land use planning system can directly influence, however, further consideration will be given to this as part of the Future Monmouthshire project and, if relevant, via Plan revision.

House Prices

- 3.17 As demonstrated in the graph below, Land Registry data indicates that average house prices in Monmouthshire have increased over the current monitoring period. Subsequently, average prices in quarter 1 2023 (January to March) at £362,921 were higher than the 2012 quarter 4 baseline price (£188,720). If the average house price trend data recorded exceeds the identified trigger for further investigation set out in relation to Policy S4, the Council will consider re-assessing the viability evidence which informed the affordable housing policy targets. This is given further consideration in the policy analysis section relating to Policy S4.

3.18 A number of recent events and proposals, including the abolition of the Severn Bridge tolls in December 2018, plans for the South East Wales Metro together with wider opportunities associated with the Cardiff Capital Region City Deal agenda and the rising cost of living could have potential impacts on house prices in Monmouthshire. It is notable in the graph that while house prices have continued to rise since Q3 2020, there is a dip in house prices in the first quarter of 2023. This is likely to reflect the impact of the increase in interest rates and rising cost of living.



Source: Land Registry UK House Price Index (November 2023)

Summary

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

4 LDP Monitoring Process

How is the LDP Monitored?

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

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

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

Policy Performance Traffic Light Rating

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

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

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

Replacement Indicators

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

Triggers for Plan Review

- 4.4 The Council is required to commence a full review of the LDP every four years. It is, however, recognised that the following exceptional circumstances could elicit an early review of the Plan:
- A significant change in external conditions
 - A significant change in national policy or legislation
 - A significant change in local circumstances e.g. closure of a significant employment site that weakens the local economy
 - A significant change in development pressures or needs and investment strategies of major public and private investors
 - Significant concerns from the results of the AMR in terms of policy effectiveness/implementation and site delivery.
- 4.5 All of these issues will be taken into consideration in determining whether a full or partial review of the Plan is necessary.

- 4.6 As detailed in paragraphs 2.16-2.18, a full review of the Monmouthshire LDP commenced in 2017 and culminated with the publication of the Final Review Report in March 2018. The report concluded that the LDP should be revised and that this should take the form of a full revision procedure, i.e. a new LDP.

Sustainability Appraisal Monitoring Framework

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

5 LDP Monitoring – Policy Analysis

5 LDP Monitoring – Policy Analysis

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

Spatial Strategy

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

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

LDP Objectives Supported: 1, 3 & 4

Contextual Changes

There are no contextual changes for this period.

Indicator	Target <i>(Previous AMR Performance)</i>	Trigger for Further Investigation	Performance 1 April 2022 – 31 March 2023	
Proportion of new housing development provided in accordance with the spatial strategy Policy S1 / settlement hierarchy set out in Policy S2*	Location of new residential development should correspond to the requirements set out in the Tables to Policy S2:	Housing completions are +/- 10% of the requirements set out in the tables to Policy S2 in any 1 year	Dwelling Completions	
	a) Main towns 41% <i>(2014-15: 27%)</i> <i>(2015-16: 40.2%)</i> <i>(2016-17: 38.2%)</i> <i>(2017-18: 71.3%)</i> <i>(2018-19: 60.3%)</i> <i>(2019-20: 60.11%)</i> <i>(2020-21: 54.2%)</i> <i>(2021-22: 43.5%)</i>			45.2%
	b) Severnside Settlements 33% <i>(2014-15: 43%)</i> <i>(2015-16: 8.1%)</i> <i>(2016-17: 19.3%)</i> <i>(2017-18: 5.4%)</i> <i>(2018-19: 16.9%)</i> <i>(2019-20: 24.43%)</i> <i>(2020-2021: 32.7%)</i>			36.4%

	(2021-22: 45.9%)		
	c) Rural Secondary Settlements 10% (2014-15: 6%) (2015-16: 37.2%) (2016-17: 21.4%) (2017-18: 12.2%) (2018-19: 16.7%) (2019-20: 3.65%) (2020-21: 2.6%) (2021-22: 5.26%)		10.2%
	d) Rural General 16% (2014-15: 24%) (2015-16: 14.5%) (2016-17: 21%) (2017-18: 11.1%) (2018-19: 6.1%) (2019-20: 11.79%) (2020-21: 10.5%) (2021-22: 5.26%)		8.2%

Analysis – Dwelling Completions

A total of 343 dwelling completions were recorded for this monitoring period. Completion rates will continue to be monitored closely to particularly given that the LDP has reached the end of its Plan period and as an evidence base for the preparation of the RLDP.

a) Main Towns

Of the 343 completions recorded during the monitoring period, 45.2% (155 dwellings) were in the County’s main towns. This is slightly higher than the identified target of 41% but within the +/- 10% flexibility range. Accordingly, the trigger for further investigation has not been reached. Chepstow accounted for the highest number of main town completions at 123 units (79%). Abergavenny accounted for 19% with 29 completions and Monmouth only 2% with 3 completions.

Of the completions in Chepstow the majority related to the allocated LDP site at Fairfield Mabey (SAH3) where 97 dwellings were completed. The remainder of completions related to small sites***. In Abergavenny 16 dwellings were completed on the LDP allocated Deri Farm site (SAH1), with the remaining completions on small sites***. Of the completions in Monmouth, two related to small sites*** with the remaining completion a LDC. Phosphates has clearly impacted on completion rates in Monmouth.

The majority of completions in the main towns related to market dwellings (130 dwellings/84%), with the majority in Chepstow (100 market dwellings). A total of 25 affordable completions were recorded, with 23 in Chepstow (6 at the Fairfield Mabey allocated site; 17 at former garage sites) and 2 in Abergavenny. There were no affordable dwelling completions in Monmouth.

The percentage of dwelling completions recorded in the main towns during this monitoring period of 45.2% is similar to last year's monitoring period but lower than the 2017-2021 monitoring periods (2021 – 22 43.5%, 2020 – 21 54.2%, 2019 – 20, 60.11%, 2018-19, 60.3% and 2017-18, 71.3%). It nevertheless remains higher than in the first three monitoring periods (2016 – 2017, 38.2%, 2015 – 2016, 40.2% and 2014 – 2015, 27%). These trends are considered to reflect the time attributed to getting the LDP allocations in position to deliver dwellings, evidenced by the contribution LDP allocations made to the main towns' completion figures (with two allocated LDP sites at Fairfield Mabey and Deri Farm accounting for 73% of the main town completions). The ongoing phosphate issue affecting the River Usk and River Wye catchment areas has also had an adverse impact on completions in Abergavenny and Monmouth.

Delivery rates will continue to be monitored closely to particularly given that the LDP has reached the end of its Plan period and as an evidence base for the preparation of the RLDP. In view of the above, there is not considered to be any significant issue with the implementation of the Plan's spatial strategy in relation to delivery of new housing in the Main Towns.

b) Severnside Settlements

The Severnside Settlements accounted for 36.4% (125) of dwelling completions recorded during the monitoring period. This is slightly higher than the identified target of 33% but within the +/- 10% flexibility range, and as such the trigger for further investigation has not been reached.

LDP allocated sites at Sudbrook Paper Mill (SAH7) and Phase 1 Rockfield Farm, Undy accounted for 36% (45 dwellings) and 30% (38 dwellings) of these completions respectively. The major windfall site at Church Road, Caldicot (approved through the unallocated sites policy) accounted for a further 40 completions (32%). The remaining 2 completions were small sites***. All of the completions recorded in Severnside related to market dwellings.

The LDP allocated site at Crick Road, Portskewett (SAH2) is currently under construction, with completions expected during the next monitoring period 2023/24. Similarly, while progress has been slower than anticipated on Strategic Housing allocation SAH6 – Land at Vinegar Hill, a planning application for 155 units received planning permission subject to the signing of a S106 Agreement on 16 June 2022, with completions anticipated on site in 2023/24. Further details on the progress of these and other LDP allocations is set out in the analysis of strategic housing sites (Policy S3).

Over the last two monitoring periods, Severnside recorded a higher proportion of overall completions than the earlier monitoring periods, which is reflective of a number of large LDP allocations delivering on sites. As such, there is not considered to be any significant

issue with the implementation of the Plan's spatial strategy in relation to dwelling completions in the Severnside area.

c) Rural Secondary Settlements

A total of 35 dwelling completions were recorded during the monitoring period within the Rural Secondary Settlements, accounting for 10.2% of all completions in the County. This is in line with the identified target of 10%, and as such the trigger for further investigation has not been reached.

The major windfall site at Grove Farm, Llanfoist (approved through the unallocated sites policy) accounted for the majority of completions in the rural secondary settlements, with 31 completions (88.6%), of which 14 were affordable. A further 3 completions were recorded in Raglan and 1 in Usk (all of which were market dwellings).

The completion rate is higher than the previous three monitoring periods (2021/22 5.26%, 2020/21 2.6% & 2019/20 3.65%). This reflects progress at the Grove Farm site in Llanfoist. Of note the LDP allocated site, Land at Chepstow Road (SAH10(iii)), Raglan, was approved in July 2023.

In view of the above, there is not considered to be any significant issue with the implementation of the Plan's spatial strategy in relation to dwelling completions delivered from this tier of the settlement hierarchy.

d) Rural General

A total of 28 dwelling completions were recorded during the monitoring period in the County's Rural General areas, which includes the Main Villages and Minor Villages listed in Policy S1, as well as homes in the open countryside. These completions account for 8.2% of the overall completions in the County. While this is lower than the identified target of 16%, it is within the +/- 10% flexibility range and, as such, the trigger for further investigation has not been reached.

Main Villages recorded 20 dwelling completions over the monitoring period (71.4%). The Main Village LDP allocated site at Well Lane Devauden (SAH11(ii)), accounted for the majority of these completions, with 15 dwellings completions (9 of which are affordable). A further 5 completions were recorded in other Main Villages, all of which related to market dwellings.

A total of 3 completions were recorded in Minor Villages comprising two dwellings and a barn conversion, all of which related to market dwellings.

The remaining 5 completions related to dwellings delivered in the open countryside. All of which relate to market dwellings and involved the conversion or change of use of an existing building.

The Main Village site at the Carpenter's Arms, Llanishen (SAH11(ix)(a)) for 8 affordable dwellings is under construction and progressing well and expected to contribute to completions during the next monitoring period.

In view of the above, there is not considered to be any issue with the implementation of the Plan's spatial strategy in relation to dwelling completions in the Rural General areas as set out in Policy S1.

Recommendation

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

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

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

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

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

** Large site windfall >10 dwellings

*** Small site windfall <10 dwellings

Indicator	Target <i>(Previous AMR Performance)</i>	Trigger for Further Investigation	Performance 1 April 2022 - 31 March 2023
Proportion of new housing development permitted in accordance with the spatial strategy Policy S1 / settlement hierarchy set out in Policy S2*	Location of new residential development should correspond to the requirements set out in the Tables to Policy S2: e) Main towns 41% <i>(2014-15: 81%)</i> <i>(2015-16: 31%)</i> <i>(2016-17: 30.2%)</i> <i>(2017-18: 59.61%)</i> <i>(2018-19: 29.6%)</i> <i>(2019-20: 13.5%)</i> <i>(2020-21: 54.2%)</i> <i>(2021-22: 23.1%)</i>	Housing permissions are +/- 10% of the requirements set out in the tables to Policy S2 in any 1 year	Dwelling Permissions 18.8%

	f) Severnside Settlements 33% <i>(2014-15: 11%)</i> <i>(2015-16: 10%)</i> <i>(2016-17: 54.1%)</i> <i>(2017-18: 24.15%)</i> <i>(2018 - 19: 53.2%)</i> <i>(2019 - 20: 61.8%)</i> <i>(2020-21: 32.7%)</i> <i>(2021-22: 23.1%)</i>		71.6%
	g) Rural Secondary Settlements 10% <i>(2014-15: 1%)</i> <i>(2015-16: 37%)</i> <i>(2016-17: 5.2%)</i> <i>(2017-18: 10.26%)</i> <i>(2018-19: 8.0%)</i> <i>(2019-20: 2.4%)</i> <i>(2020-21: 2.6%)</i> <i>(2021-22: 5.1%)</i>		0.9%
	h) Rural General 16% <i>(2014-15: 7%)</i> <i>(2015-16: 22%)</i> <i>(2016-17: 10.5%)</i> <i>(2017-18: 5.98%)</i> <i>(2018-19: 9.2%)</i> <i>(2019-20: 22.3%)</i> <i>(2020-21: 10.5%)</i> <i>(2021-22: 48.7%)</i>		8.7%

Analysis – Dwelling Permissions

Dwelling permissions in Monmouthshire during 2022-23 totalled 229 which is higher than recorded in previous two monitoring periods (39 permissions in 2021-22 and 86 permissions in 2020-21). The increase in permissions recorded during this monitoring period is predominantly due to the LDP allocated site at Vinegar Hill Undy gaining permission for 155 homes. Of the 229 dwelling permissions, 179 (78.2%) related to market homes and 50 (21.8%) were affordable homes. The latter is a significant increase compared with last year, when all permissions related to market homes.

Dwelling permissions continued to be impacted water quality issues in relation to Phosphates affecting the River Wye and River Usk, with developments required to demonstrate betterment or neutrality. Solutions are being investigated but no strategic solution for phosphates was available during the monitoring period. This is having a significant impact on the number of housing sites being brought through the planning system. In addition, the majority of the LDP allocated sites have gained permission/been developed which will impact of the number of dwelling permissions recorded in future AMRs.

Dwelling permission rates will continue to be monitored closely to particularly given that the LDP has reached the end of its Plan period and as an evidence base for the preparation of the RLDP.

e) Main Towns

Of the 229 dwellings granted planning permission during the monitoring period, 18.8% (43 units) were in the County's Main Towns of Abergavenny, Monmouth and Chepstow. This falls below the +/- 10% flexibility allowance of the identified LDP target (41%) and accordingly, the trigger for further investigation has been reached.

Chepstow accounted for the majority of dwelling permissions recorded at 88.4% (38 homes), with Monmouth accounting for 9.3% (4 homes) and Abergavenny 2.3% (1 home). The permissions were made up of 12 applications, all of which are classified as small sites, contributing to the Plan's small site allowance. Of these, 5 applications related to change of use and conversions accounting for 27 units. The remaining 7 applications related to redevelopment/new build dwellings, providing a total of 16 units.

As anticipated in earlier AMRs, the proportion of permissions in the main towns has decreased due to the allocated Strategic Housing Sites in Abergavenny, Monmouth and Chepstow gaining planning permission in previous monitoring periods. The ongoing phosphate issue affecting the River Usk and River Wye catchment areas has also had an adverse impact on dwelling permissions in Abergavenny and Monmouth in recent years. An update on the progression of allocated sites in the Main Towns is provided in the strategic sites policy analysis (Policy S3).

Given the significant impact of riverine phosphate levels in the River Usk and Wye Catchment Areas on delivery of development in the Main Towns of Abergavenny and Monmouth, there is not considered to be any significant issue with the implementation of the Plan's spatial strategy in relation to dwelling permissions granted in the Main Towns.

f) Severnside Settlements

164 of the 229 dwellings granted planning permission during the monitoring period were in Severnside settlements equating to 71.6%. This is above the identified target for this area (33%) and accordingly, the trigger for further investigation has been reached.

The reason for the high proportion of dwelling permissions recorded in Severnside is due to the strategic LDP allocation at Vinegar Hill, Undy gaining consent. This site accounted for 155 of the homes permitted (94.5%), of which 116 were for market homes and 39

affordable. The remaining 9 dwelling permissions related to small sites, 8 of which were market homes and 1 affordable home.

As above, as other LDP strategic allocations have already gained consent/been developed, it is expected that dwelling permissions recorded in future LDP AMRs will be lower in this area.

In view of the above, there is not considered to be any significant issue with the implementation of the Plan's spatial strategy in relation to dwelling permissions granted in the Rural Secondary Settlements.

g) Rural Secondary Settlements

2 units (0.9%) of all dwellings permitted during the monitoring period were in the County's Rural Secondary Settlements. This is within the 10% indicator range of the LDP target of 10%; therefore, the trigger for further investigation has not been reached.

The two dwellings permitted related to conversions, one in Raglan and one in Usk, both of which were for market homes.

Given that all of the allocated LDP sites in the Rural Secondary Settlements have now been granted permission, (SAH10(ii) Land south of School Lane, Penperlleni and SAH10(i) Cwrt Burrium, Usk are both complete and outline permission on the SAH10(iii) Land at Chepstow Road, Raglan), together with the ongoing impact of phosphates, it is expected that dwelling permissions will be lower than the identified target in these settlements in future LDP AMRs.

In view of the above, there is not considered to be any significant issue with the implementation of the Plan's spatial strategy in relation to dwelling permissions granted in the Rural Secondary Settlements.

h) Rural General

20 (8.7%) of all dwellings permitted during the monitoring period were in the County's rural areas. This is within the 10% indicator range of the LDP target of 10%; therefore, the trigger for further investigation has not been reached.

The majority of the permissions in rural areas related to conversions/change of use applications (13 dwellings) in a range of rural settlements throughout Monmouthshire. Of the remaining permissions five related to new build and one related to a One Planet Development in Tintern.

In view of the above, there is not considered to be any issue with the implementation of the Plan's spatial strategy in relation to dwelling permissions granted in the County's rural settlements.

Recommendation

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

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

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

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

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

Housing Provision

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

Contextual Changes

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

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

Indicator	Target <i>(Previous AMR Performance)</i>	Trigger for Further Investigation	Performance 1 April 2022 – 31 March 2023
1. The number of additional general market and affordable dwellings built over the plan period*	Up to 488 dwellings to be built per annum 2013-2021 <i>(2014-15: 205)</i> <i>(2015-16: 234)</i> <i>(2016-17: 238)</i> <i>(2017-18: 279)</i> <i>(2018-19: 443)</i> <i>(2019-20: 356)</i> <i>(2020-21: 419)</i> <i>(2021-22: 361)</i>	10% less or greater than the LDP strategy build rate for 2 consecutive years	343

<p>2. The annual level of housing completions monitored against the Average Annual Requirement (AAR)**</p>	<p>Difference between actual annual completions and the AAR</p> <p><i>(2014-15: -245 units (-54.4%))</i> <i>(2015-16: -216 units (-48%))</i> <i>(2016-17: -212 (-47.1%))</i> <i>(2017-18: -171 units (-38%))</i> <i>(2018-19: -7 units (-1.6%))</i> <i>(2019-20: -94 units (-20.9%))</i> <i>(2020-21: -31 units (-6.9%))</i></p>	<p>Under delivery of annual completions on two consecutive years</p>	<p>No longer recorded as 10 years' worth of housing delivery monitoring against the 10-year housing requirement of 4,500 units reached in March 2021.</p>
<p>3. Total cumulative completions monitored against the cumulative requirement (Cumulative AAR)**</p>	<p>Difference between the cumulative completions and the cumulative AAR</p> <p><i>(2014-15: -769 units (-42.7%))</i> <i>(2015-16: -985 units (-43.8%))</i> <i>(2016-17: -1197 (-44.3%))</i> <i>(2017-18: -1368 units (-43.4%))</i> <i>(2018-19: -1375 units (-38.2%))</i> <i>(2019-20: -1469 (-36.3%))</i> <i>(2020-21: -1500 (-33.3%))</i></p>	<p>Under delivery of completions on two consecutive years</p>	<p>-1,500 (33.3%) recorded for 10 years of monitoring in the 2020-21 AMR</p> <p>A further 361 units were delivered during the 2021-22 monitoring period and 343 during this monitoring period.</p>
<p>4. Density of housing permitted on allocated sites♦</p>	<p>Meet the target densities set out in</p>	<p>Planning permissions</p>	<p>28.9 dph</p>

	site allocation policies SAH1 to SAH10	granted that do not meet these densities	
5. Review of Gypsy/ Traveller Accommodation Needs and Sites Study to be completed within two years of the LDP's adoption	If a need for additional site(s) is identified seek to allocate a suitable site by Spring 2017	Identified need not met by Spring 2017	Gypsy Traveller Accommodation Assessment approved by WG January 2017. Progress on meeting need discussed below.

Analysis

1. Whilst the method by which the monitoring of housing delivery changed during the 2019-20 monitoring period, this indicator measures completions against the completion target (488) from Plan adoption in 2014 rather than from 2011, the beginning of the Plan period. However, as noted above the Adopted LDP covers the 10-year plan period 2011 – 2021, with 10 years' worth of housing delivery monitoring against the 10 year housing requirement of 4,500 units reached in March 2021. The number of completions achieved during the monitoring period is therefore noted for information only. 343 dwellings were built during the monitoring period (295 general market and 48 affordable).

61.5% of all completions were on allocated sites (211 units), including Deri Farm, Abergavenny (16), Fairfield Mabey, Chepstow (97), Sudbrook Paper Mill (45), Rockfield Farm, Undy (38) and Land at Well Lane Devauden (15). Large windfall sites accounted for a further 71 units (21%) and small sites accounted for the remaining 61 units (17.5%). The Church Road site in Caldicot accounted for over half of the windfall completions with 40 units.

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

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

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

Annual Completions Compared against the AAR

The first of the Development Plans Manual indicators measures the annual level of housing completions monitored against the AAR. The DPM states that this must be presented clearly in the AMR both in numerical and percentage terms (plus/minus x %) and that the trigger for further investigation should be under delivery of annual completions on two consecutive years. As indicated in the table below, whilst the Plan under delivered in the early years of the Plan period, housing completions were much closer to the AAR towards the end of the 10-year plan period, -7 units (-1.6%) in 2018/19, -94 units (-20.9%) in 2019/20, -31 (-6.9%) in 2020/21. This is due in main to the speed with which the strategic sites have come forward.

This indicator is no longer recorded as 10 years' worth of housing delivery monitoring against the 10-year housing requirement of 4,500 units reached in March 2021. However, the trigger for Plan review as a result of under delivery of housing completions was met in previous AMRs and work on the RLDP is progressing. Table 1 provides a summary table of annual completions.

Cumulative Completions Compared against the Cumulative AAR

The second of the Development Plans Manual (DPM) indicators measures the total cumulative completions monitored against the cumulative requirement (Cumulative AAR). Again, the DPM states that this must be presented clearly in the AMR both in numerical and percentage terms (plus/minus x %) and that the trigger for further investigation should be under delivery of completions for two consecutive years. There has been under delivery of cumulative completions since the beginning of the Plan period and so the trigger has been met. However, AMRs for the later years of the LDP plan period note that the % of under delivery has steadily declined as the strategic sites have come forward. More detailed analysis of progress on strategic sites can be found in the section on Strategic Housing Sites (Policy S3).

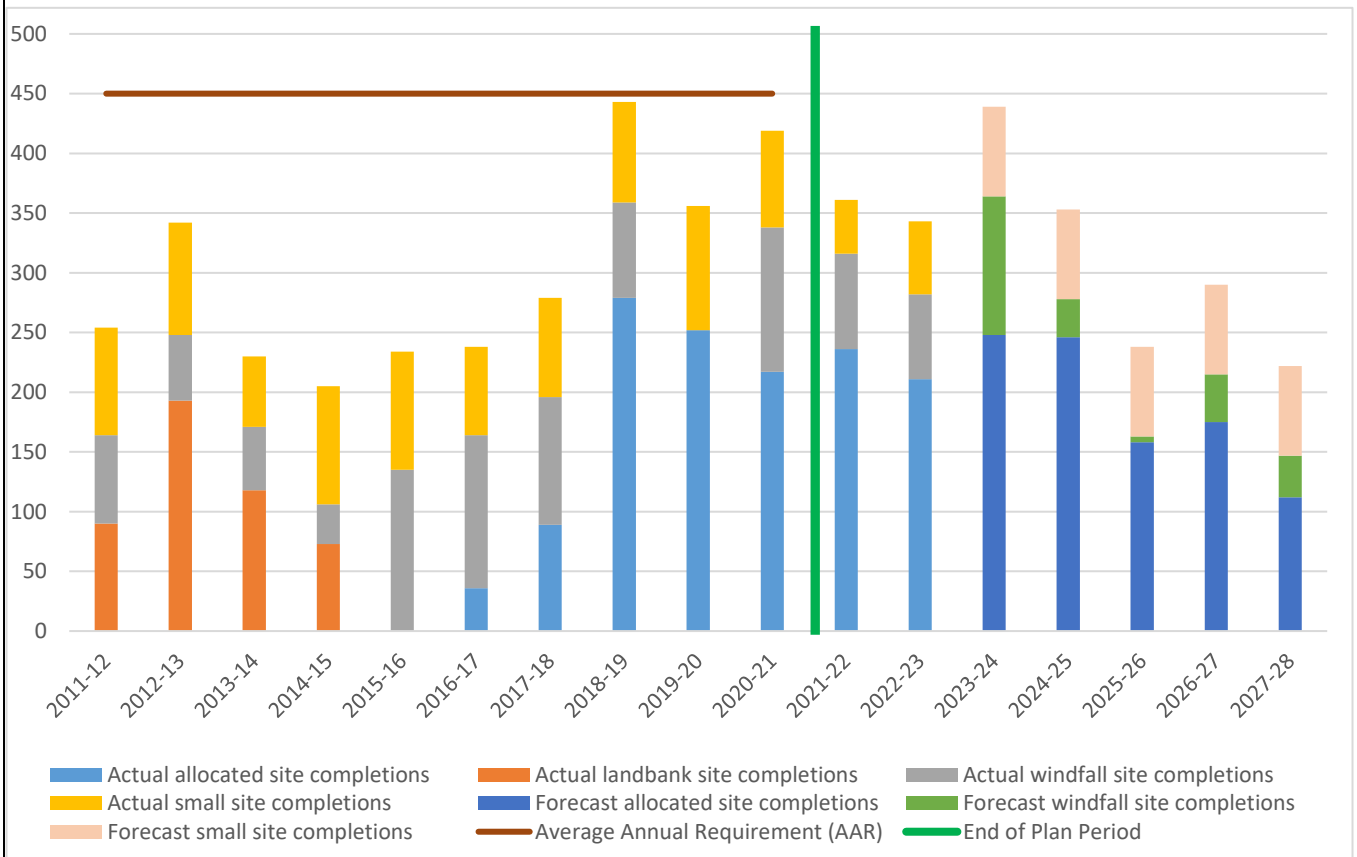
Ten years' worth of completions were recorded during the 2020-21 monitoring period, with the Plan delivering a shortfall of -1,500 units (33.3%) at that point when compared to the 10-year Plan requirement of 4,500 units. However, as noted above a further 361 units were completed during the 2021/22 monitoring period and 343 during the 2022/23 monitoring period and are included in the table below for information.

Housing Development Trajectory 2011-2028

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

trajectory has been prepared and is shown in the table and graph below. Detailed information with regard to the timing and phasing of sites included in the trajectory are included at Appendix 1. As the end of the Plan period has been reached this exercise takes the trajectory into the RLDP Plan period and covers the five-year period 2023-2028.

Housing Development Trajectory 2011-2028



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

Table 1 – Annual Completions Compared against the AAR

LDP Year	Monitoring contributing to 10-year housing requirement of 4,500 units										2021/ 22 AMR period	2022/ 23 AMR period	5 - year Trajectory 2023/24 – 2027/28				
	1	2	3	4	5	6	7	8	9	10*							
Year	2011- 12	2012 -13	2013 -14	2014 -15	2015 -16	2016 -17	2017 -18	2018 -19	2019 -20	2020 -21	2021- 22	2022- 23	2023- 24	2024- 25	2025- 26	2026- 27	2027- 28
Actual completions landbank sites ⁷	90	193	118	73	0	0	0	0	0	0	0	0					
Actual completions allocated sites	0	0	0	0	0	36	89	279	252	217	236	211					
Actual completions windfall sites	74	55	53	33	135	128	107	80	0	121	80	71					
Actual completions small sites	90	94	59	99	99	74	83	84	104	81	45	61					
Anticipated completions allocated sites													248	246	158	175	112
Anticipated completions windfall sites													116	32	5	40	35
Anticipated completions small sites													75	75	75	75	75
Total Actual Completions	254	342	230	205	234	238	279	443	356	419	361	343	439	353	238	290	222

⁷ Landbank sites are those sites which were allocated for development in previous Plans

Average Annual Reqt. (Based on straight line AAR)	450	450	450	450	450	450	450	450	450	450	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Completions against the AAR	-196	-108	-220	-245	-216	-212	-171	-7	-94	-31	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Completions % +/-against the AAR	-43.6	-24.0	-48.9	-54.4	-48.0	-47.1	-38.0	-1.6	-20.9	-6.9	N/A	N/A	N/A	N/A	N/A	N/A	N/A

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

Table 2 – Cumulative Completions Compared against the Cumulative AAR

	Monitoring contributing to 10-year housing requirement of 4,500 units											
LDP Year	1	2	3	4	5	6	7	8	9	10*		
Year	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23
Actual cumulative completions landbank sites ⁸	90	283	401	474	474	474	474	474	474	474	474	474
Actual cumulative completions allocated sites	0	0	0	0	0	36	125	404	656	873	1109	1320
Actual cumulative completions windfall sites	74	129	182	215	350	478	585	665	665	786	866	937
Actual cumulative completions small sites	90	184	243	342	441	515	598	682	786	867	912	973
Total Cumulative Completions	254	596	826	1031	1265	1503	1782	2225	2581	3000	3361	3704
Average Annual Cumulative Req.	450	900	1350	1800	2250	2700	3150	3600	4050	4500	N/A	N/A
Completions against the Cumulative AAR	-196	-304	-524	-769	-985	-1197	-1368	-1375	-1469	-1500	N/A	N/A
Cumulative completions % +/- against the Cumulative AAR	-43.6	-33.8	-38.8	-42.7	-43.8	-44.3	-43.4	-38.2	-36.3	-33.3	N/A	N/A

⁸ Landbank sites are those sites which were allocated for development in previous Plans

4. The strategic LDP allocation at Vinegar Hill gained planning permission during the current monitoring period. The density of development at the site is 28.9 dph, which is just below the target density of 30 dph.

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

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

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

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

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

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

A planning application for a change of use of land to accommodate two park homes and up to 4 touring caravans (private family site) was approved at land adjacent Sunnybank, Crick (DM/2019/01480). Although condition 3 of the permission stated that no part of the site shall be used by touring caravans and condition 4 limited the site to personal use. Application DM/2020/00883 sought to vary condition 3 and 4 to allow 4 touring pitches on the site and remove the restriction on personal use. This received a split decision with condition 3 relating to the touring caravans being approved and the removal of the personal restriction being refused (13/10/2020). This was the subject of a further modification of condition application in the last monitoring period to amend the named people that can reside on the site (DM/2021/00311), which was approved during the last monitoring period (26/05/2021).

A planning application for one traveller pitch incorporating a static caravan, touring caravan, conversion of existing stable block to a day/utility room was approved at land adjacent to Minnett's Lane, Rogiet during this monitoring period (DM/2021/01695).

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

Recommendation

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

*Core Indicators

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

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

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

Strategic Housing Sites

Monitoring Aim/Outcome: To deliver the strategic housing sites in accordance with strategic policy S3 and site allocation policies SAH1-SA7.

Strategic Policy: S3 Strategic Housing Sites

LDP Objectives Supported: 1, 3 & 4

Other LDP Policies Supported: SAH1-SA7

Contextual Changes

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

Indicator	Target	Trigger for Further Investigation	Performance 1 April 2022– 31 March 2023
1. The number of dwellings permitted on strategic sites as identified in Policy S3 and site allocation policies SAH1 to SAH7	Secure /deliver housing need on the key strategic sites identified in Policy S3 and site allocation policies SAH1-SA7 during the plan period:	Planning permission is not granted by the end of 2014 for each of the strategic sites	
	a) Deri Farm, Abergavenny		(250*)
	b) Crick Road, Portskewett		(269*)
	c) Fairfield Mabey, Chepstow		(373*)
	d) Wonastow Road, Monmouth		(340*)
	e) Rockfield Farm, Undy		(266*)
	f) Land at Vinegar Hill, Undy		155
	g) Former Paper Mill, Sudbrook		(210*)

2. The number of dwellings completed on strategic sites as identified in Policy S3 and site allocation policies SAH1 to SAH7	Dwelling completions in accordance with the housing trajectory for each of the strategic sites**	Dwelling completions fall below 10% of housing trajectory target for each of the strategic sites	
	a) Deri Farm, Abergavenny (2021-22 trajectory = 16 completions for 2022-23)		16
	b) Crick Road, Portskewett (2021-22 trajectory = 0 completions for 2022-23)		0
	c) Fairfield Mabey, Chepstow (2021-22 trajectory = 91 completions for 2022-23)		97
	d) Wonastow Road, Monmouth (2021-22 trajectory = 0 completions for 2022-23)		0***
	e) Rockfield Farm, Undy (2021-22 trajectory = 38 completions for 2021-22)		38
	f) Land at Vinegar Hill, Undy (2021-22 trajectory = 0 completions for 2022-23)		0
	g) Former Paper Mill, Sudbrook (2021-22 trajectory = 40)		45

	<i>completions for 2022-23)</i>		
Analysis			
<p>1. Dwelling Permissions</p> <p>In terms of allocated strategic sites, the strategic site at Vinegar Hill, Undy (DM/2022/01042) was granted planning permission during the current monitoring period. Consequently, all LDP strategic site allocations now have planning permission, four of which are under construction (Fairfield Mabey, Chepstow; Crick Road, Portskewett; Rockfield Farm, Undy; Vinegar Hill, Undy) or complete (Sudbrook Paper Mill and Deri Farm, Abergavenny). One site is partially complete (Wonastow Road, Monmouth), with the remaining phase at Drewen Farm currently engaged in pre-application enquiries following the announcement by Dwr Cymru Welsh Water that there is a strategic phosphate solution for Monmouth which is due to be installed by 31st March 2025.</p> <p>Given the constraints associated with some of the sites, including Deri Farm and Fairfield Mabey, the trigger date of gaining permission for all sites by the end of 2014 was unrealistic.</p> <p>Deri Farm, Abergavenny (SAH1):</p> <p>Persimmon Homes submitted a full application (DC/2014/01360) for 250 residential units (201 market and 49 affordable dwellings) in November 2014. The progress of the application was slower than anticipated due to significant issues relating to site viability, particularly affordable housing provision and the undergrounding of overhead power lines. However, these issues were subsequently resolved, the application was approved in the 2017 - 2018 monitoring period and 250 dwellings have been completed to date.</p> <p>The housing trajectory prepared in consultation with the Housing Stakeholder Group shows that the site delivered 234 dwellings within the Plan period with all dwellings completed during the current monitoring period.</p> <p>Crick Road, Portskewett (SAH2):</p> <p>In the 2018/19 monitoring period Monmouthshire County Council and Melin Homes submitted a joint outline application (DM/2018/00696) for 291 residential units (218 market and 73 affordable units), this was granted permission in March 2019. During the 2019/20 monitoring period a reserved matters application (DM/2019/01041) for 269 residential units was approved (201 market and 68 affordable units). This is below the target number of units for the site (285) in the LDP. The drop in density of the site has been driven by changes to the proposed house types and by positive improvements to the design of the site. These improvements include Green Infrastructure that forms the north-south axis of the site, the ecological implications of a badger sett on the site which has led to greater protected open space, whilst the highway requirements have resulted in safer, more accessible links. Policy SAH2 allocates 1 hectare of B1, which has been replaced with a care home which will provide up to 32 beds on the area outlined for employment use. This is subject to a separate planning application, DM/2019/01629, which was granted permission on 26 February 2020. The acceptance of this loss has previously been justified in relation to the outline permission which was approved in an earlier monitoring period.</p>			

Whilst not strictly B1 employment a care home represents a form of employment and would result in job creation on the site.

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

Fairfield Mabey, Chepstow (SAH3):

The landowner submitted an outline application (DC/2014/01290) in October 2014 for up to 600 residential units (350 to be delivered within the Plan period), commercial space including offices and workshops (Use Class B1), small scale retail/food and drink floorspace (Use Classes A1 and A3) and multi-functional green and blue open space. Progress with the application was slower than anticipated due to various matters, including highways issues (Welsh Government Highways Division had a holding objection on the application for 18 months). However, the outstanding issues have since been resolved and the site gained outline planning permission for 450 units (432 market and approximately 18 affordable units on 1.5 acres of the site) in November 2017. The outline application at the Fairfield Mabey site reduced the employment provision from 2.8ha to 0.65ha of B1 land. A Reserved Matters Application (DM/2019/00001) was approved during the 2019/20 monitoring period for 347 units. The application was for the market housing element of the site and did not include the land identified for affordable housing or employment land; the affordable housing element of the site (26 units) was the subject of a separate application for which Reserved Matters has been permitted (DM/2019/01960(RM)). The site is currently under construction with 203 completions recorded to date. Of note, an additional six affordable homes have been delivered on the Mabey Site via the purchase of market homes by Pobl. This takes the total number of affordable homes to 32.

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

Wonastow Road, Monmouth (SAH4):

Outline permission was granted for up to 370 dwellings and 6.5ha of employment land in December 2014. The site developers (Barratt/David Wilson and Taylor Wimpey) submitted a Reserved Matters application (DC/2015/00392) for 340 units (238 market and 102 affordable units) which was granted permission in November 2015. The site was completed during the 2020/21 monitoring period.

The overall LDP site allocation is for a total of 450 units. The additional units relating to this allocation are to be delivered as an extension to the site at Drewen Farm. The remaining phase at Drewen Farm is currently engaged in pre-application enquiries following the announcement by Dwr Cymru Welsh Water that there is a strategic phosphate solution for Monmouth which is due to be installed by 31st March 2025.

Rockfield Farm, Undy (SAH5):

This site is allocated for 270 residential units and 2ha of serviced land for business and industrial use in the adopted LDP. An outline planning application was submitted in July 2016 (DC/2016/00883) for 266 units and 5,575 sq m of employment land (B1 use). For the purposes of the AMR, 265 units (198 market and 67 affordable units) are recorded as a net

gain, the existing farmhouse has a residential use and is being demolished so has been taken off the overall figure. Progress with the site has been slower than anticipated due to various issues, including archaeology. These issues have, however, been resolved and the outline application was approved in March 2018. A Reserved Matters application (DM/2018/01606) was granted planning permission for phase 1 of the site in February 2019 for 144 residential units. A reserved matters application (DM/2021/00357) for 120 affordable homes (MHA) was granted planning permission during the previous monitoring period.

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

Land at Vinegar Hill, Undy (SAH6):

This site for 225 residential units is linked to the adjacent Rockfield Farm site and was expected to progress in tandem. Whilst initial progress on the site has been slow, MCC successfully bid for CCR funding to support the delivery of the site, which will enable a fully planning policy compliant scheme to be delivered despite viability pressures which had resulted in the site not coming forward. Since the allocation additional requirements have been introduced, mainly the requirement for a Sustainable Drainage System (SuDS) and this has reduced the amount of developable land on the allocation and therefore reduced the number of dwellings that are achievable on site. Additionally, some land parcels adjacent to the application site but within the allocation are within separate ownership and have not come forwards as previously anticipated, therefore further limiting the number of homes. The outline consent granted permission for up to 155 dwellings, with a reserved matters application (DM/2022/01042) providing 70 dwellings in combination with the existing 72 dwellings approved on the adjacent parcel, totalling 142 dwellings, which is considered to comply with the outline consent for up to 155 dwellings.

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

Former Paper Mill, Sudbrook (SAH7):

A full planning application (DC/2015/01184) was submitted by Harrow Estates (Redrow confirmed as the developer) in October 2015 for 212 residential units (192 market and 20 affordable units). There had been a number of site viability issues associated with this application meaning that progress with the application was slower than anticipated. However, these issues were subsequently resolved and the application was approved in the 2016/17 monitoring period (November 2016). Following a re-plan of part of the site the number of residential units on the site has decreased to 210. The site was completed during the current monitoring period.

The housing trajectory prepared in consultation with the Housing Stakeholder Group shows that the site delivered 165 dwellings within the Plan period, with all dwellings completed during the current monitoring period.

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

The housing trajectory figures demonstrate a Plan period shortfall (i.e. up to the end of 2021) of 1,092 dwellings from strategic sites. While there continues to be progress with strategic sites (with all sites now having planning permission and either under construction or complete⁹), there was a significant shortfall on the delivery of dwellings on strategic sites during the Plan period. This is primarily due to addressing constraints associated with bringing forward some of the strategic sites and the development plan process at the time did not require site viability and deliverability to be frontloaded in relation to site allocations in the Adopted LDP. The delays in sites coming forward, however, have implications for other monitoring targets and triggers and the need for any further action is being considered in connection with those particular indicators. In particular the delivery of strategic sites has obvious implications for the spatial strategy and housing delivery (general market and affordable). For further information with regard to this see the policy analysis for Policy S1, S2 and S4.

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

2. Dwelling Completions

Completions were recorded on the following allocated strategic sites during the monitoring period: Deri Farm, Abergavenny (16 completions), Fairfield Mabey, Chepstow (97 completions), Rockfield Farm, Undy (38 completions) and Sudbrook Paper Mill (45 completions). This is expected as all of these sites gained planning permission prior to this monitoring period. All of the completions recorded were in line with or exceeded the 2021-22 JHLAS trajectory. As evidenced above, it is anticipated that dwelling completions will align with the identified Housing Stakeholder Group agreed trajectory targets as the sites progress.

In light of guidance as set out in the Development Plans Manual (Ed 3) Monmouthshire County Council has produced a housing trajectory. Further analysis of the housing trajectory is included in the section on Policy S2 Housing Provision. Whilst the requirement to evidence a 5-year housing supply no longer applies it is useful to consider those units which are projected to be completed outside of the next 5 years.

⁹ SAH4 Wonastow Road, Monmouth site is partially complete, with the remaining phase at Drewen Farm currently engaged in pre-application enquiries following the announcement by Dwr Cymru Welsh Water that there is a strategic phosphate solution for Monmouth which is due to be installed by 31st March 2025.

Housing Trajectory 2021-2023

	2021-22		2022-23		Change in Number of Units Outside next 5 years
	Within next 5 years	Outside next 5 years	Within next 5 years	Outside next 5 years	
Deri Farm	16	0	-	-	-
Fairfield Mabey	267	0	170	0	=
Rockfield Farm	160	0	120	0	=
Vinegar Hill	155	70	142	83	+13
Wonastow Road (Taylor Wimpey) *	-	-	-	-	-
Wonastow Road (Barratt) *	-	-	-	-	-
Wonastow Road (Drewen Farm)	0	110	110	0	-110
Crick Road	200	69	269	0	-69
Sudbrook Paper Mill	45	0	-	-	-

One strategic site has seen an increase in the number of units outside of the next 5-year period, Vinegar Hill, Undy. However, as above, land adjacent to the part of the site with planning permission but within the allocation is within separate ownership and has not come forwards as previously anticipated. Conversely, completions on the Wonastow Road Drewen Farm, Monmouth and Crick Road, Portskewett sites have come forward in the trajectory owing to the progress made during the monitoring period. Accordingly, there are 83 units which fall outside of the next 5 years (i.e. 2023 – 2028) in the 2023 housing trajectory, compared to 249 in the previous AMR.

Recommendation

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

*Site permitted prior to this AMR monitoring period.

**2021-22 Trajectory as this forecasts completions for 2022-23 period i.e. current monitoring period.

***Site is complete.

Affordable Housing

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

Strategic Policy: S4 Affordable Housing

LDP Objectives Supported: 1, 3 & 4

Other LDP Policies Supported: H7, SAH1-SAH11

Contextual Changes

House Prices

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

Indicator	Target <i>(Previous AMR Performance)</i>	Trigger for Further Investigation	Performance 1 April 2022– 23 March 2023
1. The number of additional affordable dwellings built over the plan period* ¹	Deliver 96 affordable dwellings per annum 2011-2021 (total of 960 over the plan period) <i>(2014-15: 17)</i> <i>(2015-16: 63)</i> <i>(2016-17: 47)</i> <i>(2017-18: 84)</i> <i>(2018-19:131)</i> <i>(2019-20: 82)</i> <i>(2020-21: 71)</i> <i>(2021-22: 35)</i>	10% less or greater than the LDP strategy build rate for 2 consecutive years 2011-2021	48
2. Number of affordable dwellings secured on new housing sites	a) 35% of the total number of dwellings to be affordable on sites of 5 or more dwellings in the Main Towns and Rural Secondary Settlements identified in Policy S1 <i>(2014-15: 35%)</i> <i>(2015-16: 34%)</i>	Proportion of affordable housing achieved on development sites in each area falls below the requirement set out in Policy S4	100%

	<p>(2016-17: 43%) (2017-18: 16.5%) (2018-19: 32%) (2019-20: 100%) (2020-21: 23.35%) (2021-22: N/A)</p>		
	<p>b) 25% of the total number of dwellings to be affordable on sites of 5 or more dwellings in the Severnside Settlements identified in Policy S1</p> <p>(2014-15: 100%) (2015-16: N/A) (2016-17: 9.7%) (2017-18: 31.7%) (2018-19: 26%) (2019-20: 32%) (2020-21: N/A) (2021-22: N/A)</p>		25%
	<p>c) 60% of the total number of dwellings to be affordable on sites of 3 or more dwellings in the Main Villages identified in Policy S1</p> <p>(2014-15: 0%) (2015-16: 60%) (2016-17: 60%/20%) (2017-18: 62.5%) (2018-19: 60.0%) (2019-20: 67.5%) (2020-21: 60%/16%) (2021-22: N/A)</p>		N/A (No applicable applications)
	<p>d) Minor villages: sites with capacity for 4 dwellings make provision for 3 to be affordable; and sites with capacity for 3</p>		N/A (No applicable applications)

	<p>dwelling make provision for 2 to be affordable.</p> <p><i>(2014-15: N/A)</i> <i>(2015-16: N/A)</i> <i>(2016-17: N/A)</i> <i>(2017-18: N/A)</i> <i>(2018-19: N/A)</i> <i>(2019-20: N/A)</i> <i>(2020-21: N/A)</i> <i>(2021-22: N/A)</i></p>		
<p>3. Number of affordable dwellings permitted/built on Main Village Sites as identified in Policy SAH11</p>	<p>Main Village sites to collectively deliver 20 affordable dwellings per annum 2014-2021</p> <p><i>(2014-15: 0)</i> <i>(2015-16: 9 permitted)</i> <i>(2016-17: 9 permitted/9 built)</i> <i>(2017-18: 5 permitted/0 built)</i> <i>(2018-19: 12 permitted/3 built)</i> <i>(2019-20: 9 permitted/0 built)</i> <i>(2020-21: 3 permitted/0 built)</i> <i>(2021-22: 0 permitted/ 0 built)</i></p>	<p>10% less or greater than the target build rate for 2 consecutive years</p>	<p>0 permitted/ 9 built</p>
<p>4. Number of affordable dwellings built through rural exception schemes</p>	<p>No target</p> <p><i>(2014-15: 0)</i> <i>(2015-16: 0)</i> <i>(2016-17: 0)</i> <i>(2017-18: 0 built/3 permitted)</i> <i>2018-19: 4 (1 permitted)</i> <i>2019-20: 4 (0 permitted)</i> <i>(2020-21: 0 permitted/0 built)</i> <i>(2022-22: 0 permitted/0 built)</i></p>	<p>None</p>	<p>0 built/ 0 permitted</p>

5. Affordable housing percentage target in Policy S4	Target to reflect economic circumstances	Average house prices increase by 5% above the base price of 2012 levels sustained over 2 quarters	Refer to analysis below (5)
Analysis			
<p>1. A total of 48 affordable dwellings were completed during the monitoring period accounting for 14% of the total dwelling completions recorded. This is well below the LDP target of 96 affordable homes per annum. Housing delivery records covering the 10-year plan period 2011 - 2021 set out that the Plan has delivered 658 affordable homes compared to a target of 960 affordable homes (a shortfall of 302 affordable homes).</p> <p>The delivery rate of affordable homes has fluctuated over previous monitoring periods ranging from 17 in 2014/15, 63 in 2015/16, 47 in 2016/17, 84 2017/18, 131 2018/19, 82 2019/20, 71 2020/21 and 35 in 2021/22. A total of 578 affordable homes have been delivered since the Plan's adoption in 2014.</p> <p>Of the 48 affordable housing completion recorded during the current monitoring period, allocated LDP sites accounted for 31% - Fairfield Mabey (SAH3) accounted for 6 homes and Land at Well Lane, Devauden (SAH11(ii)) accounted for 9 homes. The other affordable housing completions comprised small sites (two former garage sites in Chepstow, 17 homes, and Abergavenny, 2 homes) and a windfall site at Grove Farm, Llanfoist (14 homes).</p> <p>The shortfall is largely attributable to the lead in period of the strategic housing sites, many of which continue to deliver homes now which contributes to the RLDP housing delivery: it is worth noting that there are 280 affordable homes with consent and due to be built in the near future. The impact of phosphates restrictions is also now affecting site commencements and therefore completions. This reduced trend of affordable housing delivery is therefore anticipated to continue in the short-term awaiting progress on the RLDP.</p> <p>Affordable housing completion rates will continue to be monitored closely particularly given that the LDP has reached the end of its Plan period and as an evidence base for the preparation of the RLDP.</p>			
<p>2. Main Towns and Rural Secondary Settlements</p> <p>The proportion of affordable dwellings permitted on sites of 5 or more homes in the County's main towns and rural secondary settlements during the monitoring period equated to 100% which is higher than the LDP target of 35%. However, this is based on one planning permission comprising a change of use from offices to 8 flats in Chepstow, all of which are for affordable homes (100% affordable housing scheme to be let by MHA).</p>			

Sevenside Settlements

One planning permission was recorded on sites of 5 or more dwellings in Sevenside settlements during the monitoring period. The related to the LDP strategic site – Land at Vinegar Hill, Undy (SAH6) – which was granted permission for 155 dwellings, of which 39 homes (25%) are affordable. This level of affordable housing provision meets the LDP target of 25% on sites of 5 or more dwellings in Sevenside.

Main Villages

No permissions were granted during the monitoring period for new housing sites of 3 or more homes in the Main Villages (see policy analysis for Policies S1 and S2). Of note, planning permission was granted for 8 dwellings in Little Mill, of which 3 are affordable (37.5%). However, this is not counted in the AMR figures as this comprised the demolition of an existing apartment block and the erection of 6 dwellings and 2 apartments as there is not net gain in dwellings.

Minor Villages

No permissions were granted during the monitoring period for small sites in Minor Villages.

Affordable housing planning permissions will continue to be monitored closely particularly given that the LDP has reached the end of its Plan period and as an evidence base for the preparation of the RLDP.

3. While there were no permissions recorded over the monitoring period on the allocated Main Village sites identified in LDP Policy SAH11, 9 affordable homes were completed at Well Lane, Devauden, SAH11(ix)(a). The Main Village site at Land Rear of Carpenters Arms, Llanishen SAH11(ix)(a) is currently under construction**. Despite this progress, the target for the Main Village sites to collectively deliver 20 affordable dwellings per annum nevertheless has not been achieved.

The impact of riverine phosphate levels in the River Usk and Wye Catchment Areas continues to have an impact on the site at Little Mill which has been unable to progress through the planning application system.

The Main Village sites have delivered 30 affordable homes since the LDP’s adoption which is significantly short of the LDP Plan period target of 20 affordable units per annum. The delivery of these sites will be given further consideration as part of the RLDP process. The reasons for the lack of progress on Main Village sites will be investigated further, including for example unrealistic land owner expectations in relation to land values. This will enable the Council to de-allocate those sites that are not progressing as intended. Letters have been sent to the land owners/ agents of all remaining undelivered Main Village Sites requesting evidence to demonstrate that the sites are deliverable and viable and whether they intend to progress them, noting they will not be rolled forward into the RLDP as allocations.

4. Rural Exceptions Completions.

No rural exception schemes were permitted or completed over this monitoring period. While there is no target in relation to the number of completions for rural exception

schemes the Council will continue to monitor this issue closely in future AMRs to determine the effectiveness of the policy framework relating to rural exception schemes.

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

As set out in Section 3, Land Registry data indicates that average house prices in Monmouthshire have increased over the current monitoring period with average prices in quarter 1 2023 (January to March) standing at £362,921, significantly higher than the 2012 quarter 4 baseline price (£188,720). A 5% increase in the 2012 quarter 4 baseline price figure would equate to an increase of £9,436. Between quarters 1 to 4 2022 the quarterly increase in house prices exceeded this figure, although house prices dipped by -£11,036 between Q4 2022 and Q1 2023. This suggests that the impact of interest rate rises coupled with the rising cost of living has impacted on house prices in Q1 2023. Whilst the trigger for further investigation has been met this indicator has been given an amber rating for this AMR reflecting the dip in house prices between Q4 2022 and Q1 2023. Housing affordability in the County is one of the key issues identified for the RLDP to address, and updated viability evidence is being prepared and will inform the Deposit RLDP policy framework.

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

Recommendation

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

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

3. Consider progress of Main Village sites as part of the RLDP process.

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

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

*Core Indicators

¹ Indicator and Target based on the Monmouthshire planning area and Monmouthshire LDP only.

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

Community and Recreation Facilities

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

Strategic Policy: S5 Community and Recreation Facilities

LDP Objectives Supported: 1 & 5

Other LDP Policies Supported: CRF1, CRF3

Contextual Changes

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

Indicator	Target <i>(Previous AMR Performance)</i>	Trigger for Further Investigation	Performance 1 April 2022 – 31 March 2023
1. Number of community and recreation facilities granted planning permission	No target* <i>(2014-15: 9)</i> <i>(2015-16: 5)</i> <i>(2016-17: 4)</i> <i>(2017-18: 10)</i> <i>(2018-19: 8)</i> <i>(2019-20:12)</i> <i>(2020-21:3)</i> <i>(2021-22:13)</i>	None*	18
2. Number of community/ recreation facilities lost	Minimise the loss of community and recreation facilities <i>(2014-15: 3)</i> <i>(2015-16: 0)</i> <i>(2016-17: 6)</i> <i>(2017-18: 2)</i> <i>(2018-19:2)</i> <i>(2019-20:4)</i> <i>(2020-21:1)</i> <i>(2021-22:1)</i>	Loss of any 1 community/ recreation facility in any 1 year	3

Analysis

1. Eighteen planning applications were approved for community and recreation uses during the current monitoring period. Nine of the applications related to community uses and nine to recreation.

Applications in relation to community uses included: redevelopment of King Henry VIII Comprehensive School at Abergavenny, redevelopment at Nevill Hall Hospital in Abergavenny to include a new two storey satellite radiotherapy unit along with additional changes including to car parking, installation of a temporary portacabin to be used as an additional classroom at Monmouth, change of use from an office building to a licensed club building at Caldicot, change of use from a dwelling to children's day care in Abergavenny, erection of a storage shed at the village hall in Tintern, change of use from light industrial to a carpentry and artists workshop providing weekend and evening workshops for the community at Chepstow, construction of a nursery unit at Trellech and a new police station at Llanfoist.

Recreational uses approved include: an upgrade of children's play area at Little Mill, an activity centre next to the Scout Hall in Caldicot, change of use from disused railway line to shared use walking and cycling route at Caldicot, extension to existing facilities at Caldicot leisure centre, improvements to the village hall at The Narth, change of use to café with outdoor covered amenity area and car parking at Llanover, replacement patio plus pergola, planting and increased car parking at The Narth and change of use to art/craft studio with café, pergola and planting at Raglan. An approval in Undy saw provision of open space plus a number of S106 contributions towards community facilities, centralised play facilities, offsite recreation, GI provision, education and sustainable transport; the benefits of these contributions are already being realised with the completion of the new Community Hub and an increase in services on the local bus route.

Overall, the number of community and recreation facilities permitted is the highest level recorded since plan adoption and indicates that the LDP community & recreational policy framework is operating effectively to enable such development in the County.

2. There has been a loss of three community facilities over the period monitored. The first relates to the loss of 0.03ha of play space at Little Mill due to the relocation and upgrade of children's play area.

The second is a change of use from a community hub to B8 use at Chepstow - the unit had been vacant for 2 year and it is considered that the proposal accords with the objectives of the LDP and local and national planning policies.

The third is a change of use from a nursery to housing at Caldicot- the nursery had been vacant for over two years and there are several other facilities in the locality. The proposed change of use accords with the objectives of policy CRF1.

While the data collected indicates that a number of community facilities have been lost to alternative uses over the monitoring period and subsequently the trigger for this indicator

has been met, their loss is justified within the context and requirements of the LDP policy framework. Consequently the Council will continue to monitor such proposals in future AMRs to determine the effectiveness of the policy framework relating to this issue.

Recommendation

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

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

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

Retail

Monitoring Aim/Outcome:	Direct new food and non-bulky retail development to the County's town and local centres and seek to enhance their vitality, attractiveness and viability.
Strategic Policy:	S6 Retail
LDP Objectives Supported:	1 & 2
Other LDP Policies Supported:	RET1-RET4

Contextual Changes

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

Indicator	Target <i>(Previous AMR Performance)</i>	Trigger for Further Investigation	Performance 1 April 2022– 31 March 2023
1. Amount of new food and non-bulky retail development permitted in town/local centres as a proportion of all retail development permitted	90% of new food and non-bulky retail floorspace to be located in town/local centres <i>(2014-15: 0%) (2015-16: 53.2%) (2016-17: 33%) (2017-18 – 35.7%) (2018-19 – 0%) (2019-20 – 70.5%) (2020-21 – 0%) (2021-22: 35%)</i>	More than 10% of new food and non-bulky retail floorspace is developed outside town/local centres in any 1 year	6.59% retail development permitted in town/local centres. 2,933 sq m permitted outside town/ local centres*
2. Percentage of vacant units within the CSA of each town and local centre*	No increase in the number of vacant units:	Vacancy rate in a town/local centre increases for 2 consecutive years	
	a) Abergavenny <i>(2014: 5.1%) (2015: 5.8%) (2016: 8.7%) (2017: 6.3%) (2018: 4.7%) (2019: 6.6%)</i>		5.8%

	(2020: 7.6%) (2021:3.6%)		
	b) Caldicot (2014: 9.2%) (2015: 7.6%) (2016: 10.1%) (2017: 8.8%) (2018: 10.6%) (2019: 7.6%) (2020: 13.4%) (2021:6.1%)		8.8%
	c) Chepstow (2014: 9.0%) (2015: 10%) (2016: 7.1%) (2017: 5.9%) (2018: 11.8%) (2019: 11.2%) (2020: 13.5%) (2021: 11.2%)		13.6%
	d) Monmouth (2014: 8.3%) (2015: 7.9%) (2016: 4.9%) (2017: 10.1%) (2018: 10.1%) (2019: 14.4%) (2020: 15.4%) (2021: 15.5%)		18.2%
	e) Magor (2014: 9.1%) (2015: 0%) (2016: 0%) (2017: 9.1%) (2018: 4.5%) (2019: 13.6%) (2020: 0%) (2021: 0%)		4%
	f) Raglan (2014: 0%) (2015: 0%) (2016: 0%) (2017: 0%) (2018: 9%) (2019: 9%) (2020: 9%) (2021: 9%)		13.3%

	<p>g) Usk <i>(2014: 7.8%)</i> <i>(2015: 11.1%)</i> <i>(2016: 13.1%)</i> <i>(2017: 9.7%)</i> <i>(2018: 15.8%)</i> <i>(2019: 15.3%)</i> <i>(2020: 9.8%)</i> <i>(2021: 8.5%)</i></p>		8.2%
3. Percentage of A1 uses in the primary shopping frontages of Abergavenny, Caldicot, Chepstow and Monmouth**	<p>% of A1 uses no less than the thresholds identified for the towns' primary shopping frontages as defined in the Primary Shopping Frontages SPG**</p>	% figures for a primary shopping frontage fall below the threshold set out in the SPG	
	<p>a) Abergavenny</p> <ul style="list-style-type: none"> PSF1 Cross St, High St, Frogmore St & 1 Nevill St (Target 75%) <i>(2014: 76%)</i> <i>(2015: 77%)</i> <i>(2016: 76%)</i> <i>(2017: 75%)</i> <i>(2018: 75%)</i> <i>(2019: 74%)</i> <i>(2020: 73%)</i> <i>(2021: 72%)</i> 		<ul style="list-style-type: none"> 67%
	<ul style="list-style-type: none"> PSF2 Cibi Walk (Target 100%) <i>(2014: 100%)</i> <i>(2015: 100%)</i> <i>(2016: 100%)</i> <i>(2017: 100%)</i> <i>(2018: 94%)</i> <i>(2019: 100%)</i> <i>(2020: 100%)</i> <i>(2021: 100%)</i> 		<ul style="list-style-type: none"> 100%
	<ul style="list-style-type: none"> PSF3 Cross St (51-60 & Town Hall) (Target 55%) <i>(2014: 36%)</i> <i>(2015: 36%)</i> <i>(2016: 36%)</i> 		<ul style="list-style-type: none"> 36%

	<p>(2017: 36%) (2018: 36%) (2019:36%) (2020: 36%) (2021: 36%)</p>		
	<p>b) Caldicot</p> <ul style="list-style-type: none"> PSF4 Newport Rd (Target 65%) (2014: 65%) (2015: 65%) (2016: 65%) (2017: 65%) (2018: 63%) (2019: 63%) (2020: 63%) (2021: 63%) 		<ul style="list-style-type: none"> 60%
	<p>c) Chepstow</p> <ul style="list-style-type: none"> PSF5 High St (Target 75%) (2014: 80%) (2015: 80%) (2016: 80%) (2017: 80%) (2018: 76%) (2019: 80%) (2020: 80%) (2021: 76%) 		<ul style="list-style-type: none"> 72%
	<ul style="list-style-type: none"> PSF6 St Mary St (Target 65%) (2014: 65%) (2015: 65%) (2016: 65%) (2017: 69%) (2018: 69%) (2019: 73%) (2020: 73%) 2021: 73%) 		<ul style="list-style-type: none"> 70%
	<p>d) Monmouth</p> <ul style="list-style-type: none"> PSF7 Monnow St (Target 75%) (2014: 77%) (2015: 76%) (2016:72%) (2017: 74%) (2018:73%) (2019: 73%) (2020: 73%) 		<ul style="list-style-type: none"> 70%

	(2021: 73%)		
	<ul style="list-style-type: none"> PSF8 Church St, Agincourt Sq & Priory St (1-4) (Target 65%) (2014: 57%) (2015: 57%) (2016:62%) (2017: 65%) (2018: 67%) (2019:67%) (2020: 69%) (2021: 69%) 		<ul style="list-style-type: none"> 65%

Analysis

One application was permitted for new A1 non-bulky retail development in the County's town/local centres during the period monitored:

- DM/2022/01034 – this relates to the change of use of the upper 2 floors of the building in St Mary's Street, Chepstow from residential to commercial to enable the optometrist which occupies the ground floor to expand.

As five applications for new retail uses were permitted outside of the centres, the trigger for this indicator has been met. However, three of the applications relate to extensions /additional retail space at existing garden centres, one is for the change of use of a vacant building to a café with retail and one is for a new Lidl supermarket in Bulwark neighbourhood centre. While the trigger has been met, given the justification for the permissions an amber rating has been given rather than a red rating as there are no concerns over the implementation of the relevant policy. Details are set out below.

- DM/2022/00067 – this relates to the extension of existing retail space (53 sqm) at Morris's of Usk Garden Centre.
- DM/2021/01913 – this relates to a single storey extension to the existing café/retail area to provide new toilets and additional retail space at Raglan Garden Centre.
- DM/2022/00966 – relates to provision of a new covered area for additional retail space at the Secret Garden, Penperlleni.
- DM/2022/00745 – relates to the change of use of a vacant building (last use D1), the Retreat Llanover, to a café with retail space, together with some potential community use. The proposed change of use is considered acceptable in principle and the continued use of the building which is important within the conservation area, is welcomed.
- DM/2021/01507 – relates to the demolition of the former Severn Bridge Club and erection of a Lidl supermarket at Bulwark neighbourhood centre in Bulwark, Chepstow (2,011 sqm GIA, 1,278 sqm Net sales area). The proposal comprises the redevelopment of a brownfield site within the settlement boundary and within Bulwark Neighbourhood Centre which complies with the policy requirements of both national and local planning

policies and will enhance the convenience goods offer to the local population. It is, therefore, considered appropriate with no detrimental impact upon the site, neighbourhood centre and wider area.

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

2. Vacancy rates noted in the AMR were recorded during September – October 2023. This demonstrates that all of the County's central shopping areas (CSA), with the exception of Monmouth, were below the GB High Street vacancy rate (13.9%, first 6 months of 2023, Local Data Company).

Comparison with 2021 vacancy rates indicates that all of the centres, with the exception of Usk, recorded an increase in vacancy rates over this period. Abergavenny saw an increase from 3.6% in 2021 to 5.8% in 2023, Caldicot 6.1% to 8.8%, Chepstow 11.2% to 13.6%, Monmouth 15.5% to 18.2%, Raglan 9% to 13.3% and Magor 0% to 4%. Usk was the only centre to record a marginal decline in vacancy rate, 8.5% to 8.2%. As Monmouth has experienced an increase in vacancy rates for more than 2 consecutive the trigger for further investigation has been reached. The vacancy rate in Monmouth is higher when compared to the other centres and is also higher than the level recorded at a GB High Street vacancy rate, as above.

In Monmouth the rise in total vacancy rates has been predominantly across the primary frontages (15.3% in 2021 to 19.2% in 2023), with a marginal in vacancy rates across the secondary frontages, 16.1% in 2021 to 16.9% in 2023. This may, in part reflect the continued impact of the Covid-19 pandemic on the high street, particularly with the loss of some national chains from Monmouth in recent years, such as Peacocks and M&Co. However, this is higher than the GB High Street vacancy rate and the highest recorded over any previous AMR monitoring period.

Although, with the exception of Monmouth, high street vacancy rates are below the GB average, it is recognised that high street vitality plays a key role in the character and attractiveness of our market towns. The cost of living and energy costs crises pose additional threats to businesses as costs increase and customer spending decreases and this challenge will require careful consideration going forwards in terms of regeneration projects and future policy. The situation will continued to be monitored as part of the AMR and the annual retail surveys.

3. The percentage of A1 retail uses within the towns' primary shopping frontages (PSF) recorded in September-October 2023*** generally accord with the thresholds identified in the Primary Shopping Frontages SPG.

The identified thresholds in two of the PSFs were set at higher levels than the existing level of non-A1 retail uses at the time as there is an aspiration to improve their retail offer i.e.

PSF3 Cross Street (51-60 & Town Hall) Abergavenny and PSF8 Church Street, Agincourt Square & Priory Street (1-4) Monmouth. While there has been no change in the proportion of retail uses within PSF3 since monitoring began, there has been an increase in the proportion of A1 retail uses within PSF8 in recent monitoring periods, from 57% in 2015 to 65% in 2023. Despite achieving the identified threshold within PSF8, it remains important that a strong policy stance on proposals for change of use to non-retail uses in both of these frontages is maintained in order to improve and protect their retail offer.

Comparison with 2021 figures indicate that the proportion of A1 uses within the towns' primary shopping frontages remained unchanged in Cibi Walk (PSF2) and Cross Street (PSF3) in Abergavenny. All other primary shopping frontages recorded a slight decline in the proportion of A1 uses, as indicated in the table above. The changes of use within these primary shopping frontages from A1 use were considered acceptable, with regard given to the impact the Covid-19 pandemic has had on town centres and the need for the planning system to respond to this by ensuring retail and commercial centres can operate as flexibly as possible. It is also recognised that complementary A2 and A3 uses can add to the vitality of a centre by attracting customers and creating additional footfall. The RLDP retail policy framework will reflect the need for town and local centres to operate flexibly.

Overall, it is considered that the towns' primary shopping frontages are functioning well, and no further investigation is required at present. The long-term impacts of the Covid-19 pandemic on the High Street and on future shopping patterns will continue to be monitored in future AMRs and reflected in the RLDP retail policy framework.

Recommendation

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

*Vacancy rates noted in this AMR were recorded during September – October 2023. Vacancy figures for September 2022 are not available as the Planning Policy Team did not have capacity to carry out the necessary survey work.

**Monmouthshire Primary Shopping Frontages SPG, April 2016. The rates recorded in the PSFs have a base date of September-October 2023. Figures for September 2022 are not available as the Planning Policy Team did not have capacity to carry out the necessary survey work.

Economy and Enterprise

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

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

LDP Objectives Supported: 7

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

Contextual Changes

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

Indicator	Target <i>(Previous AMR Performance)</i>	Trigger for Further Investigation	Performance 1 April 2022 – 31 March 2023
1. Net employment land supply/development♦	Maintain sufficient employment land to meet identified take-up rate of 1.9 ha per annum <i>(2014-15: 46.8ha) (2015-16: 41.18ha) (2016-17: 40.76ha) (2017-18: 40.16ha) (2018-19: 40.16ha) (2019-20: 40.16ha) (2020-21: 40.16ha) (2021-22: 40.16ha)</i>	Insufficient employment land available to meet the identified take-up rate of 1.9ha per annum	40.16ha
2. Take-up of employment land♦	Maintain sufficient employment land to meet identified take-up rate of 1.9 ha per annum <i>(2014-15: 0.38ha) (2015-16: 1.131ha) (2016-17: 3.21ha) (2017-18: 5.002ha) (2018-19: 0.873ha) (2019-20: 3.74ha)</i>	Insufficient employment land available to meet the identified take-up rate of 1.9ha per annum	0.24ha

	<i>(2020-21: 0.38ha)</i> <i>(2021-22: 0.055ha)</i>		
3. Planning permission granted for new development (by type) on allocated employment sites as identified in Policy SAE1♦	No specific target <i>(2014-15: 0)</i> <i>(2015-16: 3)</i> <i>(2016-17: 2)</i> <i>(2017-18: 1)</i> <i>(2018-19: 2)</i> <i>(2019-20: 0)</i> <i>(2020-21: 2)</i> <i>(2021-22: 1)</i>	Lack of development on strategic employment sites identified in Policy SAE1 by the end of 2017	1 planning permission granted
4. Planning permissions granted for employment use (B use classes) by settlement♦♦	No specific target	None	
	Main Towns <i>(2014-15: 9. ha)</i> <i>(2015-16: 0.95ha)</i> <i>(2016-17: 0.52ha)</i> <i>(2017-18: 0.784ha)</i> <i>(2018-19: 4.37ha)</i> <i>(2019-20: 0.11ha)</i> <i>(2020-21: 0.30ha)</i> <i>(2021-22: 0.3ha)</i>		0.27ha
	Sevenside Settlements <i>(2014-15: 0.39ha)</i> <i>(2015-16: 2.83ha)</i> <i>(2016-17: 0.17ha)</i> <i>(2017-18: 2.124ha)</i> <i>(2018-19: 0.04ha)</i> <i>2019-20: 0.92ha)</i> <i>(2020-21: 3:47ha)</i> <i>(2021-22: 1.69ha)</i>		3.94 ha
	Rural Secondary Settlements <i>(2014-15: 0.3ha)</i> <i>(2015-16: 0.48ha)</i> <i>(2016-17: 0.01ha)</i> <i>(2017-18: 0ha)</i> <i>(2018-19: 0.005ha)</i> <i>(2019-20: 0.01ha)</i> <i>(2020-21: 0ha)</i> <i>(2021-22: 0.05ha)</i>		0.6 ha
	Rural General <i>(2014-15: 0.25ha)</i> <i>(2015-16: 0.22ha)</i>		0.17 ha

	<i>(2016-17: 1.14ha)</i> <i>(2017-18: 0.575ha)</i> <i>(2018-19: 0.454ha)</i> <i>(2019-20: 0.096ha)</i> <i>(2020-21: 1.27ha)</i> <i>(2021-22: 1.55ha)</i>		
5. Planning permissions granted for employment use (B use classes♦♦) by sector*	No specific target	None	
	Manufacturing		0.006ha
	Wholesale & retail trade; repair of motor vehicles and motorcycles		0.01ha
	Transport & storage; information and communication		4.14ha
	Accommodation and food service activities		0.13ha
	Electricity, gas, steam & air conditioning supply; water supply; sewerage, waste management and remediation		0.04ha
	Public admin & defence; compulsory social security		0.6ha
6. Amount of employment land lost to non-employment uses (i.e. non-B1, B2, B8 uses)	Minimise the loss of employment land to non-B1, B2, B8 uses <i>(2014-15: 0.08ha)</i> <i>(2015-16: 0.56ha)</i> <i>(2016-17: 0.65ha)</i> <i>(2017-18: 0.12ha)</i> <i>(2018-19: 0.105ha)</i> <i>(2019-20: 0ha)</i> <i>(2020-21: 1.21ha)</i> <i>(2021-22: 0.03ha)</i>	Loss of any B1, B2 or B8 employment land in any 1 year	0ha
7. Proportion of resident workforce working within Monmouthshire***	Increase the proportion of resident workforce working within Monmouthshire <i>(2014: 54.5%)</i> <i>(2015: 58.3%)</i> <i>(2016: 57.9%)</i> <i>(2017: 58.1%)</i>	None	64.2%

	(2018: 60.4%) (2019:60.1%) (2020: 56.9%) (2021: 61.3%)		
8. Number of people in-commuting to Monmouthshire♦♦♦	Reduce the level of in-commuting over the plan period (2014: 19,200) (2015: 17,800) (2016: 20,400) (2017: 17,100) (2018: 24,600) (2019: 18,900) (2020: 19,000) (2021: 14,300)	None	14,500
Number of people out-commuting from Monmouthshire♦♦♦	Reduce the level of out-commuting over the plan period (2014: 19,600) (2015: 18,700) (2016: 18,700) (2017: 18,500) (2018: 17,400) (2019: 17,700) (2020: 19,600) (2021: 17,100)	None	15,600

Analysis

1. There is currently 40.16ha of employment land available across the County allocated under policy SAE1 of the Adopted LDP. The employment land availability has not changed since the previous five monitoring periods, which reflects the fact that there has been no new land take up on the County's strategic SAE1 employment sites during this current monitoring period.

Sufficient employment land has therefore been maintained over the monitoring period providing the opportunity to meet the identified Plan period take-up rate of 1.9ha per annum. Policies S8 and S9 are functioning effectively in this respect. However, the Council will continue its efforts to promote economic initiatives that seek to support economic activity in the County, including an Economy, Employment and Skills Strategy that will inform the RLDP.

2. The take-up rate (i.e. completed developments) of employment land on either allocated (SAE1 or SAE2 sites) equated to 0.24ha over the monitoring period. This was delivered over two protected employment sites: Magor Brewery (SAE2o) relating to the erection of 16 fermentation vessels (0.21ha) and Beaufort Park, Chepstow (SAE2j) relating to a small extension to Unit 4 (0.03ha).

3. One planning application was approved on allocated employment sites as identified in SAE1 during the monitoring period. This related to the allocated SAE1 employment site at Wales One, Magor (SAE1a) for the development of an industrial storage and distribution warehouse with ancillary offices (B2, B8 and B1) totalling 3.84ha. The site is currently under construction.

The trigger for this indicator is the lack of development on the SAE1 employment allocations by the end of 2017. A total of six planning permissions had been granted in SAE1 sites by the end of 2017 and a further six since 2017, giving a total of 12 applications since adoption of the LDP (albeit three relate to change of use applications not relating to B Use Classes).

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

4. This indicator seeks to monitor the amount of land approved to facilitate the delivery of additional employment floorspace for B use classes permitted by settlement in Monmouthshire. Nine applications were approved for such employment uses during the monitoring period, totalling 4.98ha. Of these, one permission related to allocated SAE1 employment site at Wales One in Magor as detailed above.

A further 0.006ha of land was approved for additional B use class related development (small extension to an existing manufacturing plant at Greencoat Ltd) on the SAE2I protected employment site at Wonastow Road, Monmouth. A further application related to the SAH4 mixed use site at Wonastow Road, comprising the redevelopment of the existing barn area which forms part of the wider Siltbuster Headquarters (0.2ha).

The remaining six applications were on non-allocated employment sites totalling 0.83ha of land. These included the construction of a police station in Llanfoist, the erection of an industrial unit (B1) in Abergavenny, the construction of a storage unit (B8) in Tintern and changes of use to B8 and B1 in Chepstow and Llangybi respectively.

The main towns accounted for 0.27ha of the approved B use class employment floorspace. This related to four planning permissions for a change of use to B8 use for light storage and distribution in Chepstow (0.01ha), the erection of an industrial unit in Abergavenny, and the two permissions at the protected and mixed-use employment sites in Wonastow Road, noted above, totalling 0.21ha).

The Severnside area accounted for the greatest proportion of approved B use class employment, comprising 3.94ha at the allocated employment site at Wales One Magor

(SAE1a) for the development of an industrial storage and distribution warehouse with ancillary offices (B2, B8 and B1).

One application was approved in the Rural Secondary Settlement of Llanfoist and related to the construction of a new police station, accounting for 0.6ha of employment land.

There were three permissions within the rural general area accounted for the remaining 0.17ha of employment land. These included the change of use to B8 for light storage and distribution in Tintern, the change of use of an agricultural barn to B1 light industrial/office in Llangybi and a new energy centre building to house new boilers at Glascoed.

Although there is no specific target relating to this indicator, the Council is keen to monitor employment permissions for B uses in the County. The amount of employment land area permitted during this monitoring period is higher than that recorded in the last AMR (3.59ha) but is comparable with that achieved over most monitoring periods. The Council will continue to monitor this issue and work with colleagues in the Economy and Enterprise Section to actively promote economic opportunities in the County.

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

In addition, as detailed in the analysis for Policy S11 (Visitor Economy), 9 applications were approved for tourism uses during the monitoring period, all of which were for tourist accommodation facilities including holiday lets and glamping accommodation in various settlements across the County. These will provide a further boost to the visitor economy in Monmouthshire.

5. This indicator seeks to monitor the amount of employment floorspace for B use classes permitted by sector in Monmouthshire. B1 use class accounted for 0.75ha of floorspace approved, B2 use class accounted for 0.006ha, and 0.28ha for B8 warehousing and storage use class. A further 3.94ha was approved on one planning permission involving a mixture of B use classes (B1, B2 and B8 at Wales One Magor, as noted above).

Turning more specifically to employment sectors, based on the UK Standard Industrial Classification (SIC) 2007, the employment permissions for 4.98ha of B use classes recorded over the monitoring period were in the following sectors*:

- Wholesale and retail trade; repair of motor vehicles/motorcycles (0.01ha)
- Transport and storage; information and communication (4.14ha)
- Manufacturing (0.006ha)
- Accommodation and food service activities (0.13ha)
- Electricity, gas, steam & air conditioning supply; water supply; sewerage, waste management and remediation (0.04ha)
- Public admin & defence; compulsory social security (0.6ha)

While there are no specific targets relating to this indicator the Council monitors employment sectors coming forward in the County. This will assist in determining whether

the Council's ambitions for growing specific key economic sectors are being achieved. A full review of the existing employment policies is being undertaken as part of the RLDP evidence base. It is recognised that the RLDP has a key role in supporting the Council's vision for economic prosperity and will be one of the main enablers in delivering Monmouthshire's priorities for sustainable economic growth which are set out in Monmouthshire 2040: Our Economic Growth and Ambition Statement and will be reflected in the emerging Economy, Employment and Skills Strategy.

6. No applications were granted during the monitoring period that related to the loss of B uses on allocated or protected employment sites (SAE1 & SAE2).

This suggests that the LDP policy framework is working effectively in retaining allocated and protected employment sites. The Council will continue to monitor such proposals in the future AMRs to determine the effectiveness of the policy framework relating to this matter.

7. The 2022 Welsh Government Commuting Statistics indicate that 64.2% of the County's residents work in the area. This is up on last year's figure of 61.3% and is also the highest level recorded since the monitoring of the Plan began. Despite this rise it remains at a lower level than the Welsh average of 73.7%. However, these figures should not be given too much weight as the data is based on a small sample survey and should therefore be treated with caution. It should be noted that responses for work location relate to the respondent's usual working pattern if coronavirus restrictions were not in place. Therefore, data for 2020 and 2021 do not reflect actual commuting patterns observed during the pandemic.

8. According to the 2022 Welsh Government Commuting Statistics, Monmouthshire has a net outward flow of 1,100 commuters – with 14,500 commuting into the area to work and 15,600 commuting out. There was significant in-commuting from Newport (2,300), Torfaen (1,700), Blaenau Gwent (1,900) and from outside Wales (3,700). The main areas for out-commuting were Bristol (3,100), Newport (3,300), Torfaen (2,000) and Cardiff (1,400) with a further 1,700 commuting to other areas in South West England and 1,600 to other areas outside Wales. The high proportion of commuting to/from areas outside of Wales clearly reflects Monmouthshire's location as a border authority.

There is an aspiration to reduce levels of both in-commuting and out-commuting recorded in Monmouthshire over the Plan period. The level of out-commuting recorded during 2022 was lower than recorded in any of the previous monitoring years. However, these figures should not be given too much weight as the data is based on a small sample survey and should therefore be treated with caution.

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

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

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

◆Data Source: Monmouthshire Employment Land Monitoring April 2022-March 2023

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

◆◆◆Data Source: Welsh Government Commuting Statistics 2022 (release date April 2023)

Rural Enterprise

Monitoring Aim/Outcome: Encourage diversification of the rural economy

Strategic Policy: S10 Rural Enterprise

LDP Objectives Supported: 1, 3, 5, 7 & 14

Other LDP Policies Supported: RE1-RE6

Contextual Changes

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

Indicator	Target <i>(Previous AMR Performance)</i>	Trigger for Further Investigation	Performance 1 April 2022 – 31 March 2023
1 Number of rural diversification and rural enterprise schemes* approved	No target <i>(2014-15: 7)</i> <i>(2015-16: 10)</i> <i>(2016-17: 6)</i> <i>(2017-18: 8)</i> <i>(2018-19: 7)</i> <i>(2019-20: 15)</i> <i>(2020-21: 8)</i> <i>(2021-22: 7)</i>	None	8
Analysis			
<p>A total of eight applications relating to rural enterprise/diversification were approved during the monitoring period. Six of the applications were approved as rural enterprise schemes and two applications as rural diversification of existing farmsteads.</p> <p>Of the rural enterprise schemes, an application for a new wedding venue was granted at Llanvihangel Gobion and additional accommodation for a wedding venue was granted at Chepstow. Other proposals permitted related to the change of use from agricultural land to equestrian land including outdoor riding arena and horse walker was granted at The Hendre; the creation of an equestrian facility at The Hendre; alterations and conversion of a steel framed barn to B1 (workshop/office) use at Monmouth; and a change from D2 use to D1 (art/craft/studio) with A1 (retail) and A3 (café and pergola) at Raglan.</p>			

With regards to the rural diversification proposals these related to diversification of existing agricultural grazing land to a new secure dog walking paddock at Trellech and the change of use of agricultural barn to B1 for production of organic apple cider vinegar drinks, tonics and condiments at Llangybi.

The number and consistency of rural diversification and rural enterprise schemes approved since the LDP's adoption (total 76 schemes) suggests that Strategic Policy S10 and the supporting development management policies are operating effectively. The Council will continue to monitor this indicator in future AMRs to determine the effectiveness of this policy framework in relation to the diversification of the rural economy.

Recommendation

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

*Rural Enterprise Schemes as listed here do not constitute those that require special justification as defined by TAN6

Visitor Economy

Monitoring Aim/Outcome: Encourage high quality sustainable tourism

Strategic Policy: S11 Visitor Economy

LDP Objectives Supported: 1, 3, 5 & 7

Other LDP Policies Supported: T1-T3, RE6, SAT1

Contextual Changes

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

Indicator	Target <i>(Previous AMR Performance)</i>	Trigger for Further Investigation	Performance 1 April 2022 – 31 March 2023
1 Number of tourism schemes approved <i>(includes extensions/conversions and new build)</i>	No target <i>(2014-15: 17)</i> <i>(2015-16: 10)</i> <i>(2016-17: 24)</i> <i>(2017-18: 16)</i> <i>(2018-19: 22)</i> <i>(2019-20: 17)</i> <i>(2020-21: 14)</i> <i>(2021-22:17)</i>	None	9 tourism schemes approved
2 Number of tourism facilities lost through development, change of use or demolition	Minimise the loss of tourism facilities <i>(2014-15: 5)</i> <i>(2015-16: 0)</i> <i>(2016-17: 1)</i> <i>(2017-18: 3)</i> <i>(2018-19: 3)</i> <i>(2019- 20: 7)</i> <i>(2020-21: 1)</i> <i>(2021-22:1)</i>	Loss of any 1 tourism facility in any 1 year	1 tourism facility lost
Analysis			
1. 9 applications were approved for tourism uses during the monitoring period, all of which were for tourist accommodation facilities. These included: <ul style="list-style-type: none"> • 5 applications for holiday lets (all conversions) in various settlements*; 			

- 2 new glamping accommodation sites: 1 pod at Trellech; 1 pod at Llantillio Crossenny; 2 shepherd huts at an existing site in Llanishen and a new site of 2 shepherd huts and 1 tepee at Llantilio Crossenny.

Collectively, these new holiday lets and glamping facilities provide 14 new units and 16 new bed spaces and will provide a further boost to the visitor accommodation available in Monmouthshire.

The number of tourist accommodation facilities approved over the monitoring period suggests that the relevant Plan policies and adopted 'Sustainable Tourism Accommodation SPG' are operating effectively allowing such developments to take place in Monmouthshire.

Comparison with previous AMRs demonstrates that the number of tourism schemes approved during the current monitoring period remains at a positive level. Cumulatively a total of 145 tourism schemes have been approved since the LDP's adoption in February 2014 which further indicates that the LDP tourism policy framework is operating effectively to enable such development in the County.

The Council will continue to monitor tourism applications closely in future AMRs to determine the effectiveness of the policy framework relating to the provision of tourist facilities.

One application has been permitted during the monitoring period relating to the loss of tourism facilities. This related to the change of use from a barn conversion holiday let to a single dwelling at Earlswood.

While visitor accommodation has been lost within Monmouthshire over the monitoring period and subsequently the trigger for this indicator has been met, the loss is small in number and justified within the context and requirements of the LDP policy framework. The Council will continue to monitor such proposals in future AMRs to determine the effectiveness of the policy framework relating to this issue, given the importance of tourism to the County's economy.

No tourist facilities were refused planning permission during the current monitoring period.

Recommendation

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

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

* Llandenny, Penallt, Bryngwyn, Mathern, St Maughans.

Efficient Resource Use and Flood Risk

Monitoring Aim/Outcome: To ensure development accords with the principles of sustainable development

Strategic Policy: S12 Efficient Resource Use and Flood Risk

LDP Objectives Supported: 1, 8, 9, 10 & 11

Other LDP Policies Supported: SD1-SD4

Contextual Changes

There are no contextual changes for this period.

Indicator	Target <i>(Previous AMR Performance)</i>	Trigger for Further Investigation	Performance 1 April 2022 – 31 March 2023
1. Proportion of development on brownfield land as a percentage of all development permitted <i>(including change of use of land) (excludes householder, conversions and agricultural buildings)</i>	Increase proportion of development on brownfield land <i>(2014-15: 28% /17.3ha)</i> <i>(2015-2016: 16.8%/10.51ha)</i> <i>(2016-17: 51.2% /18.6ha)</i> <i>(2017-18: 40.18%/21.58ha)</i> <i>(2018-19: 12.7% /3.7ha)</i> <i>(2019-20: 21% /5.3ha)</i> <i>(2020-21: 28.3% /6ha)</i> <i>(2021-22: 31.8% /3.5ha)</i>	No increase in proportion of development on brownfield land for 2 consecutive years	20.6ha 56.2%
2. Amount of development (by TAN15 category) permitted in C1 and C2 floodplain areas	All developments to be compliant with TAN15 requirements <i>(2014-15: 1)</i>	Planning permission is granted contrary to TAN15 requirements	0 application granted in Zone C2

not meeting all TAN15 tests	(2015-16: 0) (2016-17: 0) (2017-18: 1) (2018-19:1) (2019-20: 0) (2020-21: 0) (2021-22: 0)		
3. Number of new developments permitted that incorporate on-site renewable energy generation*	Increase in the number of new developments permitted incorporating renewable energy generation (2014-15: 2) (2015-16: 9) (2016-17: 5) (2017-18: 1) (2018-19: 3) (2019-20: 6) (2020-21: 1) (2021-22: 5)	No annual increase	9
4. Number of new developments completed that incorporate on-site renewable energy generation **	Increase in the number of new developments completed incorporating renewable energy generation (2014-2015: N/A) (2015-2016: 4) (2016-2017: 3) (2017-2018:2) (2018-19: 1) (2019-20: 1) (2020-21: data not available)***	No annual increase	Data not available***
Analysis			
1. A total of 36.6ha of development was permitted over the monitoring period, of which 20.6ha was located on brownfield sites. This equated to 56.2% of all development (excluding householder, conversions and agricultural buildings) as being permitted on			

brownfield land. This is an increase in the proportion of development on brownfield land compared with the previous few monitoring periods.

A large proportion of brownfield land permitted at 52%/10.8ha within the current monitoring period was in association with the redevelopment of King Henry VIII School in Abergavenny. A further 1.37ha was associated with various residential developments throughout the County and 0.9ha related to redevelopment at Nevill Hall Hospital (overall development was part brownfield/greenfield). A range of other developments were permitted on brownfield land including community, commercial, employment and retail uses.

This is the third consecutive year that the proportion of development recorded on brownfield land has increased and is the first year that the proportion of brownfield permissions has exceeded those on greenfield sites, demonstrating the sustainable use of land.

The Council will continue to monitor this indicator to determine the effectiveness of the policy framework relating to this issue.

2. No applications have been granted planning permission contrary to TAN15 requirements in either Zone C1 or C2 floodplain over the monitoring period. Policy S12 is consequently functioning effectively in this respect.

3. Nine applications have been approved incorporating on-site renewable energy during the monitoring period. This is an increase on the five recorded last year, and as such the indicator is rated green. The nine permissions included the installation of ground mounted solar panels/ solar arrays at the Hendre, Penallt, Mamhilad, Llandewi Rhydderch, Mitchel Troy and Abergavenny; EV charging, air source heat pumps & solar panels at new homes in Little Mill; and a One Planet Development at Tintern. A number of householder schemes for renewable energy installations (solar/heat pumps) were also permitted over the monitoring period. Of note, the majority of smaller scale renewable energy schemes fall under permitted development, and therefore are not picked up by the planning system.

Collectively a total of 41 schemes incorporating on-site renewable energy have been permitted since the LDP's adoption in 2014 which suggests that Strategic Policy S12 and its supporting policies are operating effectively in respect of the provision of renewable energy.

The Council will continue to monitor this issue closely in future AMRs to determine the effectiveness of the policy framework relating to efficient resource use.

4. Unfortunately, the data relating to the completion of developments incorporating on-site renewable energy generation is not available due to limited capacity in the Planning Policy Team to undertake this monitoring. It is anticipated that this data will be available for the next AMR.

Recommendation
1. No action is required at present. Continue to monitor.
2. No action is required at present. Continue to monitor.
3. No action is required at present. Continue to monitor.
4. No action is required at present. Continue to monitor.

*Additional monitoring indicator included in the monitoring framework in order to identify schemes in 4.

**Based on applications granted permission for on-site renewable energy since LDP adoption

***Data not available due to limited capacity in the Planning Policy Team to undertake this monitoring.

Landscape, Green Infrastructure and the Natural Environment

Monitoring Aim/Outcome: To protect open space and sites of acknowledged nature conservation and landscape importance

Strategic Policy: S13 Landscape, Green Infrastructure and the Natural Environment

LDP Objectives Supported: 8

Other LDP Policies Supported: LC1-LC6, GI1 & NE1

Contextual Changes

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

Indicator	Target <i>(Previous AMR Performance)</i>	Trigger for Further Investigation	Performance 1 April 2022 – 31 March 2023
1. Amount of Greenfield land lost to development which is not allocated in the development plan <i>(includes new built development – housing, employment but excludes agricultural buildings)</i>	Minimise the loss of non-allocated Greenfield land <i>(2014-15: 26 ha)</i> <i>(2015-16: 44.6 ha)</i> <i>(2016-17: 16.5 ha)</i> <i>(2017-18: 8.98ha)</i> <i>(2018-19: 9.71ha)</i> <i>(2019-20: 18.27ha)</i> <i>(2020-21: 11.7ha)</i> <i>(2021-22: 7.5ha)</i>	Any loss of non-allocated Greenfield land in any 1 year	7.44ha*
2. Amount of public open space / playing fields lost to development which is not allocated in the development plan	Minimise the loss of open space / playing fields to development that is not allocated in the development plan <i>(2014-15: 1.47ha)</i> <i>(2015-16: 0.76ha)</i> <i>(2016-17: 0)</i> <i>(2017-18: 0)</i> <i>(2018-19 :1.74ha)</i> <i>(2019-20: 0.1ha)</i> <i>(2021-22: 0ha)</i>	Any loss of open space due to development, not allocated in the development plan in any 1 year	0.15ha

<p>3. Developments permitted / completed that are within internationally / nationally important nature conservation areas**</p>	<p>None adversely affected</p> <p>(2014-15: N/A) (2015-16: 0) (2016-17: 0) (2017-18:0) (2018-19:1) (2019-20: 3) (2020-21: 1) (2021-22: 1)</p>	<p>Recorded damage or fragmentation of designated sites / habitats</p>	<p>0</p>
<p>4. Developments granted permission that cause harm to the overall nature conservation value of locally designated sites</p>	<p>Minimise developments that would cause harm to the overall nature conservation value of locally designated sites</p> <p>(2014 -15: N/A) (2015-16:1) (2016-17: 1) (2017-18:1) (2018 – 19: 2) (2019-20: 2) (2020-21: 0) (2021-22: 0)</p>	<p>1 or 2 developments result in overall harm for 2 consecutive years, or 3 or more developments result in harm in any 1 year</p>	<p>2</p>
<p>5. Number of new developments delivering habitat creation and restoration</p>	<p>Increase number of new developments delivering habitat creation / restoration</p> <p>(2014-15: 1) (2015-16: 1) (2016-17: 0) (2017-18:2) (2018-19 :1) (2019-20 :0) (2020-21: 0) (2021-22: 0)</p>	<p>None</p>	<p>0</p>

Analysis

1. Over the current monitoring period, 33 permissions were granted on greenfield land which is not allocated for development in the LDP, totalling 7.44ha. This is lower than recorded over any of the previous monitoring periods. The higher level of greenfield loss

recorded in earlier periods (44.6ha in 2015-16 and 26ha in 2014-15) was predominantly due to the increase in larger scale renewable energy (solar PV arrays) schemes permitted which were justified within the context and requirements of the LDP policy framework and national planning policy; there were no such renewable energy schemes permitted over the current monitoring period.

Change of use accounted for the majority of non-allocated greenfield land permitted at 1.92ha, with use for community facilities second at 1.76ha, this is primarily due to redevelopment at Nevill Hall Hospital (considered to be both brownfield and greenfield). The extension of residential curtilages related to 1.45ha. Residential development accounted for a further 0.5ha (4 homes including One Planet Development) and tourism accounted for 0.44ha all of which related to glamping accommodation (these are not permanently sited and relate to a reversible use of agricultural land). Other permissions related renewable energy (0.2ha, solar panels), commercial (0.6ha), employment (0.3ha) and Gypsy Traveller (0.18ha) uses. All of the permissions were considered to be compliant with the LDP policy framework.

While the monitoring data indicates that there has been a loss of non-allocated greenfield land over the monitoring period due to the aforementioned permissions (albeit less than previous monitoring periods) and subsequently the trigger for this indicator has been met, the loss is justified within the context and requirements of the LDP policy framework. It does not indicate any issue with the implementation of LDP policies and therefore no further investigation is required at present. The Council will continue to monitor such proposals in future AMRs to determine the effectiveness of the policy framework relating to this issue.

2. There were two applications permitted on areas of open space not allocated for development in the LDP totalling 0.13ha over the monitoring period, as such the trigger for further investigation has been reached.

The first application involves the loss of open space (0.03ha) associated with the construction of two apartments in Little Mill. However, the proposal incorporates the relocation and upgrade of the existing children's play area. The other application relates to the change of use of land designated as DES2 (area of amenity open space, 0.1ha) to use a residential curtilage which is considered to be compliant with the LDP policy framework. Accordingly, there are no concerns in relation to this indicator.

The Council will continue to monitor the amount of non-allocated public open space lost to development in future AMRs to determine the effectiveness of the policy framework relating to this issue.

3. There were no developments permitted or completed within internationally/nationally important nature conservation areas during the monitoring period, which suggests that the indicator target and monitoring outcome to protect such designated sites has been achieved.

This indicates that the policy framework relating to nature conservation is functioning

effectively in protecting nature conservation sites of international /national importance. The Council will continue to monitor permission and completions within these nature conservation sites to determine the effectiveness of the policy framework relating to this matter.

4. Two applications were granted over the monitoring period that were considered to cause harm to locally designated sites. The first relates to an access track to existing properties within the Pilstone Orles and Firhill SINC (Ancient and Semi Natural Woodland) in The North. While part of a SINC will be lost the proposal will provide acceptable management and enhancement measures.

The second application related to replacement of the former maternity unit at Nevill Hall Hospital with a satellite radiotherapy unit, resulting in an extended footprint, replacement car park area and other changes which extend into the Nevill Hall Hospital SINC. The proposal includes mitigation and compensation measures through biodiversity net gain, although it is noted that this relates to a bespoke mitigation strategy involving off site enhancement. On site enhancement will also seek to enhance the remainder of the SINC grassland.

While two applications were considered to cause harm to the SINC identified, the developments were conditioned to provide detailed management plans of how the remaining SINC are to be managed in the future, thus ensuring the long-term management of the SINC. Both proposals are also considered to have a net benefit to ecology. The planning application process has demonstrated that harm to the SINC was considered and justified within the context and requirements of Policy NE1 of the LDP policy framework as evidenced above. This indicates that the policy framework relating to nature conservation is functioning effectively in protecting nature conservation sites of local importance. The Council will continue to monitor permission and completions within these nature conservation sites to determine the effectiveness of the policy framework relating to this matter.

5. There were no developments recorded that were permitted to specifically deliver habitat creation and restoration during the monitoring period.

While no applications were granted to deliver habitat creation and restoration, it is likely that other schemes approved over the monitoring period will help restore habitat through improved Green Infrastructure networks. Although there is no trigger for further investigation in relation to this indicator, the Council will continue to monitor the issue in future AMRs to determine the effectiveness of the policy framework in relation to Landscape, Green Infrastructure and the Natural Environment.

Recommendation

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

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

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

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

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

*Additional 3.94ha greenfield land relates to LDP allocated employment site at Wales One Business Park Magor (SAE1a) and is therefore excluded.

**Indicator has been amended in line with the SA indicator for ease of data collection

Waste

Monitoring Aim/Outcome: Meet the County's contribution to local waste facilities

Strategic Policy: S14 Waste

LDP Objectives Supported: 12

Other LDP Policies Supported: W1-W6, SAW1

Contextual Changes

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

Indicator	Target <i>(Previous AMR Performance)</i>	Trigger for Further Investigation	Performance 1 April 2012 – 31 March 2023
Amount of waste management capacity permitted expressed as a percentage of the total capacity required as identified in the Regional Waste Plan	<p>Aim to provide between 2.2 and 5.6 hectares for new in-building waste management facilities located on appropriate B2 employment sites over the plan period</p> <p><i>(2014-15: 1.49ha permitted; 32.5ha potential waste management sites)</i></p> <p><i>(2015-16: 0.24ha permitted; 26.86ha potential waste management sites)</i></p> <p><i>(2016-17: 0ha permitted; 26.26ha potential waste management sites)</i></p> <p><i>(2017-18: 0ha permitted; 26.26ha potential waste management sites)</i></p>	Amount of B2 employment land falls below 5.6 ha	<p>Waste capacity permitted 0ha</p> <p>Identified potential waste management sites 24.92ha</p>

	<p><i>(2018-19: 0ha permitted; 26.26ha potential waste management sites)</i></p> <p><i>(2019-20: 0ha permitted; 26.26ha potential waste management sites)</i></p> <p><i>(2020-21: 0ha permitted; 26.26ha potential waste management sites)</i></p> <p><i>(2021-22: 0ha permitted; 26.26ha potential waste management sites)</i></p>		
Analysis			
<p>1. There were no permissions for waste management capacity during the monitoring period. There has been some take up of B2 land (Westgate Business Park) and the amount of land available for potential waste management sites (i.e. B2 employment sites and existing waste disposal or management sites) is currently 24.92ha. There remains, therefore, ample land available for potential waste management sites in relation to the maximum requirement of 5.6ha.</p>			
Recommendation			
<p>1. No action is required at present. Continue to monitor.</p>			

Minerals

Monitoring Aim/Outcome: Safeguard areas of aggregates resources

Strategic Policy: S15 Minerals

LDP Objectives Supported: 12

Other LDP Policies Supported: M1-M3

Contextual Changes

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

Indicator	Target <i>(Previous AMR Performance)</i>	Trigger for Further Investigation	Performance 1 April 2022 – 31 March 2023
1. Extent of primary land-won aggregates resources as a percentage of total capacity identified in the Regional Technical Statement	A minimum land bank of 10 years to be maintained <i>(2014-15: 0)</i> <i>(2015-16: 0)</i> <i>(2016-17: 0)</i> <i>(2017-18: 0)</i> <i>(20181-9: 0)</i> <i>(2019- 20: 0)</i> <i>(2020-21: 0)</i> <i>(2021-22: 0)</i>	10 years land bank is not maintained	0
2. Number of permitted permanent non-mineral developments on safeguarded sites that do not comply with Policy M2*	Minimise the number of permanent non-mineral developments on safeguarded sites <i>(2014-15: 0)</i> <i>(2015-16: 0)</i> <i>(2016-17: 0)</i> <i>(2017-18: 0)</i> <i>(2018-19: 0)</i> <i>(2019-20: 0)</i> <i>(2020-21: 0)</i> <i>(2021-22: 0)</i>	If any such developments are permitted	0

Analysis

1. No land-based minerals extraction took place in the County during the monitoring period. There has, therefore, been no reduction in the land bank, which relies on the reserves available at Ifton Quarry. This quarry has not been worked for some time but has the benefit of an existing planning permission. Given the importance of maintaining a 10 year land bank the Council will continue to monitor this issue closely in future AMRs.

2. There were no permissions for permanent non-mineral developments on safeguarded sites that did not comply with Policy M2 during the monitoring period.

This indicates that Policy M2 is being implemented effectively and no further investigation is required at present. The Council will continue to monitor this issue in future AMRs to determine the effectiveness of the policy framework relating to this issue.

Recommendation

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

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

*Indicator amended to include reference to Policy M2 for clarification

Transport

Monitoring Aim/Outcome: To increase sustainable forms of transport and ensure that all development meets sustainable transport planning principles

Strategic Policy: S16 Transport

LDP Objectives Supported: 1-6, 9 & 13

Other LDP Policies Supported: MV1-MV10

Contextual Changes

There are no contextual changes for this period.

Indicator	Target <i>(Previous AMR Performance)</i>	Trigger for Further Investigation	Performance 1 April 2022 – 31 March 2023
1. Number of improvements to transport secured through S106 agreements	No target <i>(2014-15: 3)</i> <i>(2015-16: 3)</i> <i>(2016-17: 2)</i> <i>(2017-18: 4)</i> <i>(2018-19: 3)</i> <i>(2019-20: 1)</i> <i>(2020-21: 0)</i> <i>(2021-22: 0)</i>	None	1 S106 agreement delivering transport improvements
2. Progression of Local Transport Plan* (LTP) schemes detailed in Policy MV10 in accordance with the LTP delivery timetable	LTP proposals implemented in accordance with the LTP delivery timetable	LTP proposals detailed in Policy MV10 are not being implemented in accordance with the LTP delivery timetable	Progression detailed in analysis below
Analysis			
1. During the current monitoring period one application was permitted which secured transport and pedestrian improvements through a S106 agreement. This related to the LDP allocated site at Vinegar Hill (DM/2019/01937 – Hybrid application for 155 units - 72 units full (parcel A) and 83 outline (Parcel B)) which involved £2,000 per dwelling towards sustainable travel and public transport projects in the locality, meaning £144,000 (parcel A) and Parcel B pro-rata (max £166,000). These improvements include contributions to the			

construction of Magor and Undy walkway station, walking and cycling routes linking the site with the proposed station and other key public transport interchanges and destinations up to 2 miles from the site, and provision of supported bus services linking Vinegar Hill to key destinations.

While there is no specific target relating to this indicator, the Council is interested in monitoring the amount of transport improvements secured through S106 agreements. As may be expected, given that progress with numerous allocated LDP sites was slower than anticipated, there were a relatively small number of transport improvements secured via S106 agreements in relation to these sites in the early part of the Plan period. However, in total, in the 9 years to date, of the 17 S106 agreements which have resulted in transport improvements 10 have related to allocated sites. The Council will continue to monitor this issue in future AMRs.

2. The progress of LTP* schemes detailed in Policy MV10 in accordance with the LTP timetable is as follows:

Welsh Government Road Schemes:

M4 corridor enhancement scheme Magor to Castleton: The Welsh Government (WG) decided in June 2019 to not go ahead with the M4 corridor enhancement project. The WG then set up a South East Wales Transport Commission (SEWTC) to “consider the problems, opportunities, challenges and objectives for tackling congestion on the M4 in south east Wales, and make recommendations to WG on a suite of alternative solutions”. The commission reported in November 2020. The report made a number of recommendations, and WG, Transport for Wales (TfW), the Cardiff Capital Region (CCR) and MCC are now working on implementing the recommendations.

Rail Schemes: Following the decision to not progress the M4 corridor enhancement scheme a Written Statement from the Welsh Minister for Economy and Infrastructure, stated that the Welsh Government had appointed an expert Commission (the South East Wales Transport Commission) to “consider the problems, opportunities, challenges and objectives for tackling congestion on the M4 in south east Wales and make recommendations to the Welsh Government on a suite of alternative solutions”. In November 2020, the commission reported making 58 recommendations, the Burns Delivery Board was created in Spring 2021 to bring together Welsh Government, Transport for Wales and local authorities, including Monmouthshire County Council, to deliver these. One of the key recommendations was for better local rail services and new stations between Cardiff and Severn Tunnel Junction. TfW has developed plans for 5 new stations and additional train services, and a public consultation on these proposed started in October 2023. The plans for the proposed Magor & Undy station are based on the previous work done by MCC and the Magor Action Group On Rail.

Monmouthshire County Council Road Schemes:

B4245 Magor/Undy By-pass: See above & below. The M4 corridor enhancement project would have provided a by-pass for Magor/Undy. The SEWTC report proposed an

investigation of a new connection between the A48, the B4245 and Severn Tunnel Junction station to the east of Rogiet (see below) which, depending on the exact design, would provide a by-pass on an alternative alignment.

B4245/M48 Link Road and B4245/Severn Tunnel Junction Link Road:** Following publication of the SEWTC report, TfW, with MCC support, undertook a study into a new connection between the A48, the B4245 and STJ station. The results are currently in discussion between WG, TfW and MCC.

A48 Chepstow Outer By-pass: The Chepstow Transport WelTAG stage 2 study, which was jointly sponsored by the WG, MCC and Gloucester County Council concluded in March 2021. It recommends the construction of a traffic relief road for Chepstow to allow traffic to avoid Chepstow town centre and reconstruct the current A48 to improve active travel and buses in and around Chepstow town centre. MCC has subsequently bid for funding to undertake a WelTAG stage 3 (full business case) study but has not been successful in 2023.

A472 Usk By-pass: No progress

Public Transport Improvement Schemes:

Abergavenny Rail Station Interchange:** Planned for a new accessible footbridge has continued, and construction is due to start in December 2023. MCC has reviewed plans for the bus-rail interchange, the proposed car park extension and improved active travel access, and has agreed a shortlist of options for a WelTAG stage 3 study. MCC has bid for funding to undertake this but has not been successful in 2023.

Chepstow Rail Station and Bus Station Interchange:** Proposals for Chepstow rail station improvements were included in the Chepstow Transport study that reported in March 2021 (see above). Further development was undertaken in 2022. MCC has bid for funding to undertake phase 1 of this work but has not been successful in 2023.

Severn Tunnel Junction (STJ) Interchange:** The proposed upgrade at Severn Tunnel Junction is part of the Welsh Government/Cardiff Capital Region joint 'Metro Plus' programme. A 168-space extension to the car park was delivered in April 2023. An extension to the footbridge has been designed and is expected to receive Network Rail approval in November 2023. A new combined foot/cyclepath along the B4245 between Undy and Rogiet has been outlined designed, with detailed design currently underway.

Monmouth coach stop: No further work

Monmouth Park and Ride:** No further work.

Chepstow Park and Ride:** No further work.

Monmouth bus station improvement: The departure area for services to England has received a new shelter. New display cases are expected to be delivered in spring 2024.

Abergavenny bus station improvement: There was some work to reconfigure the bus station, to improve shelter and to enable social distancing by waiting passengers in previous years. New display cases were delivered in 2022/23. Real-time information is expected to be delivered in spring 2024. The medium-long term solution is to move the bus station to the rail station (see above).

Walking and Cycling Schemes

MCC are currently delivering on key strategic active travel projects across the County. These include:

- Abergavenny to Llanfoist Active Travel scheme – incorporating a new Active Travel bridge across the River Usk and associated links.
- Severnside spinal route – including Caldicot Links, a conversion of a disused MOD railway to an Active Travel path and links through Caldicot town to the railway station.
- Monmouth spinal route – including a new Active Travel bridge across the River Wye with associated links and routes through to Kingswood Gate.

Further progress on the LTP schemes will be reported in future AMRs.

Recommendation

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

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

*the 2015 Monmouthshire Local Transport Plan (LTP) has replaced the 2010 South East Wales Regional Transport Plan (RTP). The transport schemes identified in the RTP have been carried forward to the LTP – accordingly the indicator wording has been amended to reflect this.

** Indicates those schemes identified in the South East Wales Transport Alliance Regional Transport Plan.

Place Making and Design

Monitoring Aim/Outcome: To protect sites and buildings of acknowledged built and historic interest

Strategic Policy: S17 Place Making and Design

LDP Objectives Supported: 14 & 15

Other LDP Policies Supported: DES1-4, HE1-4

Contextual Changes

There are no contextual changes for this period.

Indicator	Target <i>(Previous AMR Performance)</i>	Trigger for Further Investigation	Performance 1 April 2022 – 31 March 2023
1. Number of listed buildings and historic sites	No applications to result in the loss of listed buildings	There is a loss of more than 1 listed building each year for 3 or more consecutive years*	Refer to analysis (1) below
2. Number of conservation areas with up-to-date character appraisal	100% of identified draft Conservation Area Appraisals by 2016**	Target is not met	19 Complete (100%) Refer to analysis (2) below
3. Sample of planning applications granted for developments with potential for significant design / environmental implications	All development to contribute to the creation of a high-quality well-designed environment	Monitoring results are negative	Refer to analysis (3) below
4. Sample of planning applications granted for developments with the potential for significant impact on buildings of historic / archaeological interest, scheduled	No adverse impact on the historic environment	Any development adversely affects the historic environment	Refer to analysis (4) below

ancient monuments and conservation areas			
5.Occasions when development permitted would have an adverse impact on a listed building, conservation area, site of archaeological significance, or historic landscape park or their setting	<p>Development proposals do not adversely impact upon buildings and areas of built or historic interest and their setting</p> <p><i>(2014-15: none)</i> <i>(2015-16: none)</i> <i>(2016-17: none)</i> <i>(2017-18: none)</i> <i>(2018-19: none)</i> <i>(2019-20: one)</i> <i>(2021-22: none)</i></p>	1 or more planning consents are issued where there are outstanding objections from the Council's Conservation Team, Cadw or GGAT	None recorded

Analysis

1.Number of listed buildings and historic sites:

	Base Date 2011	2015	2016	2017	2018	2019	2020	2021	2022
Listed Buildings	2146	2153	2153	2152	2151	2149	2148	2149	2148
Scheduled Ancient Monuments	169	164	164	164	164	164	164	164	164
Historic Parks and Gardens	44	45	45	45	45	45	45	45	45
Archaeologically Sensitive Areas	10	10	10	10	10	10	10	10	10
Landscapes of Outstanding Historic Interest	3	3	3	3	3	3	3	3	3

Two Listed Buildings were delisted and there was one new listing over the monitoring period, taking the total number of listed buildings across Monmouthshire to 2,148. There were no changes in relation to Scheduled Ancient Monuments, Historic Parks and Gardens, Archaeologically Sensitive Areas or Landscapes of Outstanding Historic Interest over the monitoring period.

Whilst there has been a loss of 2 listed buildings during the monitoring period, the listing of a new building has resulted in a net loss of one listed building. The indicator has therefore been satisfied as there has not been more than 1 listed building each year for 3 or more consecutive years. Since monitoring began in 2015 there has been a cumulative loss of 5 listed buildings. Nevertheless, this is not considered to be significant and the Heritage Team has not raised concerns in relation to these losses. There has also been new listing to properties within the past 3 years. The Council will continue to monitor the

number of listed buildings and historic sites to determine the effectiveness of the policy framework relating to this issue.

2. As with the previous monitoring period, no further Conservation Area Appraisals have been adopted as Supplementary Planning Guidance during the monitoring period. A total of 19 Conservation Area Appraisals have however been adopted and the target of 100% of identified draft Conservation Area Appraisals by 2016 was therefore met in the 2015 - 2016 monitoring period. The remaining 12 Conservation Area Appraisals will be progressed in the future subject to available resources.

3. The 2022/23 Members of Planning Committee design tour considered five applications that were approved under policies within the adopted LDP. Three of the developments related to medium to large residential developments, and two were commercial schemes:

- Fairfield Mabey, Chepstow – strategic housing site – LDP allocation under Policy SAH3
- Dingestow 60/40 housing site – Main Village allocation Policy SAH11(iii);
- Llansantfraedd Court Hotel – conversion of the main building (grade II listed) to a wedding venue with a contemporary new build in the grounds for a reception area;
- Siltbusters, Monmouth – a thriving innovative business that has built new bespoke premises at Wonastow Road, Monmouth (strategic mixed use allocation under Policy SAH4);
- Juneberry Drive (off Western Avenue) Chepstow – a 100% affordable housing scheme on the site of a group of dilapidated and redundant lock up garages (LDP Policy H1, DES1, GI1 etc).

Members reacted positively to all of the developments and had no major concerns. They were pleased with the benefits of the comprehensive Green Infrastructure (GI) that was beginning to take place at the Dingestow and Siltbusters sites. These developments were able to demonstrate to members the benefits of the GI policy and its associated detailed SPG, which guides the delivery, implementation and management of GI within residential development schemes.

Members were also impressed with the placemaking emerging at Mabey Bridge with a new public square created outside Brunel House, a landmark listed building, and the development of different neighbourhoods on this larger housing development each with their own distinctive architectural character.

The Dingestow '60/40' affordable housing site was well received, where the build quality and evidence of renewable energy measures for the affordable units was praised. The surrounding landscaping and well-chosen boundary enclosures in the open street scenes, such as transparent railings with green landscaping helped create a pleasant environment for those living within the housing and surrounding vicinities. The smaller development of eight homes off Western Avenue, Bulwark evidenced how well-designed, modern housing can be accommodated into a relatively tight urban setting, while providing good living conditions for the new and existing residents. All of the homes had solar panels and were built to high standards of sustainability.

The commercial scheme for a wedding venue at Llansantfraedd Court demonstrated the added value the Council's Heritage team provide in negotiating a high quality conversion of the existing listed house and in shaping the new outbuilding in the grounds that is an excellent and complementary design, enhancing the setting of the historic mansion.

Members were interested in the Siltbusters site, not only because this was a local company that was able to expand without moving out of the County by developing one of the allocated LDP employment sites, but because they appreciated the work the case officer had taken to influence the design of the large employment unit so that it read as an individual, bespoke design and provided a sense of place in this edge of town location.

The 2022 design tour has provided evidence that there are currently some very good examples being developed of innovative and energy efficient development that provide a sense of place, and that the Council's GI SPG vision and its current implementation within sites is beginning to take shape and enhance the landscaping and setting of developments. The Council will continue to monitor the design and materials of new development to determine the effectiveness of the policy framework relating to design.

4. No applications have been identified by the Council's Heritage Team, which have potential for significant impact upon Monmouthshire's historic environment.

The trigger has not been initiated and it is considered the current LDP policy 'development in Conservation Areas' policy (HE1) is working effectively. However, we will continue to closely monitor development within sensitive historic areas.

5.No applications have been identified by the Council's Heritage Team over the monitoring period with an outstanding objection from the Council's Heritage Team, Cadw or GGAT.

The trigger has not been initiated and it is considered the current the LDP policies that protect the historic environment are functioning effectively. The Council will continue to monitor the number of listed buildings and historic sites to determine the effectiveness of the policy framework relating to this issue.

Recommendation

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

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

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

4. No action required at present. Continue to monitor.

5. No action required at present. Continue to monitor.

*Trigger wording amended to clarify that the trigger relates to a loss of more than 1 listed building each year for 3 or more consecutive years.

**Target wording amended for clarification, relates to the 18 draft Conservation Area Appraisals that were in progress during the lead up to the adoption of the LDP.

Sustainability Appraisal Monitoring Framework

- 6.1 The Sustainability Appraisal monitoring expands the assessment of the performance of the LDP against the Sustainability Appraisal (SA) Monitoring Objectives. The data collated includes a mix of qualitative and quantitative data with a commentary in the latter column to describe the progress and provide a recommendation. Not all of the indicators originally listed in the SA monitoring framework are included, information is only provided for those indicators where data is available.
- 6.2 There is an overlap with some LDP indicators, these indicators are marked in bold and coloured green for clarity. This is intended to provide an indication of how the LDP monitoring and SA monitoring are interlinked. A brief commentary is provided although reference should be made to Section 5 LDP Policy Analysis for additional information.
- 6.3 There are a number of SA indicators where information is not published annually, for example those based on the Census. The purpose of the monitoring framework is to review changes on an annual basis, as a consequence these are not necessarily going to be useful moving forward in terms of future monitoring. They have been retained in order to provide a baseline, and while work has been undertaken to try to find alternative sources of information, none appear to be available.
- 6.4 The traffic light rating system used for the LDP Monitoring Indicators has not been taken forward for use with the SA Monitoring. Many of the SA objectives are aspirational. In addition, the LDP alone would not be the only factor that would need to be considered in achieving their aims. The SA Monitoring does not include targets as such, unlike the LDP monitoring, it would therefore prove difficult to interpret the commentary into a traffic light rating. The symbols associated with certain indicators identify the desired direction for change. The symbols refer to; (+) increase or more; (-) decrease, less or none and; (nc) no change. As this relates to the ninth SA monitoring period since the adoption of the LDP, it is compared to the previous eight AMRs and highlights emerging trends. Accordingly, the direction of change is referred to as relevant in the commentary section. This is utilised to assess the LDP's progression towards meeting the identified sustainable development indicators.
- 6.5 Information contained in the SA monitoring framework in the main relates to a wide range of data produced internally, by various departments of the Council and externally from other organisations. Where data has been sourced externally, a footnote is provided to ensure the data source is easily identifiable.

Sustainability Appraisal Monitoring

Headline	Objective	SA Indicators	Data	Commentary						
Accessibility	Allow equitable access for all to jobs, services and facilities they need, in a way that reduces reliance on car use	<ol style="list-style-type: none"> 1. Average travel to work distance (-) 2. Proportion of people travelling to work by public transport, walking or cycling (+) 3. Proportion of the workforce who remain in their own area for work, according to travel to work statistics (+) 4. Proportion of housing development completed within or adjoining the main towns, Severnside Settlements, Rural Secondary Settlements (RSS) and rural general, as identified in Policy S1. 5. Percentage of major* new development within 10 minute walk from a frequent and regular bus service 	<ol style="list-style-type: none"> 1. N/A** 2. 8.9%** 3. 64,2%***** 4. Main Towns: 45.2%, Severnside: 36.4%, RSS: 10.2%, Rural General: 5.8% 5. 100% 	<p>1 – 2. The 2021 Census recorded 8.9% of people travelling to work by public transport, walking or cycling. The average travel to work distance isn't calculable from the 2021 Census data. The distance has been categorised as follows:</p> <table border="1"> <tbody> <tr> <td>Less than 10km</td> <td>22.9%</td> </tr> <tr> <td>10km to less than 30km</td> <td>20.9%</td> </tr> <tr> <td>30km and over</td> <td>8.6%</td> </tr> </tbody> </table> <p>ONS advise that data collected would be a snapshot in time, but with limited utility in measuring pre- or post-pandemic travel patterns.</p> <p>3. The Welsh Government travel to work statistics identify 64.2% of the Monmouthshire workforce remaining in their own area for work. This figure has increased by 3% since the previous AMR. However, these figures should not be given too much weight as the data is based on a small sample survey and should therefore be treated with caution.</p> <p>4. The Main Towns provided the largest proportion of dwelling completions over the monitoring period equating to 45.2% of the overall figure (343). The Severnside Settlements accounted for a total of 36.4% of completions, a decrease compared with the previous monitoring period (46%). The Rural Secondary Settlements accounted for 10.2% of completions and the Rural General area, which incorporates figures from the Main Villages, accounted for 5.83%. The Policy Analysis in Section 5 relating to the Spatial Strategy provides full analysis of this indicator.</p>	Less than 10km	22.9%	10km to less than 30km	20.9%	30km and over	8.6%
Less than 10km	22.9%									
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Headline	Objective	SA Indicators	Data	Commentary
		(+)(includes residential, employment, retail and leisure permissions only)'		<p>5. One major residential scheme was approved over the monitoring period that had not previously been recorded in AMRs. This related to the allocated housing site at Vinegar Hill granted permission as a hybrid application for 155 dwellings (72 Full and 83 outline). Four other major developments were permitted over the monitoring period that either related to allocated employment sites (Wales One, Magor) or brownfield redevelopment sites (Lidl, Severnbridge Social Club Bulwark; Nevill Hall Hospital, Abergavenny; King Henry VIII School, Abergavenny). All of these developments (100%) are located within a 10 minute walk of a frequent and regular bus service. This compares to the previous AMR where no major developments were permitted and as a result a figure of 0% was recorded. The 2020 -2021 AMR however recorded 100% and 2019-2020 AMR 66.6%. This reflects a positive increase in planning permissions.</p> <p>Continue to monitor SA objective.</p>
Housing	Provide a range of types and tenures of housing that allows people to meet their housing needs	<ol style="list-style-type: none"> 1. People in housing need (-) 2. Affordable home completions (+) 3. General market home completions 4. Density of housing permitted on allocated sites (SAH1 – SAH10) 5. The number of dwellings permitted and completed on 	<ol style="list-style-type: none"> 1. 468 per year over 5 Year Period (2020 base date) 2. 48 3. 343 4. 28.9 5. 142 dwellings permitted, 196 completed 6. 0 7. See table in commentary section 	<ol style="list-style-type: none"> 1. The Local Housing Market Assessment (LHMA) 2020-2025 uses a methodology prescribed by Welsh Government to calculate housing need which is different to that used to provide evidence for the LDP. The results, therefore, are not directly comparable. The 468 figure should not be taken as a target for the delivery of affordable housing as new build homes are not the only supply of affordable homes in Monmouthshire. Acquisitions of existing properties offer a reliable source of increasing the provision affordable homes. In addition, the Council is working with private landlords to increase the supply of private rented homes and to bring empty homes back into use. Other initiatives include the government's Help to Buy scheme. The social rent need identified in the LHMA is 319.61 per year, Low Cost Home Ownership is 115.20 per year and Intermediate Rent is 33 per year. Low cost homeownership need will be addressed through a variety of mechanisms including S106 contributions on new build

Headline	Objective	SA Indicators	Data	Commentary
		<p>strategic sites as identified in policy S3.</p> <p>6. Number of affordable dwellings built through rural exception schemes</p> <p>7. Number of dwellings provided in accordance with the settlement hierarchy set out in Policy S2</p>		<p>housing schemes negotiated by the Council as well as LCHO resales. As stated above this figure should not be taken as an annual target, it does however provide an indication of current projected need for affordable housing within the County and sets a benchmark the Council can work towards.</p> <p>2 – 3. There were 48 affordable home completions and 343 market dwelling completions over the monitoring period.</p> <p>4. The strategic LDP allocation at Vinegar Hill gained planning permission during the current monitoring period. The density of development at the site is 28.9 dph, which is just below the target density of 30 dph.</p> <p>5. A total of 142 homes were permitted on strategic sites over the monitoring period, this related to Vinegar Hill, Undy. The total number of completions related to 196 homes, the number of completions has decreased when compared to the previous AMR (229 completions 2021- 2022). The majority of strategic site completions (97) related to the SAH3 Fairfield Mabey site. Other completions were as follows; SAH1 Deri Farm (16), SAH5 Rockfield Farm, Undy (38) and SAH7 Sudbrook Paper Mill (45).</p> <p>6. No rural exception schemes were permitted or completed over this monitoring period. While there is no target in relation to the number of completions for rural exception schemes the Council will continue to monitor this issue closely in future AMRs to determine the effectiveness of the policy framework relating to rural exception schemes.</p> <p>7. The table below provides a breakdown of the 343 dwelling completions in comparison with the settlement hierarchy set out in Policy S2. The Policy Analysis in Section 5 relating to the Spatial Strategy provides a full analysis of this indicator.</p>

Headline	Objective	SA Indicators	Data	Commentary															
				<table border="1"> <thead> <tr> <th></th> <th>2022 – 2023</th> <th>Target</th> </tr> </thead> <tbody> <tr> <td>Main Towns</td> <td>45.2%</td> <td>41%</td> </tr> <tr> <td>Severnside</td> <td>36.4%</td> <td>33%</td> </tr> <tr> <td>Rural Secondary</td> <td>10.2%</td> <td>10%</td> </tr> <tr> <td>Rural General</td> <td>8.2%</td> <td>16%</td> </tr> </tbody> </table> <p>Continue to monitor SA objective.</p>		2022 – 2023	Target	Main Towns	45.2%	41%	Severnside	36.4%	33%	Rural Secondary	10.2%	10%	Rural General	8.2%	16%
	2022 – 2023	Target																	
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Health, safety & security	To improve health and wellbeing by encouraging more healthy lifestyles, and protecting people from risk that may impact on their health and/or safety	1. Amount of open space created as a result of planning permission.	1. 0.94 ha.	<p>1. 0.94 Ha of additional open space was approved as a result of two planning permissions over the monitoring period. The first related to Land at Vinegar Hill, Undy with a total of 0.5ha of public open space. This was a hybrid planning application of which full planning permission was sought for 72 dwellings, associated open space and infrastructure. The second related to Rockfield Farm, Undy where 0.44ha of public open space was provided, this application related to provision of 120 dwellings on parcels B and C2 (reserved matters). This data is collected from the Development Management Team and excludes any outline applications or applications awaiting the signing of S106 agreements. This is slight increase from the previous monitoring period 21/22 (0ha) but a substantial decrease on the 2019/20 monitoring period (12.7ha).</p> <p>Continue to monitor SA objective.</p>															
Community	To support and promote the distinctive character of local communities and community cohesion	<p>1. Number of community and recreation facilities granted planning permission (+)</p> <p>2. Amount of community and</p>	<p>1. 18</p> <p>2. 3</p> <p>3. 0.15ha</p>	<p>1. Eighteen planning applications were granted planning permission for community and recreation uses over the monitoring period. Nine of the applications related to community uses and nine to recreation. Applications in relation to community uses included: redevelopment of King Henry VIII Comprehensive school at Abergavenny, redevelopment at Nevill Hall Hospital in Abergavenny, construction of a nursery unit at Trellech and a new police station at Llanfoist. Applications for recreational uses included; extension to existing facilities at Caldicot leisure centre, improvements to the village hall at The North and an</p>															

Headline	Objective	SA Indicators	Data	Commentary
		<p>recreation facilities lost to other uses.</p> <p>3. Amount of public open space / playing fields lost to development which is not allocated in the development plan</p>		<p>approval in Undy saw provision of Open Space plus a number of S106 contributions towards community facilities, centralised play facilities, offsite recreation, GI provision, education and sustainable transport; the benefits of these contributions are already being realised with the completion of the new Community Hub and an increase in services on the local bus route. This represents an increase in the number of community / recreation facilities granted (2018-2019; 8, 2019-2020; 12, 2020-2021; 3, 2021-2022 13) and therefore meets the desired direction of change.. For further detail refer to the Policy Analysis in Section 5 relating to Community and Recreation Facilities.</p> <p>2. There has been a loss of three community facilities over the period monitored. One related to the loss of 0.03ha of play space in Little Mill, however this is due to the relocation and upgrade of the existing children’s play area. The second related to a change of use from a community hub to a B8 use in Chepstow which had been vacant for over two years. The third related to the change of use of a nursery to housing in Caldicot, the building had been vacant for over two years with several other facilities in the locality. While the data collected indicates that a number of community facilities have been lost to alternative uses over the monitoring period and subsequently the trigger for this indicator has been met, their loss is justified within the context and requirements of the LDP policy framework. For further detail refer to the Policy Analysis in Section 5 relating to Community and Recreation Facilities.</p> <p>3. During the monitoring period two permissions were granted on areas of open space not allocated for development in the LDP totalling 0.13ha. Both applications were justified and considered to be compliant with the LDP policy framework, one related to the relocation of the play area in Little Mill and the other change of use to residential</p>

Headline	Objective	SA Indicators	Data	Commentary
				<p>curtilage. For further detail refer to the Policy Analysis in Section 5 relating to Landscape, Green Infrastructure and Natural Environment.</p> <p>Continue to monitor SA objective.</p>
Biodiversity	Protect, value, manage and enhance healthy functioning ecosystems, habitats and natural species diversity, valuing nature conservation interests wherever they are found	<ol style="list-style-type: none"> Developments permitted that cause harm to the overall Nature Conservation value of locally designated sites (-) Number of new developments delivering habitat creation and restoration Hectares of ancient woodland lost to development (-) Development permitted within internationally / nationally important nature conservation areas. 	<ol style="list-style-type: none"> 3 applications 0 Data not available for the 2022-2023 monitoring period. 0 	<ol style="list-style-type: none"> There were 2 applications granted over the monitoring period that will cause harm to the overall Nature Conservation value of locally designated sites. The first related to an access track within the Pilstone Orles and Firhill SINC (Ancient and Semi Natural Woodland) in Pen Y Fan, The Narth. The second related to replacement of a building at Nevill Hall Hospital resulting in an extended footprint and car park area into a SINC. This signifies an increase from no permissions over the previous two monitoring periods to two permissions. This indicator will continue to be monitored closely in the next AMR. For further detail refer to the Policy Analysis in Section 5 relating to Landscape, Green Infrastructure and Natural Environment. There were no developments recorded permitted to specifically deliver habitat creation and restoration during the monitoring period. No data available for the 2022-2023 monitoring period. This indicator will continue to be monitored closely in the next AMR. No developments were permitted within internationally / nationally important nature conservation areas during the monitoring period. <p>Continue to monitor SA objective.</p>
Landscape	To maintain and enhance the quality and character of the landscape,	<ol style="list-style-type: none"> Number of trees protected by TPOs lost to development (-) 	<ol style="list-style-type: none"> No data available for the 2022-2023 monitoring period. 	<ol style="list-style-type: none"> No data available for the 2022-2023 monitoring period. This indicator will continue to be monitored closely in the next AMR. <p>Continue to monitor SA objective.</p>

Headline	Objective	SA Indicators	Data	Commentary
	including its contribution to the setting and character of settlements			
Built Environment	To maintain and enhance the built environment for both its visual character and distinctiveness and to create a better living environment.	<ol style="list-style-type: none"> 1. Planning permission granted for renewable and low carbon energy development. 2. Number of new developments completed that incorporate on-site renewable energy generation. (i.e. permissions following LDP adoption that have been completed over the 2022-2023 monitoring period) 3. Sample of planning applications granted for developments with the potential for significant design / environmental implications. 	<ol style="list-style-type: none"> 1. 9 2. N/A 3. N/A 	<ol style="list-style-type: none"> 1. Nine applications were approved for on-site renewable energy generation during the monitoring period. These schemes included The nine permissions included the installation of ground mounted solar panels/ solar arrays at the Hendre, Penallt, Mamhilad Llandewi Rhydderch, Mitchel Troy and Abergavenny; EV charging, air source heat pumps & solar panels at new homes in Little Mill; and a One Planet Development at Tintern. This compares to five schemes in the previous AMR. For further detail refer to the Policy Analysis in Section 5 on Efficient Resource Use and Flood Risk. 2. No data available for the 2022-2023 monitoring period. This indicator will continue to be monitored closely in the next AMR. 3. Members attending the 2023 Planning Committee design tour considered a total of five applications that were approved under the LDP. Members reacted positively in the main to the developments and no major concerns were made. Refer to the Policy Analysis in Section 5 on Place Making and Design for further details. <p>Continue to monitor SA objective.</p>

Headline	Objective	SA Indicators	Data	Commentary
Historic heritage	Understand, value, protect and restore, where necessary, the historic cultural heritage of the area, including features of the built and semi-natural environment	<ol style="list-style-type: none"> Number of listed building and historic sites (-) Sample of planning applications granted for developments with the potential for significant impact on buildings of historic / archaeological interest, scheduled ancient monuments and conservation areas adversely affected by development. Number of conservation areas with an up-to-date character appraisal 	<ol style="list-style-type: none"> Listed Buildings: 2148, Scheduled Ancient Monuments: 164, Historic Parks & Gardens: 45, Archaeologically Sensitive Areas: 10 and Landscapes of Historic Interest: 3 N/A 19 up to date Conservation Area character appraisals. 	<ol style="list-style-type: none"> Two listed buildings were delisted and another building was listed over the monitoring period resulting in a decrease of 1 overall. There were no changes in relation to Scheduled Ancient Monuments Historic Parks and Gardens, Archaeologically Sensitive Areas or Landscapes of Outstanding Historic Interest recorded in the previous monitoring period. The 2023 Planning Committee design tour considered one Listed Building application approved under the LDP, Llansantffraed Court Hotel, a grade II listed building which related to conversion of the main building to a wedding venue with a contemporary new build in the grounds for a reception area. Refer to the Policy Analysis in Section 5 on Place Making and Design for further details A total of 19 Conservation Area Appraisals have been produced and adopted as SPG. Refer to the Place Making and Design Policy Analysis in Section 5 for further details. <p>Continue to monitor SA objective.</p>
Air	To reduce all forms of air pollution in the interests of local air quality and the integrity of the atmosphere to protect from climate change	<ol style="list-style-type: none"> Number of locations where air quality exceeds objective levels per annum (-) Percentage of people employed using their car/van as their main way of commuting to and from work either 	<ol style="list-style-type: none"> 0 55.5%** 8.9%** 	<ol style="list-style-type: none"> The annual objective level of nitrogen dioxide was not exceeded in 2022. The indicator will continue to be monitored in future AMRs – 3. The 2021 Census recorded 8.9% of people travelling to work by public transport, walking or cycling; this is a decrease of 7.8% since the 2011 Census. The mode of commuting statistics are also taken from the 2021 Census identifying 55.5% of people employed as using their car/van as their main way of commuting to and from work; this is a decrease of 25.9% since the 2011 Census.

Headline	Objective	SA Indicators	Data	Commentary
		<p>by driving or as a passenger (-)</p> <p>3. Proportion of people employed travelling to work by public transport, walking or cycling (+)</p>		<p><i>It should be noted that ONS advise that data collected for the 2021 Census would be a snapshot in time, but with limited utility in measuring pre- or post-pandemic travel patterns.</i></p> <p>Continue to monitor SA objective.</p>
Water quality	To maintain and improve the quality of ground, surface and coastal waters	<p>1. % of rivers reaching 'good' water quality status (+)</p> <p>2. Proportion of allocated sites and all other developments of over 10 dwellings/1ha that incorporate SuDS (+)</p>	<p>1. 25%***</p> <p>2. 6 of 6</p>	<p>1. The Water Framework Directive (WFD) combines ecological and chemical status in its reporting, the surface water body will need to reach good status in both elements in order to reach an overall 'good status'. In the latest (interim) Water Watch Wales Cycle 3 (2021), 25% of rivers in Monmouthshire achieve "Good" status.</p> <p>2. 6 applicable applications permitted related to 2 residential schemes, 1 healthcare, 1 retail, 1 education and 1 industrial. All six of the schemes incorporated SuDS ranging from the use of swales, bioretention & rain gardens, permeable paving, filter drains, and detention basins. The number of major developments permitted has increased since the previous monitoring period (2021-2022) where there were 0 schemes permitted. The proportion of schemes that incorporate SuDS has increased to 100% compared to the previous AMR which recorded 0% (2021-2022) and 40% recorded in 2020-2021. This indicator will be monitored closely in the next AMR.</p> <p>Continue to monitor SA objective.</p>
Water supply	To maintain the quantity of water available including potable water supplies, and ground	<p>1. Proportion of groundwater bodies reaching 'good' quantity status (+)</p>	<p>1. 100%***</p>	<p>1. Monmouthshire sits within three groundwater bodies, the Usk Devonian Old Red Sandstone (ORS), Wye Secondary Devonian ORS and Usk and Wye southern Carboniferous Limestone. All three groundwater bodies had "Good" status for quantity as per the Water Watch Wales for the Cycle 3 (2021) data.</p> <p>Continue to monitor SA objective.</p>

Headline	Objective	SA Indicators	Data	Commentary
	water and river levels			
Flood risk	Ensure that new development is designed and located to avoid the risk of flooding, and ensure the risk of flooding is not increased elsewhere	<ol style="list-style-type: none"> Number of permissions for development in Flood Zones C1 and C2 not meeting all TAN 15 tests Proportion of allocated sites and all other developments of over 10 dwellings/1ha that incorporate SUDS (+) Instances where rivers experienced summer low flow (-) 	<ol style="list-style-type: none"> 0 6 of 6 No data available for the 2022-2023 monitoring period. 	<ol style="list-style-type: none"> No applications have been granted planning permission contrary to TAN15 requirements in either Zone C1 or C2 floodplain over the monitoring period. This replicates the results of the previous monitoring period. 6 applicable applications permitted related to 2 residential schemes, 1 healthcare, 1 retail, 1 education and 1 industrial. All six of the schemes incorporated SuDS ranging from the use of swales, bioretention & rain gardens, permeable paving, filter drains, and detention basins. The number of major developments permitted has increased since the previous monitoring period (2021-2022) where there were 0 schemes permitted. The proportion of schemes that incorporate SuDS has increased to 100% compared to the previous AMR which recorded 0% (2021-2022) and 40% recorded in 2020-2021. This indicator will be monitored closely in the next AMR. There are three key river monitoring stations in Monmouthshire positioned on the River Usk, River Wye and River Monnow. No data available for the 2022-2023 monitoring period. This indicator will continue to be monitored closely in the next AMR <p>Continue to monitor SA objective.</p>
Minerals and waste	To ensure that primary materials and minerals are managed in a sustainable way, by safeguarding mineral areas,	<ol style="list-style-type: none"> Number of permitted permanent non-mineral developments on safeguarded sites that do not comply with Policy M2 (-) 	<ol style="list-style-type: none"> 0 71%**** 0ha permitted 0 	<ol style="list-style-type: none"> No applications were granted for permanent non-mineral developments on safeguarded sites that did not comply with Policy M2 during the monitoring period. This is in line with the previous monitoring period. The latest data published is for the 2021 – 2022 period which suggests 71% of Monmouthshire’s total household waste was recycled or composted (based on municipal waste collected/generated as per the indicator). This has increased since the previous AMR which indicated

Headline	Objective	SA Indicators	Data	Commentary
	encouraging re-use and recycling and avoiding final disposal of resources	<p>2. Proportion of Monmouthshire’s household waste collections being recycled and composted (+)</p> <p>3. Amount of waste management capacity permitted expressed as a percentage of the total capacity required as identified in the Regional Waste Plan</p> <p>4. Extent of primary land-won aggregates resources as a percentage of total capacity identified in the Regional Technical Statement.</p>		<p>62% was recycled or composted. This indicator will continue to be monitored in future AMRs.</p> <p>3. There were no permissions for waste management capacity during the monitoring period. For further information refer to the Policy Analysis in Section 5 relating to Waste.</p> <p>4. No primary land-won aggregates were extracted over the monitoring period. There has therefore, been no reduction in the land bank in Monmouthshire. For further information refer to the Policy Analysis in Section 5 relating to Minerals.</p> <p>Continue to monitor SA objective.</p>
Land/soil	To use land efficiently by prioritising development on previously developed land where possible, and using	<p>1. Proportion of development permitted on greenfield land as a percentage of all development excluding householder, conversions and</p>	<p>1. 43.7%</p> <p>2. 7.44ha</p> <p>3. 28.86dpha</p> <p>4. 0ha</p>	<p>1. A total of 36.6ha of development was permitted over the monitoring period, 16ha of which was located on greenfield sites. This equated to 43.7% of all development (excluding householder, conversions and agricultural buildings) as being permitted on greenfield land. The percentage of greenfield land permitted for development is lower than the previous four monitoring periods, demonstrating the sustainable use of land (2021-2022; 7.5ha (68.2%) 2020-2021; 15.052ha (71.7%) 2019-2020; 19.79ha (79%) ,2018-2019; 25.27ha (87.1%), 2017-2018;</p>

Headline	Objective	SA Indicators	Data	Commentary
	existing land efficiently by tackling contamination and protecting higher grade agricultural soil	<p>agricultural buildings (nc or -)</p> <p>2. Amount of Greenfield land lost to development which is not allocated in the development plan</p> <p>3. Annual average densities of new housing development (+)</p> <p>4. Hectares of agricultural land at Grade 3a and better lost to major* development (excluding LDP allocations and agricultural development)'</p>		<p>32.12ha (59.8%). For further detail refer to the Efficient Resource Use and Flood Risk Policy Analysis in Section 5</p> <p>2. Over the monitoring period 33 permissions were granted on greenfield land not allocated for development in the LDP, totalling 7.44 hectares. This is lower than recorded over any of the previous monitoring periods. (2014-15: 26ha, 2015-16: 44.6ha, 2016-17: 16.5ha, 2017-18: 8.98ha, 2018-19: 9.71ha, 2019-20: 18.27ha, 2020-2021; 11.7ha, 2021 – 2022; 7.5ha). For further detail refer to the Landscape, Green Infrastructure and Natural Environment Policy Analysis in Section 5.</p> <p>3. The annual average density of all new housing development equated to 34.4 dwellings per hectare. This figure is higher than the previous 2021 -2022 AMR which recorded a figure of 0 (this was an error) and all of the AMRs to date other than 2017 – 2018 where a figure of 29.1 dpha was recorded. Most recent figures: 2020-2021 AMR (28.2dpha), 2019-2020 AMR (23.65dpha), 2018-2019 AMR (27.95dpha). It should be noted that only 1 application for a site over 10 dwellings was granted permission over the monitoring period for residential schemes.</p> <p>4. No agricultural land at Grade 3a and above has been lost to major development over the monitoring period. All of the relevant major developments related to redevelopment/brownfield sites.</p> <p>Continue to monitor SA objective.</p>
Energy	To secure energy efficiency improvements in all new buildings and encourage energy generation from	1. Number of new developments completed that incorporate on-site renewable energy generation. (i.e. permissions following LDP adoption that	1. 0	<p>1. No data available for the 2022-2023 monitoring period. This indicator will continue to be monitored closely in the next AMR.</p> <p>Continue to monitor SA objective.</p>

Headline	Objective	SA Indicators	Data	Commentary						
	renewable sources.	have been completed over the 2022-2023 monitoring period)								
Employment	Provide a range of jobs within Monmouthshire that help meet the needs of the resident workforce	<ol style="list-style-type: none"> Net employment land supply/ development and take-up of employment land (+) Amount of employment land lost to non-employment uses Proportion of resident workforce working in Monmouthshire (+) Average travel to work distance (-) Percentage of vacant units within CSA of each town and local centre 	<ol style="list-style-type: none"> Supply 40.16ha, Take-up 0.24ha 0.0ha 64.2%***** N/A** Abergavenny: 5.8%, Caldicot: 8.8%, Chepstow: 13.6%, Monmouth: 18.2%, Magor: 4%, Raglan: 13.3%, Usk: 8.2% 	<ol style="list-style-type: none"> The Employment Land Background Paper identified 40.16ha of employment land available across the County (the supply relates to SAE1 Identified Industrial and Business Sites only) meaning that sufficient employment land remains available. The take-up rate of employment land stood at 0.24ha over the monitoring period. The take-up¹⁰ is higher than the last AMR (0.055ha) which represented the lowest take up over the Adopted LDP period. For further information refer to the Economy and Enterprise Policy Analysis in Section 5. No applications were granted during the monitoring period that related to the loss of B uses on allocated or protected employment sites (SAE1 & SAE2). The Welsh Government travel to work statistics identify 64.2% of the Monmouthshire workforce remaining in their own area for work. This figure has increased by 3% since the previous AMR. However, these figures should not be given too much weight as the data is based on a small sample survey and should therefore be treated with caution. The average travel to work distance isn't calculable from the 2021 Census data. The distance has been categorised as follows: <table border="1" data-bbox="1420 1104 1928 1287"> <tbody> <tr> <td>Less than 10km</td> <td>22.9%</td> </tr> <tr> <td>10km to less than 30km</td> <td>20.9%</td> </tr> <tr> <td>30km and over</td> <td>8.6%</td> </tr> </tbody> </table> 	Less than 10km	22.9%	10km to less than 30km	20.9%	30km and over	8.6%
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¹⁰ Employment land take-up relates to SAE1 Identified Industrial and Business Sites, SAE2 Protected Employment Sites and Mixed Use Sites.

Headline	Objective	SA Indicators	Data	Commentary																								
				<p>ONS advise that data collected would be a snapshot in time, but with limited utility in measuring pre- or post-pandemic travel patterns.</p> <p>5. Vacancy rates recorded in the Central Shopping Areas (CSA) for all of the County's towns and local centres increased with the exception of Usk (8.2%) which saw a marginal decrease. The other vacancy rates include Abergavenny (5.8%), Caldicot (8.8%), Chepstow (13.6%), Monmouth (18.2%), Magor (4%) and Raglan (13.3%). With the exception of Monmouth, all of the centres are below the GB High Street vacancy rate (13.9%, first 6 months of 2023, Local Data Company), which suggests that Monmouthshire's town and local centres are functioning effectively, which could in part be reflective of covid and the increase in home working with residents using their local centres to access retail/services and facilities, rather than commuting into larger towns /cities.</p> <p>Continue to monitor SA objective.</p>																								
Wealth creation	Raise prosperity and quality of life by developing a more self-sustaining local economy encouraging indigenous growth	<ol style="list-style-type: none"> 1. Range of SAE1/SAE2/Identified Mixed Use Sites available, distribution and size 2. Planning permissions granted for employment use by settlement 3. Planning permissions granted for employment use by sector 	<ol style="list-style-type: none"> 1. See table in commentary section 2. Main Towns: 0.27ha, Severnside: 3.94ha, RSS: 0.6ha, Rural General: 0.17ha 3. See table in commentary section. 4. 64.2%***** 5. 14,500***** 6. 15,600***** 	<ol style="list-style-type: none"> 1. The table below identifies the range of employment sites across the County by location along with the size of the sites available. While a large proportion of land is located in Magor there is distribution across the Main Towns and some of the Rural Secondary Settlements. <table border="1"> <thead> <tr> <th>Site Reference</th> <th>Site Name/Location</th> <th>Site Use Class</th> <th>Remaining land available (ha)</th> </tr> </thead> <tbody> <tr> <td>SAE1a</td> <td>Wales One, Magor (west)</td> <td>B1</td> <td>4.0</td> </tr> <tr> <td>SAE1b</td> <td>Quay Point, Magor</td> <td>B1/B2/B8</td> <td>13.76</td> </tr> <tr> <td>SAE1c</td> <td>Gwent Europark, Magor</td> <td>B8</td> <td>13.3</td> </tr> <tr> <td>SAE1d</td> <td>Westgate, Llanfoist</td> <td>B1/B2</td> <td>1.3</td> </tr> <tr> <td>SAE1e</td> <td>Ross Road, Abergavenny</td> <td>B1/B2</td> <td>1.5</td> </tr> </tbody> </table>	Site Reference	Site Name/Location	Site Use Class	Remaining land available (ha)	SAE1a	Wales One, Magor (west)	B1	4.0	SAE1b	Quay Point, Magor	B1/B2/B8	13.76	SAE1c	Gwent Europark, Magor	B8	13.3	SAE1d	Westgate, Llanfoist	B1/B2	1.3	SAE1e	Ross Road, Abergavenny	B1/B2	1.5
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		<p>4. Proportion of resident workforce working in Monmouthshire (+)</p> <p>5. Number of people in-commuting to Monmouthshire</p> <p>6. Number of people out-commuting from Monmouthshire</p> <p>7. Tourism expenditure (+)</p> <p>8. Number of rural diversification/enterprise schemes approved</p> <p>9. Number of tourism schemes approved</p> <p>10. Number of tourism facilities lost through development, change of use or demolition</p>	<p>7. £285.08 Million *****</p> <p>8. 8</p> <p>9. 9</p> <p>10.1</p>	<table border="1"> <tr> <td>SAE1f</td> <td>Newhouse Farm, Chepstow</td> <td>B2/B8</td> <td>4.0</td> </tr> <tr> <td>SAE1g</td> <td>South Woodside, Usk</td> <td>B1</td> <td>1.3</td> </tr> <tr> <td>SAE1h</td> <td>Pill Row, Caldicot</td> <td>B1/B8</td> <td>1.0</td> </tr> <tr> <td>SAE2w</td> <td>Wales One, Magor</td> <td>B1/B2/B8</td> <td>0.57</td> </tr> <tr> <td>SAH3</td> <td>Fairfield Mabey, Chepstow</td> <td>B1</td> <td>0.65</td> </tr> <tr> <td>SAH4</td> <td>Wonastow Road, Monmouth</td> <td>B1</td> <td>2.78</td> </tr> <tr> <td>SAH5</td> <td>Rockfield Farm, Undy</td> <td>B1</td> <td>2.0</td> </tr> </table> <p>2. The Severnside area accounted for the majority of permissions relating to employment over the monitoring period equating to 3.94ha. The Rural Secondary settlements followed with 0.6ha and then the Main Towns with 0.27ha. The Rural General area accounted for 0.17ha. For further information refer to the Economy and Enterprise Policy Analysis in Section 5.</p> <p>3. The table below only identifies those sectors where planning permission for employment uses occurred over the monitoring period. The largest proportion of employment floorspace for B use classes permitted related to Transport & storage; information and communication. For the full list of sectors and additional information refer to the Economy and Enterprise Policy Analysis in Section 5.</p> <table border="1"> <thead> <tr> <th>Sector</th> <th>Size(ha)</th> </tr> </thead> <tbody> <tr> <td>Manufacturing</td> <td>0.006ha</td> </tr> <tr> <td>Wholesale & retail trade; repair of motor vehicles and motor cycles</td> <td>0.01ha</td> </tr> <tr> <td>Transport & storage; information and communication</td> <td>4.14ha</td> </tr> <tr> <td>Accommodation and food service activities</td> <td>0.13ha</td> </tr> </tbody> </table>	SAE1f	Newhouse Farm, Chepstow	B2/B8	4.0	SAE1g	South Woodside, Usk	B1	1.3	SAE1h	Pill Row, Caldicot	B1/B8	1.0	SAE2w	Wales One, Magor	B1/B2/B8	0.57	SAH3	Fairfield Mabey, Chepstow	B1	0.65	SAH4	Wonastow Road, Monmouth	B1	2.78	SAH5	Rockfield Farm, Undy	B1	2.0	Sector	Size(ha)	Manufacturing	0.006ha	Wholesale & retail trade; repair of motor vehicles and motor cycles	0.01ha	Transport & storage; information and communication	4.14ha	Accommodation and food service activities	0.13ha
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				Electricity, gas, steam & air conditioning supply; water supply; sewerage, waste management and remediation	0.04ha
				Public admin & defence; compulsory social security	0.6ha
				<p>4. The Welsh Government travel to work statistics identify 64.2% of the Monmouthshire workforce remaining in their own area for work. This figure has increased by 3% since the previous AMR. However, these figures should not be given too much weight as the data is based on a small sample survey and should therefore be treated with caution.</p> <p>5 – 6. The 2023 Welsh Government Commuting Statistics identified a total of 14,500 commuting into Monmouthshire and 15,600 out of Monmouthshire. The level of in-commuting has increased slightly since the previous monitoring period (2021-2022: 14,300) with the level of out-commuting decreasing (2021 – 2022 17,100), resulting in a net outflow of commuters. However, these figures should not be given too much weight as the data is based on a small sample survey and should therefore be treated with caution. The Economy and Enterprise Policy Analysis in Section 5 provides a further breakdown of this information.</p> <p>7. The Monmouthshire STEAM report (2022) identified the total annual tourism expenditure as £285.08 Million over the 2022 period. This compared to £182.79 Million over the 2021 period, which equates to a 56% increase. This is a significant increase since the previous period and reflects the recovery since the impact of the COVID-19 pandemic on the tourism and hospitality industries. Compared to £244.99 Million over the 2019 period, this equates to an overall 3.7% increase post COVID-19 pandemic.</p> <p>8. A total of 8 applications relating to rural diversification/enterprise were approved during the monitoring period. 6 of the applications were approved as rural enterprise schemes and 2 applications as rural</p>	

Headline	Objective	SA Indicators	Data	Commentary
				<p>diversification of existing farmsteads. Full details of which can be found in the Rural Enterprise Policy Analysis in Section 5.</p> <p>9 – 10. A total of 9 tourism schemes were approved over the monitoring period all of which were tourist accommodation facilities. These included 5 conversions to holiday lets, 2 new glamping accommodation sites and a site for 2 shepherd huts and 1 tepee.</p> <p>One planning application was approved which involved the loss of tourism facilities over the monitoring period. This related to the change of use from a barn conversion holiday let to a single dwelling in Earlswood. The Visitor Economy Policy Analysis in Section 5 provides full detail of the type of tourism facilities gained and lost over the monitoring period.</p> <p>Continue to monitor SA objective.</p>

*Major development - development involving one or more of the following: developments of 10 or more dwellings or 0.5ha or more for outline and full applications; development of building or buildings where the floor space to be created is 1000m² or more; developments on site with an area of 1ha or more; winning or working of minerals, or use of the land for mineral working deposits; or, waste development.

**Figure derived from Census 2021

*** Contains Natural Resources Wales information © Natural Resources Wales and database right. All rights reserved

**** Welsh Government Stats Wales

*****Welsh Government Commuting Statistics (Apr 2023)

*****Monmouthshire STEAM Report (2022)

7 Conclusions and Recommendations

Conclusion and Recommendations

- 7.1 This is the ninth AMR to be prepared since the adoption of the Monmouthshire LDP. As the LDP has been operational for nine years, trends have emerged through the monitoring process as to which policies are performing as intended and which are not. The AMR indicates that good progress is being made in delivering many of the Plan's policies with identified targets being met and that the LDP strategy remains sound. However, the AMR also indicates that there continues to be certain elements of the Plan which are not progressing as intended.
- 7.2 Section 5 provides a detailed assessment of how the Plan's strategic policies, and associated supporting policies, are performing against the identified key monitoring targets and outcomes and whether the LDP strategy and objectives are being delivered. This has enabled the Council to make an informed judgement of the Plan's progress in delivering the targets/monitoring outcomes and policies during this monitoring period. The table below provides a visual overview of the effectiveness of the Plan's policies during the current monitoring period based on the traffic light rating used in the assessment.
- 7.3 Overall, the plan is working effectively with the majority of the monitoring targets being achieved, a slight increase to 61 from last year's 57 green rating. There has been a slight decrease in the number of indicators that have not achieved the target this year, but there is an appropriate justification, and no concerns are raised (23 compared to last year's 26). 'Red' ratings recorded during the current monitoring period remained at 3 for the second consecutive year. Further commentary is provided below.

Targets / monitoring outcomes* are being achieved	61
Targets / monitoring outcomes* are not currently being achieved but there are no concerns over the implementation of the policy	23
Targets / monitoring outcomes* are not being achieved with subsequent concerns over the implementation of policy	3
No conclusion can be drawn due to limited data availability or no applicable data	5

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

Key Findings

- 7.4 Information collected through the monitoring process indicates that the majority of indicator targets and monitoring outcomes are being achieved (green traffic light rating), indicating that the relevant Plan policies are performing as intended. The most significant achievements include the following:

Strategy and Housing

- All seven LDP allocated strategic housing sites have planning permission, with Vinegar Hill, Undy having gained planning permission during the monitoring period. Four of these sites are under construction (Fairfield Mabey, Chepstow; Crick Road, Portskewett; Rockfield Farm, Undy; Vinegar Hill, Undy) and two are complete (Sudbrook Paper Mill and Deri Farm, Abergavenny). One site is partially complete (Wonastow Road, Monmouth), with the remaining phase at Drewen Farm currently engaged in pre-application enquiries following the announcement by Dwr Cymru Welsh Water that there is a strategic phosphate solution for Monmouth which is due to be installed by 31st March 2025.
- Progress continues to be made towards the implementation of the LDP allocations, with 343 dwelling completions recorded during the monitoring period, 211 (61.5%) of which were on LDP allocated sites. Large windfall sites accounted for 21% of completions (71 units) and small sites accounted for the remaining 17.5% (61 units).
- Two planning permissions for 5 or more dwellings during the monitoring period triggered the delivery of on-site affordable homes (100% affordable housing scheme in Chepstow for 8 homes, and Vinegar Hill, Undy 39 affordable homes (policy compliant at 25%)).

Economy and Enterprise

- The County has a total of 40.16 hectares of employment land available, indicating that sufficient employment land is maintained to meet the identified take up rate. Work on the RLDP is exploring why the remaining employment sites have not yet come forward, and will consider whether or not they should be de-allocated or if alternative interventions would secure their delivery.
- One planning application approved on allocated employment sites as identified in SAE1 during the monitoring period at Wales One, Magor (SAE1a) for the development of an industrial storage and distribution warehouse with ancillary offices (B2, B8 and B1) totalling 3.84ha. The site is currently under construction.
- There has been progress in terms of employment permissions within the County, with 10 permissions granted for a range of B use class employment uses on allocated (SAE1), protected employment sites (SAE2) and sites elsewhere in the County. This included the allocated employment site at Wales One, Magor (development of an industrial storage and distribution warehouse with ancillary offices (B2, B8 and B1) totalling 3.84ha which is currently under construction.

- No applications were granted during the monitoring period that related to the loss of B uses on allocated or protected employment sites (SAE1 & SAE2).
- Eight planning applications were approved for rural diversification or enterprise schemes. Some related to B use class uses such as small starter B1 workshop/office also contributing to the point above and others were for rural enterprises such as a new dog walking paddock at Trellech.
- The Council approved proposals for 9 tourism related applications, relating to 5 holiday lets proposals and 4 glamping facilities. Comparison with previous AMRs demonstrates that the number of tourism schemes approved during the current monitoring period remains at a positive level. The Sustainable Tourism Accommodation Supplementary Planning Guidance [SPG] (November 2017) has helped clarify our general support for this important sector of our economy.

Retail and Community Facilities

- The proportion of A1 retail uses within the towns' Primary Shopping Frontages generally accord with the thresholds identified in the Primary Shopping Frontages SPG.
- Eighteen planning applications were approved for community and recreation uses during the monitoring period. These included the redevelopment of King Henry VIII Comprehensive School in Abergavenny, change of use from disused railway line to shared use walking and cycling route at Caldicot and extension to existing facilities at Caldicot leisure centre.

Environment

- A total of 36.6ha of development was permitted over the monitoring period, of which 20.6ha was located on brownfield sites. This equates to 56.2% of all development (excluding householder, conversions and agricultural buildings) and is an increase on last year's figure of 31.8%.
- No applications have been granted planning permission contrary to TAN15 requirements in either Zone C1 or C2 floodplain over the monitoring period.
- Nine applications have been approved incorporating on-site renewable energy, including included the installation of ground mounted solar panels/ solar arrays at various locations, EV charging, air source heat pumps & solar panels at new homes in Little Mill and a One Planet Development at Tintern.
- Ample land remains available for potential waste management sites and there has been no reduction in the minerals land bank.
- There were no applications that resulted in the loss of listed buildings or historic sites and no development permitted which would have an adverse impact on the historic environment.

7.5 This indicates that much of the policy framework is operatively effectively allowing appropriate development to take place and that good progress has been made in implementing the LDP.

7.6 The analysis also indicates that there are various policy indicators which are not being achieved but there are no corresponding concerns over policy implementation (amber traffic light rating). Further investigation has determined that there are justified reasons for the performance recorded and this is not representative of any fundamental issue with the implementation of the policy framework or strategy at this time. The most significant findings in relation to these are as follows:

Housing

- 343 dwellings were built during the monitoring period (295 general market and 48 affordable). Completions recorded over the second half of the plan monitoring period have been significantly higher than those achieved during the first half of the plan monitoring period (1,579 completions 2018-2021 compared to 956 completions 2014-2018).
- Dwelling permissions during 2022/23 (229 dwellings) were higher than recorded in the previous two monitoring periods. The increase is predominantly due to the LDP allocated site at Vinegar Hill Undy gaining permission for 155 homes. Of the 229 dwelling permissions, 179 (78.2%) related to market homes and 50 (21.8%) were affordable homes. Nevertheless, dwelling permissions are likely to decline as the majority of LDP allocated sites already have planning permission and the LDP has reached the end of the Plan period. This highlights the importance of progressing the RLDP at pace. In addition, the introduction of the measures in January 2021 to control phosphate levels in the River Usk and River Wye Catchment areas, which cover a large proportion of the County, has impacted on our ability to grant planning permissions in a significant proportion of the County. Strategic Phosphate solutions have been secured for the primary settlements of Monmouth and Abergavenny and Officers and Cabinet Members are working with stakeholders to deliver both engineered and nature solutions to this challenge in other rural areas.
- Progress continues towards the implementation of the Plan's spatial strategy with 45.2% (155 dwellings) of recorded completions delivered in the County's main towns. Chepstow accounted for most of these completions (123 dwellings/79%), of which 98 completions were recorded at the strategic site allocation at Fairfield Mabey. Abergavenny accounted for 19% (29 dwellings) of completions in the main towns and Monmouth recorded just 3 completions which reflects the phosphate constraint in this area. Completions within the Severnside area, Rural Secondary Settlements and Rural General areas all remained within the acceptability range indicating that overall, the housing is being delivered in accordance with the spatial strategy.
- Some progress has been made on a couple of Main Village allocated sites with 9 affordable homes completed at SAH11(ii) Well Lane, Devauden and 4 affordable homes at SAH11(ix)(a) Land rear of Carpenters Arms, Llanishen under construction.

Economy and Enterprise

- One application was permitted during the monitoring period relating to the loss of tourism facilities. This related to the change of use from a barn conversion holiday let to a single dwelling at Earlswood. The loss is however, considered to be justified within the context and requirements of the LDP policy framework.

Retail and Community Facilities

- All of the County's central shopping areas (CSA), with the exception of Monmouth, were below the GB High Street vacancy rate (13.9%, first 6 months of 2023, Local Data Company). However, comparison with 2021 vacancy rates indicates that all of the centres, with the exception of Usk, recorded an increase in vacancy rates in September/October 2023.
- Marginal declines were recorded in A1 retail uses in Primary Shopping Frontages in Abergavenny (PSF1 Cross St, High St, Frogmore St & 1 Nevill St), Caldicot, Chepstow (PSF5 High Street) and Monmouth (PSF7 Monnow Street). However, overall, the towns' primary shop frontages are functioning well.
- One application was permitted for new A1 food and non-bulky retail developments in the County's town/local centres during the period monitored. However, five applications were permitted outside of the centres. Of those permitted outside existing centres, three related to extensions/additional retail space at existing garden centres, one for the change of use of a vacant building to a café with retail and one for a new Lidl supermarket in Bulwark neighbourhood centre. On balance, it was considered both met relevant local and national retail planning policy and guidance.
- Three community facilities have been granted permission to an alternative use during the monitoring period, relating to the loss of play space at Little Mill due to the relocation and upgrade of children's play area, a change of use from a community hub to B8 use at Chepstow, and a change of use from a nursery to housing at Caldicot. However, these losses are justified within the context and requirements of the LDP policy framework.

Environment

- Approximately 7.44ha of land was permitted on non-allocated greenfield land during the monitoring period. This is lower than recorded in any monitoring period; however, this remains above the target of no loss of non-allocated greenfield land. In each case, however, the loss was considered justified within the context and requirements of the LDP policy framework at the time of decision making and is reflective of the limited brownfield opportunities in the County.
- Two applications were permitted on areas of open space not allocated for development in the LDP totalling 0.13ha over the monitoring period. These involved the loss of open space (0.03ha) associated with the construction of two apartments in Little Mill, and the change of use of land designated as DES2 (area

of amenity open space, 0.1ha) to use a residential curtilage. However, these were considered justified within the context and requirements of the LDP policy framework.

- 7.7 Notwithstanding the above, the information collected through the monitoring process has identified three key policy indicator targets that are not progressing as intended (red traffic light rating). These relate to overall housing completion figures, affordable housing delivery rates and vacancy rates in Monmouth's Central Shopping Area:

Strategy and Housing

- Housing delivery records covering the 10-year plan period 2011 - 2021 set out that the Plan had delivered a shortfall of 1,500 homes (33.3%) when compared to the 10-year Plan requirement of 4,500 dwellings. However, in more recent AMRs the % under delivery has steadily declined as the strategic sites have come forward. This shortfall is largely attributable to the lead in period of the strategic housing sites, many of which continue to deliver homes now which contributes to the RLDP housing delivery: it is worth noting that 1,008 homes have planning permission and are due to be built in the near future. The impact of phosphates restrictions is also now affecting site commencements and therefore completions. During this monitoring period, 343 dwellings were completed. Given the importance attached to the supply of housing land, a full review of the LDP commenced in 2017 and culminated with the publication of the Final Review Report in March 2018. The latest position on the RLDP is discussed below in the recommendations section

Affordable Housing

- 48 affordable homes were completed during the monitoring period accounting for 14% of total completions recorded (343). This is well below the LDP target of 96 affordable homes per annum. Housing delivery records covering the 10-year plan period 2011 - 2021 set out that the Plan has delivered 658 affordable homes compared to a target of 960 affordable homes (a shortfall of 302 affordable homes). Proportionately, this shortfall is almost identical to the shortfall in total housing delivery. This shortfall is largely attributable to the lead in period of the strategic housing sites, many of which continue to deliver homes now which contributes to the RLDP housing delivery: it is worth noting that there are 280 affordable homes with consent and due to be built in the near future. The impact of phosphates restrictions is also now affecting site commencements and therefore completions. This reduced trend of affordable housing delivery is therefore anticipated to continue in the short-term awaiting progress on the RLDP. This is a matter of concern given the estimated annual need for 468 affordable homes in the County¹¹.

¹¹ MCC Local Housing Market Assessment (LHMA), 2020. An updated LHMA is being prepared to inform the RLDP.

Retail and Community Facilities

- As increased vacancy rates have occurred for four consecutive years in the Monmouth Central Shopping Area, the trigger for this indicator has been met. The vacancy rate stood at 18.2% in September 2023 which is an increase from 15.5% recorded in 2021.

Supplementary Planning Guidance (SPG)

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

Sustainability Appraisal (SA) Monitoring

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

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

- The annual objective level of nitrogen dioxide was not exceeded in in 2022/23. For the sixth year running there was no exceedance in Usk.
- Monmouthshire sits within three groundwater bodies, the Usk Devonian Old Red Sandstone (ORS), Wye Secondary Devonian ORS and Usk and Wye southern Carboniferous Limestone. All three groundwater bodies had good status for quantity as per the Water Watch Wales for the Cycle 3 (2021) data.
- The latest waste data published for 2021-2022 suggests that 71% of Monmouthshire's total household waste was recycled or composted. This has increased since the previous AMR which indicated 62% was recycled or composted.
- No agricultural land at Grade 3a and above has been lost to major development over the monitoring period.
- The Monmouthshire STEAM report (2022) identified the total annual tourism expenditure as £285.08 Million over the 2022 period. This compared to £182.79 Million over the 2021 period, equates to a 56% increase. This is a significant increase since the previous period and reflects the recovery since the impact of the COVID-19 pandemic on the tourism and hospitality industries. Compared to £244.99 Million over the 2019 period, equates to a 3.7% increase post COVID-19 pandemic.

Conclusions & Recommendations

- 7.11 Overall, the 2022-23 AMR indicates that good progress continues to be made in implementing many of the Plan's policies and that overall, the strategy remains sound. However, while progress has been made in relation to the Plan's Strategic Housing Sites, cumulative completion rates for the Plan period are lower than the Plan requirement and remain a matter of concern if Monmouthshire's housing needs are to be met. However, this is due to a time-lag in site delivery rather than an issue with the sites not happening at all.
- 7.12 The LDP reached the end of the Plan period at the end of 2021, with 10-years' worth of completions recorded in the 2021 monitoring period and while all seven strategic housing allocations now have planning permission¹² and will continue to play an important role in housing delivery and completion rates in the short term, dwelling permissions are likely to decline over the next few years which is cause for concern. Analysis of anticipated completions indicates that completion rates are estimated to remain stable for a couple of years and then forecast to reduce the lower levels (238 units in 2025/26, 290 units in 2026/27 and 222 units in 2027/28). These forecasts do not however, include any contribution from the emerging RLDP which will improve housing land supply as the plan progresses to adoption. In the meantime, however, the time lag between the two plans is an area of concern for its implications on housing delivery in the County.
- 7.13 Similar concerns are shared with the level of affordable housing secured and completed during the monitoring period. This again is considered to be reflective of a combination of the strategic sites gaining planning permission and being built out and restrictions on development due to phosphates constraints. Of note, two new planning permissions were approved during the monitoring period that triggered delivery of on-site affordable housing. Some progress has also been made on a couple of Main Village sites with 9 affordable dwellings completed at SAH11(ii) Well Lane, Devauden and 4 affordable dwellings at SAH11(ix)(a) Land rear of Carpenters Arms, Llanishen are under construction.
- 7.14 As can be seen from the analysis throughout Section 5, phosphate water quality issues in the River Usk and Wye Catchments continue to have implications for the ongoing delivery of development in the County. The Council is committed to seeking solutions to the phosphate issue and is in proactive discussions with the key organisation, including NRW, Welsh Government, DCWW and the development industry, to seek viable and timely solutions in the affected settlements. Of note, DCWW has committed to prioritising improvement works at the Llanfoist WwTW serving Abergavenny

¹² SAH4 Wonastow Road, Monmouth site is partially complete, with the remaining phase at Drewen Farm currently engaged in pre-application enquiries following the announcement by Dwr Cymru Welsh Water that there is a strategic phosphate solution for Monmouth which is due to be installed by 31st March 2025.

(benefitting the River Usk catchment), and Monmouth WwTW (benefitting the River Wye catchment). These improvements are currently subject to design and regulatory approval however there is a firm commitment that these improvements will be completed by 31st March 2025. This investment will significantly reduce the amount of phosphates entering the water environment from the treatment works, providing environmental improvement and capacity for new development (housing, commercial, retail, agricultural) to proceed, supporting the long-term sustainability of towns and communities while safeguarding water quality. Nevertheless, the short-term implications on the delivery of new homes raises concerns.

- 7.15 These issues reinforce the need to progress with the RLDP to provide a continued policy framework and mechanism for addressing the County's housing and affordability issues. In light of the concerns with housing delivery and associated outcomes, the progression of the RLDP remains a key priority of the Council. In December 2022 Council endorsed a revised Preferred Strategy to be issued for statutory consultation/engagement in December 2022 - January 2023 and agreed a RLDP Revised Delivery Agreement which amended the project timetable for Plan preparation. The revised Preferred Strategy responded to a number of challenges that arose following stakeholder consultation and engagement on the previous Preferred Strategy in Summer 2021, namely the Welsh Government objection to the level of growth set out in that Preferred Strategy and water quality issues in the Rivers Wye and Usk. Work is currently progressing on the preparation of the Deposit Plan which is anticipated to be subject to statutory consultation/engagement in late Spring 2024.
- 7.16 With regard to the consecutive increased vacancy rates in the central shopping area of Monmouth, it is worthy of note that the rise in vacancy rates has predominantly been experienced in the primary shopping frontages. This may, in part reflect the continued impact of the Covid-19 pandemic on high streets across the UK, particularly given the loss of some national chains from the town centre, such as Peacocks and M&Co.
- 7.17 WG guidance¹³ published in response to the Covid-19 pandemic recognises that whilst retail development should continue to be focussed in town centres, retail and commercial centres should be enabled to operate as flexibly as possible. This will ensure that going forward retail and commercial centres are hubs of social and economic activity and the focal point for a diverse range of services and cultural activities/functions, which support the needs of local communities. This approach should enable the planning system to be responsive, flexible and pragmatic to assist with the recovery from Covid-19.

¹³ Building Better Places - The Planning System Delivering Resilient and Brighter Futures: Placemaking and the Covid-19 recovery (WG, July 2020) - <https://gov.wales/planning-policy-covid-19-recovery> ; Welsh Government letter regarding temporary permitted development rights in town centres, 30 March 2021 - <https://gov.wales/coronavirus-covid-19-new-temporary-permitted-development-rights-support-economic-recovery-html>

- 7.18 The Council through its Regeneration team has submitted a funding bid to secure a share of Central Government’s ‘Levelling Up Fund’ to make improvements to Market Hall and Shire Hall, two key buildings in the town centre as well as improvements to Monnow Street and Blestium Street. A ‘Levelling Up Fund’ bid was also submitted for the acquisition of 7-43 Newport Road, Caldicot, public realm improvements to Caldicot town centre and refurbishment of Caldicot Wellbeing Centre. Unfortunately, our bids for round two of Levelling Up Funding round 2 (LUF2) were unsuccessful. The Council is awaiting an announcement on the parameters and timescales for LUF3.
- 7.19 Although, with the exception of Monmouth, high street vacancy rates are below the GB average (13.9% first 6 months of 2023, Local Data Company), it is recognised that high street vitality plays a key role in the character and attractiveness of our market towns. The Council is delivering a number of initiatives to support the vitality of town centres. These include proposals for public realm and active travel improvements in Monnow Street, for which it is anticipated that a bid will be submitted for WG Transforming Towns funding. The proposals reflect the substantial and growing body of evidence that investment in high quality public realm which prioritises active travel modes is not only positive in terms of safety, health and wellbeing, but also delivers economic benefits in terms of, for example, higher footfall and lower vacancy rates.
- 7.20 A detailed ongoing audit of vacancies in Monmouth suggests that a number of the units in Monnow Street that are currently vacant or were at the time that the data cited in this report were gathered, are likely to become occupied in the near future. Work with landlords, businesses and agents is ongoing to further address the vacancy rate, including through grants to support refurbishment of empty or underused units, and proposals for meanwhile uses. The forthcoming Placemaking Plan to be developed in partnership with Monmouth Town Council is also expected to consider this issue.
- 7.21 The cost of living and energy costs crises pose additional threats to businesses as costs increase and customer spending decreases and this challenge will require careful consideration going forwards in terms of regeneration projects and future policy. The RLDP provides an opportunity to review high street planning policies to fit the needs of the future.
- 7.22 Accordingly, the AMR recommends the following:
1. Continue to progress work on the Deposit RLDP.
 2. Continue to work with the relevant organisations to secure solution to the phosphate water quality issues in the Usk and Wye Riverine SACs.
 3. Continue to work with other Council departments and relevant stakeholders to explore options for increasing affordable housing delivery.

4. Submit the ninth AMR to the Welsh Government and publish the AMR on the Council's website.
5. Continue to monitor the Plan through the preparation of successive AMRs.

Appendix 1 – Timing and Phasing of Sites

Allocations

Settlement Tier / Settlement	Allocated Site Name	Total site capacity	Development Progress		Units estimated for next 5 year period (all of which is beyond the LDP Plan Period)				
			Total Completions on site	U/C	2023-2024	2024-2025	2025-2026	2026-2027	2027-2028
Main Towns									
Abergavenny	Deri Farm (DC/2014/01360)	250	250	0	0	0	0	0	0
	Coed Glas (DC/2015/01587)	51	51	0	0	0	0	0	0
Chepstow	Fairfield Mabey (DM/2019/00001, DM/2019/01960 (AH) & DM/2019/01961)	373	203	71	19	80	0	0	0
Monmouth	Wonastow Road (DC/2015/00390 & DC/2015/00392)	340	340	0	0	0	0	0	0
	Wonastow Road (remainder of site)	110	0	0	0	0	0	55	55
	Tudor Road Wyesham	35	0	0	0	0	0	35	0
Sevenside Settlements									
Portskewett	Crick Road (DM/2019/01041)	269	0	12	50	50	50	50	57
Magor Undy	Rockfield Farm (Phase 1)(DM/2018/01606)*	144	144	0	0	0	0	0	0
	Rockfield Farm (remainder of site) (DM/2021/00357(RM))	120	0	0	30	35	35	20	0

Settlement Tier / Settlement	Allocated Site Name	Total site capacity	Development Progress		Units estimated for next 5 year period (all of which is beyond the LDP Plan Period)				
			Total Completions on site	U/C	2023-2024	2024-2025	2025-2026	2026-2027	2027-2028
	Land at Vinegar Hill (DM/2019/01937 & DM/2022/01042)	142	0	8	50	55	29	0	0
	Land at Vinegar Hill (remainder of site)	83	0	0	0	0	0	0	0
Sudbrook	Former Paper Mill (DC/2015/01184)	210	210	0	0	0	0	0	0
Rural Secondary Settlements									
Penperlleni	Land South of Usk Road (DC/2013/01001)	40	40	0	0	0	0	0	0
Raglan	Land at Chepstow Road (DM/2018/00769)(O/L) & DM/2021/02070 (RM)	38	0	0	0	10	28	0	0
Usk	Cwrt Burrium**	7	7	0	0	0	0	0	0
Main Villages									
Cross Ash	Land adj Cross Ash Garage (DM/2017/01335)	6	0	0	0	6	0	0	0
	Land adj Village Hall	10	0	0	0	0	0	0	0
Devauden	Land at Well Lane (DM/2018/01741)	15	15	0	0	0	0	0	0
Dingestow	Land South East (DM/2018/01404)	15	15	0	0	0	0	0	0

Settlement Tier / Settlement	Allocated Site Name	Total site capacity	Development Progress		Units estimated for next 5 year period (all of which is beyond the LDP Plan Period)				
			Total Completions on site	U/C	2023-2024	2024-2025	2025-2026	2026-2027	2027-2028
Grosmont	Land to the west	15	0	0	0	0	0	0	0
Little Mill	Land to the north	15	0	0	0	0	0	15	0
Llanddewi Rhydderch	Land rear Village Hall	5	0	0	0	0	0	0	0
Llanellen	Land to the north west	15	0	0	0	0	0	0	0
Llanfair Kilgeddin	Land north (DM/2018/02001(O/L))	5	0	0	0	0	5	0	0
Llangybi	Land at Ton Road	10	0	0	0	0	0	0	0
Llanishen	Land rear Carpenters Arms (DM/2019/02053(RM))	8	0	8	0	0	0	0	0
	Church Road	5	0	0	0	0	0	0	0
Mathern	Land to the west	15	0	0	0	0	0	0	0
Penallt	Land south west (DM/2015/00606)	10	0	0	0	10	0	0	0
Pwllmeyric	Hill Farm	17	0	0	0	0	0	0	0
Shirenewton	Land to east (south of minor road) (DM/2018/02066(O/L))	11	0	0	0	0	11	0	0
Werngifford Pandy	Land adjacent	15	0	0	0	0	0	0	0

*Original outline permission for 266 dwellings. Phase 1 of development is 144 dwellings

** Approved 23.04.20 for 7 dwellings

Sites with planning permission

Settlement Tier / Settlement	Allocated Site Name	Total site capacity	Development Progress		Units estimated for next 5 year period (all of which is beyond the LDP Plan Period)				
			Total Completions on site	U/C	2023-24	2024-25	2025-26	2026-27	2027-28
Main Towns									
Abergavenny	Mulberry House (DM/2014/01015)	27	0	8	0	0	0	0	0
Chepstow	Osborn International (DC/2009/00910)	169	44	0	0	0	0	0	0
Monmouth	Hillcrest Road, Wyesham (DM/2019/02054)	11	0	7	4	0	0	0	0
	Land west Rockfield Road (DM/2017/00539(O/L))	70	0	0	0	0	0	35	35
Severnside Settlements									
Caldicot	Church Road (DM/2019/01761)	130	84	46	0	0	0	0	0
Rogiet	Green Farm (DC/2015/01328)	10	0	0	0	0	5	5	0
Rural Secondary Settlements									
Llanfoist	Land at Grove Farm (DM/2019/00346)	106	37	27	10	32	0	0	0
Rural									
Llanellen	Llanellen Court Farm (DC/2015/00474)	14	0	14	0	0	0	0	0

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APPENDIX 2



monmouthshire
sir fynwy

Equality and Future Generations Evaluation

<p>Name of the Officer completing the evaluation Mark Hand</p> <p>Phone no: 07773478579 E-mail: markhand@monmouthshire.gov.uk</p>	<p>Please give a brief description of the aims of the proposal</p> <p>Scrutiny of the adopted Monmouthshire Local Development Plan (LDP) ninth Annual Monitoring Report (AMR) and recommendation for endorsement of the AMR to the Welsh Government.</p>
<p>Name of Service area</p> <p>Planning (Planning Policy)</p>	<p>Date 07/11//2023</p>

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

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Age	The AMR includes indicators that monitor health and access to community facilities and open space. These matters affect all of our communities but could disproportionately affect children and elderly people who may have limited ability to travel greater distances.	None identified at this stage.	The AMR includes indicators that monitor health and access to community facilities and open space.
Disability	The AMR includes indicators that monitor health and access to community facilities and open space. These matters affect all of our communities but could disproportionately affect people with disabilities who may have limited ability to travel greater distances.	None identified at this stage	The AMR includes indicators that monitor health and access to community facilities and open space.
Gender reassignment	None identified at this stage	None identified at this stage	N/A
Marriage or civil partnership	None identified at this stage	None identified at this stage	N/A
Pregnancy or maternity	None identified at this stage	None identified at this stage	N/A

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Race	None identified at this stage	None identified at this stage	N/A
Religion or Belief	None identified at this stage	None identified at this stage	N/A
Sex	The AMR includes indicators that monitor employment provision. One of the challenges facing the County is the imbalance between male and female earnings, although this situation is improving. The LDP aims to provide economic growth and employment provision, which could indirectly impact on wage equality and therefore access to housing and quality of life. The jobs in the foundation economy are disproportionately occupied by females. This sector is vital to support our communities, as are jobs in tourism. Neither sectors are generally well-paid, although they often offer flexible working conditions that can assist work-life balance. Wage levels are not within the remit of planning policy and policies to try to seek only high paid jobs could be to the detriment of this vital economic sector.	None identified at this stage	N/A
Sexual Orientation	None identified at this stage	None identified at this stage	N/A

2. The Socio-economic Duty and Social Justice

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

	Describe any positive impacts your proposal has in respect of people suffering socio economic disadvantage	Describe any negative impacts your proposal has in respect of people suffering socio economic disadvantage.	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
<p>Socio-economic Duty and Social Justice</p>	<p>The AMR provides detail relating to specific indicators that monitor a wide range of topic areas including affordable housing with a specific indicator relating to average house prices.</p> <p>Good quality and affordable housing is important in achieving poverty reduction and equitable prosperity, and supporting the best start in life.</p>	<p>N/A</p>	<p>This and successive AMRs will measure the impacts of the LDP on a range of social, economic and environmental indicators. The results of the AMRs will identify trends and allow remedial action to be taken, if necessary, to ensure the LDP objectives are being delivered. The monitoring process will also inform and shape the RLDP by reflecting on what is working and what is not.</p> <p>The results of the ninth AMR identifies an issue in relation to affordable dwelling completions whereby these were below the LDP target of 96 homes per annum with 48 completions over the 2022 – 2023 monitoring period. While progress has been made in relation to the Plan’s Strategic Housing Sites, housing completions and affordable housing delivery rates for the Plan period are significantly lower than the Plan requirement and remain a matter of concern if Monmouthshire’s housing needs are to be met. However, this is due to a time-lag in site delivery rather than an issue with the sites not happening at all: it is worth noting that approx. 1,000 homes (including 280 affordable homes) have planning permission and due to be built in the near future .</p>

Policy making and the Welsh language.

How does your proposal impact on the following aspects of the Council's Welsh Language Standards:	Describe the positive impacts of this proposal	Describe the negative impacts of this proposal	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts
<p>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>This and successive AMRs will measure the impacts of the LDP on a range of social, economic and environmental indicators. The Planning (Wales) Act 2015 provides a statutory basis to the established practice of giving consideration to the impacts of LDPs on the use of the Welsh language and that sustainability appraisals include specific consideration of such impacts.</p>	<p>N/A the AMR is a monitoring tool of the Adopted LDP reporting data from 01/04/22– 31/03/23</p>	<p>The results of the AMR will identify trends and allow remedial action to be taken, if necessary, to ensure the LDP objectives are being delivered. The monitoring process will also inform and shape the RLDP by reflecting on what is working and what is not.</p> <p>The AMR will be published in both Welsh and English.</p>
<p>Operational</p> <p>Recruitment & Training of workforce</p>	<p>N/A the AMR is a monitoring tool of the Adopted LDP reporting data from 01/04/22– 31/03/23</p>	<p>N/A</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 AMR will be published in both Welsh and English.</p>	<p>None of the Planning Policy team are Welsh speakers, however, there are robust systems in place to deal with phone calls and correspondence without delaying the provision of the service.</p>	<p>This and successive AMRs will measure the impacts of the LDP on a range of social, economic and environmental indicators. The Planning (Wales) Act 2015 provides a statutory basis to the established practice of giving consideration to the impacts of LDPs on the use of the Welsh language and that sustainability</p>

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





Well Being Goal	Does the proposal contribute to this goal? Describe the positive and negative impacts.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
<p>A prosperous Wales Efficient use of resources, skilled, educated people, generates wealth, provides jobs</p>	<p><i>The LDP strategy seeks to increase employment opportunities within Monmouthshire; the policy framework protects existing employment sites and allocates additional land for employment use.</i></p> <p>Positive: The AMR monitors the implementation of the Plan as a whole, including employment policies.</p> <p>Negative: None identified at this stage.</p>	<p>Continue to monitor employment land supply and take up throughout the County through the annual Employment Land Survey undertaken by the Planning Policy Service. The data from the next survey will inform the 2023-24 AMR. The results of AMRs to date will identify trends and allow remedial action to be taken, if necessary, to ensure the LDP objectives are being delivered, those objectives being directly related to creating a prosperous Wales. The monitoring process will also inform and shape the RLDP by reflecting on what is working and what is not.</p>
<p>A resilient Wales Maintain and enhance biodiversity and ecosystems that support resilience and can adapt to change (e.g. climate change)</p>	<p><i>The LDP strategy seeks to maintain and enhance biodiversity within Monmouthshire; the policy framework protects existing sites and promotes green infrastructure.</i></p> <p>Positive: The AMR monitors the implementation of the Plan as a whole, including biodiversity impacts.</p> <p>Negative: None identified at this stage.</p>	<p>Continue to monitor biodiversity throughout the County to inform the 2023-24 AMR.</p> <p>The results of AMRs to date will identify trends and allow remedial action to be taken, if necessary, to ensure the LDP objectives are being delivered, those objectives being directly related to creating a resilient Wales. The monitoring process will also inform and shape the RLDP by reflecting on what is working and what is not.</p>


Well Being Goal	Does the proposal contribute to this goal? Describe the positive and negative impacts.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
<p>A healthier Wales People's physical and mental wellbeing is maximized and health impacts are understood</p>	<p>Positive: The AMR monitors the implementation of the Plan as a whole. The sustainability appraisal/strategic environmental appraisal measures LDP impact on a range of sustainability indicators including open space, air and water quality.</p> <p>Negative: None identified at this stage.</p>	<p>Continue to monitor sustainability indicators throughout the County to inform the 2023-24 AMR. The results of AMRs to date will identify trends and allow remedial action to be taken, if necessary, to ensure the LDP objectives are being delivered. Creating healthy communities forms part of delivering sustainable development. The monitoring process will also inform and shape the RLDP by reflecting on what is working and what is not.</p>
<p>A Wales of cohesive communities Communities are attractive, viable, safe and well connected</p>	<p>Positive: The AMR monitors the implementation of the Plan as a whole, including the spatial strategy. The Covid-19 pandemic emphasised the importance of socially sustainable communities and ensuring a balanced demography.</p> <p>Negative: None identified at this stage.</p>	<p>Continue to monitor indicators to inform the 2023-24 AMR. The results of AMRs to date will identify trends and allow remedial action to be taken, if necessary, to ensure the LDP objectives are being delivered. Creating healthy communities forms part of delivering sustainable, resilient and cohesive communities. The monitoring process will also inform and shape the RLDP by reflecting on what is working and what is not.</p>
<p>A globally responsible Wales Taking account of impact on global well-being when considering local social, economic and environmental wellbeing</p>	<p>Positive: The AMR monitors the implementation of the Plan as a whole. The sustainability appraisal/strategic environmental appraisal measures LDP impact on a range of sustainability indicators. Preparation of the AMR allows the Council to assess LDP impact on the social, economic and environmental well-being of the County.</p> <p>Negative: None identified at this stage.</p>	<p>Continue to monitor SA indicators to inform the 2023-24 AMR. The monitoring process will also inform and shape the RLDP by reflecting on what is working and what is not.</p>
<p>A Wales of vibrant culture and thriving Welsh language</p>	<p>Positive: The AMR monitors the implementation of the Plan as a whole, including impact on community</p>	<p>Continue to monitor indicators throughout the County to inform the 2023-24 AMR. The Planning</p>

2023
 2023
 2023
 2023
 2023

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>Culture, heritage and Welsh language are promoted and protected. People are encouraged to do sport, art and recreation</p>	<p>facilities. The Welsh language impact is a material planning consideration and was fully considered during the adoption of the LDP via the SA/SEA process.</p> <p>Negative: None identified at this stage.</p>	<p>(Wales) Act 2015 provides a statutory basis to the established practice of giving consideration to the impacts of LDPs on the use of the Welsh language and that sustainability appraisals include specific consideration of such impacts. The monitoring process will also inform and shape the RLDP by reflecting on what is working and what is not.</p>
<p>A more equal Wales People can fulfil their potential no matter what their background or circumstances</p>	<p>Positive: Preparation of the AMR allows the Council to assess LDP impact on the social, economic and environmental well-being of the County.</p> <p>Negative: None identified at this stage.</p>	<p>Continue to monitor indicators throughout the County to inform the 2023-24 AMR. The results of the ninth AMR identify an issue in relation to housing delivery, affordable dwelling completions were below the LDP target of 96 units per annum with 48 completions. This affects the ability of our communities to secure appropriate and affordable accommodation. The continued progression of a RLDP is therefore essential in addressing inequality. Creating a more equal Wales forms part of delivering sustainable development.</p> <p>The monitoring process will also inform and shape the RLDP by reflecting on what is working and what is not.</p>

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

Sustainable Development Principle	Does your proposal demonstrate you have met this principle? If yes, describe how. If not explain why.	Are there any additional actions to be taken to mitigate any negative impacts or better contribute to positive impacts?
 <p>Long Term</p> <p>Balancing short term need with long term and planning for the future</p>	<p>The ninth AMR measures short/medium term impacts since Plan adoption which enables future comparative analysis. Sustainable development is central to the adopted LDP.</p>	<p>Successive AMRs will be prepared on an annual basis, providing both an annual evaluation of Plan performance and year by year comparison from which emerging long term trends may be identified and reported on. This will inform the evidence base for the RLDP.</p>
 <p>Collaboration</p> <p>Working together with other partners to deliver objectives</p>	<p>The AMR measures Plan implementation and delivery. The LDP was prepared through extensive engagement with a wide range of internal and external stakeholders.</p>	<p>The Council will continue to monitor and report on this in the 2023-24 AMR and will consider any actions required in light of the AMR findings. The AMR indicates that some of the Plan's objectives are not being delivered, particularly in terms of housing delivery, and therefore officers recommend to continue to progress work on the RLDP.</p>
 <p>Involvement</p> <p>Involving those with an interest and seeking their views</p>	<p>The LDP was prepared through extensive engagement with a wide range of internal and external stakeholders.</p>	<p>There is no requirement to undertake public consultation on this AMR. The RLDP will nevertheless be taken forward through extensive community and stakeholder engagement, expanding on the methods used previously, including through the use of digital involvement options to provide communities with information and the ability to engage with the RLDP in a virtual manner.</p>
 <p>Prevention</p> <p>Putting resources into preventing problems occurring or getting worse</p>	<p>The AMR demonstrates the extent to which the LDP strategy and objectives are being achieved and whether the Plan's policies are functioning effectively. Emerging trends may be identified and appropriate action considered at an early stage.</p>	<p>The AMR recommends to continue to progress work on the RLDP. This will ensure up to date policies and proposals in the County once the RLDP is adopted.</p>

Sustainable Development Principle	Does your proposal demonstrate you have met this principle? If yes, describe how. If not explain why.	Are there any additional actions to be taken to mitigate any negative impacts or better contribute to positive impacts?
 <p>Considering impact on all wellbeing goals together and on other bodies</p>	<p>The AMR measures the impact of the LDP on the social, economic and environmental well-being of the County.</p>	<p>Future AMRs will examine LDP impacts over a longer period and evidence the emergence of any trends at different spatial scales. Delivering sustainable development (social, economic and environmental) is central to the LDP.</p> <p>Continue to monitor indicators to inform the 2023-24 AMR.</p>

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

	Describe any positive impacts your proposal has	Describe any negative impacts your proposal has	What will you do/ have you done to mitigate any negative impacts or better contribute to positive impacts?
Safeguarding	None identified at this stage.	None identified at this stage.	N/A.
Corporate Parenting	The AMR monitors affordable housing provision. The monitoring process will inform and shape the RLDP by reflecting on what is working and what is not. The RLDP has the potential to provide affordable housing, delivery and allocation of which should be cognisant of the needs of children leaving care.	None identified at this stage.	N/A.

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

An extensive range of data sets have been used to prepare the AMR, from a wide range of sources both internal and external to the Council. These are clearly referenced in the document, but include the Development Management planning application database and planning policy annual monitoring surveys. Additional data has been provided by colleagues in the Ecology, Tourism, Housing, Waste and Transport Services.

External sources of data include Welsh Government, Natural Resources Wales, Office for National Statistics and Stats Wales.

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

Positive - The AMR is a positive tool for monitoring the effectiveness of the LDP and ultimately determining whether any revisions to the Plan are necessary. It aims to demonstrate the extent to which the LDP strategy and objectives are being achieved and whether the Plan's policies are functioning effectively. It allows the Council to assess the impact of the LDP on the social, economic and environmental well-being of the County and identifies any significant contextual changes that might influence the Plan's implementation or revision.

The AMR is required to be prepared each year following plan adoption, providing an annual evaluation of plan performance and year by year comparison. This is the ninth AMR to be prepared since the adoption of the LDP and is based on the period 01 April 2022 – 31 March 2023. The findings of the ninth AMR have been analysed and compared to the findings in previous eight AMRs allowing emerging trends to be identified and reported on.

The AMR recommends that work progresses on the RLDP. It is further recommended that the AMR is scrutinised and recommended for endorsement to submit to the Welsh Government.

Negative – None identified at this stage. There are no implications, positive or negative, for social justice, corporate parenting or safeguarding.

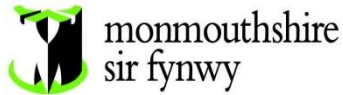
7. ACTIONS: As a result of completing this form are there any further actions you will be undertaking? Please detail them below, if applicable.

What are you going to do	When are you going to do it?	Who is responsible
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Submit the ninth AMR to the Welsh Government and publish the AMR on the Council's website.	November 2023	Head of Placemaking, Regeneration, Highways and Flooding Head of Planning Planning Policy Team
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8. VERSION CONTROL: The Equality and Future Generations Evaluation should be used at the earliest stage, such as informally within your service, and then further developed throughout the decision making process. It is important to keep a record of this process to demonstrate how you have considered and built in equality and future generations considerations wherever possible.

Version No.	Decision making stage	Date considered	Brief description of any amendments made following consideration
1.0	Performance and Overview Scrutiny Committee	22/11/2023	
1.1	Individual Cabinet Member	20/12/2023	



SUBJECT: King Henry VIII 3 – 19 School Funding Formula
MEETING: Performance and Overview Scrutiny Committee
DATE: 22nd November 2023.
DIVISION/WARDS AFFECTED: All.

1 PURPOSE

- 1.1 The purpose of the report is to inform the committee of the comments received on the recent consultation to agree a formula for the new King Henry VIII 3 – 19 School in Abergavenny and to allow the committee to comment on the proposal as part of the consultation process.

2 RECOMMENDATIONS

- 2.1 Members of the Committee scrutinise the proposals and the responses already received and provide comments on the proposals which will be considered by cabinet.

3 KEY ISSUES

- 3.1 King Henry VIII 3 – 19 School opened 1st September 2023, the school is currently based on two sites, the exiting secondary school site and the former Deri View primary school site. The new school is currently under construction and once completed in the autumn term of 2024 the whole school will relocate to the new building.
- 3.2 This is the first all through school for Monmouthshire and therefore no funding formula currently exists. The school budget forum agreed on 23rd March 2023 to consult on agreeing the funding formula.
- 3.3 The consultation opened on 12th September 2023 and closed on 24th October 2023. The Consultation paper is shown in Appendix 1.
- 3.4 In summary there are no proposed changes to the distribution via the age weighted pupil unit, this will remain the same for all schools. The only changes proposed to the premises funding is a reduction in maintenance funding due to the warranties in place for the building and equipment. This formula was agreed in 2017 and has been applied to all our new schools. The funding details are as follows:

Years 1 – 5 only funding for cyclical maintenance will be delegated,

years 6 – 10 50% of general maintenance and 100% of cyclical maintenance will be delegated and

Year 11+ funding will fall in line with all schools.

- 3.5 It is anticipated that the rates on the new school will increase significantly. Under the current regulations rates are funded at actual cost, a request for additional funding will be requested as part of the 2024-25 budget process to reflect this.
- 3.6 The proposal also reflects a larger management team: Headteacher, 2 non-teaching Deputy Headteachers and 7 teaching Assistant Headteachers. It is clear from some of the responses that this is an area of significant discussion. The current funding levels are detailed as part of the responses in Appendix 2.
- 3.7 The school will host two special resource bases, one in the lower school and one in the middle / secondary phase. There are no proposed changes to the funding formula for these, funding will be delegated in line with the current formula. Also, the formula currently used to delegate funding to mainstream pupils with ALN will remain the same.

4 RESOURCE IMPLICATIONS

- 4.1 The total funding for other schools will not be affected by this change, there is no proposed reduction to school budgets. Any changes to the formula will not be implemented until April 2025 for the 2025-26 financial year.
- 4.2 The only request to increase the funding for the individual school's budget as a result of this will be for the additional charges for rates as a result of the increase in building value.

5. WELL BEING OF FUTURE GENERATIONS IMPLICATIONS (INCORPORATING EQUALITIES, SUSTAINABILITY, SAFEGUARDING & CORPORATE PARENTING)

See attached in appendix 3.

8. CONSULTEES

DMT, School Budget Forum, All Headteachers, All Governing Bodies, All Elected Members and SLT.

9. BACKGROUND PAPERS

Fair Funding Regulations 2018

Schools Funding (Wales) Regulations 2010

Section 52 (current formula distribution).

10. AUTHOR

Nikki Wellington – Support Services Manager

Email: Nicolawellington@monmouthshire.gov.uk



Appendix 1

MONMOUTHSHIRE LOCAL EDUCATION AUTHORITY

CHILDREN AND YOUNG PEOPLE DIRECTORATE

CONSULTATION DOCUMENT – FUNDING FORMULA.

- This document forms part of the consultation process on the proposed changes to the funding formula, which delegates funding to schools within Monmouthshire.
- The relevant Welsh Government legislation that Monmouthshire Local Education Authority is bound by is:

The Schools Budget Share (Wales) Regulations 2010.

CONSULTATION DOCUMENT

PROPOSED CHANGES TO SCHOOLS FUNDING FORMULA TO FUND KING HENRY VIII 3 – 19 SCHOOL.

Date of Issue: **12th September 2023**

Action Required: **Consultation closes noon on the 24th October 2023.**

Title of Document: The Review of Funding for Schools in Monmouthshire to fund King Henry VIII 3 – 19 School Consultation Document.

Audience: All Head teachers of Monmouthshire Schools, Chairs of Governing Bodies of Monmouthshire Schools, The Schools Budget Forum, the Senior Leadership Team, the Departmental Management Team of the Children and Young People Directorate, Diocesan Directors of Education and All Elected Members.

Overview: This document details the reasons for the review of the current consultation on Schools funding and outlines the new proposals for the distribution of this funding.

Action Required: A proforma (Appendix 1) is enclosed for your response. The completed form should be sent to the address below by the consultation closing date of **noon on the 24th October 2023**.

Responses to: Nikki Wellington
Support Services Manager
Children and Young People Directorate
Monmouthshire County Council
e-mail: nicolawellington@monmouthshire.gov.uk

Further Information: Enquiries about this consultation document should be directed to **Nikki Wellington**

Nikki Wellington
Tel: 01633 644549 / 07766 504389
e-mail: nicolawellington@monmouthshire.gov.uk

Additional Copies: These can be obtained from Nikki Wellington (telephone number and e-mail address above)

Related Documents: The Schools Budget Shares (Wales) Regulations 2010

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1 Background	4
2 Issues with Current Arrangements	4
3 Proposal	4 - 5

Appendix 1 – Response Proforma

1. Background

The new King Henry VIII 3 – 19 School opened 1st September 2023, initially this will be on two sites, the former King Henry V111 site and the former Deri View Primary School site, the build is under construction and once the school moves to single site the funding formula will need to be agreed to reflect the first 3 – 19 school in Monmouthshire.

Following a meeting of the School Budget Funding Forum on the 23rd March 2023 members agreed to consult on creating a new funding formula to delegate funding for the new King Henry VIII 3 – 19 School.

The number of pupils determine the group of school and larger schools do receive additional funding for management structures and caretaking.

This proposal is not to increase the funding for the individual schools budget overall, however given the anticipated increase in rates it is proposed that cabinet will be asked to fund the increase in rates via a budget pressure.

2. Issues with current arrangements

- 2.1 Given that this is the first 3 – 19 school in Monmouthshire there is no formula to support the funding arrangements which mean that a new formula will need to be agreed.

3. Proposals.

3.1 Age weighted pupil unit.

All pupils are funded via a lump sum dependent on their age, lump sum is the same for all English medium schools with Welsh Medium receiving a small additional uplift. Each school only receive the funding for the ages that they teach.

This lump sum is calculated using several factors with the main funding relating to teaching staff. Other factors include: midday supervisors, resources, free school meals and funding for teaching assistants.

The regulations state that a minimum of 70% of the funding needs to be distributed in this way.

Proposal: No changes to this funding however the new school will receive the lump sum for all ages.

3.2 Premises and other factors.

The majority of the funding for premises costs are based on the floor or ground area with a condition weighting dependent on the age of the school. Rates are funded at actual cost.

The funding for caretaker is based on the group of school, group 1 schools which are the smallest schools receive funding for a part time caretaker while the larger schools receive additional funding for a full-time caretaker and an assistant caretaker.

Included in other factors are a number of service level agreements where funding is either a contribution to the cost or the full costs to buy back the service.

In addition to this funding is also provided for management structures and deprivation. The current formula for primary schools is a Headteacher and a teaching Deputy Headteacher, for secondary schools the funding reflects a Headteacher, a non-teaching Deputy Headteacher and 3 teaching assistant Headteachers.

Proposal:

There are no changes proposed to the funding for premises and ground, the areas will be adjusted to reflect the new school and the condition weighting will be reduced to one. Under the current formula building maintenance costs are reduced to reflect the warranties that will be in place.

The funding is reduced according to the age of the new build:-

Years 1 – 5 = 100% reduction in funding (although funding is provided for cyclical maintenance)

Years 6 – 10 = 50% reduction in funding (ensuring it covers the cyclical maintenance costs)

Years 11+ = 0% reduction in funding

Rates will continue to be funded at actual costs.

The service level agreement funding will be adjusted to reflect a group 7 school.

Deprivation will remain unchanged.

The funding for the management structure will reflect: Headteacher, 2 non-teaching Deputy Headteachers and 7 teaching Assistant Headteachers.

3.3 Additional Learning Needs.

The school will host two special resource bases, one for the primary phase and one for the secondary phase. The current funding for this is based on the numbers of staff needed to support the bases.

All school receive a delegated lump sum for which 70% is based on pupil numbers and 30% on the number of pupils supported by an individual development plan.

Proposals:

There are no proposals to change this funding.

The total funding for individual schools will not be affected and there is no reduction to the individual school budget.

Any changes to the formula will not be implemented until April 2025 for the financial year 2025-26.

The impact assessment is shown in Appendix 2.

4. Responses – to be received by noon on the 24th October 2023.

Please use appendix 1 below to complete your response.

APPENDIX 1 – RESPONSE PROFORMA

School represented (if applicable)

Formula area	I agree	I disagree	If you disagree, what is your proposal?
Age Weighted Pupil Unit (ref 3.1)			
Premises and other factors (ref 3.2)			
Additional Learning Needs (ref 3.3)			

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Consultation Responses

Disappointingly only 7 responses were received from 4 schools. These are detailed below:

1. Response from School Business Manager – King Henry VIII 3 – 19 School:

The funding of the management structure is crucial to operate the 3 – 19 through school approach.

I disagree with the funding for the premises and grounds maintenance as this does not reflect the additional costs associated with maintaining the new high-quality sports pitches. If the school is able to have autonomy (away from Mon-Life) to 'let' the pitches for community use then this will not be an issue for the school. Historically there has been an arrangement with the leisure centre that facilities are shared (both ways) but this would restrict any income generation.

Local Authority Response:

The leisure centre has an income generation target for these lettings which ultimately provides income for Monmouthshire County Council. In addition, the income generated will also be used to offset the loan repayments for the pitches and the new school building. The maintenance budget for the sports pitches for all 4 secondary schools was delegated to the school budget several years ago. Should the income go direct to the school they would need to make the loan payments and have the income target to meet. The central budgets for Monmouthshire County Council would see a shortfall in income which would need to be generated from other services including schools.

2. Response from Headteacher of Kymin View.

I think the funding formula is fair. I assume that the ratio is based on teachers and management as most schools try to fund learning support assistants through the grants which there is never enough in the budget to cover the WG guidelines for ratios of adults to children.

Local Authority Response:

No changes have been made to ratios for teachers or management structures for the primary phase. There are changes proposed for the secondary phase and these are detailed in the responses below.

Response from Monmouth Comprehensive Governor:

On behalf of the Governing Body of Monmouth Comprehensive School in the position as Chair of the Finance and Resources committee I would like to raise an objection to the proposed changes in respect of School Funding for King Henry VIII 3 – 19 school funding formula.

We feel strongly that all schools within Monmouthshire must receive funding against a common matrix and that the only true and fair measure has to be the number of students on roll.

Monmouth Comprehensive School (MCS) currently educates almost three times more learners than Chepstow Comprehensive School and yet receives the same amount of Leadership Block Funding.

On paper the King Henry VIII 3 – 19 School will aim to educate roughly the same total learners as MCS and yet the current proposal seems to more than double up on Leadership funding and grant an additional £20,000 with no specific designation. It is utterly wrong to launch a combined 3 – 19

school while still treating the primary and secondary levels of the school as completely different entities and then call for additional leadership on top. This sets an unsustainable and unfair precedent and totally defeats the financial object of a 3 -19 school.

We could also argue that MCS manages two schools within one if we proposed that our Special Needs Resource Base needed additional and different management and leadership funding from the mainstream secondary provision.

We believe the current proposal opens Monmouthshire County Council up to severe scrutiny problems. It will be unavoidable that parents and pupils in Monmouthshire will read this blatant and direct underfunding of MCS pupils. On one hand MCC is suggesting there is no link between numbers on roll and the leadership funding and on the other hand MCC is also suggesting that a school with broadly the same numbers of pupils requires more leadership funding. Both cannot be right. Either all schools must be offered exactly the same amount of money to best support the leadership structure or schools must receive a fair proportion of the funding based on the pupils they are educating.

With only four secondary schools in the county Monmouthshire County Council must be capable of working with Headteachers and Governing Bodies to produce a Leadership funding formula which is fairly distributed and treats pupils across the county with the same level of financial respect.

At this stage the Governing Body of Monmouth Comprehensive School completely rejects the current proposal for the School Funding Formula and specifically Leadership Funding.

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At this stage the Governing Body of Monmouth Comprehensive School completely rejects the current proposal for the School Funding Formula and specifically Leadership Funding.

Response from Monmouth Comprehensive Governor:

I am a parent governor at Monmouth Comprehensive School and chair the Student Progression Committee. I am writing in response to the above consultation document. Apologies for not using appendix 1 of the document to provide feedback, I have a pdf document. If you need my input on the appendix please could you send me a word document and I will complete it.

I disagree with section 3.2 of the proposals for a number of reasons:

As a general point the funding formula applied based on number of students appears to have little recognition of the additional costs incurred based on student numbers. If the leadership structure is inadequate I am concerned that there will be a detrimental impact on student learning and progression. If I compare MCS to Chepstow Comprehensive MCS has significantly more students and the same level of funding.

The proposal includes funding for £20,000. I do not understand the rationale behind this and would welcome additional detail.

I do not understand the rationale for the proposed management structure funding for King Henry. The proposal appears to provide more leadership positions than a primary and a secondary school would receive if they were separate entities.

In addition King Henry will be one school and should therefore have the formula for one school applied.

I also recognise the total number of students for King Henry will be similar to MCS and, therefore, believe the proposal to be inequitable.

Response from Monmouth Comprehensive School Headteacher:

I do have concerns about this aspect of the funding proposal.

We have almost 3 times NOR than Chepstow. However, we both get the same leadership block funding. Although I could make a strong case for this disadvantaging us, I can also see that there are reasons for it.

Overall I think that KH8 3-19 and MCS will have broadly similar NOR.

There is however no parity between KH8 3-19 and MCS. The proposed block funding is treating the primary and secondary phase of KH8 3-19 as separate entities by funding them as if they were separate schools, whereas it of course is one entity. This is just not equitable. I am being asked to accept parity where NOR are vastly different on one hand, but also to accept lack of parity on the other hand, even though NOR are broadly similar.

In a launch phase, and whilst there are separate sites, I can understand that there might be a need for additional capacity. However, once established there will in fact be savings compared to having separate schools.

On top of this, there is an additional £20k in the proposal, for which there seems to be no explanation. At a point where we are being sent messages by Paul Matthews about having to tighten our belts and make cuts, this does not seem equitable at all.

Local Authority Response:

The responses for Monmouth Comprehensive School raise very similar objections and therefore will be answered as one response:

King Henry 3 – 19 Schools has a capacity of 1820 plus 30 for a nursery. The aim of the consultation is to establish one formula for the whole school and not split it between phases.

The school will host two special need resource basis, one for primary aged pupils and one for secondary aged.

Currently all the secondary schools are funded for one headteacher (L31), two deputy headteachers (L21) and 3 assistant headteachers (L14). The current funding for a group 3 primary school is for one headteacher (L17) and a deputy headteacher (L11).

The proposal is to fund the 3 – 19 School one headteacher (L31) two deputy headteachers (L21) and 7 assistant headteachers (L14). The cost of this proposal is an additional £20,432.

The leadership funding for all schools has not been reviewed for several years and the Governing Body of Monmouth Comprehensive School are raising concerns that it is not equitable. In discussion with representatives of Monmouth Comprehensive School they have agreed to accept current proposals and that the leadership funding will be subject to a separate review and any changes will be implemented for the 2025-26 financial year.

Response from Trellech Primary School Governing Body:

We agree with all the proposals.



<p>Name of the Officer Nikki Wellington</p> <p>Phone no: 07766504389 E-mail: nicolawellington@monmouthshire.gov.uk</p>	<p>Please give a brief description of the aims of the proposal</p> <p>This proposal sets out the recommendations for a funding formula for the 3 – 19 King Henry VIII school in Abergavenny. This is the first 3 – 19 school in Monmouthshire. All schools have to have an agreed formula to distribute funding and this paper sets out the proposals for this school.</p>
<p>Name of Service area</p> <p>Children and Young People</p>	<p>Date 1st September 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 positive impact of this is that the school will be funded via a formula that is based on the same funding formula for all other schools. It will be based on pupil numbers, floor area and additional learning needs.	No specific impact	The formula is based on the same formula as all other schools with additional funding for the management team. All schools are being consulted to highlight any areas of concern and to agree the proposals.
Disability	The funding for pupils with additional learning needs is the same as all schools. The same criteria will be used for all schools.	No specific impact	The same criteria will be used for all schools. This is applicable for both the mainstream additional learning needs and pupils attending the specialist resource bases.

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 specific impact	No specific impact	No specific impact
Marriage or civil partnership	No specific impact	No specific impact	No specific impact
Pregnancy or maternity	No specific impact	No specific impact	No specific impact
Race	.No specific impact	No specific impact	No specific impact
Religion or Belief	.No specific impact	No specific impact	No specific impact
Sex	No specific impact	No specific impact	No specific impact
Sexual Orientation	.No specific impact	No specific impact	No specific impact

2. The Socio-economic Duty and Social Justice

P0990261

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	No specific impact	No specific impact	No specific impact.

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 favourably</p>	<p>No specific impact</p>	<p>No specific impact</p>	<p>No specific impact</p>
<p>Operational</p> <p>Recruitment & Training of workforce</p>	<p>The funding for staffing ratios is the same as all Monmouthshire schools with an uplift for management structures. The funding reflects the ratios required for the school.</p>	<p>No specific impact</p>	<p>The funding formula provides the necessary funding to ensure the correct staffing ratios can be met.</p>
<p>Service delivery</p> <p>Use of Welsh language in service delivery</p> <p>Promoting use of the language</p>	<p>No specific impact</p>	<p>No specific impact</p>	<p>No specific impact</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 positive impact is that the funding distributed will allow the school to meet the staffing ratios, on top of this grants will be made available to allow interventions to continue.	No specific impact
A resilient Wales Maintain and enhance biodiversity and ecosystems that support resilience and can adapt to change (e.g. climate change)	No specific impact	No specific impact
A healthier Wales People's physical and mental wellbeing is maximized and health impacts are understood	No specific impact	No specific impact
A Wales of cohesive communities Communities are attractive, viable, safe and well connected	No specific impact	No specific impact
A globally responsible Wales Taking account of impact on global well-being when considering local social, economic and environmental wellbeing	No specific impact	No specific impact
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 specific impact	No specific impact
A more equal Wales		

Well Being Goal	Does the proposal contribute to this goal? Describe the positive and negative impacts.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
People can fulfil their potential no matter what their background or circumstances	The school will have the funding to support pupils through their education and allow pupils to have the support they need to fulfil their potential.	Funding provided to allow all staffing ratios to be met and additional funding provided to ensure interventions can be provided.

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>	A sustainable staffing structure is being developed by the Head and Governing Body, to enable it to have the full impact and improve standards the funding will be required to support this. The funding will allow all ratios to be met.	The school will be provided with three year indicative funding to allow them to plan for the long term.
 <p>Collaboration</p> <p>Working together with other partners to deliver objectives</p>	The schools already work with a large number of partners to achieve their objectives, this will allow these partnerships to continue.	None
 <p>Involvement</p> <p>Involving those with an interest and seeking their views</p>	None	None

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>The Headteacher and the Governing Body are responsible for identifying how the funding is spent. This will include programmes of support for pupils, this may include resources to help support and educate pupils to ensure they reach their potential.</p>	<p>The intervention programmes already in place will continue and assist in pupils achieving their goals.</p>
 <p>Integration</p> <p>Considering impact on all wellbeing goals together and on other bodies</p>	<p>None</p>	<p>None</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	No impact	N/A
Corporate Parenting	No impact	No impact	N/A

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

School balances / grant plans / staffing proposals / school budget / pupil data

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

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

The main benefits are that the school will be funded to ensure that staffing ratios can be met and this will be consistent with other schools in Monmouthshire. Additional grants will be provided to allow intervention programmes. The overall responsibility for the budget remains with the Headteacher and Governing Body.

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
Review of school budget and how the formula is supporting this	May 2025	Headteacher and Governing Body with School improvement from the Local Authority.

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
1.1	Consultation document for circulation to interested parties.	12 th September 2023	Initial Draft
1.2	Scrutiny Committee Consultation	10th November 2023	Revised Draft for Performance and Overview Scrutiny Committee

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Monmouthshire's Scrutiny Forward Work Programme 2022-23

Performance and Overview Scrutiny Committee				
Meeting Date	Subject	Purpose of Scrutiny	Responsibility	Type of Scrutiny
22nd November 2023	Month 5 Budget Monitoring	To scrutinise the budgetary position (revenue and capital) for services falling within the committee's remit at Month 5.	Jonathan Davies Cllr Callard	Budget Monitoring
	Schools Funding Formula	To scrutinise the funding formula prior to Cabinet's decision.	Nicola Wellington Cllr Garrick/Callard	Pre-decision Scrutiny
	Strategic Risk Register	To agree any future risks for scrutiny.	Richard Jones Hannah Carter	Performance Monitoring
	LDP Annual Monitoring Report	To scrutinise prior to Cabinet Member sign off for dispatch to Welsh Government.	Mark Hand Cllr Griffiths	Pre-decision Scrutiny
Special – 29th November 2023	Asset Management Strategy	Pre-decision Scrutiny ahead of full Council.	Peter Davies Jonathan Davies Cllr Garrick	Pre-decision Scrutiny
	Financial Strategy	Pre-decision Scrutiny ahead of full Council.	Peter Davies Jonathan Davies Cllr Callard	Pre-decision Scrutiny
	Month 6 Budget Monitoring	To scrutinise the budgetary position (revenue and capital) for services falling within the committee's remit at Month 6.	Jonathan Davies Cllr Callard	Budget Monitoring
20th February 2024	Scrutiny of the Budget Proposals	Scrutiny of the budget mandates relating to the committee's remit.	Peter Davies Jonathan Davies Cllr Callard	Budget Scrutiny

Monmouthshire's Scrutiny Forward Work Programme 2022-23

Performance and Overview Scrutiny Committee				
Meeting Date	Subject	Purpose of Scrutiny	Responsibility	Type of Scrutiny
26 th March 2024	Covid learning and pandemic preparedness	To discuss learning following the impact of the pandemic and how we prepare for a future one, following publication of the revised Outbreak Control Plan Wales.	David Jones Louise Driscoll (ABUHB) Cllr Brocklesby?	Performance Monitoring
21 st June 2024	Public Protection Performance 23/24	To review the performance of the service area.	David Jones Cllr Sandles?	Performance Monitoring
	Registration Services Annual Report 21/22	To review the performance of the service area.	David Jones Cllr Sandles?	Performance Monitoring
To be confirmed	Recruitment and retention	Effect on the Council's performance and ability to deliver.		
To be confirmed	Use of Reserves	Future proofing and resilience planning as well as supporting long-term strategic priorities.		
To be confirmed (was last in Jan 23)	Procurement Performance Review	Review of the joint working arrangements and benefits realised to date.	Scott James Steve Robinson Rachel Garrick	Performance Monitoring
To be confirmed JANUARY? (was last in Dec 22)	Welsh Education Strategic Plan	To scrutinise performance against the action plan.	Sharon Randall Smith Will Mclean	Performance Monitoring

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Other items in the Community and Corporate Plan which the Committee might want to scrutinise:

- Social Justice Strategy progress and Tackling Poverty and Inequality Plan progress

Monmouthshire's Scrutiny Forward Work Programme 2022-23

- Socially Responsible Procurement Strategy Delivery
- Business Monmouthshire project monitoring/updates
- Undertake a 'learning led' review of educational provision in Chepstow
- Chief Officer for Education's Monitoring Report 2024
- Review of property assets
- Data strategy
- Digital strategy
- Food strategy (School meals and deforestation? [Place Committee?])

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Performance and Overview Scrutiny Committee

Action List

24th October 2023

Minute Item:	Subject	Officer / Member	Outcome
4	Provide a list of current S106 projects that have benefitted from funding in the last year	Craig O'Connor / Mark Hand	Craig O'Connor in process of organising
6	Add a report from Chief Officer for Education about school attendance and a report about learner outcomes to work programme (in new year)	Will Mclean / Robert McGowan	Will Mclean looking into dates
8	Update the attendance list for 20 th Sept meeting to show Councillor Buckler's attendance	Robert McGowan / Wendy Barnard	Democratic Services notified 24 th October

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Committee / Decision Maker	Meeting date / Decision due	Report Title	Responsible Cabinet Member	Purpose	Author	Date item added to the planner
Council	01-Jul-25	RLDP for Adoption	Paul Griffiths - Sustainable Economy	To adopt the RLDP following receipt of the Inspector's report, making it the County's Development Plan as defined by S38(6) of the Planning and Compulsory Purchase Act 2004	Mark Hand / Rachel Lewis	23-Aug-22
Cabinet	02-Oct-24	Adoption of Abergavenny Placemaking Plan	Paul Griffiths - Sustainable Economy	To adopt the Abergavenny Placemaking Plan, co-produced with Abergavenny Town Council, to inform future regeneration priorities and grant bids	Mark Hand / Dan Fordham	3-Oct-22
Cabinet	02-Oct-24	Adoption of Magor Placemaking Plan	Paul Griffiths - Sustainable Economy		Mark Hand / Dan Fordham	3-Oct-22
Cabinet	02-Oct-24	Adoption of Monmouth Placemaking Plan	Paul Griffiths - Sustainable Economy	To adopt the Monmouth Placemaking Plan, co-produced with Monmouth Town Council, to inform future regeneration priorities and grant bids	Mark Hand / Dan Fordham	3-Oct-22
Council	01-Sep-24	RLDP submission for examination	Paul Griffiths - Sustainable Economy	To endorse the submission of the Deposit RLDP to the Welsh Government for examination by an independent Inspector. By agreeing, Council will be saying it wants this document to be the adopted RLDP for Monmouthshire.	Mark Hand / Rachel Lewis	23-Aug-22
Council	16-May-24	RLDP Deposit Plan endorsement for consultation	Paul Griffiths - Sustainable Economy	To endorse the Deposit RLDP for public consultation and engagement.	Mark Hand / Rachel Lewis	5-Jan-23
ICMD	17-Apr-24	Welsh Church Fund Working Group - meeting 4 held on 7th March 2024	Rachel Garrick - Resources		Dave Jarrett	30-Mar-23
Cabinet	10-Apr-24	NEET Reduction Strategy			Hannah Jones	4-Sep-23
Cabinet	14-Mar-24	Local Flood Strategy	Paul Griffiths - Sustainable Economy		Mark Hand	9-Oct-23
Cabinet	06-Mar-24	2023/24 Revenue and Capital Monitoring - Month 9	Rachel Garrick - Resources		Jon Davies	27-Apr-23

Council	29-Feb-24	Appointment of Monmouthshire Local Access Forum		To secure the appointment of members to the Monmouthshire Local Access Forum for its next 3 year period.	Matthew Lewis	18-Jan-23
Council	29-Feb-24	Financial Strategy	Ben Callard - Resources		Jon Davies	
Council	29-Feb-24	Final Budget Proposals	Ben Callard - Resources		Jon Davies	
Cabinet	07-Feb-24	Economic Development Strategy		REFRESHING THE MONMOUTHSHIRE BUSINESS GROWTH & ENTERPRISE STRATEGY and action plan in setting the economic ambition for the county and providing a strategic framework that guides future economic	Hannah Jones	9-Jan-23
Cabinet	07-Feb-24	Local Transport Plan	Catrin Maby	To adopt the Local Transport Plan	Debra Hill-Howells / Christian Schmidt	4-Oct-22
Cabinet	07-Feb-24	Climate and Nature Emergency		To receive an update on progress made towards the Climate and Nature Emergency Strategy and to agree the new overarching Climate and Nature Emergency Strategy and action plan format	Hazel Clatworthy	19-Oct-23
Council	18-Jan-24	Council Tax Reduction Scheme	Ben Callard - Resources		Ruth Donovan	
Council	18-Jan-24	Strategic Equality Plan 2024		To seek approval of a new Strategic Equality Plan for the period 2024-28, incorporating MCCs contribution to national action plans on race equality, LGBTQ and other protected characteristics	Matthew Gatehouse	13-Oct-23
Cabinet	17-Jan-24	Approval of the revised MCC Counter Fraud, Corruption & Bribery Policy	Rachel Garrick - Resources		Jan Furtek	2-Nov-23
Cabinet	17-Jan-24	Sustainable Communities for Learning Strategic Outline Programme update	Martyn Groucutt - Education	To provide members with details of the revisions to the Strategic Outline Programme for the Sustainable Communities for Learning Programme which will inform the development of projects within the rolling programme of	Debbie Graves	12-Sep-23

Cabinet	17-Jan-24	Financial Strategy	Ben Callard - Resources		Jon Davies	
Cabinet	17-Jan-24	Draft Budget Proposals	Ben Callard - Resources		Jon Davies	29-Sep-23
ICMD	03-Jan-24	Welsh Church Fund Working Group - meeting 3 held on 7th December 2023	Rachel Garrick - Resources		Dave Jarrett	30-Mar-23
ICMD	20-Dec-23	Council Tax Base Report	Ben Callard - Resources		Ruth Donovan	
ICMD	20-Dec-23	LDP Annual Monitoring Report	Paul Griffiths - Sustainable Economy	To endorse the LDP Annual Monitoring Report for submission to WG	Mark Hand / Rachel Lewis	16-Jan-23
Cabinet	13-Dec-23	Children's Services: Foster Carer Recruitment and Retention – Foster Friendly Policy	Ian Chandler - Social Care & Safeguarding	The purpose of the report is to outline a proposal to create a policy that supports MCC employees who are existing foster carers or wish to become foster carers through offering an appropriate leave entitlement.	Dr Charlotte Drury	9-Nov-23
Cabinet	13-Dec-23	Primary catchment review			Matthew Jones	23-Jun-23
Cabinet	13-Dec-23	Community & Corporate Plan performance update	Mary Ann Brocklesby - Whole Authority Strategy	To provide cabinet with the latest performance report of commitments in the Community and Corporate Plan	Richard Jones	5-Sep-23
Cabinet	13-Dec-23	Whole Authority Strategic Risk Assessment	Mary Ann Brocklesby - Whole Authority Strategy	To provide Cabinet with an overview of the current strategic risks facing the authority and to seek approval of the strategic risk assessment	Richard Jones	5-Sep-23
Cabinet	13-Dec-23	Local Flood Strategy	Catrin Maby	To adopt the Local Flood Strategy Plan	Mark Hand / Ross Price	4-Oct-22

Cabinet	13-Dec-23	2023/24 Revenue and Capital Monitoring - Month 6	Rachel Garrick - Resources		Jon Davies	27-Apr-23
Cabinet	13-Dec-23	Pavement Café Policy	Paul Griffiths - Sustainable Economy	To adopt the pavement café policy as the basis for making decisions on applications for licences	Mark Hand / Paul Keeble	4-Oct-22
Cabinet	13-Dec-23	consultation on the relocation of Ysgol Gymraeg Y Fenni			Matthew Jones	23-Aug-23
Cabinet	13-Dec-23	Road Safety Strategy	Catrin Maby	To adopt the Road Safety Strategy	Mark Hand / Paul Keeble	4-Oct-22
Council	07-Dec-23	Relocation of PRS in South Monmouthshire	Martyn Groucutt - Education	Relocation of South Monmouthshire PRS	Morwenna Wagstaff	13-Nov-23
Council	07-Dec-23	DIRECTOR'S ANNUAL REPORT		to provide Council with an overview of SOCIAL CARE AND HEALTH directorate with a focus on year 2022 – 2023.	Jane Rodgers	31-Jul-23
Council	07-Dec-23	Asset Management Strategy			Nick Keyse	28-Sep-23
Council	07-Dec-23	SAFEGUARDING ANNUAL EVALUTION REPORT		To provide Council with the annual self-evaluation of safeguarding from a whole authority perspective.	Jane Rodgers / Diane Corrister	31-Jul-23
ICMD	29-Nov-23	Whole Authority Safeguarding Policy	Ian Chandler - Social Care & Safeguarding		Naomi Lovesay	3-Nov-23
ICMD	29-Nov-23	Museums - Accredited			Rachael Rogers	12-Oct-23

ICMD	29-Nov-23	A013 Highway Traffic Regulation Amendment Order	Catrin Maby - Climate Change and Environment		Mark Hand	18-Sep-23
ICMD	29-Nov-23	A012 Highway Traffic Regulation Amendment Order	Catrin Maby - Climate Change and Environment	Speed limit changes at Caerwent Brook/Dewstow Road	Mark Hand	18-Sep-23
ICMD	15-Nov-23	'Planning Annual Performance Report	Paul Griffiths - Sustainable Economy	To endorse the Planning Department Annual Performance Report for submission to WG	Mark Hand / Rachel Lewis	16-Jan-23
ICMD	15-Nov-23	A012 Highway Traffic Regulation Amendment Order MOVED TO 29TH NOV		Double yellows at Main Road, Portskewett, leading to S	Mark Hand	18-Sep-23
ICMD	15-Nov-23	A013 Highway Traffic Regulation Amendment Order MOVED TO 29TH NOV		Speed limit changes at Caerwent Brook/Dewstow Road	Mark Hand	18-Sep-23
Cabinet	15-Nov-23	DEVELOPING THE FUTURE MY DAY MY LIFE BASES	Ian Chandler - Social Care & Safeguarding	This report presents the findings of the final options appraisal for the proposed future My Day, My Life bases in Abergavenny, and to seek approval of the recommended base.	Jane Rodgers	7-Nov-23
Cabinet	15-Nov-23	Budget Process and timetable	Rachel Garrick - Resources		Jon Davies	
Cabinet	08-Nov-23	Public Services Ombudsman for Wales Annual letter 2022-23 to Monmouthshire County Council		The purpose is to fulfil the expectation of the Public Services Ombudsman for Wales that their report is brought to the attention of Cabinet.	Annette Evans/Matthew Gatehouse	17-Oct-23
Cabinet	08-Nov-23	RIPA Review		To review RIPA strategy and arrangements	Geraint Edwards	25-Sep-23
Cabinet	08-Nov-23	2023/24 Revenue and Capital Monitoring - Month 5	Rachel Garrick - Resources		Jon Davies	

Council	26-Oct-23	Monmouthshire County Council Self- assessment 2022/23		to seek Council approval of the Self-Assessment report 2022/23 in line with requirements outlined in the Local Government and Elections (Wales) Act 2021 and to ensure that members have a clear and transparent assessment of the Council's	Richard Jones	4-Jul-23
Council	26-Oct-23	RPB Area Plan			Jane Rodgers	4-Jul-23
Council	26-Oct-23	RLDP Preferred Strategy consultation report	Paul Griffiths - Sustainable Economy	To endorse the RLDP Preferred Strategy including any proposed changes arising from the public consultation.	Mark Hand / Rachel Lewis	3-Oct-22
ICMD	25-Oct-23	Welsh Church Fund Working Group - meeting 2 held on 21st September 2023	Rachel Garrick - Resources		Dave Jarrett	30-Mar-23
Cabinet	11-Oct-23	Disposal of Land at Natgavenny Lane	Rachel Garrick - Resources	To seek Cabinet approval for the disposal of a parcel of land adjacent to the Nantgavenny Lane Busines Park, Mardy, Abergavenny	Nick Keyse	
Cabinet	11-Oct-23	Developing a base for My Day My Life in Monmouth and Abergavenny	Ian Chandler - Social Care & Safeguarding	Further to the recommendations from the Practice Solutions review, the report sets out the criteria and decision making in respect of which bases to develop for the My Day My Life in both Monmouth and Abergavenny, and makes a recommendation on the	Ceri York	25-Sep-23
ICMD	11-Oct-23	MEMORANDUM OF UNDERSTANDING – TCBC AND MCC HERITAGE SERVICES IN RELATION TO MAMHILAD NYLON SPINNERS LISTED BUILDING.	Paul Griffiths - Sustainable Economy	The purpose of this report is to propose that MCC join into an MoU in relation to the provision of Heritage Advice to consider the ongoing management of the Nylon Spinners listed building at Mamhilad.	Amy Longford	22-Sep-23
Cabinet	04-Oct-23	Gypsy, Roma and Traveller Consultation			Cath Fallon	4-Sep-23
ICMD	27-Sep-23	Extending Public Spaces Protection Order (PSPOs) to tackle Anti Social Behaviour (ASB)		To seek approval to extend three Public Spaces Protection Orders (PSPO) in respect of Bailey Park, Abergavenny; Lower Abergavenny (including Castle Meadows) and Monmouth Town (including Chippenham	Andrew Mason	31-Aug-23
Council	21-Sep-23	REPORT ON JOINT SCRUTINY ARRANGEMENTS FOR CORPORATE JOINT COMMITTEES			Hazel Ilett	4-Sep-23

Council	21-Sep-23	Governance and Audit Committee Annual Report 2022/23	Paul Griffiths - Sustainable Economy	To inform Council of the work and conclusions of the Governance and Audit Committee from 1st April 2022 to 31st March 2023	Chair of Governance and Audit Committee, Andrew Blackmore	27th July 2023
Council	21-Sep-23	Standards Committee Annual Report		This report is the first annual report from the Standards Committee to Council as required by the change in law set out in the Local Government and Elections Act 2021. It has to report on the discharge of the Committee's functions for the	Matt Phillips	10-Oct-22
ICMD	13-Sep-23	Highway Traffic Regulation Amendment Order 12 MOVED TO 25TH OCTOBER 2023	Catrin Maby - Climate Change and Environment	'Agreement to make the traffic order - parking/waiting restrictions at Justins Hill and Wyesham Avenue, Wyesham; Main Road and Castle Way, Portskewett; lane leading to Sugarloaf Llanwenarth car park; and Wonastow	Mark Hand	
ICMD	13-Sep-23	Proposed Changes to the Membership of the School Budget Funding Forum	Martyn Groucutt - Education		Nikki Wellington	
ICMD	13-Sep-23	'Highways Traffic Regulation Amendment Order 12 deferred to September 13th		Agreement to make the traffic order - parking/waiting restrictions at Justins Hill and Wyesham Avenue, Wyesham; Main Road and Castle Way, Portskewett; lane leading to Sugarloaf Llanwenarth car park; and Wonastow	Mark Hand	24-May-23
Cabinet	06-Sep-23	Respite review for people with learning disabilities			Jane Rodgers	31-Jul-23
Cabinet	06-Sep-23	Home to School Transport Policy 2024/25		To consider the adoption of the proposed Home to School Transport Policy for the academic year 2024/25	Deh Hill Howells	
Cabinet	06-Sep-23	Proposal to establish a Welsh medium seedling school in Monmouth		Cabinet to consider objection report and make final determination on how to proceed.	Debbie Graves	27-Mar-23
ICMD	16-Aug-23	Castle Wood Usk Low Cost Home Ownership Future Use	Sara Burch - Inclusive and Active Communities			
ICMD	16-Aug-23	electric vehicle charging rate for public and staff at EV	Catrin Maby - Climate Change and Environment		Deb Hill Howells	20-Jul-23

ICMD	16-Aug-23	Highways Traffic Regulation Amendment Order 11	Catrin Maby - Climate Change and Environment	Agreement to make the traffic order - Exception Orders to identify those restricted roads that will remain 30mph in September 2023 instead of defaulting to 20mph	Mark Hand	
ICMD	16-Aug-23	Highways Traffic Regulation Amendment Order 10	Catrin Maby - Climate Change and Environment	Agreement to make the traffic order - prohibition of driving Pwll Du, Llanelly Hill and Belmont Close/Belmont Road Abergavenny	Mark Hand	
ICMD	02-Aug-23	Welsh Church Fund Working Group - meeting 1 held on 22nd June 2023	Rachel Garrick - Resources		Dave Jarrett	
ICMD	02-Aug-23	Highways Traffic Regulation Amendment Order 10 deferred to August 16th	Catrin Maby - Climate Change and Environment	Agreement to make the traffic order - Exception Orders to identify those restricted roads that will remain 30mph in September 2023 instead of defaulting to 20mph	Mark Hand	3-Oct-22
Cabinet	26-Jul-23	Implementation of the My Day My Life review recommendations			Ceri York	
Cabinet	26-Jul-23	Gypsy and Traveller Site Identification			Ian Bakewell	12-Jul-23
Cabinet	26-Jul-23	•Review of the Respite Opportunities Service			Ceri York	14-Mar-23
Cabinet	26-Jul-23	2023/24 Revenue budget progress – early update			Jon Davies	8-Jun-23
Cabinet	26-Jul-23	S016 Funding Castle Park and Arch Bishop Rowan Williams Schools.			Cath Saunders	13-Jun-23
Council	20-Jul-23	Gifts & Hospitality Report			Matt Phillips	12-Jun-23

Council	20-Jul-23	Freedom of the Borough Presentation			Joe Skidmore	5-May-23
Council	20-Jul-23	Recruitment of Local Access Forum		To agree arrangements for the recruitment of the Monmouthshire Local Access Forum for the next 3 year period of appointment	Matthew Lewis	21-Jun-23
ICMD	12-Jul-23	Highways Traffic Regulation Amendment Order 10 DEFERRED TO 16TH AUG	Catrin Maby - Climate Change and Environment	Agreement to make the traffic order - prohibition of driving Pwll Du, Llanelly Hill	Mark Hand	19-May-23
ICMD	12-Jul-23	transfer the school balances for both Deri View and King Henry VIII School to the new King Henry VIII 3 – 19 School.	Rachel Garrick - Resources	Both King Henry VIII school and Deri View Primary school are closing on 31 st August 2023 and the new King Henry VIII 3 – 19 School will open on 1 st September 2023, under a statutory closure of schools the financial balances transfer to the Local Authority,	Nikki Wellington	4-Apr-23
	05-Jul-23	Reopen Monmouth Cemetery for new burials			Rhian Jackson	
Cabinet	05-Jul-23	RESERVATION OF GRAVE PLOTS		To seek cabinet approval to cease the provision of reserving grave spaces (not incl cremated remains plots) in Llanfoist Cemetery	Rhian Jackson	7-Nov-22
Cabinet	05-Jul-23	2022/23 Revenue and Capital Monitoring - Outturn Report	Rachel Garrick - Resources		Jon Davies	27-Apr-23
ICMD	28-Jun-23	Highway Traffic Regulation Order	Catrin Maby - Climate Change and Environment	Agreement to make the traffic order - making permanent the part-time prohibition of driving on Cross Street and Market Street Abergavenny	Mark Hand	6-Jun-23
Council	22-Jun-23	Gwent Public Services Board Well-being plan		To approve the Public Services Board's Well-being Plan that sets out the steps being taken collaboratively by public services to improve wellbeing in Gwent ahead of approval by the Gwent Public Services Board.	Richard Jones	20-Jan-23
Council	22-Jun-23	Chief Officer Children and Young People's Report 2023			Will McLean	14-Feb-23

Cabinet	07-Jun-23	Adoption of Transforming Chepstow Masterplan	Paul Griffiths - Sustainable Economy	To adopt the Transforming Chepstow Masterplan, co-produced with Chepstow Town Council, to inform future regeneration priorities and grant bids	Mark Hand / Dan Fordham	3-Oct-22
Cabinet	07-Jun-23	Transforming Towns Strategic Grant regeneration priorities and LUF3 bid	Paul Griffiths - Sustainable Economy	To agree the priority projects for bids for WG Strategic grant funding to 24/25 and the submission for round 3 of Levelling Up Funding	Mark Hand / Dan Fordham	3-Oct-22
Cabinet	07-Jun-23	Proposal to establish a Welsh medium seedling school in Monmouth		Cabinet to consider the results of the consultation, recommendations and decide whether to publish statutory notices.	Debbie Graves	27-Mar-23
Cabinet	07-Jun-23	Socially Responsible Procurement Strategy	Rachel Garrick - Resources	To endorse the Socially Responsible Procurement Strategy	Scott James	22-Aug-22
ICMD	24-May-23	Highway Traffic Regulation Amendment Order 9	Catrin Maby - Climate Change and Environment	Agreement to make the traffic order - including Llantrisant 20mph village lane, 40mph through road, possibly Llantrisant (Usk to Wentwood) 50mph; 20mph Gilwern and surrounding villages	Mark Hand	14-Apr-23
Council	18-May-23	Political Balance Report		The Council is required to review at, or as soon as practicable after, the Council's annual meeting, the representation of different political groups on the bodies to which the Council makes appointments.	Matt Phillips	2-Feb-23
Council	18-May-23	Outside Bodies Report		To appoint representatives to serve on outside	Matt Phillips	2-Feb-23
Council	18-May-23	Appointments to Committees		To appoint committees together with their membership and terms of reference in accordance with the Council's Constitution.	Nicola Perry	2-Feb-23
Council	18-May-23	Constitution update		For the Monitoring Officer to bring proposed amendments and highlight changes made over the previous 12 months	Matt Phillips	2-Feb-23
Council	18-May-23	Corporate Parenting Strategy			Diane Corrister	24-Aug-22

Cabinet	17-May-23	Review of Home to School Transport Policy 24/25.	Martyn Groucutt - Education	The purpose: Is to seek approval to commence consultation on proposed amendments to the Home to School Transport Policy for the academic year 2024/25.	Deb Hill Howells	12-Apr-23
Cabinet	17-May-23	Monnow Street public realm improvements	Paul Griffiths - Sustainable Economy	To agree how we proceed with proposals for Monnow Street public realm following consultation	Mark Hand / Dan Fordham	6-Mar-23
ICMD	10-May-23	Highways Traffic Regulation Amendment Order 9 MOVED TO 24TH MAY	Catrin Maby - Climate Change and Environment	Agreement to make the traffic order - including Llantrisant 20mph village lane, 40mph through road, possibly Llantrisant (Usk to Wentwood) 50mph; 20mph Gilwern and surrounding villages	Mark Hand	3-Oct-22
Council	20-Apr-23	Motion for the Rivers and Oceans update		Deferred - new date to be advised	Hazel Clatworthy	10-Jan-23
Council	20-Apr-23	Community and Corporate Plan		To seek approval of a new Community and Corporate Plan that sets the direction for the council and county of Monmouthshire, articulating the authority's purpose and priorities alongside the steps we will take to deliver these, the	Matt Gatehouse	6-Feb-23
ICMD	12-Apr-23	Welsh Church Fund Working Group - meeting 4 held on 9th March 2023	Rachel Garrick - Resources		Dave Jarrett	
Cabinet	05-Apr-23	Rapid Rehousing Transition Plan	Sara Burch - Inclusive and Active Communities	To agree a plan to transition the delivery of homelessness that minimises the use of and the time homeless applicants spend in temporary accommodation	Rebecca Cresswell / Ian Bakewell	24-Jan-23
ICMD	22-Mar-23	Non Domestic Rates application for Hardship Relief - RESTRICTED	Rachel Garrick - Resources		Ruth Donovan	
ICMD	22-Mar-23	Highways Traffic Regulation Amendment Order 8	Catrin Maby - Climate Change and Environment	Agreement to make the traffic order - including Monmouth Road, Raglan no right turn onto A40; resi permit parking at Exmouth Place, Chepstow and Ross Road, Abergavenny; 3T weight restriction on Old Wye Bridge Chepstow; waiting	Mark Hand	
Council	09-Mar-23	Pay Policy		To approve the publication of Monmouthshire County Council's Pay Policy, in compliance with the Localism Act."	Sally Thomas	1-Feb-23

Council	09-Mar-23	Council Tax Premiums			Peter Davies	18-Jan-23
Council	09-Mar-23	Capital Strategy & Treasury Strategy			Jon Davies	17-May-22
Council	09-Mar-23	Youth Council			Jade Atkins	7-Dec-22
ICMD	08-Mar-23	Proposed amendment to primary school catchment area – Llandenny Village	Martyn Groucutt - Education		Debbie Graves	10-Jan-23
ICMD	08-Mar-23	Highways Traffic Regulation Amendment Order 8 DEFERRED TO 22 MARCH	Catrin Maby - Climate Change and Environment	Agreement to make the traffic order - including Monmouth Road, Raglan no right turn onto A40; resi permit parking at Exmouth Place, Chepstow and Ross Road, Abergavenny; 3T weight restriction on Old Wye Bridge Chepstow; waiting	Mark Hand	
Council	02-Mar-23	Final Budget Sign Off including Council Tax Resolution			Jon Davies	
Cabinet	01-Mar-23	2023/4 Final Revenue and Capital Budget Proposals			Jon Davies	17-May-22
Cabinet	01-Mar-23	2023/4 WCF/Trust Treasury Fund Investments			Dave Jarrett	17-May-22
Cabinet	01-Mar-23	Month 9 budget monitoring report			Jon Davies	6-Feb-23
Cabinet	01-Mar-23	Monmouthshire ECO Flex 'Joint Statement of Intent' and Memorandum of Understanding"			Steve Griffiths	16-Nov-22

Cabinet	01-Feb-23	Tudor Street				9-Jan-23
ICMD	25-Jan-23	Highway Traffic Regulation Amendment Order No 7	Catrin Maby - Climate Change and Environment	Agreement to make the traffic order	Mark Hand	15-Dec-22
ICMD	25-Jan-23	Community Council and Police Precepts - final	Rachel Garrick - Resources		Jon Davies	17-May-22
Council	19-Jan-23	'To determine the name for the new 3-19 School in Abergavenny		'To determine the name for the new 3-19 School in Abergavenny	Cath Saunders	28-Nov-22
Council	19-Jan-23	Council Diary		To confirm the Council Diary 23/24	John Pearson	14-Dec-22
Council	19-Jan-23	Appointments		A report for Council to appoint or ratify a number of appointments to bodies and positions	Matt Phillips	
Council	19-Jan-23	Community and Corporate Plan				
Council	19-Jan-23	Tudor Road Call-In			Nicola Perry	3-Jan-23
Council	19-Jan-23	Council Tax Reduction Scheme			Ruth Donovan	31-May-22
Cabinet	18-Jan-23	Garden Waste			Carl Touhig	21-Dec-22

Cabinet	18-Jan-23	Draft Revenue & Capital Proposals			Jon Davies	
Cabinet	18-Jan-23	Council Tax Premiums Consultation - Long Term Empty Properties and Second Homes			Ruth Donovan	
Cabinet	18-Jan-23	Proposal to establish a Welsh Medium Seedling school in Monmouth		To seek cabinet approval to commence statutory consultation processes to establish a Welsh Medium seedling provision in Monmouth.	Debbie Graves	23-Sep-22
ICMD	11-Jan-23	Clydach Ironworks Enhancement	Sara Burch - Inclusive and Active Communities	To seek approval for the transfer of land associated with the Clydach Ironworks Enhancement Scheme	Matthew Lewis	8-Dec-23
ICMD	11-Jan-23	Welsh Church Fund Working Group			Dave Jarrett	17-May-22
ICMD	14-Dec-22	Council Tax Base report			Ruth Donovan	31-May-22
ICMD	14-Dec-22	2023/4 Community Council & Police Precepts - draft			Jon Davies	17-May-22
Cabinet	07-Dec-22	Regional Integration Fund		To consider the financial liabilities and implications of the Regional Integration Fund and its tapered funding model.	Jane Rodgers	21-Nov-22
Cabinet	07-Dec-22	National Adoption Services and Foster Wales Joint Committee			Jane Rodgers	9-Nov-22
Cabinet	07-Dec-22	2022/23 Revenue and Capital Monitoring report - Month 6			Jon Davies	17-May-22
Council	01-Dec-22	Corporate Safeguarding Policy.		For Council to endorse the revised Corporate Safeguarding Policy.	Jane Rodgers	10-Nov-22
Council	01-Dec-22	Governance & Audit Committee Annual Report 2021/22			Andrew Wathan	18-Oct-22
Council	01-Dec-22	RLDP Preferred Strategy	Paul Griffiths - Sustainable Economy	To seek Council endorsement of the new Preferred Strategy for eight week consultation	Mark Hand / Rachel Lewis	25-Jul-22
ICMD	30-Nov-22	TUDOR STREET		To seek a decision regarding the Council's forward use of the property located in Tudor Street ahead of the outcomes of the wider review of My Day My Life	Jane Rodgers	14-Nov-22

ICMD	30-Nov-22	Govilon Section 106 Funding for Recreation & Play	Rachel Garrick - Resources		Mike Moran	8-Nov-22
ICMD	30-Nov-22	Highways Traffic Regulation Amendment Order 5	Catrin Maby - Climate Change and Environment		Mark Hand	3-Oct-22
ICMD	30-Nov-22	Planning Annual Performance Report (APR) Deferred to 30-Nov-22	Paul Griffiths - Sustainable Economy		Mark Hand Phil Thomas	3-Oct-22
ICMD	30-Nov-22	Highways Traffic Regulation Amendment Order 6	Catrin Maby - Climate Change and Environment	Agreement to make the traffic order	Mark Hand	23-Aug-22
Cabinet	09-Nov-22	Implementing Sharepoint online		To secure funding to implement the project	Sian Hayward	13-Oct-22
Cabinet	09-Nov-22	A County of Sanctuary		To set out the reasons why an earlier decision is required due to time restrictions associated with TAN 15	Matt Gatehouse	20-Sep-22
Cabinet	09-Nov-22	SPF Update Report			Hannah Jones	12-Sep-22
Cabinet	09-Nov-22	Revenue & Capital MTFP update and process			Jon Davies	17-May-22
Cabinet	09-Nov-22	MonLife Heritage Strategy (or ICMD)		DEFERRED	Matthew Lewis	10-Feb-22
Council	27-Oct-22	RESPONSE TO URGENT NEED FOR HOUSING ACCOMMODATION		To present a proposal to enable Council to respond flexibly and promptly to the urgent need for housing accommodation, to address the	Cath Fallon	10-Oct-22
Council	27-Oct-22	Community and Corporate Plan		To seek endorsement of the new Community and Corporate Plan setting out the purpose, values	Matt Gatehouse / Paul Matthews	3-Oct-22
Council	27-Oct-22	Outside Bodies Appointment			John Pearson	3-Oct-22
Council	27-Oct-22	Annual Safeguarding Report			Kelly Turner	24-Aug-22
Council	27-Oct-22	Social Care & Health: Directors Report 2021/22			Jane Rodgers	6-Jul-22
ICMD	26-Oct-22	Welsh Church Fund Working Group			Dave Jarrett	14/7/22
Cabinet	19-Oct-22	PSOW annual letter		Present the Public Services Ombudsman For Wales' annual report as required by the letter	Matt Phillips	28-Sep-22
Cabinet	19-Oct-22	Regional Partnership Board - Gwent Market Position Statement		To provide a Market Stability Report produced by the Regional Partnership Board setting out a high	Paul Diamond Head of Regional Partnership Team	22-Sep-22
Cabinet	19-Oct-22	Community and Corporate Plan		To seek endorsement of the new Community and Corporate Plan setting out the purpose, values	Gatehouse / Paul Mattf	20-Sep-22
Cabinet	19-Oct-22	22/23 Revenue and Capital Monitoring report - Month 4			Jon Davies	17-May-22
Cabinet	19-Oct-22	Land adjacent to Caldicot Comprehensive School - Housing Development Opportunity		To seek approval of the disposal of land at Caldicot Comprehensive School for the	Nick Keyse	
ICMD	12-Oct-22	Local Development Annual Monitoring Report (AMR)		DEFERRED TO 26 OCT	Rachel Lewis/Cllr Paul Griffiths	23/08/22
ICMD	12-Oct-22	Welsh Church Fund Working Group		DEFERRED TO 26 OCT	Dave Jarrett	14/07/22

ICMD	12-Oct-22	Ending Library Fines		enabling more people to enjoy reading without the worry of incurring a fine if they are unable to return	Cheryl Haskell/Fookes?	20-Sep-22
ICMD	28-Sep-22	Transport Policy			Deb Hill Howells - MG	22-Aug-22
ICMD	28-Sep-22	B4245 speed limit		DEFERRED TO 26 OCT	Mark Hand	18-Jul-22
Council	27-Sep-22	Tackling poverty and inequalities			Nick John	24-Aug-22
Council	27-Sep-22	RLDP Options Report			Rachel Lewis	25-Jul-22
Council	27-Sep-22	Rivers and Ocean			Hazel Clatworthy	9-Jun-22
Council	27-Sep-22	Monmouthshire County Council self - assessment report 2021/2			Richard Jones	23-May-22
ICMD	14-Sep-22	Welsh Church Fund Working Group - meeting 2 held on 21st July 2022 (no meeting/no report -			Dave Jarrett	17-May-22
Cabinet	07-Sep-22	Transport Policy Consultation Update.			Deb Hill Howells	22-Aug-22
Cabinet	07-Sep-22	Cost Of Living			Matt Phillips	25-Jul-22
ICMD	31-Aug-22	MY DAY, MY LIFE SERVICE EVALUTATION			Ceri York	15-Aug-22
ICMD	31-Aug-22	Homeseach Policy & Procedure - Amendments & Welsh Translation Requirement			Ian Bakewell	
ICMD	03-Aug-22	Additional Resources in Educations Strategy		Resources required to develop and maintain schools education systems and the implementatin	Sian Hayward	14-Jun-22
ICMD	03-Aug-22	Designation of Secondary Catchment Areas			Matthew Jones	6-Jun-22
ICMD	03-Aug-22	Welsh Church Fund Working Group - meeting 1 held on 23rd June 2022 - Moved to ICMD 3rd Aug 2022			Dave Jarrett	
Cabinet	27-Jul-22	Wye Valley Villages Future Improvement Plan			Mark Hand	1-Jul-22
Cabinet	27-Jul-22	Regen Three Year Programme			Mark Hand	1-Jul-22
Cabinet	27-Jul-22	Review of Chepstow High Street closure			Mark Hand	1-Jul-22
Cabinet	27-Jul-22	Home to School Transport Policy 2023-24.			Deb Hill Howells	27-Jun-22
Cabinet	27-Jul-22	MUCH (Magor & Undy Community Hall) report			Nick Keys	9-Jun-22
Cabinet	27-Jul-22	Shared Prosperity Fund Local Investment Plan and Regional Lead Authority Arrangements			Hannah Jones	23-May-22

Cabinet	27-Jul-22	Welsh Church Fund Working Group - meeting 1 held on 23rd June 2022 - Moved to ICMD 3rd Aug 2022			Dave Jarrett	17-May-22
Cabinet	27-Jul-22	2021/22 Revenue and Capital Monitoring outturn			Peter Davies/Jon Davies	17-Feb-22
Cabinet	27-Jul-22	Play Sufficiency Assessment and Action Plan 22/23			Matthew Lewis	10-Feb-22
Cabinet	27-Jul-22	Housing Support Programme Strategy (Homeless Strategy)			Ian Bakewell	
Cabinet						

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Monmouthshire Select Committee Minutes

Meeting of Performance and Overview Scrutiny Committee held at County Hall, Usk - Remote Attendance on Tuesday, 24th October, 2023 at 10.00 am

Councillors Present

County Councillor Alistair Neill, (Chairman)
County Councillor Laura Wright, (Vice Chairman)

County Councillors: Jill Bond, Alistair Neill, Paul Pavia, Peter Strong, Ann Webb, Laura Wright, Catherine Fookes, Meirion Howells, Maureen Powell, Sue Riley, Paul Griffiths and Martyn Groucutt and Maureen Powell (substituting for Rachel Buckler)

Also in attendance County Councillors Paul Griffiths, Deputy Leader and Cabinet Member for a Sustainable Economy, Martyn Groucutt, Cabinet Member for Education

APOLOGIES: County Councillor Rachel Buckler

Officers in Attendance

Hazel Ilett, Scrutiny Manager
Robert McGowan, Policy and Scrutiny Officer
Mark Hand, Head of Place-making, Housing, Highways and Flood
Andrew Jones, Development Management Area Team Manager
Stacey Jones, Senior Accountant
Amy Longford, Development Management Area Team Manager

Note: the following minutes focus on the challenge from members – for the full discussion, the recording of the meeting is at www.youtube.com/watch?v=4MuLQ9WHyq&list=PLlmqn4nAaFJDsC93C-EKJZrFkDEQBdiXK&index=11

1. Declarations of Interest

None

2. Public Open Forum

None.

3. Planning Annual Performance Report

Cabinet Member Paul Griffiths and Craig O'Connor introduced the report, Philip Thomas delivered a presentation, and they answered the members' questions with Amy Longford and Andrew Jones.

Questions from committee members:

- How was the backlog in enforcement overcome?
- What does the percentage of affordable houses given on p6 equate to? Are we expecting more in 23/24?

- What were the £110k consultancy fees used on?
- Does the council use 'lean principles' to look at processes and determine waste?
- The Planning committee is mentioned as a consultee – did the report go to that committee?
- Is there a mistake on p28, with the number of applications received for this year being less than the number determined?
- Is the table on p31 showing a £2.1m uplift reflecting the RLDP value?
- Does the joint heritage service represent value for money? Do we receive sufficient funds from Blaenau Gwent to cover costs? Does it take away from valuable work in Monmouthshire?
- Could members have a list of all S106 projects that have benefitted from funding in the last year?
- **Share list and info – ACTION**
- How will the Building At Risk strategy be expedited, and when will it be ready?
- How do officers ensure that they get the balance right between applying the law but allowing development of heritage buildings?
- How accurate is the collation of Planning's data and what are our quality assurances?
- How are we securing the best possible scheme for securing outcomes and can we have some detail and context? Have we approached academic institutions to develop those?
- Has the Planning function been fundamentally reviewed and what guarantees can be given that if there were an inspection by Audit Wales or similar we wouldn't be found severely wanting?
- Is the Welsh Government likely to introduce comparative data in future years?
- Are we sure that the phosphate stripping in Monmouth and Llanfoist will be adequate for future demand?
- Is the proportion of planning applications approved a valid measure of performance? How confident are we that approvals are in line with planning policy?
- Enforcement performance is low, with anecdotal reports of our failure to address continued breaches – does this potentially encourage others to breach regulations?
- Is digitising microfiche cost-effective, considering the staff hours required to digitise vs how often it's requested?
- Can the £84m to the local economy be promoted, especially with businesses?
- Is it possible to have a hyperlink that goes directly to the application?
- Is the relatively small number of appeals due to good engagement with applicants?
- The council lost 4 appeals – was that against big developers with big teams? What about appeals from local residents?
- What cost are we incurring in appeals?
- We need to ensure that we build back up the confidence lost in some residents due to the poor performance of 290 days for a positive enforcement action
- Do we prioritise major applications over general ones? If so, is there a good value in prioritising the larger ones?
- The inclusion of 'opportunities moving forward' is very welcome in the report, and is recommended to other services in their performance reports

- Would it be a good idea to involve a planning officer from another authority to oversee the performance assessment, in order to make it as robust and objective as possible? – something officers can take away (Action? [Craig])
- The report's preface references work being done 'in a timely manner', which seems to jar against the 290 days before a positive enforcement action – can they both be correct? Does the inclusion of this line undermine the report's objectivity?

Chair's Summary:

The report was moved and recommendation approved.

4. Chief Officer for Education: Verbal Update

Cabinet Member Martyn Groucott and Will Mclean delivered the update and answered the members' questions.

Questions from committee members:

- Is the answer to the steep decline in learners at GCSE and A-Level us helping to promote languages for job and career opportunities?
- Presumably the Cabinet Member meant that Caldicot and Magor students have been actively encouraged to study languages, rather than 'pressured'? (The CM agreed)
- In addition to a change in aspirations since the pandemic, has there been an effect from wider strategy decisions e.g. Brexit, the change in apprenticeships, the decline of, and underinvestment in, industry, etc.?
- Is the cost-of-living crisis a factor, with people unable to go on holiday and have the experiences that awaken an interest in languages? (The Chair noted that more holidays are being sold now than before pandemic)
- Note that there is a long-term trend in the decline of language, so one measure of the new curriculum's success would be if it reverses that trend – but we won't know for a few years
- Given that the figures showing a decline in uptake are broadly the same for GCSE and A-level, is the key to increase GCSE numbers?
- Has the introduction of Welsh had an impact on the take-up of other languages?
- In previous years, if only a few pupils wanted to learn a language they would join with a different school, as it's not realistic to have a teacher for just a few pupils – so is funding the problem?
- Was there a heyday in language uptake? e.g. twinning was very active in the 80s, and there were lots of exchanges at the time – are there lessons to be learned there?
- Were there more student exchanges and pen friends in previous decades?
- Are there activities planned for the Young Ambassadors to take back to their schools, especially relating to culture, to make the pupils want to engage with languages?
- Are there any early indications around change in the new curriculum from three separate sciences to one, any early lessons that can be drawn?

- Are there many in the schools who don't believe that the approach now to science is the best way forward, and is there work to be done to ensure there isn't a disconnect between what schools are doing and what universities expect?

Chair's Summary:

Thank you to the Cabinet Member and Chief Officer. Will Mclean will bring an attendance report to the committee – **ACTION**

5. Performance and Overview Scrutiny Committee Forward Work Plan and Action List

The Covid learning and pandemic preparedness has been confirmed for March 26th. A reminder to members of the joint scrutiny with People on 14th November. The Community and Corporate Plan performance update report will go to Cabinet on 13th December, so the committee might need to add a Special meeting in January to scrutinise it. There is a list of topics from the C&C Plan at the bottom of the work programme for consideration; a list of topics that are coming forward for a future decision and which might be of interest to the committee will be emailed in due course, for a fuller discussion at the next meeting.

6. Council and Cabinet Work Plan

7. To approve the minutes of the previous meeting : 20th September 2023

The minutes were agreed with the following amendment: that Councillor Buckler is missing from the attendance list for the meeting, so needs to be added – **ACTION**

8. Next meeting: 22nd November 2023

The meeting ended at **12.45 pm**