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Neuadd y Sir
Y Rhadyr
Brynbuga

Dydd Mawrth, 13 Ionawr 2026

Dear Cynghorwyr,

CABINET

Gofynnir i chi fynychu cyfarfod **Cabinet** a gynhelir yn **Steve Greenslade Room, County Hall, Usk** ar **Dydd Mercher, 21ain Ionawr, 2026,** am **4.30 pm.**

AGENDA

1. Ymddiheuriadau am absenoldeb

2. Datganiadau o Fuddiant

3. YMGYNGHORIAD STATUDOL AR GYNNIG I NEWID YSTOD OEDRAN YSGOL GYNRADD DURAND O 3-11 OED I 4-11 OED — 1 - 44

   Is-adran/Wardiau yr effeithir arnynt: Cil-y-coed

   Pwrpas: Pwrpas yr adroddiad yw gofyn am ganiatâd yr Aelodau i ymgynghori â rhanddeiliaid ar fwriad y Cyngor i newid ystod oedran Ysgol Gynradd Durand o 3-11 oed i 4-11 oed.

   Y cynnig yw disodli'r feithrinfa ysgol a gynhelir gan ALl gyda lleoliad heb ei gynnal yn seiliedig ar safle'r ysgol sydd wedi'i gymeradwyo i ddarparu addysg gynnar wedi'i ariannu.

   Awdur: Sue Hall, Rheolwr Blynyddoedd Cynnar

   Manylion Cyswllt: susanhall@monmouthshire.gov.uk

4. GWERTHU DAU FWTHYN FFERM YN LEECHPOOL HOLDINGS — 45 - 56

   Is-adran/Wardiau yr effeithir arnynt: Porth Sgiwed

   Pwrpas: Ceisio cymeradwyaeth ar gyfer gwaredu dau fwthyn fferm gwag yn Leechpool Holdings, Porth Sgiwed, a nodwyd fel rhai dros ben i anghenion yn dilyn adolygiad mewnol gyda gwasanaethau, nad oes ganddynt angen wedi'i nodi mwyach.

   Awdur(on): Ben Thorpe – Syrfëwr Datblygu
   Emily Hayes – Syrfëwr Asedau

   Manylion Cyswllt: benthorpe@monmouthshire.gov.uk
   emilyhayes@monmouthshire.gov.uk

5. DYRANIAD A106 CHURCH ROAD A CRICK ROAD O GYLLID A106 HAMDDEN ODDI AR Y SAFLE — 57 - 218

Is-adran/Wardiau yr effeithir arnynt: Cil-y-coed, Porth Sgiwed, Glannau Hafren

Pwrpas: Ceisio cymeradwyaeth y Cabinet ar gyfer dyrannu cyllid Adran 106 hamdden oddi ar y safle a dderbyniwyd gan ddatblygiadau Church Road a Crick Road yng Nghil-y-coed a Phorth Sgiwed, tuag at brosiectau a nodwyd fel buddiolwyr a enwyd o fewn y cytundebau hyn.

Awdur: Colette Bosley, Rheolwr Cefn Gwlad, Cyrchfannau ac Amgylchedd

Manylion Cyswllt: colettebosley@monmouthshire.gov.uk

6. CYNIGION CYLLIDEB REFENIW A CHYFALAF DRAFFT 2026/27 — 219 - 420

Is-adran/Wardiau yr effeithir arnynt: Pob Un

Pwrpas: Nodi cynigion cyllideb refeniw a chyfalaf drafft ar gyfer blwyddyn ariannol 2026/27.

Dechrau cyfnod o ymgynghori ar gynigion cyllideb ddrafft am gyfnod o bedair wythnos sy'n dod i ben ar 18fed Chwefror 2026.

Awdur: Jonathan Davies, Pennaeth Cyllid (Dirprwy Swyddog A151)

Manylion Cyswllt: jonathandavies2@monmouthshire.gov.uk

Yours sincerely,

Paul Matthews
Chief Executive

PORTFFOLIOS Y CABINET

Cynghorydd Sir	Maes Cyfrifoldeb	Ward
Mary Ann Brocklesby	**Arweinydd** Swyddog Arweiniol – Paul Matthews, Matthew Gatehouse, Peter Davies, Will Mclean Strategaeth a Chyfeiriad Awdurdod Cyfan Adolygu a gwerthuso perfformiad awdurdod cyfan, gan gynnwys DDAT Perthynas â Llywodraeth Cymru, Llywodraeth y DU a chymdeithasau llywodraeth leol Perthnasoedd Rhanbarthol gan gynnwys Cyd-bwyllgorau Corfforedig, Byrddau Gwasanaethau Cyhoeddus a Chynllunio Argyfwng trawsffiniol	Llanelly
Paul Griffiths	**Aelod Cabinet dros Gynllunio a Datblygu Economaidd a'r Dirprwy Arweinydd** Swyddog Arweiniol – Will McLean, Craig O'Connor Strategaeth Economaidd Cynllun datblygu lleol a chynllun datblygu strategol gan gynnwys safleoedd tai strategol Digartrefedd, darpariaeth dai fforddiadwy a thai sector preifat (cartrefi gwag, cynllun prydlesu, benthyciadau gwella cartrefi, grantiau cyfleusterau i'r anabl a thechnoleg addasol) Cefnogi Canol Trefi gan gynnwys parcio ceir a gorfodi Rheoli Datblygu a Rheoli Adeiladu Sgiliau a Chyflogaeth Cysylltedd band eang Meysydd parcio a gorfodaeth sifil safonau masnach, iechyd yr amgylchedd, iechyd y cyhoedd, trwyddedu	Chepstow Castle & Larkfield
Ben Callard	**Aelod Cabinet dros Adnoddau** Swyddogion Arweiniol – Peter Davies, Matt Gatehouse Cyllid gan gynnwys y CATC a'r cylch cyllideb blynyddol Refeniw a Budd-daliadau Adnoddau Dynol, cyflogres, iechyd a diogelwch Tir ac adeiladau Cynnal a chadw a rheoli eiddo Caffael strategol	Llanfoist & Govilon
Laura Wright	**Aelod Cabinet dros Addysg** Swyddogion Arweiniol – Will McLean, Deb Hill-Howells Addysg Blynyddoedd Cynnar	Grofield

	Addysg statudol pob oed Anghenion dysgu ychwanegol/cynhwysiant Addysg ôl-16 ac addysg oedolion Safonau a gwelliant ysgolion Dysgu cymunedol Rhaglen cymunedau cynaliadwy ar gyfer dysgu Gwasanaeth ieuenctid Cludiant ysgol	
Ian Chandler	**Aelod Cabinet dros Ofal Cymdeithasol, Diogelu a Gwasanaethau Iechyd Hygyrch** Swyddog Arweiniol – Jane Rodgers Gwasanaethau plant Maethu a mabwysiadu Gwasanaeth Troseddau Ieuenctid Gwasanaethau oedolion Diogelu awdurdod cyfan (plant ac oedolion) Anableddau Iechyd meddwl Lles Perthynas â darparwyr iechyd a mynediad at ddarpariaeth iechyd	Park
Catrin Maby	**Aelod Cabinet dros Newid Hinsawdd a'r Amgylchedd** Swyddogion Arweiniol – Deb Hill-Howells, Craig O'Connor, Datgarboneiddio Cynllunio Trafnidiaeth gan gynnwys cludiant o'r cartref i'r ysgol Priffyrdd a Fflyd Cyngor Sir Fynwy Rheoli gwastraff, gofal strydoedd, sbwriel, mannau cyhoeddus a pharciau Palmentydd a lonydd cefn Lliniaru Llifogydd Isadeiledd Gwyrdd, Bioamrywiaeth ac Iechyd Afonydd	Drybridge
Angela Sandles	**Aelod Cabinet dros Gydraddoldeb ac Ymgysylltu** Swyddogion Arweiniol – Matthew Gatehouse, Paul Matthews, Jane Rodgers, James Williams Datblygu cymunedol, anghydraddoldeb a thlodi (iechyd, incwm, maeth, anfantais, gwahaniaethu, ynysu ac argyfwng costau byw) Ymgysylltu â dinasyddion a hybu democratiaeth gan gynnwys gweithio gyda sefydliadau gwirfoddol Profiad y dinesydd - hybiau cymunedol, canolfan gyswllt, gwasanaeth cwsmeriaid a chofrestryddion, cyfathrebu, cysylltiadau cyhoeddus a marchnata Canolfannau hamdden, chwarae a chwaraeon Cyfleusterau cyhoeddus Gwasanaethau Etholiadol ac adolygiad o'r cyfansoddiad Moeseg a safonau	Y Dref

	Iaith Gymraeg Safonau Masnach, Iechyd yr Amgylchedd, Gwarchod y Cyhoedd, a Thrwyddedu	
Sara Burch	**Materion Gwledig, Tai a Thwristiaeth** Swyddog Arweiniol – Craig O'Connor, Jane Rodgers Cynhyrchu a bwyta bwyd yn lleol, gan gynnwys amaeth-goedwigaeth a garddwriaeth leol Digartrefedd, Llety dros dro, tai sector preifat, (cynlluniau prydlesu cartrefi gwag, benthyciadau gwella cartrefi, grantiau cyfleusterau i'r anabl a thechnoleg ymaddasol), Dyrannu tai cymdeithasol Cysylltedd band eang Teithio Llesol Mynediad i Gefn Gwlad a Hawliau Tramwy Datblygu Twristiaeth a Gwasanaethau Diwylliannol	Cantref

Nodau a Gwerthoedd Cyngor Sir Fynwy

Ein Pwrpas

- i ddod yn sir ddi-garbon, gan gefnogi lles, iechyd ac urddas i bawb ar bob cam o'u bywydau.

Amcanion rydym yn gweithio tuag atynt

- Lle teg i fyw lle mae effeithiau anghydraddoldeb a thlodi wedi'u lleihau;
- Lle gwyrdd i fyw a gweithio gyda llai o allyriadau carbon a gwneud cyfraniad cadarnhaol at fynd i'r afael â'r argyfwng yn yr hinsawdd a natur;
- Lle ffyniannus ac uchelgeisiol, lle mae canol trefi bywiog a lle gall busnesau dyfu a datblygu;
- Lle diogel i fyw lle mae gan bobl gartref maen nhw'n teimlo'n ddiogel ynddo;
- Lle cysylltiedig lle mae pobl yn teimlo'n rhan o gymuned ac yn cael eu gwerthfawrogi;
- Lle dysgu lle mae pawb yn cael cyfle i gyrraedd eu potensial.

Ein Gwerthoedd

Bod yn agored. Rydym yn agored ac yn onest. Mae pobl yn cael cyfle i gymryd rhan mewn penderfyniadau sy'n effeithio arnynt, dweud beth sy'n bwysig iddynt a gwneud pethau drostynt eu hunain/eu cymunedau. Os na allwn wneud rhywbeth i helpu, byddwn yn dweud hynny; os bydd yn cymryd peth amser i gael yr ateb, byddwn yn esbonio pam; os na allwn ateb yn syth, byddwn yn ceisio eich cysylltu gyda'r bobl a all helpu - mae adeiladu ymddiriedaeth ac ymgysylltu yn sylfaen allweddol.

Tegwch. Darparwn gyfleoedd teg, i helpu pobl a chymunedau i ffynnu. Os nad yw rhywbeth yn ymddangos yn deg, byddwn yn gwrando ac yn esbonio pam. Byddwn bob amser yn ceisio trin pawb yn deg ac yn gyson. Ni allwn wneud pawb yn hapus bob amser, ond byddwn yn ymrwymo i wrando ac esbonio pam y gwnaethom weithredu fel y gwnaethom.

Hyblygrwydd. Byddwn yn parhau i newid a bod yn hyblyg i alluogi cyflwyno'r gwasanaethau mwyaf effeithlon ac effeithiol. Mae hyn yn golygu ymrwymiad gwirioneddol i weithio gyda phawb i groesawu ffyrdd newydd o weithio.

Gwaith Tîm. Byddwn yn gweithio gyda chi a'n partneriaid i gefnogi ac ysbrydoli pawb i gymryd rhan fel y gallwn gyflawni pethau gwych gyda'n gilydd. Nid ydym yn gweld ein hunain fel 'trefnwyr' neu ddatryswyr problemau, ond gwnawn y gorau o syniadau, asedau ac adnoddau sydd ar gael i wneud yn siŵr ein bod yn gwneud y pethau sy'n cael yr effaith mwyaf cadarnhaol ar ein pobl a lleoedd.

Caredigrwydd – Byddwn yn dangos caredigrwydd i bawb yr ydym yn gweithio gyda nhw, gan roi pwysigrwydd perthnasoedd a'r cysylltiadau sydd gennym â'n gilydd wrth wraidd pob rhyngweithio.

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SUBJECT:	**STATUTORY CONSULTATION ON PROPOSAL TO CHANGE THE AGE RANGE OF DURAND PRIMARY SCHOOL FROM 3-11 YEARS TO 4-11 YEARS**
MEETING:	**CABINET**
DATE:	**21ST JANUARY 2026**

1) PURPOSE:

a) The purpose of the report is to seek Members' permission to consult with stakeholders on the Council's intention to change the age range of Durand Primary School from 3-11 years to 4-11 years.

b) The proposal is to replace the LA maintained school nursery with a non-maintained setting based on the school site that is approved to provide funded early education.

2) RECOMMENDATIONS:

It is recommended that Members:

a) Agree to enter into a statutory consultation process as set out in the School Organisation Code (a document produced by virtue of the School Standards and Organisation (Wales) Act 2013) to obtain the views of consultees on changing the age range of Durand Primary School and replacing the school nursery with an approved non-maintained setting on the school site.

b) Agree and approve the attached draft consultation document (appendix 1) which proposes to change the age range of Durand Primary School from 3-11 years to 4-11 years.

3) KEY ISSUES:

a) The Council is committed to giving every young person in Monmouthshire the best possible start in life, as set out in the Corporate Plan. At its heart is improving the educational achievement and attainment of all children and young people in the county.

b) The duty to ensure appropriate provision of school places is not limited to statutory school places. The Council has a duty under the Childcare Act 2006 to ensure that families can access their entitlement to a minimum of 10 hours a week of early education from the term following their child's 3rd birthday until they are offered a full-time school place.

c) The Childcare Offer for Wales was first introduced in Monmouthshire in 2019 and was fully rolled out in September 2020; through this scheme working parents can access up to 30 hours a week of funded early education and childcare. As a result, we have seen a shift to parents choosing an approved non-maintained setting that is able to offer the full 30 hours a week, in preference to school nurseries that are only able to offer 12.5 hours a week.

d) Numbers attending Durand Nursery have reduced significantly since the introduction of the Childcare Offer. The school has a capacity of 60 part time places (30 morning and 30 afternoon), but they haven't been close to being full since 2018-19, and some years they have only required a morning session.

Numbers on roll at Durand Primary Nursey						
2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25
58	36	30	37	35	39	40

e) Running the nursery class with significant surplus places negatively impacts the school budget.

f) In the recent Estyn inspection, teaching and learning at Durand Primary was judged to be good in most classes, but it was noted that the classes for younger learners was an area for development.

g) The school is currently using a supply teacher to lead the nursery class and they would be able to redeploy the other nursery staff within the main school; hence, there would be no need for any redundancies if the age range was changed and the school nursery was replaced with a non-maintained setting.

h) In the summer term the Headteacher of Durand Primary School entered discussions with a private provider that already has two successful day nurseries in other areas of Monmouthshire that are approved for early education and Flying Start childcare. As a result, Little Gems at Durand

opened in September 2025 and is currently offering wrap around childcare for children attending the school nursery.

i) The non-maintained setting is currently sharing the space with the school nursery, as there was no other space available on site, so the school nursery provides early education in the mornings, and Little Gems takes over at 11.30am and offers wrap around childcare. This isn't a long-term solution as it is difficult for two providers to share a space. It also limits the length of sessions the non-maintained setting is able to provide, and the owner of Little Gems has already expressed concerns that they won't be sustainable in the long term if they can only offer part time places.

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

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

5) OPTIONS APPRAISAL

a) The attached consultation document outlines three options for nursery provision at Durand Primary School:

1. Do nothing and maintain the status quo. This would mean that Durand Primary School would continue with its current age range of 3-11 years offering 30 part time nursery places (mornings only) and a non-maintained setting would offer wrap around childcare in the afternoons.
2. Change the age range of Durand Primary School from 3-11 years to 4-11 years and replace the school nursery with a non-maintained setting approved to provide funded early education and wrap around childcare.
3. End the lease agreement with Little Gems to enable Durand Nursery to offer 60 part time places (morning and afternoon sessions), with no wrap around childcare available on site.

b) The preferred option on which we would like to consult is option 2, which is to change the age range of Durand Primary School from 3-11 years to 4-11 years and replace the school nursery with a non-maintained setting approved to provide funded early education and wrap around childcare.

c) This option is not only the most financially viable, but it also delivers excellent teaching and learning facilities, whilst offering greater flexibility for parents.

d) The consultation process is proposed to run over the next 6 months in line with the timescales outlined below:

Consultation stage

Statutory Consultation Period to commence	Statutory Consultation Period concludes	Period of consultation required
29th January 2026	13th March 2026	6 weeks (including 20 school days)

Post consultation stage

Stage of process	Key date
Cabinet considers the results of the consultation and determines whether to proceed with proposal	15th April 2026
Should the Council wish to proceed, statutory notices will be published and we will enter objection period	23rd April 2026
Closure of the objection period	22nd May 2026
Cabinet considers the objection report and determines whether or not to implement the proposal	8th July 2026
Implementation of Proposal	September 2026

6. REASONS:

6.1 The Council has a statutory duty as part of the School Organisation Code 2018 to consult with appropriate stakeholders when considering any significant school reorganisation proposals.

6.2 The proposed change will help to address the Council's commitment to provide children with the best possible start in life and to be ready for school.

6.3 The proposed change will offer more flexibility to families and enable parents/carers to remain in work or return to work or training.

7. RESOURCE IMPLICATIONS:

7.1 The proposal would have no specific resource implications for the Council.

7.2 Offering nursery provision with significant surplus places has placed a strain on the budget of Durand Primary School; therefore, the proposal to change the age range of Durand Primary School from 3-11 years to 4-11 years and replace the school nursery with a non-maintained setting approved to provide funded early education and wrap around childcare would have a positive financial impact for the school.

7.3 The non-maintained setting is privately owned, so they manage their own finances. The early education would be funded through the non-maintained element of the Local Authority Education Grant and eligible parents would be able to access funding for the wrap around childcare directly from the Welsh Government through the Childcare Offer Scheme.

8. CONSULTEES:

Children, Learning, Skills & Economy (CLSE) DMT
Cllr Laura Wright, Cabinet Member for Education

9. BACKGROUND PAPERS:

Welsh Government School Organisation Code 2018
Childcare Act 2006

10. AUTHOR:

Sue Hall, Early Years Manager

11. CONTACT DETAILS:

Tel: 01633 644461
E-mail: susanhall@monmouthshire.gov.uk

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CONSULTATION DOCUMENT

Change the age range of Durand Primary School from 3-11 years to 4-11 years

MONMOUTHSHIRE COUNTY COUNCIL

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1. INTRODUCTION

Monmouthshire County Council (the Council) has a statutory duty under the Childcare Act 2006 to ensure that all 3- and 4-year-olds can access their entitlement to a minimum of 10 hours of funded early education a week during term time. This education can be provided by a local authority-maintained nursery or an approved non-maintained setting. The Childcare Act 2006 also places a duty on local authorities to secure, as far as is reasonably practicable, provision of childcare that is sufficient to meet the requirements of working parents.

The Council must consider the sustainability of schools and settings by ensuring that resources and facilities are efficiently utilised to deliver the educational opportunities that our children deserve.

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

The purpose of this document is to provide information on the Council's proposal to change the age range of Durand Primary School from 3-11 years to 4-11 years and replace the school nursery class with a non-maintained setting offering funded early education places.

2. CONSULTATION ARRANGEMENTS

The Council proposes ***to change the age range of Durand Primary School from 3-11 years to 4-11 years.*** This change will result in a revised capacity of 210 places with no nursery provision.

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

The proposed timescales for the formal consultation process are:

Statutory Consultation Period to commence on	**Statutory Consultation Period concludes on**	**Period of consultation required**
29th January 2026	13th March 2026	6 weeks (including 20 school days)

2.1 FORMAL CONSULTATION PROCESS

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

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

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

Date	Consultee group	**Session time**	**Venue**
To be arranged	Staff	16:00 – 16:50	Durand Primary School
	Governors	17:00 – 17:50	
	Parents and other interested parties	18:00 – 18:50	

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

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

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

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

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

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

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

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

2.2 CONSULTATION WITH CHILDREN AND YOUNG PEOPLE

The views of children and young people are extremely important to the Council and therefore children and young people will be provided with opportunities to contribute to this consultation process. Consultation with children and young people will be supported by key professionals and their views captured and considered in any reports that may determine our way forward.

2.3 CONCLUSION OF THE FORMAL CONSULTATION PROCESS

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

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

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

Stage of process	**Key date**
Cabinet consider the results of the consultation and determines whether to proceed with proposal	15th April 2026
Should the Council wish to proceed, statutory notices will be published and we enter into objection period	23rd April 2026
Closure of the objection period	22nd May 2026
Cabinet consider the objection report and determine whether or not to implement the proposal	8th July 2026
Implementation of Proposal	September 2026

2.4 IMPLEMENTATION OF THE PROPOSALS

Should the outcome of the statutory process outlined within this consultation document conclude that proposals are to proceed as presented, the age range of Durand Primary School will change from September 2026.

3. BACKGROUND INFORMATION

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

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

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

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

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

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

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

4. CURRENT PROVISION

Monmouthshire County Council currently has 43 settings providing early education, made up as follows:

- 13 LA maintained nurseries within our primary schools
- 30 approved non-maintained settings

The majority of our LA nurseries are situated within one of the four main towns – Abergavenny, Caldicot, Chepstow and Monmouth; whereas, in the smaller villages and rural areas, early education is mostly provided by non-maintained settings.

There are no catchment areas for early education, parents can choose the provision that best meets their needs.

5. THE JOURNEY SO FAR

The Childcare Offer for Wales was introduced in 2017 and was fully rolled out in September 2020. This is a Welsh Government initiative offering up to 30 hours a week of funded early education and childcare for 3- and 4-year-olds from eligible families. These 30 hours a week consist of at least 10 hours of early education and up to 20 hours of childcare.

To be eligible for the Childcare Offer, both parents must:

- Be employed and earn at least equivalent to 16 hours a week at National Minimum Wage but no more than £100,000 per annum; or
- Be on Statutory Pay and Leave (Sick, Maternity, Paternity, Parental, Bereavement or Adoption Leave); or
- Be enrolled on a further or higher education course that is at least 10 weeks in length.

Since the full rollout of the Childcare Offer, we have seen an upward trend towards parents choosing to access their early education in non-maintained settings rather than LA maintained school nurseries, as they can access early education and wrap around childcare at the same setting.

Overall, take up of early education in Monmouthshire is high and has been consistently more than 90% of the eligible population.

6. THE PROPOSAL

The proposal is to change the age range of Durand Primary School from 3-11 years to 4-11 years.

The school nursery will close and funded early education will be provided by an approved non-maintained setting operating from the school site.

There is already a non-maintained setting on site offering wrap around childcare for children attending the school nursery. The proposed closure of the nursery at Durand Primary School will allow the existing non-maintained setting to extend their provision and offer early education places in the mornings and afternoons, in addition to wrap around childcare. This will provide more flexibility for families.

It will also result in financial savings for Durand Primary School and enable them to focus on pupils of statutory school age.

6.1 REASONS FOR THE PROPOSAL

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

1) Our Statutory duties

Monmouthshire County Council has a statutory duty under the Childcare Act 2006 to ensure that all children aged 3 and 4 years can access their entitlement to a minimum of 10 hours a week of funded early education. There is also a duty on local authorities to secure, as far as is reasonably practicable, provision of childcare that is sufficient to meet the requirements of working parents.

One of the ways to fulfil both statutory duties is to develop more non-maintained childcare settings that are also approved to offer early education. This facilitates parents accessing their full entitlement of 30 hours funded early education and childcare in one setting.

2) Responding to parental demand

Take up of early education is relatively high in Monmouthshire, with more than 90% of eligible children accessing their entitlement to early education in their pre-school year within a Monmouthshire setting.

Prior to the introduction of the Childcare Offer for Wales, take up of early education was shared equally between LA maintained school nurseries and approved non-maintained settings. Since the full rollout of the Childcare Offer for Wales in September 2020, we have seen a notable decline in the number of families accessing their early education in a LA maintained school nursery, compared with an

increase in the number of families accessing their early education in an approved non-maintained setting.

The change in parental demand for early education across the two types of provision is illustrated in the following table:

Number of children accessing early education in the summer term						
	2019	**2021**	**2022**	**2023**	**2024**	**2025**
LA maintained school nursery	587	481	476	470	469	445
Non-maintained approved setting	633	565	620	634	680	698
TOTAL	1220	1046	1096	1104	1149	1143

** There are no figures for 2020 due to Covid restrictions.*

In response to this demand, we need to increase the number of non-maintained settings approved to provide early education. We also need to consider the financial implications on schools who are operating with significant numbers of surplus places in their nursery class.

3) Quality teaching and learning environments

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

Approved non-maintained early education settings receive specialist support and training from the Education Achievement Service (EAS) and the Local Authority Early Years team. This has resulted in our non-maintained settings successfully implementing the Non-Maintained Curriculum for Wales and offering high quality provision. This can be evidenced in recent Estyn and CIW joint inspection reports, where our settings have received more than 25 judgements of excellent over the last 6 years and 7 settings have been asked to produce a best practice case study.

Due to financial constraints, many of our LA school nurseries have a HLTA rather than a teacher leading their nursery class. These individuals haven't necessarily received any formal training in child development, whereas childcare staff are required to have a level 2 or level 3 qualification in Childcare, Play and Learning Development (CCPLD), and the majority of our approved settings have a leader with a level 5 Childcare qualification.

Non-maintained settings are required to operate with a minimum ratio of one member of staff for every 8 children. The recommended ratio for school nurseries is one member of staff for every 10 children; however, this ratio isn't compulsory.

Taking all of this into account, the school has asked us to consider changing the age range of Durand Primary School from 3-11 years to 4-11 years and replace the school nursery with a non-maintained setting approved to provide funded early education and wrap around childcare.

7. OPTIONS APPRAISAL

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

Option 1 – Do nothing and maintain the status quo. This would mean that Durand Primary School would continue with its current age range of 3-11 years offering 30 part time nursery places (mornings only) and a non-maintained setting would offer wrap around childcare in the afternoons.

Strengths	Weaknesses
Consistency for children and families	The school nursery would be unable to offer early education for rising 3s once their morning session was full
Nursery children are on the school roll	Sustainability of non-maintained setting is at risk if they can only offer part time places
Early education and childcare can be accessed on the same site	School nursery and non-maintained setting would have to share the same space with no break between sessions
	Different staff would be offering the early education from the wrap around childcare, resulting in more daily transitions for young children

Option 2 – Change the age range of Durand Primary School from 3-11 years to 4-11 years and replace the school nursery with a non-maintained setting approved to provide funded early education and wrap around childcare.

Strengths	Weaknesses
More flexibility for working families, as they can access early education and childcare in one setting	Children will not join the school roll until their Reception year
Children will receive their early education in a setting with a higher level of support from the EAS and the LA	Families looking for a school nursery place may choose to send them to one of the other schools in the locality
There is the option for the setting to expand this provision to include after	

school care, holiday provision and Flying Start childcare	

Option 3 – End the lease agreement with Little Gems to enable Durand Nursery to offer 60 part time places (morning and afternoon sessions), with no wrap around childcare available on site.

Strengths	Weaknesses
There would be sufficient places in the school nursery to accommodate rising 3s	Financial implications on school budget to run with significant surplus places
Nursery children are on the school roll	Limited options for working families who require wrap around childcare
	More daily transitions for young children who require wrap around childcare and have to be transported to a different setting to access this provision

8. SCHOOLS AFFECTED BY THE PROPOSAL

8.1 CURRENT NUMBERS ON ROLL

The following table shows general information on the schools affected or likely to be affected by the proposals. The number on roll in nursery is based on the current school admission numbers as of September 2025:

School Name	Age Range	Number of Nursery Places Available	Number on Nursery Roll September 2025
Durand Primary School	3-11 years	60	26
Castle Park Primary School	4-11 years	0	0
Dewstow Primary School	3-11 years	60	21
Ysgol Gymraeg Cil y Coed	3-11 years	34	23
ARW CiW Primary School	4-11 years	0	0

The following table shows the number of children accessing early education in an approved non-maintained setting in and around Caldicot town as of September 2025:

Setting Name	Location	Number Accessing Early Education September 2025
Red Robins Nursery	Castle Park Primary School, Caldicot	20
Crossway Nursery	Sandy Lane, Caldicot	10
Crossway Park Nursery	Newport Road, Caldicot	0
Caerwent Nursery	Chepstow Road, Caerwent	40
Little Tigers Daycare	Rogiet Primary School, Rogiet	25

8.2 NUMBERS ON ROLL TRENDS

The following table shows the number of pupils on roll in the nursery for the last five annual school censuses for all schools affected by the proposal:

School Name	January 2021	January 2022	January 2023	January 2024	January 2025
Durand Primary School	27	36	33	32	34
Dewstow Primary School	36	38	34	38	22
Ysgol Gymraeg Cil y Coed	12	21	21	28	31
TOTAL	**75**	**95**	**88**	**98**	**87**

** Nursery admissions in January 2021 were noticeably lower than previous years in all settings due to the impact of the Covid pandemic.*

The following table shows the number of pupils accessing early education for the last five years at an approved non-maintained setting affected by the proposal:

Setting Name	January 2021	January 2022	January 2023	January 2024	January 2025
Red Robins Nursery	N/A	20	27	28	28
Crossway Nursery	7	6	9	16	18
Caerwent Nursery	26	29	43	35	44
Little Tigers Daycare	33	37	34	30	28
TOTAL	**66**	**92**	**113**	**109**	**118**

** Crossway Park Nursery isn't included as it didn't open until September 2024 and wasn't approved as an early education provider until September 2025.*

This data illustrates the increased demand for approved non-maintained settings over the last five years.

8.3 PROJECTED NEED

The Council utilises a range of data to analyse the forecasted demand on school places across the County. Information supplied by Aneurin Bevan University Health Board (ABUHB) relating to newborn children within the County combined with projected figures relating to known housing developments, enables us to project the demand levels and ensure appropriate provision is in place.

The school numbers below are formed based on a cluster projection model, which ensures that there is an appropriate number of school places at schools within the cluster to accommodate any potential oversubscription at individual schools. The projections also model a percentage of young people electing to attend Welsh Medium Education, formed on the basis of current trends, which could of course change and impact on the number attending English / Welsh Medium school(s).

The information in the table below identifies the expected pupil numbers entering Reception classes in the Caldicot town area over the next five years:

School area	Sept 2026	Sept 2027	Sept 2028	Sept 2029	Sept 2030
Durand, Dewstow, ARW, Castle Park, & Ysgol Y FFin	119	117	124	120	120

8.4 SURPLUS PLACES

The table below shows the current and projected levels of surplus places in school nurseries affected by the proposal:

	January 2025			January 2026		
	Number of Places	Number on Roll	Surplus Places	Number of Places	Number on Roll	Surplus Places
Durand Primary School	60	34	26 43%	60	32	28 46.7%
Dewstow Primary School	60	22	38 63%	60	30	30 50%

Ysgol Gymraeg Cil y Coed	34	31	3 9%	34	32	2 5.9%

8.5 BUILDING CONDITION RATINGS

The table below shows the building condition rating as assessed during the most recent condition survey carried out by Monmouthshire County Council for those schools likely to be affected by the proposal:

Condition Rating	**Definition**
A	As new condition
B	Sound, operationally safe, and exhibiting only minor deterioration
C	Operational but major repair or replacement needed in the short to medium-term (generally 3 years)

For each of the schools affected by proposals, the below table confirms their current building condition rating:

School Name	**Condition rating**
Durand Primary School	B
Castle Park Primary School	C
Dewstow Primary School	A
Ysgol Gymraeg Cil y Coed	C
ARW CiW Primary School	B

9. QUALITY AND STANDARDS IN EDUCATION

All approved non-maintained settings receive support from both the Local Authority and the regional consortia the Education Achievement Service (EAS) to help ensure they operate effective management and teaching practices. Monmouthshire has a good track record of delivering quality early education.

Consideration of the potential impact of the proposal on quality and standards is aligned with the Estyn Inspection framework:

Learning

The proposal will not affect the quality of learning in any of the schools or non-maintained settings in the Caldicot cluster. The approved non-maintained setting that is proposed to replace Durand Nursery will receive the appropriate level of challenge and support to ensure that high-quality learning is achieved.

Wellbeing and attitudes to learning

Children's wellbeing is paramount and will impact on their attitude to learning. Consistency of staff, learning environments, session structure and expectations are all factors that can affect a child's wellbeing. Reducing the number of transitions for a child is likely to have a positive impact on their wellbeing.

The proposal should not impact negatively on wellbeing and attitudes towards learning at any of the affected schools or non-maintained settings.

Teaching and learning experiences

Teaching and learning at approved non-maintained settings will follow the Welsh Government 'Curriculum for Funded Non-Maintained Nursery Settings'. *This curriculum aspires to create in children positive dispositions towards learning which, if nurtured, will last a lifetime and provide the firm foundation which all our children need to support them in realising the four purposes of Curriculum for Wales (Curriculum for Funded Non-Maintained Nursery Settings, 2022, p.3).*

For those children currently attending Durand Primary School Nursery, the proposals are likely to have a hugely positive impact on their teaching and learning experiences, as the Curriculum for Funded Non-Maintained Nursery Settings has been designed by professionals specifically to meet the needs of pre-school children.

The proposal will not impact the teaching and learning experiences at the other affected schools or non-maintained settings.

Care support and guidance

Durand Primary School will continue to be supported by the local authority and the Education Achievement Service to provide high quality care, support, and guidance, as will the proposed non-maintained setting.

There will be no change in care support and guidance at the other affected schools or non-maintained settings.

Leadership and management

The leadership and management teams of Durand Primary School and the proposed non-maintained setting will continue to receive support and guidance from the local authority and Education Achievement Service to ensure best practice in leadership and management is maintained.

There will be no change to the quality and effectiveness of leaders and managers at the other affected schools and non-maintained settings.

A summary of Estyn Reports for affected schools and non-maintained settings can be found under appendix 1.

10. WELSH IN EDUCATION STRATEGIC PLAN

Durand Primary School is an English medium setting and it is proposed to replace this with an English medium non-maintained setting with bilingual elements.

In the Caldicot area, Welsh medium early education is available at Ysgol Gymraeg Y Ffin. Wrap around childcare, along with Flying Start childcare provided by Cylch Meithrin Cil y Coed on the school site.

11. FINANCE

Offering nursery provision with significant surplus places has placed a strain on the budget of Durand Primary School; therefore, the proposal to close the nursery would have a positive financial impact for the school.

The proposed non-maintained setting would be privately owned, so they would manage their own finances. The early education would be funded through the non-maintained element of the Local Authority Education Grant and eligible parents would be able to access funding for the wrap around childcare directly from the Welsh Government through the Childcare Offer Scheme.

12. LAND AND BUILDINGS

Durand Primary School nursery class is currently located in a separate building on the school site with an enclosed outdoor area and its own entrance. The classroom has been set up specifically to accommodate pre-school aged children and effectively deliver early education.

This consultation proposes to locate the non-maintained setting in the existing nursery building on the school site.

13. STAFFING

Staff currently employed by Durand Primary School and working in the nursery class will be redeployed in the school. There is currently a vacancy within the nursery that is being covered by supply staff, so proposals would not result in any redundancies.

Establishing a non-maintained setting on site will provide employment opportunities for childcare workers.

14. COMMUNITY IMPACT / EQUALITY IMPACT ASSESSMENT

14.1 COMMUNITY IMPACT ASSESSMENT

Community Impact Assessments are a structured way for the Council to fully understand the implications of its decisions and whether they are detrimental or discriminatory to certain groups or sections of the community. They help the Council to consider the impact of its decisions and policies within and between communities more generally. The Community Impact Assessment process ensures that the Council's decision-making process is robust and impacts on all communities within Monmouthshire are fully considered in Council business. By carrying out impact assessments, the Council is working to promote equality for all our service users, employees and the wider community.

14.2 EQUALITY IMPACT ASSESSMENT

The Council recognises that people have different needs, requirements and goals and will work actively against all forms of discrimination by promoting good relations and mutual respect within and between our communities, residents, elected members, job applicants and workforce. The Council will also work to create equal access for everyone to our services, irrespective of ethnic origin, sex, age, marital status, sexual orientation, disability, gender reassignment, religious beliefs or non-belief's, use of Welsh language, BSL or other languages, nationality, responsibility for any dependents, or any other reason which cannot be shown to be justified.

An Equality Impact Assessment has been undertaken and can be found at www.monmouthshire.gov.uk/school-reorganisation.

15. WELSH LANGUAGE IMPACT

The proposal would have no significant impact on Welsh Language provision.

16. ADMISSION ARRANGEMENTS

Monmouthshire County Council will continue to be responsible for the admission arrangements at Durand Primary School and the other schools within the cluster; any decisions will be undertaken in line with the agreed School Admission Policy.

Parents / carers will have the opportunity to complete an application online and can express up to three preferences. The Local Authority operates an equal preference scheme, which means that all preferences are considered equally in line with the Local Authority's oversubscription criteria, and not on the basis of the order in which they are listed on the application form.

Non-maintained settings are private providers and are responsible for their own admission arrangements.

16.1 CATCHMENT AREAS

There are no catchment areas for nursery provision.

17. HOME TO SCHOOL TRANSPORT

Home to school transport is not available for nursery provision.

Further details of the home to school transport policy can be found on the following link:

https://www.monmouthshire.gov.uk/school-transport-home-to-school

18. OTHER INFORMATION

Further Information and regular up-dates on this proposal can be found on the following webpage:

www.monmouthshire.gov.uk/school-reorganisation

Frequently asked questions will be up-loaded weekly and put onto the Monmouthshire County Council Website.

19. APPENDIX 1 – ESTYN REPORTS

Durand Primary School

Inspection date	Recommendations	Follow-up
2025	R1 Improve opportunities for younger pupils to develop as independent and creative thinkers and learners	No

Castle Park Primary School

Inspection date	Recommendations	Follow-up
2022	R1 Further develop assessment for learning to better support pupils to understand the purpose of their learning and the progress they make. R2 Improve pupils' Welsh language skills across the school.	Yes

A team of inspectors visited Castle Park Primary School in September 2024 to consider how the school has made progress in addressing the two recommendations from its core inspection in December 2022. Estyn's view was that leaders and staff at the school have worked well to address these recommendations, and they recognise that there are aspects that could improve further.

Dewstow Primary School

Inspection date	Recommendations	Follow-up
2022	R1 Improve leadership at all levels. R2 Improve evaluation and improvement processes. R3 Improve the quality of teaching and learning experiences across the school. R4 Plan for the progressive and systematic development of pupils' skills across the curriculum,	Yes

	including regular opportunities for them to develop their writing skills. R5 Strengthen assessment processes and feedback to pupils. R6 Provide regular opportunities for pupils to develop pupils as independent learners. R7 Improve pupils' progress in Welsh and support them to apply their skills across the school.	

A team of inspectors visited Dewstow Primary School in April 2024 for a follow-up visit, and the school was judged to have made sufficient progress in relation to the recommendations following the most recent core inspection and was, therefore, removed from the list of schools requiring special measures.

Ysgol Gymraeg Y Ffin

Inspection date	Recommendations	Follow-up
2017	R1 Share best practice in teaching across the school. R2 Develop opportunities for pupils to apply their numeracy skills more frequently in other areas of the curriculum in key stage 2. R3 Ensure opportunities to develop pupils' ICT skills in key stage 2.	Yes

It has been eight years since Ysgol Gymraeg Y Ffin's last Estyn inspection, so they are anticipating an inspection within this academic year.

Archbishop Rowan Williams CiW Primary School

Inspection date	Recommendations	Follow-up
2024	R1 Improve the use of the outdoor learning environment to broaden the curriculum and enhance the development of pupils' creative, physical and critical thinking skills.	No

Since 2019, the inspection process has changed for non-maintained settings, and they are now jointly inspected by Estyn and Care Inspectorate Wales (CIW). A summary of recommendations is provided for non-maintained settings in Caldicot

and the surrounding area that have undergone a joint inspection. There is yet to be a joint Estyn & CIW inspection at Red Robins or Crossway Park Nursery.

Crossway Nursery

Inspection date	Recommendations	Follow-up
2022	R1 Further enhance the environment to support children's literacy skills.	No

Caerwent Nursery (formerly Mathern Day Nursery at Caerwent)

Inspection date	Recommendations	Follow-up
2022	R1 Improve children's Welsh language skills. R2 Develop manageable systems for observation, planning and assessment to identify future learning and to monitor children's progress effectively.	No

Little Tigers Daycare

Inspection date	Recommendations	Follow-up
2022	R1 Develop children's and practitioners' use of the Welsh language. R2 Ensure that leaders address the area of non-compliance identified during the inspection.	No

20. APPENDIX 2 – LIST OF CONSULTEES

- Parents, carers/guardians and staff members of schools affected by the proposal
- The governing body of any school affected by the proposal
- Pupils/Pupil Councils of schools directly affected by the proposal
- Headteachers of schools affected by the proposal
- Welsh Ministers
- All MCC Town and Community Councils
- All MCC Assembly Members representing the area served by the school
- All Members of Parliament representing MCC area
- All MCC Libraries
- Directors of Education of all bordering LAs – Blaenau Gwent, Newport, Powys, Torfaen, Herefordshire, Gloucestershire
- MCC Youth Service
- GAVO
- Monmouthshire Governors Association
- Teaching trade unions
- Support Staff trade unions
- Welsh Language Commissioner
- Welsh Ministers
- ESTYN
- RHAG
- Mudiaid Meithrin
- Church in Wales Diocesan Trust, Director of Education
- Roman Catholic Diocesan Trust, Director of Education
- South East Wales Consortium
- South East Wales Education Achievement Service
- Gwent Police and Crime Commissioner
- Early Years & Childcare Partnership
- Welsh in Education Forum

21. APPENDIX 3 – RESPONSE PRO-FORMA

PROPOSAL – *Change the age range of Durand Primary School from 3-11 years to 4-11 years.*

YOUR VIEWS

We would like your views on the above proposal. Please complete this pro-forma and return it to the address at the bottom, alternatively it can be handed in at the consultation event or there is an on-line response pro-forma available at www.monmouthshire.gov.uk/school-reorganisation

Access Unit, Monmouthshire County Council, County Hall, Rhadyr, Usk, NP15 1GA or email strategicreview@monmouthshire.gov.uk.

Please tick the box if you wish to be notified of the publication of the consultation ☐ report.

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Integrated Impact Assessment Template

(incorporating Equalities, Socio-economic Duty, Future Generations, Welsh Language Measures, Corporate Parenting)

Name of the Officer Sue Hall **Phone no:** 01633 644461 **E-mail:** susanhall@monmouthshire.gov.uk	**Please give a brief description of the aims of the proposal** To consult on the proposal to change the age range of Durand Primary School from 3-11 years to 4-11 years and replace the school nursery with a non-maintained setting approved to provide early education.
Name of Service area Early Years Section, CLSE Directorate	**Date** December 2025

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 *Consider the impact on our community in relation to age, e.g. how do we engage with older and younger people about our services, access issues etc. Also consider what issues there are for employment and training.*	Currently there are only 30 nursery / early education places available at Durand Primary School for 3 and 4 year olds; hence, there are insufficient places to accommodate rising 3s. This proposal would increase the number of early education places to 56.	Nursery aged children wouldn't be included on the school roll, instead they wouldn't be admitted until the term following children's 4th birthday.	Approved non-maintained settings have more flexibility than school nurseries as they can cater for a larger age range and offer longer hours.

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Disability *Consider the impact and what issues there are around each of the disability needs groups e.g. access to buildings/services, how we provide services and the way we do this; producing information in alternative formats, employment issues etc.*	The non-maintained setting would be based on the school site in the existing nursery building, which meets current guidelines around disabled access.	No impact	N/A
Gender reassignment *Consider the provision of inclusive services for transgender people and groups. Also consider what issues there are for employment and training.*	No impact	No impact	N/A
Marriage or civil partnership *Same-sex couples registered as civil partners have the same rights as married couples and must be provided with the same benefits, such as survivor pensions, flexible working, maternity/paternity pay and healthcare insurance. Consider the impact of your proposal on these rights.*	No impact	No impact	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?
Pregnancy or maternity *A woman is protected from discrimination during her pregnancy, maternity leave and 26 weeks from the day she gives birth. Including the provision of services, goods and facilities and recreational or training facilities. Consider the impact of your proposal on these protections.*	No impact	No impact	N/A
Race *What will the proposal do to promote race equality with the aim of eliminating unlawful discrimination, promoting equality of opportunity and promoting good relations between different racial groups. Think about the potential to affect racial groups differently. Possible issues include providing translation/interpreting services, cultural issues and customs, access to services, issues relating to Asylum Seeker, Refugee, Gypsy & Traveler, migrant communities and recording of racist incidents etc.*	No impact	No impact	N/A
Religion or Belief *Consider the impact e.g. dietary issues, religious holidays or days associated with religious observance, cultural issues and customs. Also consider what issues there are for employment and training.*	No impact	No impact	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?
Sex *Consider what issues there are for men and women. Will this impact disproportionately on one group more than another e.g. equal pay, responsibilities for dependents, issues for carers, access to training, employment issues.*	Changing from a maintained nursery to a non-maintained setting will offer more flexiblity to families and will enable parents/carers to return to work or training.	No impact	N/A
Sexual Orientation *Consider the provision of inclusive services for e.g. older and younger people from the Lesbia, Gay and Bi-sexual communities. Also consider what issues there are for employment and training.*	No impact	No impact	N/A

2. The Socio-economic Duty

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.

Socio-economic disadvantage can be defined as living in less favorable social and economic circumstances than others in society. It also includes social justice, which is about reducing inequalities by working towards more equal distribution of wealth and opportunities so everyone can achieve their full potential.

Consider how the proposal could affect the following vulnerable groups:

Armed Forces Community (including veterans)
Single parents
Vulnerable families
Single adult households
Carers
Students
People living in the most deprived areas
Pensioners
Homeless People
People misusing substances
People who have experienced the asylum system
People involved in the criminal justice system

Socio-economic Duty	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 from socio economic disadvantage.	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts in relation to the Socio-economic disadvantage?
Think of what evidence you have about socio-economic disadvantage and inequalities of outcome in relation to this proposal. Will it impact disproportionately on certain groups? Can the proposals be improved to reduce inequalities of outcome?	The existing provision at Durand Nursery is limited to 2 ½ hours a day, which makes it difficult for the main carer to access work or training opportunities. A non-maintained setting would be able to offer up to 6 hours a day, providing more opportunity for parents/carers to return to work or training.	School nurseries usually offer 12 hours a week, whereas early education funding is only available for 10 hours a week.	Working families are eligible for the Childcare Offer, which provides funding for wrap around childcare, so eligible families can access a total of up to 30 hours a week of funded early education and childcare.

3. Policy making and the Welsh language

What are the effects that the proposals would have on the Welsh language, specifically on opportunities for people to use Welsh and on treating the Welsh language no less favourably than English? How could positive effects be increased, or negative effects be mitigated? Explain how you believe the proposals could be improved so as to have positive effects or increased positive effects on opportunities for people to use the Welsh language and on treating the Welsh language no less favourably than the English language.

How does your proposal impact on the following aspects of the Council's Welsh Language Standards:	Describe the positive impacts of this proposal	Describe the negative impacts of this proposal	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts
Policy Making: *Consider what impact this policy decision will have on the Welsh Language. This includes opportunities for people to use the language, opportunities to promote the language and treating the language no less favourably that the English language. Include any data and evidence e.g. WESP, Census Data, Cymraeg 2050, Welsh Language Strategy.*	No impact	N/A	N/A
Operational: **Recruitment & Training of workforce** *Carefully consider whether vacant posts require Welsh language skills as a desirable or essential skill. This is especially pertinent with front line roles as more than 10 % of the population of Monmouthshire speak Welsh. Also, when assessing the need for Welsh language skills keep in mind the existing Welsh language skills within the workforce. In service areas where there is a current lack of Welsh language skills, posts should be advertised as Welsh language essential. Additionally, consider where further training may be needed to increase the number of staff who can speak Welsh and to enhance the skills of current Welsh speakers.*	N/A	N/A	N/A
Service Delivery: **Use of Welsh language in service delivery** *When advertising our services you must promote the fact that people can deal with the council in Welsh by*	All consultation documents and social media posts will be available in Welsh and English. Consultees can choose to respond in Welsh or English.	N/A	N/A

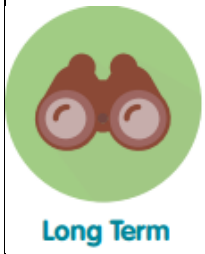
phone, email, twitter, Facebook, letters, forms, website transactions etc.	The admissions portal promotes the options for Welsh medium education.		

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 Goals	**Describe the positive impacts the proposal has on the wellbeing goal.**	**Describe the negative impacts the proposal has on the wellbeing goal.**	**What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?**
A prosperous Wales *An innovative, productive and low carbon society which recognises global limits and uses resources efficiently (including acting on climate change); a skilled and well-educated population in an economy which generates wealth and provides jobs.*	The proposal will increase the length of sessions families can access, hence enabling parents to return to work or training. It also provides an opportunity to support the growth and sustainability of a small business within the community.	No impact	N/A
A resilient Wales *Maintains and enhances a biodiverse natural environment with healthy functioning ecosystems that support social, economic and ecological resilience and the capacity to adapt to change (for example climate change).*	No impact	No impact	N/A
A healthier Wales *People's physical and mental well-being is maximised and in which choices and behaviours that benefit future health are understood.*	No impact	No impact	N/A

Well Being Goals	Describe the positive impacts the proposal has on the wellbeing goal.	Describe the negative impacts the proposal has on the wellbeing goal.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
A Wales of cohesive communities *Communities are attractive, viable, safe and well connected*	There are currently limited childcare options available in this community. Replacing the school nursery with a non-maintained setting would increase the services available to the community and make it more attractive to working families.	There are less options within the community for those families that are specifically looking for a LA maintained school nursery	Information can be provided to parents to explain that approved non-maintained providers are required to follow the Curriculum for Wales in the same way as school nurseries.
A globally responsible Wales *Taking account of impact on global well-being when considering local social, economic and environmental wellbeing*	Families requiring childcare will be able to access it within their locality, so they will be able to walk rather than needing to travel. by car; hence, this will reduce their carbon footprint.	No impact	N/A
A Wales of vibrant culture and thriving Welsh language *Promotes and protects culture, heritage and the Welsh language, and participation in the arts, and sports and recreation*	No impact	No impact	N/A
A more equal Wales *People can fulfil their potential no matter what their background or circumstances. (This includes the protected characteristics listed in Section 1 above. You can add more detail there. Don't forget to think about the impacts on poverty)*	Providing wrap around childcare will enable parents/carers to return to work, hence giving them the opportunity to become more financially secure and prevent them from living in poverty	No impact	N/A

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

Sustainable Development Principles	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?
 Balancing short term need with long term and planning for the future *We are required to look beyond the usual short term timescales for financial planning and political cycles and instead plan with the longer term in mind (guidance says at least 10 years, but preferably 25)*	We have seen an upward trend towards parents choosing non-maintained settings over school nurseries to access their early education. The demand for childcare from a younger age is also increasing and a non-maintained setting is more flexible and is able to provide for a wider age range.	N/A
 Working together with other partners to deliver objectives	The success of this proposal is dependent on a strong collaboration between the Local Authority, the school and the non-maintained setting. There is already an established relationship in place, and all parties are committed to working together to achieve a positive outcome for the children and their families.	Non-maintained setting will be invited to school events and will be seen as an extension to the school community.

Sustainable Development Principles	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?
 Involving those with an interest and seeking their views *Who are the stakeholders who will be affected by your proposal? Have they been involved? Do those people reflect the diversity of the area which is served?*	The school governing body are aware of this proposal and have had an opportunity to ask questions and they are in support.	Other stakeholders include parents/carers, school staff, other schools and non-maintained settings. They will all be informed of the consultation process and will have an opportunity to respond with their views.
 Putting resources into preventing problems occurring or getting worse	Estyn have recently inspected Durand Primary School and praised the quality of teaching and learning in most classes, however they did report that the classes for their youngest learners was an area for development. The non-maintained setting would receive specialist Early Years support from the EAS.	N/A
 Considering impact on all wellbeing goals together and on other bodies *Focus here on how you will better integrate the Wellbeing Goals impacts on people, economy and environment described above and balance any competing impacts. Think about impacts the proposal may have on other organisations*	There is a possibility that this may have a negative impact on schools in the nearby area that don't have wrap around provision on site. It could also impact other childcare providers in the area.	We will continue to work with schools and providers to develop wrap around provision on site or to arrange with nearby settings or childminders to collect from the school.

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

	Describe any positive impacts your proposal has	Describe any negative impacts your proposal has	What will you do/ have you done to mitigate any negative impacts or better contribute to positive impacts?
Safeguarding *Safeguarding in this context applies to children (not yet reached 18th birthday) and adult at risk (identified as a person over the age of 18 and who (a) is experiencing or is at risk of abuse or neglect, (b) has needs for care and support (whether or not the authority is meeting any of those needs), and (c) as a result of those needs is unable to protect himself or herself against the abuse or neglect or the risk of it.) Safeguarding is about ensuring that everything is in place to promote the well-being of children and adults at risk, preventing them from being harmed and protecting those who are at risk of abuse and neglect.*	The non-maintained setting is required to comply with the MCC Safeguarding Policy. All staff have received safeguarding training at a level that is relevant to their role and they have a named Designated Safeguarding Officer (DSO) and Deputy DSO.	The setting is based on the school site and will operate during school hours, so this could impact on existing safeguarding arrangements.	The Headteacher has had sight of DBS checks for staff in the non-maintained setting and they have arrangements in place to safeguard both pupils in the school and children in the setting. The Headteacher will have regular meetings with the setting to discuss any concerns or issues. The setting will also receive monitoring visits from Local Authority Officers and safeguarding will be discussed as part of these visits. They will also be required to complete a safeguarding audit (SAFE) every two years.

Corporate Parenting, Care Leavers and Care Experienced People *This relates to those children who are 'looked after' by the Local Authority either through voluntary arrangements with their parents or through a Court Order. The Council has a corporate duty to consider 'children who are looked after especially and to promote their welfare (in a way, as though those children were their own). It also relates to care experienced people (people who have spent time in care when they were under 18 years old). The Council must consider how to help overcome the disadvantages and discrimination they experience.*	N/A	N/A	N/A

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

This will include your baseline position, measures and studies that have informed your thinking and the recommendation you are making. It should allow you to identify whether any changes resulting from the implementation of the recommendation have had a positive or negative effect. Key strategies and documents that may help you include: Community and Corporate Plan, Asset Management Strategy, Digital and Data Strategy, Medium Term Financial Strategy, People Strategy, Socially Responsible Procurement Strategy: Enabling Strategies See Guidance for more examples.

The development of this proposal has been based mainly on parental demand, which is measured through data around take up of places and enquiries received. It incorporates the council's core values, particularly in relation to flexibility and elements of the Community and Corporate Plan in terms of Monmouthshire being a Learning Place and a Thriving and Ambitious Place to live and work.

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

This section should summarise the key issues arising from the evaluation. This summary must be included in the Committee Report Template

The main positive impacts of this proposal is that families will be able to access early education and wrap around childcare in one setting. This will enable parents/carers to return to work or training, whilst providing continuity of care for the children, giving them the best possible start in life.

There are very few negative impacts of this proposal and mitigating actions have been put in place for any that have been identified.

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?

10. **VERSION CONTROL: The Integrated Impact Assessment 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 *e.g. budget mandate, DMT, SLT, Scrutiny, Cabinet etc*	Date considered	Brief description of any amendments made following consideration
1	*Cabinet*	21.01.2026	

monmouthshire
sir fynwy

SUBJECT: **SALE OF TWO FARM COTTAGES AT LEECHPOOL HOLDINGS**

MEETING: **CABINET**

DATE: 21st January 2026

DIVISION/WARDS AFFECTED: Portskewett

1. PURPOSE:

1.1 To seek approval for the disposal of two vacant farm cottages located in Leechpool Holdings, Portskewett, identified as surplus to requirements following internal review with services that no longer have an identified need.

2. RECOMMENDATIONS:

That Cabinet:

2.1 Agrees that the two cottages are declared surplus to requirements and can be disposed of on the open market to realise a capital receipt and relieve the Council of costs associated with vacant property.

3. KEY ISSUES:

3.1 The two cottages were subject to a decision by Cabinet on 17th January 2024 which approved the repurposing of vacant agricultural cottages, including for such purposes as temporary accommodation for homelessness and social services residential housing as supported accommodation.

3.2 Due to the cottages general condition and rural, semi-isolated locations the two cottages were subsequently deemed unsuitable for both Housing, Adult and Children's Service's needs, and with no other alternative use identified, they are considered surplus to requirements.

3.3 There are currently six vacant farm cottages held as accommodation options for farm tenants. These cottages provide accommodation options for Council farm tenants if a change of circumstances arises, on the expiry or termination of their tenancy, or due to retirement. There is currently no known demand for the cottages for this use, and no demand is anticipated with other housing options generally preferred.

3.4 The cottages are in poor condition having been vacant for some time and would require extensive refurbishment works to meet current housing and energy performance standards.

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

4.1 The Equality and Future Generations Evaluation Assessment seen in Appendix One, details the following positive impacts which include:

- An opportunity to affect the open market housing supply in the locality, thereby providing an increased opportunity for local people to purchase a home within the community they grew up in.
- The Council will benefit from a Capital receipt.
- The Council will be relieved of costs associated with vacant properties.
- Makes best use of Council property assets bringing vacant properties back into use.

4.2 There are no negative impacts associated with this proposal.

5. OPTIONS APPRAISAL

5.1 An options appraisal has been undertaken in Table One below and can be summarised as follows:

Table One – Options Appraisal

Option	Positives	Negatives	Recommended?
Dispose of the farm cottages	The Council will be relieved of all liabilities associated with the cottages. The Council will receive a capital receipt.	Loss of potentially suitable accommodation for use by retiring farm tenants, although other farm cottages remain available if the need arises.	Yes
Retain the farm cottages 1.Repurpose farm cottages to meet core Council objectives	Provides accommodation to contribute towards meeting policy objectives, including the need for temporary accommodation.	Cottages are located in semi-rural locations with no immediate access to facilities and services. Cottages require significant investment to bring accommodation up to appropriate living standards. No demand for these cottages from MCC Services.	No
2. Maintain the cottages as vacant in the unlikely event they are needed for farm tenants	Offers an option if and when such a need arises.	Vacant properties fall into disrepair and carry significant costs. Payment of Council Tax premiums whilst property is empty. Damage to reputation for holding vacant properties when there is such a demand for housing across the County. Significant investment required to meet current housing and energy performance standards.	No

3. Let the cottages under a Farm Business Tenancy (FBT) or similar agreement	Offers accommodation for suitable tenants under its current use. Generates revenue stream via rent of approx. £25k pa. Relieves Council of vacant property costs.	Insufficient land available to ensure a viable holding can be achieved. Reduced rent (cannot attract market rent as unable to let on the open market on Assured Shorthold Tenancy agreement) Improvement works at cost to Council as WG funding unavailable.	No

6. EVALUATION CRITERIA

The decision to declare the properties surplus and for sale will be reviewed 12 months following Cabinet decision. It is envisioned the sale of both properties will complete during this period.

7. REASONS:

7.1 The cottages are held as options for Council tenants who may be in need of rehoming due to a change in personal circumstances (i.e. retirement or the passing of a tenant or their partner). Such occasions are few and far between and generally not sought by the tenants due to alternative preferred housing options.

7.2 Of the farm cottages Cabinet previously approved for repurposing, numbers 5 and 28 Leechpool Holdings are considered unsuitable as temporary or supported accommodation. Two other cottages (3 and 23 Leechpool Holdings) are considered suitable for alternative small scale market garden type operations and could be let on the open market by Estates via a Farm Business Tenancy Agreement. The cottages would require improving to bring up to lettable standards, with works managed by Landlord Services and funded by the County Farms Maintenance Budget. Another formerly vacant cottage has been refurbished and is now let as temporary accommodation via MCC Housing. The others remain vacant and held as accommodation options for farm tenants.

8. RESOURCE IMPLICATIONS:

8.1 The disposal of the two cottages will generate a capital receipt in the region of £700k.

8.2 The Council are currently paying vacant property costs including council tax. The proposed disposal of two cottages will relieve MCC of this financial liability.

8.3 Landlord Services will ensure the two retained vacant properties are refurbished in line with WG accommodation standards and Council Asset Management Plan including improved energy efficiency measures. The cottages will be occupied, maintained and will generate a financial return in the form of rent.

9. CONSULTEES:

County Councillor Ben Callard (Cabinet Member for Resources)

Senior Leadership Team

County Councillor Lisa Dymock (Portskewett)

Nicholas Keyse Head of Landlord Services

Ian Bakewell - Housing and Communities Team

Social Services (Adult & Children's Teams)

MCC Legal Services

10. BACKGROUND PAPERS:

Appendix 1 – Equality and Future Generations Evaluation

Appendix 2 – Property Plans

11. AUTHOR:

Ben Thorpe – Development Surveyor

Emily Hayes – Asset Surveyor

12. CONTACT DETAILS:

Tel: 01633 644773
E-mail: benthorpe@monmouthshire.gov.uk / emilyhayes@monmouthshire.gov.uk

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

Name of the Officer completing the evaluation Ben Thorpe **Phone no:** 01633 644964 **Email:** benthorpe@monmouthshire.gov.uk	**Please give a brief description of the aims of the proposal** The proposed disposal of two vacant farm cottages located in Leechpool Holdings, Portskewett, identified as surplus to requirements following internal review with services that no longer have an identified need.
Name of Service area Landlord Services – Estates	**Date** 21st January 2026

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	None	None	None
Disability	None	None	None
Gender reassignment	None	None	None

Marriage or civil partnership	As above	As above	As above
Pregnancy or maternity	As above	As above	As above
Race	As above	As above	As above
Religion or Belief	As above	As above	As above
Sex	As above	As above	As above
Sexual Orientation	As above	As above	As above

2. The Socio-economic Duty and Social Justice

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

	Describe any positive impacts your proposal has in respect of people suffering socio economic disadvantage	**Describe any negative impacts your proposal has in respect of people suffering socio economic disadvantage.**	**What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?**
Socio-economic Duty and Social Justice	None	None	None

3. Policy making and the Welsh language.

How does your proposal impact on the following aspects of the Council's Welsh Language Standards:	Describe the positive impacts of this proposal	Describe the negative impacts of this proposal	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts
Policy Making Effects on the use of the Welsh language, Promoting Welsh language Treating the Welsh language, no less favourably	None	None	N/A
Operational Recruitment & Training of workforce	None	None	N/A
Service delivery Use of Welsh language in service delivery Promoting use of the language	None	None	N/A

4.

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	**Positive:** Positively contributes to local economy providing housing options for people looking to live and work in Monmouthshire. The construction improvement works	None

	required may contribute to the local economy through the supply of materials and labour. **Negative:** None	
A resilient Wales Maintain and enhance biodiversity and ecosystems that support resilience and can adapt to change (e.g., climate change)	**Positive:** N/A **Negative:** N/A	There is the option to increase the energy efficiency standards of the properties through the refurbishment works.
A healthier Wales People's physical and mental wellbeing is maximized, and health impacts are understood	**Positive:** Positively contributes to the health of people. Good housing supports well-being. **Negative:** N/A	None
A Wales of cohesive communities Communities are attractive, viable, safe, and well connected	**Positive:** Positively contributes by effectively increasing housing supply thereby helping local people remain in their home communities. Increased availability of housing in the area provides opportunities for young people looking to remain in the communities where they grew up. **Negative:** N/A	N/A
A globally responsible Wales Taking account of impact on global well-being when considering local social, economic, and environmental wellbeing	**Positive:** Refurbishment works will likely improve and maximise the energy efficiency of the properties to reduce future energy costs and loss. **Negative:** N/A	N/A.
A Wales of vibrant culture and thriving Welsh language Culture, heritage, and Welsh language are promoted and protected. People are encouraged to do sport, art, and recreation	**Positive:** N/A **Negative:** N/A	N/A
A more equal Wales People can fulfil their potential no matter what	**Positive:** N/A **Negative:** N/A	N/A

their background or circumstances		

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?
Balancing short term need with long term and planning for the future	Yes. There is a surplus of vacant farm cottages. The proposed disposal of two will bring them back into use, providing housing on the open market whilst not impacting the availability of other housing for Council farm tenants.	No
Working together with other partners to deliver objectives	No	N/A
Involving those with an interest and seeking their views	Estates have consulted MCC Services that may have a need for the vacant cottages.	N/A
Putting resources into preventing problems occurring or getting worse	If the vacant properties remain vacant for an extended period of time they will fall into disrepair and be subject to vandalism and break-in. The cottages would need securing and would become a blight on the landscape of which would upset local communities and in particular immediate neighbours.	Maintain the gardens and grounds until their disposal to reduce the unkempt visual impact of the cottages.
Considering impact on all wellbeing goals together and on other bodies	The proposal indirectly positively impacts on well-being, for example, has the potential for additional good quality accommodation in the area, supporting well-being and reducing the Council's financial liabilities.	N/A

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	None.	None.	N/A
Corporate Parenting	None.	None.	N/A

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

The legislation and good practice which have informed the policy revisions are:

- Section 123 of the Local Government Act 1972
- Asset Management Strategy

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?

Positive -

The positive impacts of this proposal are:

- An opportunity to affect the open market housing supply in the locality, thereby providing an increased opportunity for local people to purchase a home within the community they grew up in.
- The Council will benefit from a Capital receipt.
- The Council will be relieved of costs associated with vacant properties.
- Makes best use of Council property assets bringing vacant properties back into use.

Negative

None.

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

What are you going to do	When are you going to do it?	Who is responsible

Prepare marketing/sales particulars and prepare tender packs. Engage Property Services colleagues regarding the improvement works to the two cottages proposed to be retained and let on an FBT.	Immediately following Cabinet decision.	Estates.
Consider and plan next steps and responsibilities.	On going	Estates.

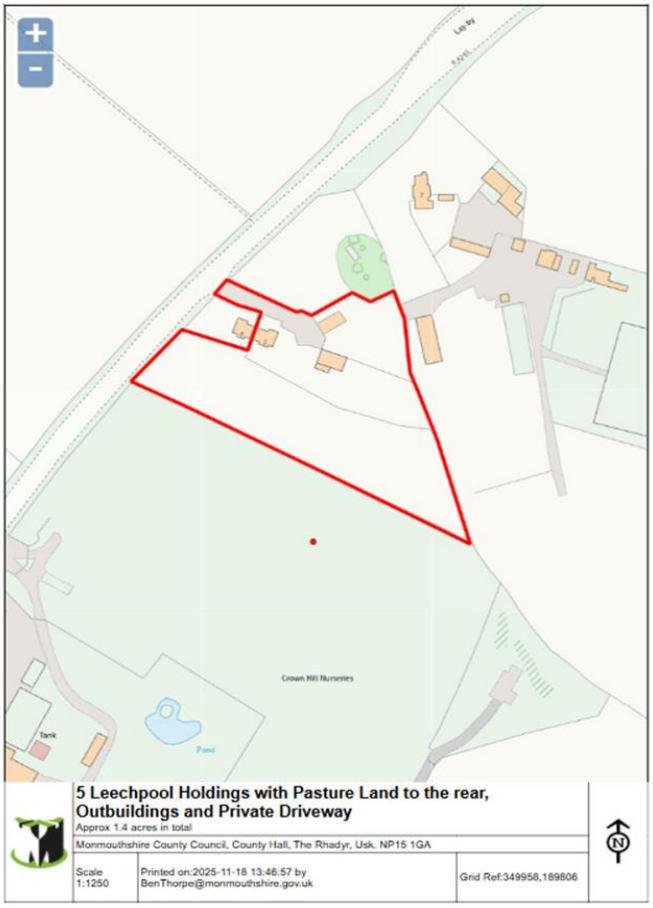
10. VERSION CONTROL: The Equality and Future Generations Evaluation should be used at the earliest stage, such as informally within your service, and then further developed throughout the decision-making process. It is important to keep a record of this process to demonstrate how you have considered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

Version No.	Decision making stage	Date considered	Brief description of any amendments made following consideration
1.	SLT/Cabinet Members	January 2026	

Appendix 2

Property Plan





SUBJECT:	**S106 CHURCH ROAD AND CRICK ROAD ALLOCATION OF S106 OFFSITE RECREATION FUNDING**
MEETING:	**CABINET**
DATE:	**21ST JANUARY 2026**
DIVISION/WARDS AFFECTED:	**CALDICOT, PORTSKEWETT, SEVERNSIDE**

1. PURPOSE:

1.1 To seek Cabinet approval for the allocation of Section 106 offsite recreation funding received from the Church Road and Crick Road developments in Caldicot and Portskewett, towards projects identified as named beneficiaries within these agreements.

2. RECOMMENDATIONS:

2.1 That Cabinet approves the allocation of £144,000 from the Church Road S106 offsite recreation contribution to the Caldicot Greenway/Multi-User Route (MUR) project.

2.2 That Cabinet approves the allocation of £167,000 from the Crick Road S106 offsite recreation contribution to the Caldicot Greenway/MUR project, subject to receipt of funds.

3. KEY ISSUES:

S106 Background

3.1 The Church Road and Crick Road residential developments in Caldicot and Portskewett have each been subject to Section 106 agreements, which set out the financial contributions to be made by the developers to support local infrastructure, recreation, and community facilities.

3.2 The Section 106 agreement for Church Road (dated 17 April 2019 - see attached Appendix 1) required the developer to pay a range of contributions, including a specific off-site recreation facilities contribution. The agreement states the funding should be used for one or a combination of four named beneficiary projects which includes:

1) Caldicot Greenway Scheme,
2) Caldicot Castle Country Park,
3) Hall Park Open Space,
4) Caldicot Town Centre Regeneration Project.

The total off-site recreation contribution was calculated based on the final number of market dwellings delivered, with payments made in two instalments: one prior to occupation of 50% of the market dwellings, and the second prior to occupation of 80% of the market dwellings. The total off-site recreation funding received from Church Road was £170,336. At its meeting on 5th May 2024 (see attached Appendix 3) Cabinet decided:

a) To allocate £25,880 towards the cost of upgrading the play area at Castroggi (also known as the Hall Park Open Space),
b) To create a capital budget of £144,456 in 2024/25 (the remaining balance of the S106 offsite recreation contribution from Church Road) to fund works at one or more of three beneficiary sites, namely:
    - the Caldicot Greenway Scheme
    - Caldicot Castle Country Park
    - the Caldicot Town Centre Regeneration Scheme
c) To delegate to the Chief Officer for Customer, Culture and Wellbeing in consultation with the Cabinet Member for Equalities and Engagement, a decision on how the remaining funding of £144,456 should be spent, to be taken following consultation with the local Caldicot county council members and Caldicot Town Council.

3.1 The Section 106 agreement for Crick Road (dated 29 March 2019 – see attached Appendix 2) required the developer to pay an “Adult Recreation Contribution” of £400,000 to Monmouthshire County Council. The agreement states the funding should be used for one or a combination of four named beneficiary projects which includes:

1) Developing the former MOD railway as a footway/cycle path (creating links from the property to Caldicot Country Park and the Cornfield Project),
2) improvements to Caldicot Castle Country Park,
3) the Caldicot Regeneration Scheme,
4) Cornfield Project.

The agreement stipulated that the contribution should be paid prior to completion or occupation (whichever was the soonest) of 50% of the dwellings. This sum is index-linked and ring-fenced for the specified projects, ensuring that the funding is used to deliver tangible benefits for the local community.

3.2 A decision now needs to be made to ensure that the significant Section 106 offsite recreation contributions from the Church Road and Crick Road developments are allocated in a way that delivers maximum benefit to the community, supports active

travel and recreation, and complies with the terms of the S106 agreements. The Council must make decisions that balance the needs of residents, the ambitions of the Council's strategic plans, and the requirements set out in the legal agreements with developers.

3.3 Proposed recipient: Caldicot Greenway and Multi-user route

3.4 The Caldicot Greenway/MUR is a transformative active travel corridor that links the former munitions railway line, now a dedicated path for walkers and cyclists between Portskewett and Caldicot, with the wider footpath network in Caldicot Castle Country Park, including a vital connection out onto Church Road (see Appendix 4 – Map and photo's). This strategic route forms part of the Severnside spinal network, designed to connect residents of Caldicot, Caerwent, Portskewett, Crick, Sudbrook, and the broader Severnside area, to local facilities, employment, education, and retail. In addition, the route acts as an important connection for key destinations such as Caldicot Castle and Country Park and for local users and visitors to access the Gwent Levels and the Wales Coast Path. By enabling safe, traffic-free access for journeys under three miles, the Caldicot Greenway/MUR supports the Council's ambition to create "20-minute neighbourhoods" and foster cohesive, sustainable communities where active travel is the preferred choice.

3.5 The significance of the MUR to the community is strongly evidenced by stakeholder and public feedback. A recent public consultation exercise in August/September this year (which reached over 460+ residents and businesses) generated significant public support indicating over 65% of respondents supporting the project and only 12% opposed (see Appendix 5 Stakeholder Highlights and Appendix 6 for the full report). Consultation responses show that the majority of residents intend to use the route for leisure, with many also seeing its value for commuting and school journeys. Accessibility is a key theme: respondents highlighted the need for a flat, even surface and seating options to support users with reduced mobility and welcomed the route's potential to remove barriers such as gates that currently limit access for wheelchair and mobility scooter users. The Caldicot Greenway/MUR is also valued for its natural setting, with requests for planting, seating, and clear signage to enhance both the visual appeal and inclusivity of the route. Stakeholders emphasised the importance of a bound surface suitable for all users, and the route's ability to provide safe, traffic-free access to local destinations such as Severn View residential park. Overall, the consultation demonstrated strong community support for the Caldicot Greenway/MUR, recognising its role in promoting health, wellbeing, and social inclusion for all.

3.6 To date the Caldicot Greenway/MUR was able to benefit from Active Travel (AT) grant funding. Last year the Welsh Government funding was reduced, and the criteria was changed. Caldicot Greenway/MUR has therefore sought alternative funding to complete the connection through the Castle and Country Park to Caldicot via a combination of Shared Prosperity Funding (SPF), Active travel core funding and S106 funding where it is a named beneficiary.

3.7 **Proposed S106 Church and Crick Road Offsite recreational funding allocation**

3.8 As stated above the Church Road S106 agreement has a remaining £144,456 of funding to be allocated and Crick Road S106 has £400,000 yet to be determined.

3.9 As a named beneficiary of both S106 offsite recreational allocations the Caldicot Greenway/MUR project represents a vital opportunity to complete the remaining access for all multi-user route, which aims to link the former munitions railway line, now a shared active travel path, with Caldicot Castle Country Park and the wider footpath network. This project will significantly improve connectivity and access for walkers and cyclists, supporting the Council's objectives for sustainable transport and healthy communities as set out above. The estimated cost of the Caldicot Greenway/MUR project is £650,000. To date, £190,000 from Active Travel core funding and £150,000 from the Shared Prosperity Fund have been secured, but a further £310,000 is required to enable the project to proceed.

3.10 The case for allocating the remaining £144,456 from Church Road and £167,000 from Crick Road S106 funds to the Caldicot Greenway/MUR project is strong and aligns with the requirements of the S106 legal agreements. These allocations will:

- Safeguard existing external funding – maximising value for money.
- Deliver benefits to two named recipients from the S106 agreements.
- Deliver on the councils' strategic priorities and commitments given in the Green Infrastructure Strategy to enhance connectivity and provide multifunctional green corridors linking communities and greenspaces with access to nature. (Green-Infrastructure-Strategy-Volume-1 adopted 2024) and the Countryside Access Improvement Plan (2020-30) to connect communities to deliver high-quality accessible routes for walkers, cyclists and mobility users and support health and wellbeing.
- Deliver on public demands to provide a route that is accessible for all (following stakeholder and public consultation).
- Link existing communities in Caldicot and Portskewett providing shared access to employment, education, leisure and retail.
- Provide the link to the development north of Crick Road proposed in the RLDP.
- Act as a key link promoting access to destinations such as the Castle and Country Park, Gwent Levels and Wales Coast Path.
- Ensure delivery of the S106 legal agreement within a timely fashion towards a ready to go project.

3.11 The allocation of £167,000 will provide a contribution that would cover two named recipients of the S106 Crick Road agreement comprising 42% of the total allocation leaving 58 % £233,000 from the Crick Road S106 offsite contribution. During the

consultation session with the Severnside Forum on 8th December (Appendix 9) members provided alternative projects where the S106 funding could be utilised. Members made reference to projects to support the regeneration of the Caldicot Town Centre and the Cornfield Project both of which are beneficiaries of the Crick Road S106 agreements. Work is ongoing to establish costs and deliverability of projects including Skate Park improvements and redevelopment of the toilet block at Portskewett and Sudbrook Recreation Hall which were discussed at the Severnside Members consultation meeting (Appendix 9). Discussions with local members will continue to determine how the remaining £233,000 is allocated. Where funds are allocated to Caldicot Town Centre regeneration, priorities will be assessed by Placemaking Group of Caldicot councillors.

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

3.13 An Integrated Impact Assessment incorporating equalities, future generations, (Welsh language and socio-economic duty) is attached in Appendix 7. The evaluation has confirmed that the Caldicot Greenway/MUR will have a large range of positive effects, including making active travel more accessible for people of all ages and abilities, improving health and wellbeing, fostering social inclusion, and supporting economic regeneration in areas of deprivation. The scheme is designed to be inclusive, with no direct negative impacts identified for protected characteristics, and it actively promotes the Welsh language and culture. The main negative impacts relate to delays over funding confirmation and inability to deliver the full route, and potential increased costs together with possible environmental disruption during construction, but these are being addressed through careful planning, ecological surveys, and ongoing stakeholder engagement. Overall, the proposal is expected to deliver substantial benefits for the community, with mitigation measures in place to minimise any adverse effects.

4. OPTIONS APPRAISAL

Options	Benefits	Risks	Comments/mitigation
Do nothing	Detailed scheme design completed and consents in place. Existing secured funding will enable a small section from the end of existing Greenway to connect with the B4245 to be constructed, and compound restored (see Green Route Appendix 8).	• Unable to complete proposed project with current funding. • Not deliver on a publicly consulted scheme that has received significant community support. • Loss of public trust in delivering projects. • Poor value for money – opportunity to	• Not recommended

		utilise match funding to deliver a completed access for all connected scheme for residents. If further funding arose increased costs and Planning and SAB consent would need to be reapplied for to set up the compound for access and machinery. • Higher construction costs due to reduced nature of scheme and stop/start clauses. • Extreme weather events delaying construction. • Planning and SAB delays.	
Allocate reduced funding (limited ability to deliver beyond the Green Route under 'do nothing' due to engineering and project management costs)	As above - the jump to deliver beyond the Green Route due to engineering and project management costs makes additional incremental delivery difficult.	As above	Not recommended
Allocate full requested funding	• Completion of full scheme. • Deliver on a publicly consulted scheme that has received significant community support. • Gain public trust in delivering a scheme that has been included in council plans and priorities and consulted upon	• Delays in decision making for allocation of funding. • Higher construction costs due to clause breaks and mitigation in tender contract to reduce impacts of funding shortfalls. • Extreme weather events delaying construction.	Recommended

	and where clear demand has been identified. • Deliver on the council's equality requirements by providing a safe and accessible route for all. • Value for money by maximising our match funded secured grant allocations and removing the need for additional costs to reinvigorate planning and sab consents. • Costs capped to market levels due to funding certainty.	• Planning and SAB delays.	

5. EVALUATION CRITERIA

5.1 Monitoring and Evaluation is ongoing and to be provided as part of the grant requirements together with a project programme for construction and delivery (see attached Appendix 8).

6. REASONS:

6.1 Approval of the Caldicot Greenway and Multi-User Route S106 funding allocation would enable the completion of the Caldicot Multi-user route to provide a transformative active travel corridor linking communities across Severnside from Caldicot to Portskewett connecting communities with key destinations such as Caldicot Castle, the Gwent Levels, and the Wales Coast Path.

6.2 Completion of the scheme will enable safe, traffic-free journeys under three miles, and will supports the Council’s ambition for 20-minute neighbourhoods, promoting health and wellbeing opportunities for residents and visitors alike. Approval will deliver a publicly consulted scheme that has enjoyed clear community support and is embedded in council plans and priorities while demonstrating the Council’s commitment to equality by creating a safe, accessible route for all users.

6.3 The scheme offers excellent value for money by leveraging secured match-funded grants which are essential to spend by the end of this financial year and avoiding additional costs that would arise from taking a phased approach.

7 RESOURCE IMPLICATIONS:

7.1 Approval of full S106 funding will maximise use of full currently secured grant funding enabling delivery of schemes, no additional resource implications other than officer's time to oversee delivery of scheme. Risks to scheme delivery have been highlighted above.

8 CONSULTEES:

8.1 A cabinet report was submitted on May 5th, 2024, in relation to the S106 Church Road allocation. Members were consulted on the allocation of the S106 Church Road offsite recreation funding. Section 3 Key Issues sets out the decision, leaving the remaining allocation of £144, 456 to be determined.

8.2 On 8th December 2025, Severnside members were consulted in a workshop on the allocate the remaining funding from the S106 Church Road (£144,456) and S106 Crick Road funding (£167,000). Details of the proposal are described in Section 3 of this report, Key Issues. Minutes of the meeting and presentation have been attached for transparency (see Appendix 9 and 10).

8.3 A comprehensive engagement strategy has been undertaken to determine support and appropriateness of the proposal:

1) Meetings and workshops with council staff in Planning and SAB, together with Ecology, PROW, Castle staff, and external organisations such as NRW and Cadw as part of a full and comprehensive series of engagement exercises.

2) Full public consultation was carried out during August /September 2025 to understand local views prior to the scheme design being completed and submitted for Planning/SAB. Significant public support was received with over 65% of respondents supporting the project and only 12% opposed (see Appendix 5 and 6). The majority see the route as a valuable leisure and community asset.

<u>Summary of contact:</u>

- 460+ people reached through letters, emails and drop-in sessions and workshops
- 34 survey responses (online/paper)
- 2 public drop-in sessions (100+interactions)
- Letter drop to 300+ homes
- Emails to 46 local groups and businesses

8 BACKGROUND PAPERS:

Appendix 1 – S106 Church Road Agreement
Appendix 2 – S106 Crick Road Agreement
Appendix 3 – Cabinet Decision 5th May 2024
Appendix 4 – Map and Photo's
Appendix 5 – Stakeholder consultation highlights
Appendix 6 – Stakeholder consultation full report
Appendix 7 – Equality & Future Generations Evaluation (Integrated Impact assessment)
Appendix 8 – Green Route & Programme Delivery
Appendix 9 – Minutes of Severnside members meeting 8.12.25
Appendix 10 –Presentation Severnside members meeting 8.12.25

9 AUTHOR:

Colette Bosley, Countryside, Destination & Environment Manager

10 CONTACT DETAILS:

Tel: 01633 644852
E-mail: colettebosley@monmouthshire.gov.uk

TOWN LEGAL LLP

DATED 17th April 2019

(1) MONMOUTHSHIRE COUNTY COUNCIL

(2) HARVINGTON PROPERTIES LIMITED

(3) CHARLES LEWIS HEAVEN, CLAIRE HEAVEN-ROBERTS AND MELANIE JAYNE WORGAN

AGREEMENT

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under section 106 Town and Country Planning Act 1990

relating to land at

Church Farm, Church Road, Caldicot

THIS AGREEMENT is made the 17th day of April 2019

BETWEEN

(1) MONMOUTHSHIRE COUNTY COUNCIL of County Hall, The Rhadyr, Usk NP15 1GA ("**the Council**");

(2) HARVINGTON PROPERTIES LIMITED (company number 02069071) whose registered address is 417 Finchley Road, Hampstead, London, NW3 6HJ (the "**First Owner**"); and

(3) CHARLES LEWIN HEAVEN of Hawthorn House, Blackrock Road, Portskewett, Monmouthshire NP26 5TW, CLAIRE HEAVEN-ROBERTS of 1 Southbrook Cottage, Silver Street, Thorverton, Devon, EX5 5LT, and MELANIE JAYNE WORGAN of Cropthorne Farm, Main Road, Portskewett, Monmouthshire NP26 5TR (together, the "**Second Owner**").

RECITALS

(A) The Council is the local planning authority for the purposes of the Act for the area in which the Land is situated and the authority entitled to enforce the obligations contained in this Agreement.

(B) The First Owner is the freehold owner of that part of the Land registered at the Land Registry under title number WA697340.

(C) The Second Owner is the freehold owner of that part of the Land registered at the Land Registry under title numbers WA550306 and CYM449939. The Second Owner is also the freehold owner of the Adjacent Fields registered at the Land Registry under title numbers WA550306 and CYM449939. Claire Heaven-Roberts of the Second Owner was formerly known as Claire Louise Heaven-Ince, which name is listed on the title numbers WA550306 and CYM449939.

(D) The First Owner submitted the Application to the Council and the Council resolved at a development committee meeting on 5 March 2019 to grant the Permission subject to the First Owner and Second Owner entering into this Agreement.

(E) The Council is satisfied that the planning obligations contained in this Agreement are necessary to make the Development acceptable in planning terms, directly related to the Development and fairly and reasonably relate in scale and kind to the Development.

1. **DEFINITIONS AND INTERPRETATION**

1.1 In this Agreement, the following words and expressions have the following meanings:

Acceptable Costs Guidance	means the Acceptable Cost Guidance issued by the Welsh Government to RSLs as guidance on the acceptability of total scheme costs for grant purposes as at the date of a binding contract between the Owner and the RSL (or Council as appropriate);
Act	means the Town and Country Planning Act 1990 (as amended);
Adjacent Fields	means the land owned by the Second Owner shown edged yellow on Plan 1;
Affordable Housing	means subsidised housing that will be available to people who cannot afford to occupy dwellings generally available on the open

	market, including housing available for rent at levels set by the Welsh Government;
Affordable Housing Dwellings	means the Dwellings constructed as part of the Development for Affordable Housing;
Agreement	means this agreement;
Application	means the application for planning permission registered by the Council under reference number DM/2018/00880;
Approved Affordable Housing Mix	means the approved mix of Affordable Housing Dwellings as set out in Schedule 4 of this Agreement;
Community Park	means the 4.68 hectares of land including existing woodland shown edged purple on Plan 1;
Community Park and Green Infrastructure Maintenance Contribution	means the sum of **£233,152.61** (not indexed) as a contribution towards the maintenance of the Community Park and the Green Infrastructure over a period of 20 years;
Development	means the development of the Land in accordance with the Permission;
DQR	means the Development Quality Requirements guidance published by the Welsh Government as at the date of this Agreement;
Dwelling	means a residential unit constructed as part of the Development;
Education Contribution	means the sum of **£345,140** indexed (calculated on the basis of a shortfall of 20 primary school spaces) as a contribution towards educational facilities at Castle Primary School, Church Road or other primary schools in the vicinity;
Hornet Robberfly Management Plan	means a plan setting out measures to be implemented over a period of 10 years on the Adjacent Fields to safeguard and protect the habitat of the hornet robberfly, which shall include details of cattle grazing, stocking densities and habitat improvements that will be undertaken;
Green Infrastructure	means those parts of the Land, together comprising no less than 1.03 hectares (but not including the Community Park or the Net Developable Area), which are to be laid out as green spaces (e.g. grass verges, planting, trees, hedgerows, wildflower meadow, mown paths), the precise location of which is to be agreed pursuant to condition 1 of the Permission;
Green Infrastructure Plan	means a plan setting out the timescales for delivery of the Green Infrastructure, and any amendment to such plan as may be agreed by the Council from time to time;

Implementation	means the carrying out pursuant to the Permission of a material operation as defined in section 56(4) of the Act save that for the purposes of this Agreement none of the following operations shall constitute a material operation: (a) archaeological investigations or site inspections or investigations; (b) site or soil surveys; (c) decontamination or remedial works; (d) demolition or site clearance; (e) the laying or diversion of services; (f) the erection of a site compound; (g) the erection of temporary fences or hoardings; (h) the display of advertisements including the erection of advertisement hoardings; (i) interim landscaping work; (j) any works associated with temporary access; (k) any works associated with access to the Adjacent Fields or Retained Land; and (l) works in connection with the prevention of harm to protected species, (and **"Implement"**, **"Implemented"** and **"Implementation Date"** shall be construed accordingly);
Indexed	means Indexed linked in accordance with clause 6;
Land	means the land at Church Farm, Caldicot, shown edged red on Plan 2;
Local Highways and Sustainable Transport Contribution	means the sum of **£130,000** Indexed as a contribution towards sustainable transport initiatives and highway improvements in Caldicot;
Market Dwellings	means the Dwellings constructed as part of the Development which are not Affordable Housing Dwellings;
Neutral Tenure	means a tenure of Affordable Housing which is not fixed but can vary according to needs, means and preferences of households to whom it is offered;
Net Developable Area	means those parts of the Land, together comprising 3.8 hectares, available for the development of Dwellings;

Occupation	means occupation for the purposes permitted by the Permission other than occupation for the purposes of construction, fitting out, decoration, marketing or site security and **"Occupy"** shall be construed accordingly;
Owner	means the First Owner and the Second Owner;
Permission	means the planning permission to be granted by the Council for the development of the Land to be issued pursuant to the Application substantially in the form attached at Annexure 2;
Plan 1	means the plan labelled "Plan 1" attached at Annexure 1;
Plan 2	means the plan labelled "Plan 2" attached at Annexure 1;
Price	means 42% of the Acceptable Cost Guidance attributable to the relevant Dwelling transferred as at the date of a binding contract between the Owner and the RSL (or Council as appropriate);
Retained Land	means the land hatched green on Plan 1;
Retail Prices Index	means the all items index of retail prices issued by the Office for National Statistics;
RSL	means a social landlord registered by the Welsh Ministers under part 1 of the Housing (Wales) Act 2014; and
Working Day	means a day other than a Saturday, Sunday or public holiday in Wales.

1.2 Clause headings shall not affect the interpretation of this Agreement.

1.3 A person includes a natural person, corporate or unincorporated body (whether or not having separate legal personality).

1.4 A reference to a company shall including any company, corporation or other body corporate, wherever and however incorporated or established.

1.5 Unless the context otherwise requires, words in the singular include the plural and in plural shall include the singular.

1.6 Unless the context otherwise requires, a reference to one gender shall include a reference to the other gender.

1.7 A reference to any party shall include that party's successors in title subject to the terms of this Agreement and in the case of the Council the successors to its respective statutory functions.

1.8 A reference to a statute or statutory provision is a reference to it as amended, extended or re-enacted from time to PROVIDED THAT, as between the parties, no such amendment, extension or re-enactment shall apply to the Agreement to the extent that it would impose any new or extended obligation, liability or restriction on, or otherwise adversely affect the rights of, any party.

1.9 A reference to a statute or statutory provision shall include any subordinate legislation made from time to time under that statute or statutory provision.

1.10 A reference to writing or written does not include faxes or e-mail.

1.11 References to clauses, schedules and plans are to the clauses, schedules and plans of this Agreement.

1.12 Any phrase introduced by the terms including, include, in particular, or any similar expression shall be construed as illustrative and shall not limit the sense of the words preceding those terms.

1.13 Where an obligation falls to be performed by more than one person, the obligation can be enforced against every person so bound jointly and against each of them individually.

2. STATUTORY PROVISIONS

2.1 This Agreement constitutes a planning obligation for the purposes of section 106 of the Act, section 111 of the Local Government Act 1972 and any other enabling powers.

2.2 The obligations contained in this Agreement are planning obligations for the purposes of section 106 of the Act and, subject to clause 2.3, are entered into by the Owner with the intention that they bind the interests held by those persons in the Land and their respective successors in title subject to the terms of this Agreement.

2.3 The planning obligations contained in Schedule 2 to this Agreement are entered into by the Second Owner only with the intention that they bind the interest held by the Second Owner in the Adjacent Fields and their successors in title subject to the terms of this Agreement.

2.4 The obligations contained in this Agreement are enforceable by the Council in accordance with section 106 of the Act.

3. CONDITIONALITY

The obligations in this Agreement take effect on the date of this Agreement unless otherwise specified save for clauses 4.2, 4.3 and 4.4 which are conditional upon:

(a) the grant of the Permission by the Council; and

(b) Implementation.

4. COVENANTS BY THE OWNER

4.1 The First Owner shall pay to the Council on completion of this Agreement the reasonable legal costs of the Council incurred in the negotiation, preparation and creation of this Agreement.

4.2 The Owner shall pay to the Council on or before Implementation the sum of £1,200 Indexed as a contribution towards the Council's costs of monitoring the implementation of this Agreement.

4.3 The Owner so as to bind the Land covenants with the Council to observe and perform the obligations contained in Schedule 1.

4.4 The Second Owner covenants with the Council so as to bind the Adjoining Fields to observe and perform the obligations contained in Schedule 2 and for the avoidance of doubt no other obligations other than the obligations in Schedule 2 shall be binding and enforceable against the owner or mortgagee from time to time of the Adjoining Fields.

5. COVENANTS BY THE COUNCIL

The Council covenants with the Owner to comply with the obligations on its part contained in this Agreement at the times and in the manner provided herein.

6. **INDEXATION**

Any sum required to be paid to the Council under this Agreement which it is stated shall be indexed shall be increased by an amount equivalent to the increase in the Retail Prices Index from the date of this Agreement until the date on which such sum is paid. If the Retail Prices Index ceases to exist, the Council and the Owner shall agree in writing (acting reasonably) an alternative index to use instead of the Retail Prices Index.

7. **LIABILITY AND ENFORCEMENT**

7.1 No person shall be liable for any breach of this Agreement after parting with all of its interest in the Land or Adjoining Fields or the part of the Land or Adjoining Fields in respect of which the breach relates, except in respect of any breach subsisting prior to parting with such interest.

7.2 This Agreement shall not be enforceable against:

(a) individual owners or occupiers of any Dwellings constructed on the Land pursuant to the Permission or their individual mortgagees;

(b) a statutory undertaker or any other person who acquires any part of the Land or Adjoining Fields or interest therein solely for the purpose of supply of electricity, gas, water, drainage, telecommunications services or public transport services; or

(c) any chargee or mortgagee from time to time who shall have the benefit of a charge or mortgage of or on any part or parts of the Land or Adjoining Fields or any receiver or security agent appointed by such chargee or mortgagee or any person deriving title through such chargee, mortgagee, receiver or security agent unless and until such chargee, mortgagee, receiver, security agent or person has entered into possession of the Land or Adjoining Fields or part thereof to which such obligation relates.

8. **TERMINATION OF THIS AGREEMENT**

This Agreement shall be determined and have no further effect if the Permission:

(a) expires without having been implemented;

(b) is modified or revoked other than with the consent of the Owner; or

(c) is quashed following a successful legal challenge.

9. **LOCAL LAND CHARGE**

9.1 This Agreement is a local land charge and may be registered as such by the Council.

9.2 Following the performance and full satisfaction of all the terms of this Agreement or if this Agreement is determined pursuant to clause 8 the Council will on the written request of the Owner cancel all entries made in the local land charges register in respect of the Agreement.

10. **INTEREST ON LATE PAYMENT**

If any sum or amount has not been paid to the Council by the date it is due, the Owner shall pay the Council interest on that amount at 5 per cent above the Bank of England base rate from time to time. Such interest shall accrue on a daily basis for the period from the due date to and including the date of payment.

11. **NOTICES**

11.1 Any notice or other communication required to be given under this Agreement shall be in writing and shall be sent by pre-paid first class post or recorded delivery or by commercial courier, to any

person required to receive the notice or other communication at its address as set out in this Agreement or as otherwise specified by the relevant person by notice in writing to each other person.

11.2 Any notice or other communication shall be deemed to have been duly received:

(a) if sent by pre-paid first class post or recorded delivery, at 9.00 am on the second Working Day after posting; or

(b) if delivered by commercial courier, on the date and at the time that the courier's delivery receipt is signed.

11.3 The Owner shall notify the Council in writing at least 10 Working Days prior to the following events occurring:

(a) Implementation;

(b) first Occupation;

(c) Occupation of 50% of the Market Dwellings; and

(d) Occupation of 80% of the Market Dwellings.

12. **DUTY TO ACT REASONABLY AND IN GOOD FAITH**

The parties agree with one another to act reasonably and in good faith in the fulfilment of the obligations in this Agreement.

13. **DISPUTE RESOLUTION**

Any dispute, controversy or claim arising out of or relating to this Agreement, including any question regarding its breach, existence, validity or termination or the legal relationships established by this Agreement, shall be finally resolved by arbitration in accordance with the Arbitration Act 1996. It is agreed that:

(a) the tribunal shall consist of one arbitrator appointed jointly by the parties;

(b) in default of the parties' agreement as to the arbitrator, the arbitrator shall be appointed on either party's request by the President for the time being of the Royal Institution of Chartered Surveyors;

(c) the costs of the arbitration shall be payable by the parties in the proportions determined by the arbitrator (or if the arbitrator makes no direction, then equally); and

(d) the seat of the arbitration shall be Wales.

14. **WAIVER**

No waiver (whether expressed or implied) by the Council or Owner of any breach or default in performing or observing any of the covenants terms or conditions of this Agreement will constitute a continuing waiver and no such waiver will prevent the Council from enforcing any of the relevant terms or conditions or for acting upon any subsequent breach or default.

15. **SEVERANCE**

15.1 If any court or other competent authority finds that any provision of this Agreement (or part of any provision) is invalid, illegal or unenforceable, that provision or part-provision shall, to the extent required, be deemed to be deleted, and the validity and enforceability of the other provisions of this Agreement shall not be affected.

15.2 If any invalid, unenforceable or illegal provision of this Agreement would be valid, enforceable and legal if some part of it were deleted, subject to agreement between the parties the provision shall apply with the minimum modification necessary to make it legal, valid and enforceable.

16. **FUTURE PERMISSIONS**

Nothing in this Agreement shall prohibit or limit the right to develop any part of the Land or Adjacent Fields in accordance with any planning permission (other than the Permission or modification, variation or amendment thereof) granted after the date of the Permission.

17. **THIRD PARTY RIGHTS**

No person other than a contracting party may enforce any provision of this Agreement by virtue solely of the Contracts (Rights of Third Parties) Act 1999.

18. **VALUE ADDED TAX**

18.1 Each amount stated to be payable by the the Council or the Owner to the other under or pursuant to this Agreement is exclusive of VAT (if any).

18.2 If any VAT is at any time chargeable on any supply made by the Council or the Owner under or pursuant to this Agreement, the party making the payment shall pay the other an amount equal to that VAT as additional consideration on receipt of a valid VAT invoice.

19. **GOVERNING LAW**

This Agreement is governed by and shall be interpreted in accordance with the laws of England and Wales as they apply in Wales

This Agreement has been executed as a deed and is delivered and takes effect on the date stated set out above.

SCHEDULE 1

OWNER'S COVENANTS WITH THE COUNCIL

The Owner covenants with the Council as follows:

1. **AFFORDABLE HOUSING**

1.1 To provide 35% of the total number of Dwellings as Affordable Housing subject to the provisions of this paragraph 1 of Schedule 1.

1.2 To provide, design and construct the Affordable Housing Dwellings:

(a) in accordance with the DQR;

(b) unless otherwise agreed by the Council, in accordance with the Approved Affordable Housing Mix; and

(c) unless otherwise agreed by the Council, in three separate areas so as to ensure that the Affordable Housing Dwellings are pepper-potted across the Development.

1.3 To procure that the Affordable Housing Dwellings are transferred to an RSL or the Council using the following procedure:

(a) prior to Implementation the Owner shall serve a notice on an RSL ("the First Sale Notice") offering to sell the Affordable Housing Dwellings to the RSL at the Price and at the same time a copy of such notice shall be sent to the Council;

(b) if the RSL accepts the Owner's offer in the First Sale Notice to acquire the Affordable Housing Dwellings, the Owner shall use reasonable endeavours to exchange contracts as soon as possible;

(c) if by the expiry of the period of 6 (six) months from the service of the First Sale Notice on an RSL, the RSL:

(i) has declined the offer; or

(ii) failed to accept or refuse the offer; or

(iii) accepted the offer but failed to exchange contracts (save that this shall not operate if the Owner has caused material delay in replying to reasonable enquiries or providing reasonable necessary information so as to make exchange of contracts possible),

then, unless otherwise agreed by the Owner and Council, the RSL will be deemed to have rejected the Owner's offer to acquire the relevant Affordable Housing Dwellings pursuant to the First Sale Notice;

(d) upon the actual or deemed rejection of the offer pursuant to the First Sale Notice by an RSL, the Owner shall serve a notice upon the Council giving a period of 3 (three) months for the Council to identify another RSL ("the second RSL") or the Council itself to acquire the Affordable Housing Dwellings at the Price ("the Second Sale Notice");

(e) if by the expiry of the period of 6 (six) months following the service of the Second Sale Notice, the second RSL and the Council have:

(i) declined the offer; or

(ii) failed to accept or refuse the offer; or

(iii) accepted the offer but failed to exchange contracts (save that this shall not operate if the Owner has caused material delay in replying to reasonable enquiries or providing reasonable necessary information so as to make exchange of contracts possible),

then, unless otherwise agreed by the Owner and the Council, the second RSL and the Council will be deemed to have rejected the Owner's offer pursuant to the Second Sale Notice to acquire the relevant Affordable Housing Dwellings and the Owner shall be required to pay a contribution in lieu of providing the Affordable Housing Dwellings ("the Affordable Housing Contribution") in accordance with paragraphs 1.4 and 1.5 of this Schedule 1.

1.4 The Affordable Housing Contribution shall be calculated as follows:

FC = [OMV x (1-DRM)) – (ACG x DP)] x N

FC = Financial Contribution

OMV = Open Market Value

DRM = Developer Return and Marketing (0.23)

ACG = Acceptable Cost Guidance

DP = Default percentage of ACG (0.42)

N = Number of Affordable Housing Dwellings (0.35)

Worked Example:

3 bed house in a band 5 area

FC = [(228,995 x (1-DRM)) - (212,100 x 42%)] x 0.35

228,995 x 0.77 =	176,326
212,100 x 0.44 =	89,082
176,326 - 89,082 =	87,244
87,244 x 0.35 =	30,535

1.5 The Affordable Housing Contribution shall be paid to the Council in two equal instalments as follows:

(a) the first instalment prior to Occupation of 50% of the Market Dwellings; and

(b) the second instalment prior to Occupation of of 80% of the Market Dwellings.

1.6 For the avoidance of doubt:

(a) paragraphs 1.4 and 1.5 of this Schedule 1 shall not apply unless an Affordable Housing Contribution is required pursuant to paragraph 1.3 of this Schedule 1; and

(b) following payment of the Affordable Housing Contribution, if required pursuant to paragraph 1.3 of this Schedule 1, the Owner shall be released from any further obligations under paragraph 1 of Schedule 1.

1.7 Following a written request from the Council, to provide to the Council such information concerning the progress of negotiations for the disposal of the Affordable Housing Dwellings as shall be reasonably required by the Council.

1.8 Not to Occupy or permit Occupation of more than:

(a) 50% of the Market Dwellings until such time as 50% of the Affordable Housing Dwellings have been constructed and are ready for Occupation; and

(b) 80% of the Market Dwellings until such time as all of the Affordable Housing Dwellings have been constructed and are ready for Occupation.

1.9 The Affordable Housing Dwellings shall remain in Neutral Tenure in perpetuity.

1.10 To keep such full and proper records as are reasonably required to demonstrate to the Council compliance with the Affordable Housing obligations contained in this Agreement.

1.11 Not to impose any management and/or maintenance charges whatsoever upon the RSL or the subsequent occupants of the affordable units.

1.12 To procure that on the first disposal of each Affordable Housing Dwelling as an Affordable Housing Dwelling a restriction is entered in the Proprietorship Register of the title of the Affordable Housing Dwelling in the following terms:

"No disposition of the registered estate (other than a charge) by the proprietor of the registered estate is to be registered without a certificate signed by a conveyancer that the provisions of Schedule 1 to the Agreement dated [2019] made by (1) Monmouthshire County Council (2) Harvington Properties Limited and (3) Charles Lewis Heaven, Claire Heaven-Roberts and Melanie Jayne Worgan pursuant to Section 106 of the Town and Country Planning Act 1990 have been complied with".

1.13 Notwithstanding the provisions of this Agreement, any mortgagee, chargee, receiver or administrative receiver of an Affordable Housing Dwelling and having a mortgage or charge over it may dispose of the estate or interest mortgaged to it on the open market in exercise of its statutory power of sale under the terms of the mortgage or charge, or a receiver appointed by such mortgagee may do so, and the covenants, restrictions and obligations contained in this Agreement shall not apply to that sale and the Affordable Housing Unit shall thereafter cease to be subject to the said covenants, restrictions and obligations and to this Agreement.

2. EDUCATION

2.1 Subject to paragraph 2.2, to pay the Education Contribution to the Council in two instalments:

(a) the first instalment of £172,500 indexed prior to Occupation of 50% of the Market Dwellings; and

(b) the second instalment of £172,500 indexed prior to Occupation of 80% of the Market Dwellings.

2.2 If approval is sought for less than 130 Dwellings as part of the reserved matters application, then the second instalment of the Education Contribution shall be reduced so that the total amount paid equals £17,257 indexed per primary school place required.

3. LOCAL HIGHWAYS AND SUSTAINABLE TRANSPORT

3.1 To pay the Local Highways and Sustainable Transport Contribution to the Council in two instalments:

(a) the first instalment of £52,000 prior to Occupation of 50% of the Market Dwellings; and

(b) the second instalment of £78,000 prior to Occupation of 80% of the Market Dwellings.

3.2 Prior to Occupation of 80% of the Dwellings, to design and construct and make available for use the internal road network for the Development to the boundary of the Land at point B on Plan 1, engineered in such a way as to make a future connection by the Council possible from Heol Telfi.

4. COMMUNITY PARK

4.1 To complete the landscaping works to the Community Park in accordance with the details approved pursuant to conditions 1 and 6 of the Permission no later than Occupation of 80% of the Market Dwellings.

4.2 Prior to Occupation of 80% of the Market Dwellings, to provide an informal wild play area in the Community Park in accordance with a design and in a location to be agreed with the Council, or in lieu of providing such informal play area to pay the sum of £25,000 Indexed to the Council at the same time as the transfer in accordance with paragraph 4.3 below to enable the Council to deliver the informal wild play area in the Community Park.

4.3 Following completion of the landscaping works to the Community Park in accordance with the details approved pursuant to conditions 1 and 6 of the Permission, to transfer the freehold of the Community Park to the Council for a consideration of £1, provided that the transfer shall be subject to the following:

(a) a restriction that the Community Park shall only be utilised for the purposes of public recreation and for no other purpose whatsoever;

(b) the reservation of rights of access for the owners and occupiers from time to time of the Adjacent Fields across the access track at point A on Plan 1;

(c) the reservation of rights of access across the Community Park for the owners and occupiers from time to time of the Retained Land;

(d) the grant of sufficient access for the Council to the Adjacent Fields to enable the Council to carry out maintenance of the Community Park; and

(e) the grant and reservation of such other rights of access and passages of services reasonably necessary for the beneficial enjoyment of the Development, the Retained Land, the Adjacent Fields and the use of the Community Park.

5. GREEN INFRASTRUCTURE

5.1 Not to implement until the Green Infrastructure Plan has been submitted to and approved in writing by the Council.

5.2 To deliver the Green Infrastructure in accordance with the timescales set out in the approved Green Infrastructure Plan and in accordance with the details approved pursuant to conditions 1 and 6 of the Permission.

5.3 Following completion of the Green Infrastructure, to transfer the freehold of the Green Infrastructure to the Council for a consideration of £1, provided that the transfer shall be subject to the following:

(a) a restriction that the Green Infrastructure shall only be utilised for the purposes of public amenity and for no other purpose whatsoever; and

(b) the grant and reservation of such rights of access and passages of services reasonably necessary for the beneficial enjoyment of the Development, the Retained Land, the Adjacent Fields and the use of the Community Park.

6. **COMMUNITY PARK AND GREEN INFRASTRUCTURE MAINTENANCE**

6.1 On completion of the transfer of the Community Park or Green Infrastructure to the Council pursuant to paragraphs 4.3 or 5.3 above, whichever is the earlier, to pay to the Council the Community Park and Green Infrastructure Maintenance Contribution.

6.2 On completion of the transfer of the Green Infrastructure to the Council pursuant to paragraph 5.3 above, to pay to the Council the sum of £5,000 indexed to be used by the Council to prepare a maintenance plan for the Green Infrastructure.

7. **OFF-SITE RECREATION FACILITIES**

7.1 To pay a sum of £1566 indexed in respect of each Market Dwelling constructed at the Development (the "Off-Site Recreation Facilities Contribution") to be used by the Council to support and develop off-site recreational facilities in the vicinity of the Development, which shall include one or more of the following: the Caldicot Greenway Scheme; Caldicot Castle Country Park; Hall Park Open Space; and the Caldicot Town Centre Regeneration Project.

7.2 The Off-Site Recreation Facilities Contribution shall be payable in two equal instalments:

(a) the first instalment shall be payable prior to Occupation of 50% of the Market Dwellings;

(b) the second instalment shall be payable prior to Occupation of 80% of the Market Dwellings.

8. **ECOLOGY**

Not to implement until a Hornet Robberfly Management Plan has been submitted to and approved in writing by the Council.

SCHEDULE 2

SECOND OWNER'S COVENANTS WITH THE COUNCIL IN RESPECT OF THE ADJACENT FIELDS

The Second Owner covenants with the Council as follows:

1. **ECOLOGY**

For a period of 10 years from the Implementation Date, not to Occupy the Adjacent Fields otherwise than in compliance with the approved Hornet Robberfly Management Plan.

2. **ACCESS**

At all times following transfer of the freehold of the Community Park to the Council, at no cost to the Council, to ensure that the Council is provided with sufficient access to the Adjacent Fields to carry out maintenance of the Community Park.

SCHEDULE 3

COUNCIL'S COVENANTS

1. APPLICATION OF FUNDS

1.1 Where the Council receive any financial contribution from the Owner in respect of any obligations in this Agreement, the Council shall use the financial contribution only for the purpose for which it was paid.

1.2 In the event that any financial contribution received from the Owner in respect of any obligations in this Agreement has not been spent or committed for expenditure by the Council within 5 years following the date of receipt the Council shall refund to the Owner any part which has not been spent or committed for expenditure, together with any accrued interest.

SCHEDULE 4

APPROVED AFFORDABLE HOUSING MIX

General Needs	Number of Dwellings
2 person 1 bed flats	12 (3 x 4 blocks of walk up flats)
4 person 2 bed houses	16
5 person 3 bed houses	4
6 person 4 bed houses	2
OAP and Disabled	**Number of Dwellings**
2 person 1 bed flats	8 (with a lift)
3 person 2 bed bungalows	2
Adapted bungalow (2 or 3 bed)	1

Notes:

The above mix is based on the delivery of 130 Dwellings as part of the Development. If approval is sought for less than 130 Dwellings as part of the reserved matters application, the above mix shall be pro-rated downwards accordingly.

The delivery of an adapted bungalow (2 or 3 bed) is considered to be the equivalent of 2 Affordable Housing Dwellings.

Executed as a deed by affixing the common seal of **MONMOUTHSHIRE COUNTY COUNCIL** in the presence of:



Member of the Council [redacted]

Authorised Officer
Head of Law [redacted]

Executed as a deed by **HARVINGTON PROPERTIES LIMITED** acting by: [redacted]

Director

In the presence of:

Witness signature: [redacted]

Witness name: C. FREEMAN

Occupation: SECRETARY

Address: [redacted]

Signed as a deed by **CHARLES LEWIN HEAVEN** in the presence of: [redacted]

Witness signature: [redacted]

Witness name: SANDRA ELAINE PRICE

Occupation: ACCOUNTANT

Address: [redacted]

Signed as a deed by **CLAIRE HEAVEN-ROBERTS** In the presence of:

[redacted]

Witness signature: [redacted]

Witness name: Louise Trump

Occupation: Housewife

Address: [redacted]

Signed as a deed by **MELANIE JAYNE WORGAN** In the presence of:

[redacted]

Witness signature: [redacted]

Witness name: Allan Rae

Occupation: Butcher

Address: [redacted]

ANNEXURE 1

PLANS

ANNEXURE 2

DRAFT PLANNING PERMISSION

monmouthshire
sir fynwy

Cymeradwyo /Approval of Planning Permission

Deddf Cynllunio Tref a Gwlad 1990
Gorchymyn Cynllunio Tref a Gwlad (Gweithdrefn Rheoli Datblygu) Cymru 2012
Town and Country Planning Act 1990
The Town and Country Planning (Development Management Procedure) (Wales) Order 2012

Cais Rhif/ Application No: **DM/2018/00880**

Ymgeisydd/ Applicant:	Harvington Properties Ltd	**Asiant/Agent**	Mr Roger Hepher 45 Welbeck Street Marylebone London W1G 8DZ United Kingdom

Mae **CYNGOR SIR FYNWY** fel yr Awdurdod Cynllunio Lleol drwy hyn yn **caniatáu**'r datblygiad dilynol yn unol â'r cynlluniau a'r cais a gyflwynwyd i'r Cyngor, yn ddarostyngedig i unrhyw amodau.

MONMOUTHSHIRE COUNTY COUNCIL as Local Planning Authority hereby **Approved Subject To S106** the following development in accordance with the plans and application submitted to the Council, subject to any conditions.

Lleoliad/Location:	Land To East Of Church Road Caldicot Monmouthshire
Disgrifiad o'r Cynnig/Description of Proposal:	Outline application (with all matters other than access reserved for future determination) for the erection of up to 130 dwellings (Use Class C3), provision of new open space including a new community park and other amenity space, engineering and landscaping works including sustainable urban drainage system and enabling works.

DARLLENWCH Y NODIADAU A ATODIR OS GWELWCH YN DDA
PLEASE READ THE ATTACHED NOTES

MAE'N BWYSIG EICH BOD YN CYDYMFFURFIO GYDA'R CYNLLUNIAU A GYMERADWYWYD A'R CANIATÂD CYNLLUNIO, YN CYNNWYS AMODAU. DARLLENWCH Y NODIADAU SY'N CYD-FYND Â'R PENDERFYNIAD HWN OS GWELWCH YN DDA.

PWYSIG: MAE'R CYFATHREBIAD YMA'N EFFEITHIO AR EICH EIDDO

IT IS IMPORTANT THAT YOU COMPLY WITH THE APPROVED PLANS AND THE PLANNING PERMISSION, INCLUDING CONDITIONS. PLEASE READ THE NOTES ACCOMPANYING THIS DECISION.

IMPORTANT THIS COMMUNICATION AFFECTS YOUR PROPERTY

Amodau a Rhesymau/Conditions and Reasons

DRAFT

1 Approval of the details of the layout, scale and appearance of the building(s) and the landscaping of the site (hereinafter called the reserved matters) shall be obtained from the Local Planning Authority prior to any works commencing on site.

REASON: The application is in outline only.

2 (a) Application for approval of all the reserved matters shall be made to the Local Planning Authority before the expiration of 12 months from the date of this permission.

b) The development hereby approved must be begun either before the expiration of two years from the date of this permission, or before the expiration of two years from the date of approval of the last of the reserved matters to be approved, whichever is the later.

REASON: In order to comply with Section 92 of the Town and Country Planning Act 1990 and to adhere to the ground rules set out in "Addressing our lack of 5 year land supply: Monmouthshire's Approach to Unallocated Sites".

3 No development shall take place until the applicant or his agent or successor in title has secured the implementation of a programme of archaeological work in accordance with a written scheme of investigation which has been submitted to and approved in writing by the Local Planning Authority.

REASON:

To identify and record any features of archaeological interest discovered during the works, in order to mitigate the impact of the works on the archaeological resource.

4 No development shall take place until a drainage scheme has been submitted to, and approved by, the Local Planning Authority. The scheme shall provide for the disposal of foul, surface and land water and shall include an assessment of the potential to dispose of surface and land water by sustainable means. Thereafter the scheme shall be implemented in accordance with the approved details prior to the occupation of the development and no foul water, surface water or land drainage shall be allowed to connect directly or indirectly with the public sewerage system.

REASON: To ensure satisfactory facilities are available for disposal of foul and surface water.

5 The Reserved Matters pursuant to the layout of the proposed development shall ensure that the internal estate roads and footways shall be designed and laid out to facilitate the future connection of the desirable secondary means of access if so required by the Highway Authority at a future date.

Reason: To provide for a secondary vehicle access at some time in the future.

6 The details submitted pursuant to the Reserved Matter for landscaping shall reflect the guidelines set out in the Land Budget Plan (ref: edp4019_d065b), Indicative Green Infrastructure Plan (ref: edp4019_d066c) and Indicative Green Infrastructure Masterplan (ref: edp4019_d062d) in addition to providing details of all strategic planting and open space and design principles in addition to providing details incorporating;

- proposed finished levels or contours;

- means of enclosure;

- Hard surfacing materials;

- Soft landscape details including planting plans, specifications including cultivation and other operations associated with plant and grass establishment, schedules of plants, noting species, sizes, numbers and densities;

REASON: To ensure the provision afforded by appropriate landscape design and Green Infrastructure in accordance with policies LC5, S13, and GI1 and NE1.6.

7 The details submitted pursuant to the Reserved Matter for layout shall include the proposed and existing functional services above and below ground (e.g. drainage details, power etc);

- Water Features (including SUDS details);

- Clarification of access connections beyond the site.

REASON: To ensure the provision afforded by appropriate landscape design and Green Infrastructure in accordance with policies LC5, S13, and GI1 and NE1.6.

8 All hard and soft landscape works shall be carried out in accordance with the relevant recommendations of appropriate British Standards or other recognised Codes of Good Practice. A time table for these works shall be submitted as part of the reserved matters submission and all works shall be carried out in accordance with the timetable agreed with the Local Planning Authority. The planted areas shall be kept clear of underground utilities. Any trees or plants that, within a period of five years after planting, are removed, die or become, in the opinion of the Local Planning Authority, seriously damaged or defective, shall be replaced as soon as is reasonably practicable with others of species, size and number as originally approved, unless the Local Planning Authority gives its written consent to any variation.

REASON: To ensure the provision, establishment and maintenance of a reasonable standard of landscape in accordance with the approved designs.

9 A schedule of landscape maintenance for a minimum period of five years or until the areas are passed to the council for adoption, whichever is the sooner, shall be submitted to and approved by the Local Planning Authority and shall include details of the arrangements for its implementation this shall be integrated into the GI management Plan.

Reason: To ensure the provision of amenity afforded by the proper maintenance of existing and / or new landscape features.

10 No development shall take place (including demolition, ground works, vegetation clearance) until a Construction Environmental Management Plan (CEMP: Biodiversity) has been submitted to and approved in writing by the local planning authority. The CEMP (Biodiversity) shall include the following:

a) Risk assessment of potentially damaging construction activities;

b) Identification of "biodiversity protection zones";

c) Practical measures (both physical measures and sensitive working practices) to avoid or reduce impacts during construction (may be provided as a set of method statements);

d) The location and timing of sensitive works to avoid harm to biodiversity features;

e) The times during construction when specialist ecologists need to be present on site to oversee works;

f) Responsible persons and lines of communication;

g) The role and responsibilities on site of an ecological clerk of works (ECoW) or similarly competent person; and

h) Use of protective fences, exclusion barriers and warning signs.

The approved CEMP shall be adhered to and implemented throughout the construction period strictly in accordance with the approved details.

NOTE: See BS 42020:2013, Clause 10, for a comprehensive list of issues and activities that may be considered and included within a CEMP.

REASON: To safeguard habitats and species protected under the Conservation of Habitats and Species Regulations 2017, the Wildlife and Countryside Act 1981 (as amended), and Environment (Wales) Act 2016.

11 Prior to any works commencing on site a Construction Traffic Management Plan (CTMP) shall be submitted to and approved by the local planning authority, which shall include traffic management measures, hours of working, measures to control dust, noise and related nuisances, and measures to protect adjoining users from construction works. The development shall be carried out in accordance with the approved CTMP.

REASON: To ensure a satisfactory form of development takes place.

12 There shall be no built form of development within either side of a 15 metre easement from the centre line of the high pressure gas main that crosses the site.

REASON: In the interests of public safety.

13 No development shall be commenced until details of the proposed arrangements for future management and maintenance of the proposed streets within the development have been submitted to and approved by the local planning authority. The streets shall thereafter be maintained in accordance with the approved management and maintenance details until such time as an agreement has been entered into under section 38 of the Highways Act 1980 or a private management and Maintenance Company has been established.

REASON: In the interest of highway safety and to ensure compliance with Policy MV1 of the Local Development Plan.

Condition Updates (If any)

Gwybodaeth/Informatives :-

1 Wales and West Utilities has pipes in the area, the apparatus may be affected and at risk during construction works. Should planning permission be approved the developer should contact Wales and West Utilities directly on any plant or enclosure apparatus. to discuss details of their requirements before any works commence on site. Development will not be allowed on any plant or enclosure apparatus.

Polisiau Cynllun Datblygu Lleol Sir Fynwy
Monmouthshire Local Development Plan Policies :-

S1 LDP The Spatial Distribution of New Housing Provision

S2 LDP Housing Provision

S4 LDP Affordable Housing Provision

S5 LDP Community and Recreation Facilities

S12 LDP Efficient Resource Use and Flood Risk

S13 LDP Landscape, Green Infrastructure and the Natural Environment

S15 LDP Minerals

S16 LDP Transport

S17 LDP Place Making and Design

H1 LDP Residential Development in Main Towns, Severnside Settlements and Rural Secondary Settlements

CRF2 LDP Outdoor Recreation/Public Open Space/Allotment Standards and Provision

SD3 LDP Flood Risk

SD4 LDP Sustainable Drainage

LC1 LDP New Built Development in the Open Countryside

LC5 LDP Protection and Enhancement of Landscape Character

NE1 LDP Nature Conservation and Development

EP1 LDP Amenity and Environmental Protection

M2 LDP Minerals Safeguarding Areas

MV1 LDP Proposed Developments and Highway Considerations

MV3 LDP Public Rights of Way

DES1 LDP General Design Considerations

Y Cynlluniau a gymeradwywyd gyda'r caniatâd hwn yw:
The **Plans** approved with this permission are:

Cyfeirnod Cynllun /Plan Ref. No.	**Fersiwn Rhif/Version No.**
edp4019_d036b	Maximum Building Heights
edp4019_d017d	Site Location Plan
epd4019 roo56	DAS
17147 TA 01	Transport Assessment
epd4019 roo4d	Ecological Appraisal
edp 4019 roo2d	LVIA
1366/1	Soils and Agricultural Q
Building Parameters	

epd 4019 roo16	Arboricultural Impact Ass
17147 FTP 01	Framework Travel Plan
17147 FCA v3	FCA
PAC Repoert	PAC Report
Planning Statement	Planning Statement
4019 do66 C	Indicative GI Plan
4019 d062 D	Indicative GI Master Pla
4019 d064 G	Section 106 Plan 1
4019 d065 B	Land Budget Plan
17147	TA Additional Modelling
17147 ATA 01	Travel Audit

DRAFT

HYSBYSIAD PWYSIG

RHODDWYD EICH CANIATÂD CYNLLUNIO

DARLLENWCH YR WYBODAETH DDILYNOL YN OFALUS OS GWELWCH YN DDA

Os ydych yn asiant rhowch yr Hysbysiad hwn i'ch cleient gyda'r Caniatâd Cynllunio os gwelwch yn dda

Gall sut y symudwch ymlaen gyda'ch datblygiad effeithio ar eich eiddo, er enghraifft ei werth neu werthiant ac arwain at gamau gorfodaeth os nad ydych yn dilyn y cyngor yma.

Amodau

Darllenwch yr amodau'n ofalus os gwelwch yn dda. Eich cyfrifoldeb chi yw cydymffurfio â nhw.

- Gall rhai amodau olygu fod angen cyflwyno manylion, ee deunyddiau neu dirlunio, cyn i'r gwaith ddechrau neu cyn y gwnelr newid defnydd. Mae'n rhaid i chi sicrhau eich bod yn cydymffurfio gyda holl amodau o'r math yma cyn i'r gwaith ddechrau neu o fewn y cyfnod a nodwyd.
- Bydd methiant i gyflwyno materion sydd eu hangen gan amod yn gwneud eich caniatâd cynllunio yn annilys a gall arwain at gamau gorfodaeth yn eich erbyn.

Cydymffurfio gyda Chynlluniau Cymeradwy

Mae'n rhaid i chi wneud y datblygiad fel y'i cymeradwywyd neu gytuno ar newidiadau. ***Bydd eich caniatâd yn annilys os nad ydych yn gwneud y datblygiad yn llwyr yn unol â chynlluniau cymeradwy.***

- Bydd angen i chi wneud cais newydd os dymunwch amrywio eich cynllun neu newidiadau yn ganlyniad gofynion eraill.

Gall y Cyngor gymryd camau gorfodaeth a all arwain at erlyniad yn y Llys Ynadon lle medrir gosod cosb o hyd at £20,000. Er mwyn sicrhau eich bod yn osgoi unrhyw un o'r canlyniadau uchod, gofynnir i chi sicrhau eich bod yn cydymffurfio gyda phob agwedd o'ch caniatâd a chynlluniau.

Cadwch yr Hysbysiad yma gyda'ch Caniatâd Cynllunio os gwelwch yn dda
Gwnewch yn siŵr fod gan eich Adeiladwr gopi o'r Cynlluniau a Gymeradwywyd.

NODIADAU

Apeliadau i Lywodraeth Cymru

- Os ydych wedi eich tramgwyddo gan benderfyniad yr Awdurdod Cynllunio Lleol i roi caniatâd cynllunio yn ddarostyngedig i amodau, yna gallwch apelio at Lywodraeth Cymru yn unol ag Adran 78 Deddf Cynllunio Tref a Gwlad 1990.

- Os ydych eisiau apelio, yna mae'n rhaid i chi wneud hynny o fewn **chwe mis** o ddyddiad yr hysbysiad hwn yn defnyddio ffurflen y gallwch ei chael gan yr Arolygiaeth Cynllunio, Parc Cathays, Caerdydd CF10 3NQ.

- Gall Llywodraeth Cymru ganiatáu cyfnod hirach ar gyfer rhoi hysbysiad apêl ond ni fydd fel arfer yn barod i ddefnyddio'r pŵer yma os nad oes amgylchiadau arbennig sy'n esgusodi'r oedi wrth roi hysbysiad o'r apêl.

- Nid yw'n rhaid i Lywodraeth Cymru ystyried apêl os yw'n ymddangos na allai'r Awdurdod Cynllunio Lleol fod wedi rhoi'r caniatâd heb yr amodau y gwnaethant eu gosod gan roi ystyriaeth i ofynion statudol, i ddarpariaethau'r gorchymyn datblygu ac unrhyw gyfarwyddiadau a roddwyd dan y gorchymyn.

- Yn ymarferol nid yw Llywodraeth Cymru yn gwrthod ystyried apeliadau yn unig oherwydd bod yr Awdurdod Cynllunio Lleol wedi seilio eu penderfyniad ar gyfarwyddyd a roddwyd gan Lywodraeth Cymru.

Hysbysiadau Prynu

- Os yw un ai'r Awdurdod Cynllunio Lleol neu Lywodraeth Cymru yn gwrthod caniatâd i ddatblygu tir neu ei roi yn ddarostyngedig i amodau, gall perchennog y tir hawlio na all naill ai wneud defnydd rhesymol fuddiol o'r tir yn ei gyflwr presennol na gwneud y tir yn alluog o ddefnydd rhesymol fuddiol drwy wneud unrhyw waith datblygu sydd wedi neu a fyddai'n cael ei ganiatáu.

  - Yn yr amgylchiadau hyn gall y perchennog gyflwyno hysbysiad prynu i'r Cyngor lle mae'r tir wedi'i leoli. Bydd yr hysbysiad yn ei gwneud yn ofynnol i'r Cyngor brynu ei ddiddordeb yn y tir yn unol â darpariaethau Rhan VI Deddf Cynllunio Tref a Gwlad 1990.

IMPORTANT NOTICE

YOUR PLANNING PERMISSION HAS BEEN GRANTED

PLEASE READ THE FOLLOWING INFORMATION CAREFULLY
If you are an agent please pass this Notice to your client with the Planning Permission

How you proceed with your development may affect your property, for example its value or sale and lead to enforcement action if you do not follow this advice.

Conditions

Please read the conditions carefully. It is your responsibility to comply with them.

- Some conditions may require the submission of details, eg materials or landscaping, *before* work starts or a change of use is made. You must ensure that you comply with all conditions of this type before work starts or within the period specified.
- Failure to submit matters required by condition will make your planning permission invalid and may lead to enforcement action being taken against you.

Compliance With Approved Plans

You must carry out the development as approved or agree changes.
If you do not carry out the development in strict accordance with the approved plans your permission will be invalid.

- If you wish to vary your scheme or changes result from other requirements you will need to make a new application.

The Council can take enforcement action which may lead to prosecution in the Magistrates Courts where a fine of up to £20,000 can be imposed. In order to ensure that you avoid any of the above consequences please ensure that you comply with all aspects of your permission and plans.

Please Keep this Notice with Your Planning Permission
Make Sure Your Builder has a Copy of the Approved Plans

NOTES

Appeals to the Welsh Government

- If you are aggrieved by the decision of the Local Planning Authority to grant planning permission subject to conditions, then you can appeal to the Welsh Government in accordance with Section 78 of the Town and Country Planning Act 1990.

- If you want to appeal, then you must do so within **six months** of the date of this notice using a form which you can get from the Planning Inspectorate, Cathays Park, Cardiff CF10 3NQ.

- The Welsh Government can allow a longer period for the giving of a notice of an appeal but will not normally be prepared to use this power unless there are special circumstances that excuse the delay in giving notice of appeal.

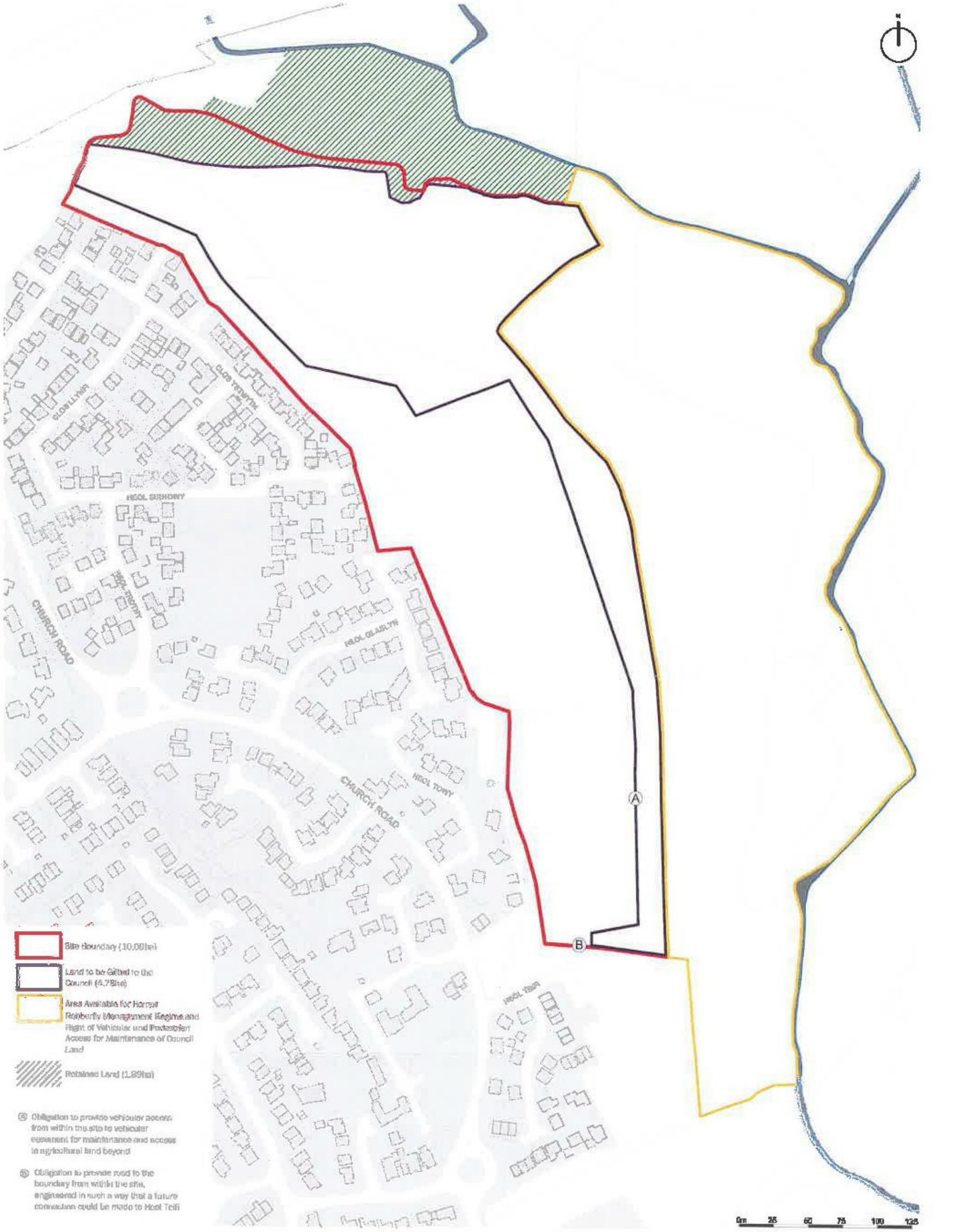
- The Welsh Government need not consider an appeal if it seems that the Local Planning Authority could not have granted the permission without the conditions they imposed having regard to statutory requirements, to the provisions of the development order and to any directions given under the order.

- In practice the Welsh Government does not refuse to consider appeals solely because the Local Planning Authority based their decision on a direction given by the Welsh Government.

Purchase Notices

- If either the Local Planning Authority or the Welsh Government refuse permission to develop land or grant it subject to conditions, the owner of the land may claim that he can neither put the land to a reasonably beneficial use in its existing state nor render the land capable of a reasonably beneficial use by the carrying out of any development which has been or would be permitted.

- In these circumstances the owner may serve a purchase notice on the Council in whose area the land is situated. This notice will require the Council to purchase his interest in the land in accordance with the provisions of Part VI of the Town and Country Planning Act 1990.



the environmental dimension partnership

info@edp-uk.co.uk www.edp-uk.co.uk
Cirencester 01285 740427

date	19 MARCH 2019
drawing number	edp4019_d084h
scale	1:2,500 @ A3
drawn by	[redacted]
checked	PA
QA	JF

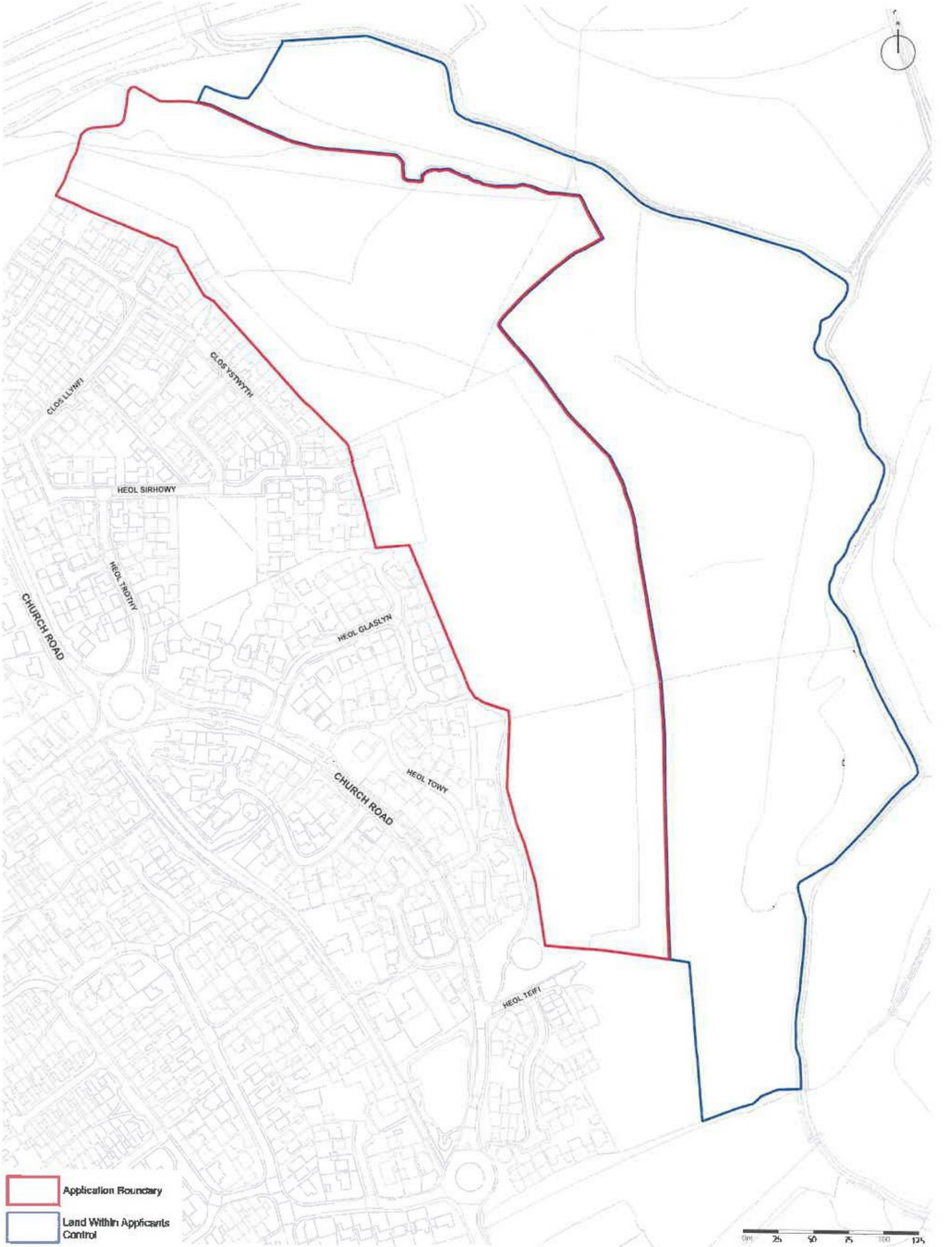
client
Harvington Properties

project title
Church Farm, Caldicot

drawing title
Section 106 Plan - 1

[redacted]

[redacted]



the environmental dimension partnership

client
Harvington Properties

project title
Church Farm, Caldicot

drawing title
Site Location Plan

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DATED

29th March 2019

PLANNING OBLIGATION UNDER SECTION 106 OF THE TOWN AND COUNTRY PLANNING ACT 1990 RELATING TO LAND SOUTH OF CRICK ROAD, PORTSKEWETT, MONMOUTHSHIRE

between

MONMOUTHSHIRE COUNTY COUNCIL

and

MELIN HOMES LIMITED

Legal Services
Monmouthshire County Council
County Hall
The Rhadyr
Usk
NP15 1GA

(JC P40/7.0582)

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THIS DEED is dated 29th March 2019

(1) **MONMOUTHSHIRE COUNTY COUNCIL** of County Hall The Rhadyr Usk Monmouthshire NP15 1GA (**Council**).

(2) **MELIN HOMES LIMITED** of Ty'r Efail Lower Mill Field Pontypool Torfaen NP4 0XJ (**Developer**).

BACKGROUND

(A) The Council is the local planning authority for the purposes of the TCPA 1990 for the area in which the Property is situated.

(B) The Council is the freehold owner of part of the land comprised in title numbers WA917584 and CYM696005 which land is not bound by the terms of this Deed .

(C) The Developer is the owner of the Property which is contained within title numbers WA917584 and CYM696005and has made the Planning Application and is proposing to carry out the Development.

(D) The Council having regard to the provisions of the Local Development Plan and to all other material considerations resolved that Planning Permission should be granted for the Development subject to the prior completion of this Deed.

AGREED TERMS

1. **INTERPRETATION**

The following definitions and rules of interpretation apply in this Deed:

1.1 Definitions:

Acceptable Cost Guidance: the Acceptable Cost Guidance issued by the Welsh Government to RSLs as guidance on the acceptability of total scheme costs for grant purposes as at the date of a binding contract between the Developer and the RSL.

Adult Recreation Contribution : means the sum of £400,000 to be paid to the Council and used for the purposes set out in Paragraph 3 of Schedule 1

Affordable Housing: subsidised housing (irrespective of tenure exclusive shared equity or other financial arrangements) that will be available to people who cannot afford to occupy dwellings generally available on the open market and for the avoidance of doubt will include housing available for rent at levels set by the Welsh Government.

Affordable Housing Units: Dwellings to be constructed on the Site pursuant to the Development which shall be constructed in accordance with DQR.

Base Rate: the higher of 5% and the base rate from time to time of Barclays Bank Plc.

Caldicot Regeneration Scheme means the plan approved by the Council's Cabinet for the regeneration of Caldicot Town Centre.

Chargee means any mortgagee or chargee of the RSL or any receiver or manager (including an administrative receiver) or any administrator howsoever appointed including a housing administrator and their successors in title.

Chargee's Duty means the tasks and duties set out in paragraph 1.12 of the First Schedule.

Commencement of Development: the carrying out in relation to the Development of any material operation as defined by section 56(4) of the TCPA 1990 but disregarding for the purposes of this Deed and for no other purpose, the following operations: demolition works; site clearance; ground investigations; site survey works; temporary access construction works; archaeological investigation; and erection of any fences and hoardings around the Property.

Commence and **Commences** shall be construed accordingly.

Commencement Date: the date Development Commences.

Completion means in relation to a Dwelling constructed and approved in accordance with building regulations.

Contribution: means the Adult Recreation Contribution the Education Contribution and the Sustainable Transport Contribution but for the avoidance of doubt shall not include the Affordable Housing Contribution (if such is required to be paid) payable under this Deed.

The Cornfield Project means the community organisation operating within Portskewett and Sudbrook promoting sport and leisure facilities.

Council's Retained Land means that part of title numbers WA917584 and CYM696005 which is not comprised in the Property

Default Interest Rate: 4% per annum above the Base Rate.

Development: the development of the Property authorised by the Planning Permission.

DQR: the Development Quality Requirements Design Standards and Guidance produced by the Welsh Government current at the date this Deed is completed.

Dwelling: a residential unit authorised to be constructed on the Property by the Planning Permission.

Education Contribution: means the financial contribution to be calculated and paid to the Council under the terms of Paragraph 5 of Schedule 1

Index Linked: increased in accordance with the following formula:

Amount payable = the payment specified in this Deed x (A/B) where:

A= the figure for the Retail Prices Index (All Items) that applied immediately preceding the date the payment is due.

B= the figure for the Retail Prices Index (All Items) that applied when the index was last published prior to the date of this Deed.

Market Housing Unit means a Dwelling to be sold on the open market and for the avoidance of doubt not an Affordable housing Unit.

Masterplan: means the plan attached to this Deed showing (among other things) the Open Space and comprising drawing number 16117 (05) 200 Rev C

Neutral Tenure: where tenure of the affordable housing is not predetermined but can vary according to needs, means and preferences of households to whom it is offered.

Occupation: occupation for the purposes permitted by the Planning Permission but not including occupation by personnel engaged in construction, fitting out or decoration or occupation for marketing or display or occupation in relation to security operations and "**Occupy**" and "**Occupied**" shall be construed accordingly.

Open Space Land means that part of the Property as shown on the Masterplan on which the Play Area and Open Space Works are to be carried out.

Open Space Works: laying out of any Open Space Land in accordance with the Open Space Works Specification.

Open Space Works Specification: a specification for the carrying out of the Open Space Works and the maintenance of them to be agreed in writing between the Developer and the Council before Commencement of the Development.

Plan 1: the plan attached and marked as Plan 1 showing the boundary to the Planning Application 0.

Plan 2: the plan attached and marked as Plan 2 showing the boundary to the Property

Play Area means an equipped play area (or areas) located within the Open Space Land in a position(s) to be agreed with the Council as part of the relevant application for reserved matters approval and to a cost (including costs of construction, procuring and installing the play equipment and making the Play Area ready for use) not exceeding £125,000 (one hundred and twenty five thousand pounds).

Price: 42% of the Acceptable Cost Guidance as at the date of a binding contract between the Developer and the RSL.

Private Dwellings: means the Dwellings excluding the Affordable Housing Units.

Planning Application: the application for outline planning permission under reference number DM/2018/00696.

Planning Permission: the planning permission to be granted by the Council in respect of the Planning Application in the draft form attached as Annex B

Property: the land at South of Crick Road, Crick, Portskewett, Monmouthshire shown edged red on Plan 2 being part of the land registered at HM Land Registry with absolute title under title number CYM696005 and WA917584.

Protected Tenant means any tenant or occupier or a qualifying applicant who (a) has exercised the right to acquire pursuant to the Housing Act 1996 or any statutory provision for the time being in force (or any equivalent contractual right) in respect of a particular Affordable Housing Unit (b) has exercised any statutory right to buy (or any equivalent contractual right) in respect of a particular Affordable Housing Unit (c) has been granted a shared ownership lease by an RSL (or similar arrangement where a share of the Affordable Housing Unit is owned by the RSL) in respect of a particular Affordable Housing Unit and which tenant has subsequently purchased from the RSL all remaining shares so that the tenant owns the entire Affordable Housing Unit (d) who has purchased under the homebuy option scheme or similar arrangement where the qualifying nominee acquires the whole of the Affordable Housing Unit and receives an interest free equity loan from an RSL who holds a charge over the Affordable Housing Unit securing the loan which priority ranks behind that of any mortgagee.

RSL: an RSL as defined in the Housing Act 1996 Part 1 with Welsh Government approved development status in Monmouthshire and for the avoidance of doubt RSL shall include Melin Homes Limited.

Social Housing Grant Top Up: the ACG Wheelchair supplements to be paid to the Developer in addition to the 42% of ACG paid in relation to the 7 adapted bungalows to be built on the Property as part of the Development

Specified Date: the date upon which an obligation arising under this Deed is due to be performed or such other dated as shall be agreed in writing with the Council as appropriate.

Sustainable Transport Contribution means the sum of £50,000 (fifty thousand pounds) index linked to be paid by the Developer to the Council under the terms of paragraph 4 of Schedule 1.

TCPA 1990: Town and Country Planning Act 1990.

VAT: value added tax chargeable under the Value Added Tax Act 1994 and any similar replacement tax and any similar additional tax.

Working Day: any day which is not a Saturday, a Sunday, a bank holiday or a public holiday in Wales.

1.2 Clause headings shall not affect the interpretation of this Deed.

1.3 A **person** includes a natural person, corporate or unincorporated body (whether or not having separate legal personality).

1.4 A reference to a **company** shall include any company, corporation or other body corporate, wherever and however incorporated or established.

1.5 Unless the context otherwise requires, words in the singular shall include the plural and in the plural shall include the singular.

1.6 Unless the context otherwise requires, a reference to one gender shall include a reference to the other genders.

1.7 A reference to any party shall include that party's personal representatives, successors and permitted assigns and in the case of the Council the successors to its respective statutory functions.

1.8 Unless the context otherwise requires, a reference to a statute or statutory provision is a reference to it as amended, extended or re-enacted from time to time.

1.9 Unless the context otherwise requires, a reference to a statute or statutory provision shall include any subordinate legislation made from time to time under that statute or statutory provision.

1.10 A reference to **writing** or **written** excludes faxes.

1.11 A reference to **this Deed** or to any other deed or document referred to in this Deed is a reference to this Deed or such other deed or document as varied or novated (in each case, other than in breach of the provisions of this Deed) from time to time.

1.12 References to clauses and Schedules are to the clauses and Schedules of this Deed.

1.13 An obligation on a party not to do something includes an obligation not to allow that thing to be done.

1.14 Any words following the terms **including, include, in particular, for example** or any similar expression shall be construed as illustrative and shall not limit the sense of the words, description, definition, phrase or term preceding those terms.

1.15 Where an obligation falls to be performed by more than one person, the obligation can be enforced against every person so bound jointly and against each of them individually.

1.16 Insofar as different parts of or interests in the Property are owned by different persons each person covenants with the Council and with one another to co-operate insofar as they are able to ensure that the covenants herein on behalf of "theDeveloper" are fulfilled as expeditiously as possible.

2. STATUTORY PROVISIONS

2.1 This Deed constitutes a planning obligation for the purposes of section 106 of the TCPA 1990, section 111 of the Local Government Act 1972 and any other enabling powers.

2.2 The covenants, restrictions and obligations contained in this Deed are planning obligations for the purposes of section 106 of the TCPA 1990 and are entered into by the Developerwith the intention that they bind the interests held by the Developer in the Property and its successors and assigns.

2.3 The covenants, restrictions and obligations contained in this Deed are enforceable by the Council in accordance with section 106 of the TCPA 1990.

3. CONDITIONALITY

With the exception of clauses 2, 3,10,11, 13, 16, 17, 19, 20, 21, 22 and 24 (which take effect immediately), this Deed is conditional on the grant and issue of the Planning Permission.

4. COVENANTS TO THE COUNCIL

4.1 The Developer covenants with the Council to:

(a) observe and perform the covenants, restrictions and obligations contained in Schedule 1

(b) give at least 10 (ten) Working Days written notice to the Council of the intended Commencement Date.

(c) give written notice to the Council upon Occupation of the first Private Dwelling

(d) give written notice to the Council upon Occupation of the first Affordable Housing Unit

(e) provide occupancy figures at any time upon written request from the Council to do so (provided only 1 (one) such request is made in any calendar period of 3 (three) months.

(f) not to submit reserved matters applications containing Open Space or Dwellings on the Council's Retained Land

4.2 The DeveloperCovenants that if it has not provided the information referred to in clause 4.1. above within 20 (twenty) working days of it becoming available it shall on each occasion it fails to do so pay to the Council the reasonable and proper costs (up to a max of £1000 (one thousand pounds) on each occasion of default) the Council incurs in obtaining the information.

4.3 For the avoidance of doubt the Developer shall be bound by the covenants contained in this Deed on the part of the Developer if and to the extent the Developer acquires and interest in the Property

5. COVENANTS BY THE COUNCIL

5.1 The Council covenants with the Developer to observe and perform the covenants, restrictions and obligations on its part contained in Schedule 2 of this Deed.

5.2 For the avoidance of doubt other than clause 5.3 below the Council shall not be bound as a landowner by the terms of this Deed

5.3 The Council covenants not to permit the constructions of any Dwellings constructed under the terms of the Planning Permission on the Council's Retained Land

6. INDEXATION

6.1 All financial contributions payable to the Council shall be Index Linked.

6.2 Where reference is made to an index and that index ceases to exist or is replaced or rebased then it shall include reference to any index which replaces it or any rebased index (applied in a fair and reasonable manner to the periods before and after rebasing under this deed) or in the event the index is not replaced, to an alternative reasonably comparable basis or index as the Council shall advise the Developerin writing.

7. RELEASE

7.1 No person shall be liable for any breach of a covenant, restriction or obligation contained in this Deed after parting with all of its interest in the Property, except in respect of any breach subsisting prior to parting with such interest.

7.2 Upon the Commencement of Development any obligations under Section 106 of the Act (or Section 52 of the Town & Country Planning Act 1971) that are in effect prior to the date of the Deed and attaching to or affecting the Property shall be released and be of no further effect.

7.3 It is hereby agreed by the Council that:

7.3.1 except for the terms of paragraph 1 of Schedule 1 in relation to the occupants of Affordable Housing Units the terms of this Deed shall not be enforceable against the occupants or owners or their mortgagees of individual Dwellings and as a consequence of this release the owners and occupants (and their mortgagees) of individual Dwellings shall not be required to enter into any deed varying or supplementing this Deed

7.3.2 the terms of this Deed shall not bind a statutory undertaker providing services to and within the Property as a result of its or their ownership or occupation of any part of the Property required as part of its or their statutory function.

8. DETERMINATION OF DEED

The obligations in this Deed shall cease to have effect if before the Commencement of Development, the Planning Permission:

(a) expires;

(b) is varied or revoked other than at the request of theDeveloper; or

(c) is quashed following a successful legal challenge.

9. LOCAL LAND CHARGE

This Deed is a local land charge and shall be registered as such by the Council.

10. COUNCIL'S COSTS

The Developer shall pay to the Council on or before the date of this Deed:

(a) the Council's reasonable and proper legal costs together with all disbursements incurred in connection with the preparation, negotiation, completion and registration of this Deed.

(b) the sum of £1000 as a contribution towards the Council's costs of monitoring the implementation of this Deed.

11. INTEREST ON LATE PAYMENT

If any sum or amount has not been paid to the Council by the date it is due, the Developershall pay the Council interest on that amount at the Default Interest Rate (both before and after any judgment). Such interest shall accrue on a daily basis for the period from the due date to and including the date of payment.

12. OWNERSHIP

12.1 The Developer warrants that no person other than the Developer has any legal or equitable interest in the Property.

12.2 Until the covenants, restrictions and obligations in this Deed have been complied with, the Developer will give to the Council within 10 (ten) Working Days, the following details of any conveyance, transfer, lease, assignment, mortgage or other disposition entered into in respect of all or any part of the Property:

(a) the name and address of the person to whom the disposition was made; and

(b) the nature and extent of the interest disposed of

Provided this shall not include a sale disposal or transfer of any individual Dwelling to an owner occupier of that Dwelling except as may be required to comply with Clause 4.1.

13. REASONABLENESS

Any approval, consent, direction, authority, agreement or action to be given by the Council under this Deed shall not be unreasonably withheld or delayed.

14. CANCELLATION OF ENTRIES

14.1 On the written request of the Developer at any time after each or all of the obligations have been performed or otherwise discharged (and subject to the payment of the Council's reasonable and proper costs) the Council will issue a written confirmation of such performance or discharge.

14.2 Following the performance and full satisfaction of all the terms of this agreement or if this Deed is determined pursuant to clause 14.1 (and subject to the payment of the Council's reasonable and proper costs and charges) the Council will on the written request of the Developer cancel all entries made in the local land charges register in respect of this deed.

15. MANAGEMENT, MAINTENANCE AND NOTICE OF OCCUPATIONS

1The Developer covenants in respect of the Affordable Housing Units, whether at the time of transfer to the RSL or otherwise, not to impose any management and/or maintenance charges whatsoever upon the RSL or the subsequent occupants of the Affordable Housing Units.

16. DISPUTES

Any dispute, controversy or claim arising out of or relating to this Deed, including any question regarding its breach, existence, validity or termination or the legal relationships established by this Deed, shall be finally resolved by arbitration in accordance with the Arbitration Act 1996. It is agreed that:

(a) the tribunal shall consist of one arbitrator appointed jointly by the parties;

(b) in default of the parties' agreement as to the arbitrator, the arbitrator shall be appointed on either party's request by the President for the time being of the Royal Institution of Chartered Surveyors;

(c) the costs of the arbitration shall be payable by the parties in the proportions determined by the arbitrator (or if the arbitrator makes no direction, then equally); and

(d) the seat of the arbitration shall be Wales

17. NO FETTER OF DISCRETION

Nothing (contained or implied) in this Deed shall fetter or restrict the Council's statutory rights, powers, discretions and responsibilities.

18. WAIVER

No failure or delay by the Council to exercise any right or remedy provided under this Deed or by law shall constitute a waiver of that or any other right or remedy. No single or partial exercise of such right or remedy shall prevent or restrict the further exercise of that or any other right or remedy.

19. FUTURE PERMISSIONS

Nothing in this Deed shall prohibit or limit the right to develop any part of the Property in accordance with any planning permission (other than the Planning Permission or modification, variation or amendment thereof) granted after the date of the Planning Permission.

20. AGREEMENTS AND DECLARATIONS

The parties agree that:

(a) nothing in this Deed constitutes a planning permission or an obligation to grant planning permission; and

(b) nothing in this Deed grants planning permission or any other approval, consent or permission required from the Council in the exercise of any other statutory function.

21. NOTICES

21.1 Any notice to be given under this Deed must be in writing and must be sent by pre-paid first class post or other next working day delivery service.

21.2 Any notice to be given under this Deed must be sent to the relevant party as follows:

(a) to the Council at County Hall The Rhadyr Usk Monmouthshire NP15 1GA marked for the attention of Legal Services;

(b) to the Developer at Ty'r Efail Lower Mill Field Pontypool Torfaen NP4 0XJ marked for the attention of the Chief Executive

or as otherwise specified by the relevant party by notice in writing to each other party.

21.3 Any notice given in accordance with clause 21.1 0 and clause 21.2 will be deemed to have been received if sent by pre-paid first class post or other next working day delivery service, at 9.00 am on the second Working Day after posting.

21.4 A notice given under this Deed shall not be validly given if sent by fax or e-mail.

21.5 This clause does not apply to the service of any proceedings or other documents in any legal action or, where applicable, any arbitration or other method of dispute resolution.

22. THIRD PARTY RIGHTS

A person who is not a party to this Deed shall not have any rights under the Contracts (Rights of Third Parties) Act 1999 to enforce any term of this Deed.

23. VALUE ADDED TAX

23.1 Each amount stated to be payable by the Council or the Developerto the other under or pursuant to this Deed is exclusive of VAT (if any).

23.2 If any VAT is at any time chargeable on any supply made by the Council or the Developerunder or pursuant to this Deed, the party making the payment shall pay the other an amount equal to that VAT as additional consideration on receipt of a valid VAT invoice.

24. GOVERNING LAW

This Deed and any dispute or claim arising out of or in connection with it or its subject matter or formation (including non-contractual disputes or claims) shall be governed by and construed in accordance with the law of England and Wales as it applies in Wales.

This document has been executed as a deed and is delivered and takes effect on the date stated at the beginning of it.

Executed as a deed by affixing
the common seal of
MONMOUTHSHIRE COUNTY COUNCIL
in the presence of:



[redacted]

Member of the Council

[redacted]

Authorised Offi

Signed as a deed by **Melin Homes Limited** acting by a director in the presence of the witness named below and delivered at the date hereof:	
	Director [redacted]
Witness si[redacted] ..... Witness n[redacted] ..... Address .....[redacted] Occupation .....[redacted]	

Schedule 1 Covenants to the Council

1. AFFORDABLE HOUSING

1.1. To provide 25% (twenty five percent) of the Dwellings as Affordable Housing Units with the following mix:

- 16 x 2 person 1 bed flats (blocks of 4 – walk up)
- 30 x 4 person 2 bed houses
- 19 x 5 person 3 bed houses
- 1 x 7 person 4 bed house
- 7 x 2 bed adapted bungalows

Provided That the Developer shall not be required to have precisely the same percentage or mix of Affordable Housing Units in each phase of the Development.

1.2. To provide, design and construct the Affordable Housing Units in accordance with DQR.

1.3. Where the Developer is not also an RSL the owner for the time being of the Property shall procure that the Affordable Housing Units are transferred to the RSL at the Price and in any event on the basis that such Affordable Housing is to be used for Affordable Housing purposes in perpetuity (but subject to the terms of paragraphs 1.10 and 1.11).

1.4. Unless at the relevant time the Developer is an RSL the Affordable Housing Units shall be sold at the Price on the following basis for each phase of the Development:

1.4.1. Within three (3) months following the grant of the reserved matters consent for the relevant phase of the Development, the Developer shall serve a notice on an RSL ("the First Sale Notice") offering to sell the Affordable Housing Units within such phase of the Development to the RSL, at the Price at the same time, a copy of such notice shall be sent to the Council.

1.4.2. If by the expiry of the period of 6 (six) months from the service of the First Sale Notice on the RSL, the RSL:

1.4.2.1. has declined the offer; or

1.4.2.2. failed to accept or refuse the offer; or

1.4.2.3. accepted the offer but failed to exchange contracts save for this shall not operate if the Developer has caused delay in replying to reasonable enquiries or providing necessary information so as to make exchange of contracts possible

then the RSL will be deemed to have rejected the Developer 's offer to acquire the relevant Affordable Housing Units pursuant to the First Sale Notice.

1.4.3. Upon the actual or deemed rejection of the offer pursuant to the First Sale Notice by the RSL the Developer shall serve a further notice upon the Council giving a period of 3 (three) months for the Council to identify another RSL ("the second RSL") or the Council itself to acquire the Affordable Housing Units at the Price ("the Second Sale Notice").

1.4.4. If by the expiry of the period of 6 (six) months following the service of the Second Sale Notice, the second RSL and the Council has:

1.4.4.1. declined the offer or

1.4.4.2. failed to accept or refuse the offer or

1.4.4.3. accepted the offer but failed to exchange contracts save for this shall not operate if the Developer has caused delay in replying to reasonable enquiries or providing necessary information so as to make exchange of contracts possible

then the second RSL and the Council will be deemed to have rejected theDeveloper's offer pursuant to the Second Sale Notice to acquire the relevant Affordable Housing Units within the relevant phase and the Developer shall be required to pay a contribution in lieu of providing the Affordable Housing Units within the relevant phase ("the Affordable Housing Contribution").

1.5. In the event that the Developer is required to pay an Affordable Housing Contribution in accordance with paragraph 1.4 of this Schedule 1 such contribution shall be calculated as follows:

AHC = [OMV x (100%-DRM)) – (ACG x DP)] x N

AHC = Affordable Housing Contribution for affordable housing

OMV = Open Market Value

DRM = Developer Return and Marketing (23%)

ACG = Acceptable Cost Guidance

DP = Default percentage of ACG (42%)

N = Number of Dwellings (the value of N is 25%)

(Example is a 3 bed house in a band 5 area)

OMV £228,995 x 0.77 = £176,326

ACG £212,100 x 42% = £89,082

£176,326 – £89,082 = £87,244

£87,244 x 25% (1 unit) = **£21,811**

the Developerwill pay the Affordable Housing Contribution to the Council before Occupation of 75% of the Private Dwellings and from the date of payment in respect of a particular Affordable Housing Unit the provisions of paragraph 1 of Schedule 1 shall cease to apply to that Affordable Housing Unit in perpetuity and that Affordable Housing Unit shall thereafter become a Private Dwelling

1.6 Following a written request from the Council the Developer shall provide to the Council such information concerning the progress of negotiations for the disposal of the Affordable Housing Units as shall be reasonably required by the Council.

1.7. The Developercovenants not to Occupy or permit first Occupation of more than:

1.7.1. 50% of the Private Dwellings in a phase until such time as 50% of the Affordable Housing Units in that phase have been constructed and are ready for Occupation

1.7.2. 75% of the Private Dwellings in a phase until such time as all of the Affordable Housing Units in that phase have been constructed and are ready for Occupation or any Affordable Housing Contribution payable relevant to such phase has been paid to the Council.

1.8 The Affordable Housing Units shall be of Neutral Tenure and sold or let by the RSL on terms appropriate to the tenure under which they are disposed of to the occupants.

1.9 The Developer and/or RSL as appropriate shall keep such full and proper records as are reasonably required to demonstrate to the Council compliance with the Affordable Housing obligations contained in this Deed and any supplementary agreement hereto.

1.10 The Developer will be awarded a Social Housing Grant Top Up in addition to the 42% of ACG to be paid by the RSL for the 7 adapted bungalows. This top up will be paid to the party constructing the said seven adapted bungalows to cover the

additional cost of adaptations to the said seven adapted bungalows to be erected on the Property.

1.11 The obligations within this Deed shall not be binding on:

1.11.1 any Chargee provided that the Chargee shall have first complied with the Chargee's Duty

1.11.2 any Protected Tenant or any mortgagee or chargee of the Protected Tenant or any person deriving title from the Protected Tenant or any successor in title thereto and their respective mortgagee and chargees

1.12 The Chargee prior to seeking to dispose of the Affordable Housing Unit(s) pursuant to any default under the terms of its mortgage or charge shall give not less then 4 (four) weeks prior notice in writing to the Council of its intention to dispose and:

1.12.1 in the event that the Council responds within 4 (four) weeks from receipt of the notice that it or an RSL will purchase the Affordable Housing Unit(s) then the Chargee shall co-operate with such arrangements and use its reasonable endeavours to complete such transfer

1.12.2 if the Council or the RSL identified by the Council in its notice cannot within 16 (sixteen) weeks of the date of service of its response under paragraph 1.12.1 complete such transfer then provided that the Chargee shall have complied with its obligations under this part of the Deed the Chargee shall be entitled to dispose of the Affordable Housing Unit(s) free from the obligations contained within this Deed which obligations shall determine absolutely

PROVIDED THAT at all times the rights and obligations in this paragraph 1.12 shall not require the Chargee to act contrary to its duties under the charge or mortgage and that the Council shall protect the interest of the Chargee in respect of monies

outstanding under the charge or mortgage including all principal sums, accrued interest and costs.

1.13 To procure that on the first disposal of each Affordable Housing Unit a restriction is entered in the Proprietorship Register of the title to each of the Affordable Housing Units in the following terms:

"No disposition of the registered estate (other than a charge) by the proprietor of the registered estate is to be registered without a certificate signed by a conveyancer that the provisions of the First Schedule to the Agreement dated [2019] made between Monmouthshire County Council (1) and (2) pursuant to Section 106 of the Town and Country Planning Act 1990 have been complied with".

2 OPEN SPACE TRANSFER AND WORKS

The Developer agrees and covenants with the Council:

2.1 To provide the Play Area

2.2 To fully implement the Open Space Works including the Play Area and shall not allow Occupation of the last Market Housing Unit until they have been completed to the reasonable satisfaction of the Council

2.3 To establish a management company to own and maintain the Open Space Land and Play Area foot paths (other than adopted footpaths) and drainage conduits and or basins but it may by notice in writing to the Council and upon payment of a commuted sum to be agreed between the Developer and the Council require the Council to take a transfer of the Open Space

3. RECREATION CONTRIBUTION

3.1 Prior to Completion or Occupation (whichever is the soonest) of 50% of the Dwellings to pay the Adult Recreation Contribution be used for one or a combination of the following proposals:

(i) Develop a former MOD railway as a footway/cycle path creating links from the Property to Caldicot Country Park and the Cornfield Project

(ii) Improvements to Caldicot Castle Country Park

(iii) Caldicot Regeneration Scheme

(iv) The Cornfield Project

4. SUSTAINABLE TRANSPORT CONTRIBUTION

Prior to Completion or Occupation (whichever is the soonest) of 40% of the Dwellings to pay to the Council the Sustainable Transport Contribution to be used by the Council to pump prime a continuing and improved bus service to and from Portskewett and Caldicot Town Centre and/or local railway stations.

5. EDUCATION CONTRIBUTION

5.1 Prior to Completion or Occupation (whichever is the soonest) of 25% of the Dwellings to pay to the Council the sum of £400,000 (four hundred thousand pounds) index linked being the first instalment of Education Contribution to be used towards the cost of providing, expanding or improving educational facilities (which may include the purchase and improvement of land and buildings) at primary school(s) serving the Property

5.2 Prior to Completion or Occupation (whichever is the soonest) of 50% of the Dwellings to pay to the Council the remainder of the Education Contribution towards the cost of providing, expanding or improving educational facilities (which may include the purchase and improvement of land and buildings) at primary school(s) serving the Property

5.3 The total Education Contribution will be calculated as follows and will be based upon Private Dwellings only:

Need (n) = A/1000*119 + B/1000*217 +C/1000*294

Where:

A is the number of 2 bed market dwellings

B is the number of 3 bed market dwellings

C is the number of 4+ bed market dwellings

Total Education Contribution = n x £17,257 index linked (eg Current mix would require 47 places. The figure for 2019 is £17,257 per pupil and therefore the sum required would be £811,079.00)

5.4 The remainder of the Education Contribution referred to in paragraph 5.2 equals the total Education Contribution calculated as per paragraph 5.3, less the £400,000 paid under paragraph 5.1

6. HIGHWAYS WORKS AGREEMENT

6.1 To enter into an agreement under Section 278 of the Highways Act 1980 prior to commencement of development and complete the works pursuant to such agreement to construct any required off site highway works including

(i) the proposed B4245 junction and improvement works including footways, street lighting, the narrowing of the bridge, islands, road markings, signs, bus stops etc

(ii) the Crick Road junction and Crick Road improvements including footways, road markings etc.

6.2 To complete the s278 Agreement for off site highway improvement works prior to the Occupation of the first Dwelling.

Schedule 2 Covenants by the Council

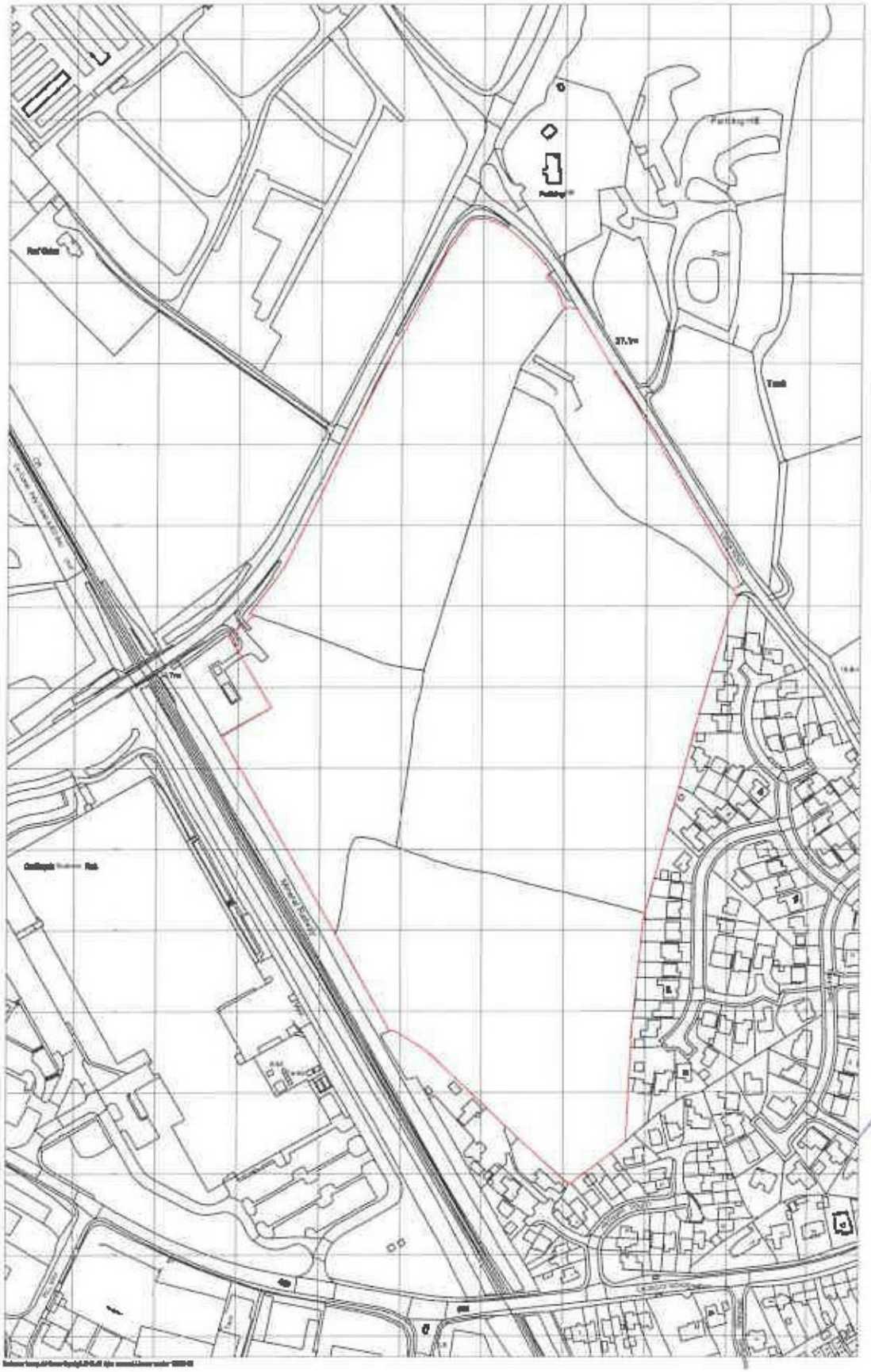
1. CONTRIBUTIONS

1.1 Not to use any of the Contributions other than for the purposes for which it was paid (whether by the Council or another party).

1.2 In the event that the Contributions have not been spent or committed for expenditure by the Council within 5 (five) years following the date of receipt of the Contribution the Council shall refund to the person who paid the Contributions any part of the Contribution which has not been spent or committed for expenditure, together with any accrued interest.

Annex A. Plan 1 Plan 2 and The Masterplan

Crick Road, PORTSKEWETT, Caldicot



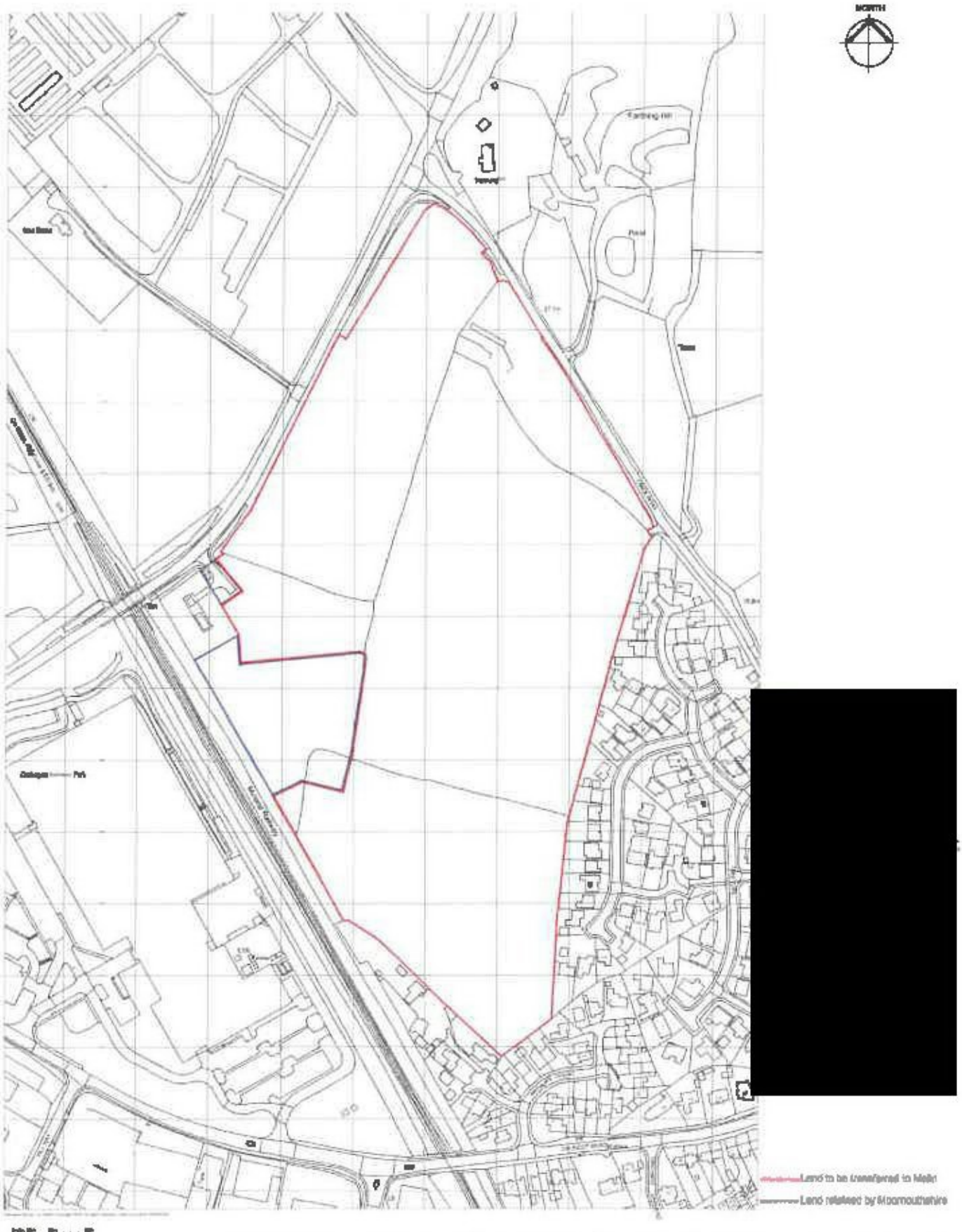
[redacted]

PRELIMINARY
PLANNING ✓
DESIGN
TENDER
CONSTRUCTION

powelldobson ARCHITECTS

Land at Crick Road, PORTSKEWETT, Caldicot for Main Homes
Site Location Plan

Crick Road, PORTSKEWETT, Caldicot



powelldobson ARCHITECTS

Land at Crick Road, PORTSKEWETT,

Land Transfer Plan


Masterplan Legend
Site Boundary
Neighbourhood Core Residential Area
Village Street an Greenway Residential Area
Key building or group of buildings location
Care Facility Development Parcel
Greenway running along Principle Village Street
Ecology and POS areas
POS including LEAP/LAP/Informal Space
Key POS
Secondary/Informal POS
Existing trees/hedgerows to be retained replaced or translocated as necessary
Informal pedestrain route thro' ecology/POS exact position subject to detailed design
Principle Vehicular Access
Secondary Vehicular Access
Shared footpath cycleway along Greenway and connecting into wider neighbourhood
Possible future Sustrans route
Trees in public realm or front gardens subject to detailed design
Street Hierarchy
1: Village Street - Greenway
2: Secondary Street
3: Shared Surface Street
4: Lane/Private Drive
Character Areas
1: Village Street and Greenway
2: Neighbourhood Core
Farthing Hill
NORTH

Annex B. Draft Planning Permission

monmouthshire
sir fynwy

Cymeradwyo /Approval of Planning Permission

Deddf Cynllunio Tref a Gwlad 1990
Gorchymyn Cynllunio Tref a Gwlad (Gweithdrefn Rheoli Datblygu) Cymru 2012
Town and Country Planning Act 1990
The Town and Country Planning (Development Management Procedure) (Wales) Order 2012

Cais Rhif/ Application No: **DM/2018/00696**

Ymgeisydd/ Applicant:	Melin Homes And Monmouthshire CC	**Asiant/Agent**	Miss Llinos Hallett Unit 9 Oak Tree Court Cardiff Gate Business Park Cardiff CF23 8RS United Kingdom

Mae **CYNGOR SIR FYNWY** fel yr Awdurdod Cynllunio Lleol drwy hyn yn **caniatáu**'r datblygiad dilynol yn unol â'r cynlluniau a'r cais a gyflwynwyd i'r Cyngor, yn ddarostyngedig i unrhyw amodau.

MONMOUTHSHIRE COUNTY COUNCIL as Local Planning Authority hereby **Approve** the following development in accordance with the plans and application submitted to the Council, subject to any conditions.

Lleoliad/Location:	Land Development South Of Crick Road Crick Road Portskewett Monmouthshire
Disgrifiad o'r Cynnig/Description of Proposal:	Outline application (with all matters reserved except for access) for residential development of up to 291 dwellings, a care home and public open space, landscaping and associated infrastructure works

DARLLENWCH Y NODIADAU A ATODIR OS GWELWCH YN DDA
PLEASE READ THE ATTACHED NOTES

MAE'N BWYSIG EICH BOD YN CYDYMFFURFIO GYDA'R CYNLLUNIAU A GYMERADWYWYD A'R CANIATÂD CYNLLUNIO, YN CYNNWYS AMODAU. DARLLENWCH Y NODIADAU SY'N CYD-FYND Å'R PENDERFYNIAD HWN OS GWELWCH YN DDA.

PWYSIG: MAE'R CYFATHREBIAD YMA'N EFFEITHIO AR EICH EIDDO

IT IS IMPORTANT THAT YOU COMPLY WITH THE APPROVED PLANS AND THE PLANNING PERMISSION, INCLUDING CONDITIONS. PLEASE READ THE NOTES ACCOMPANYING THIS DECISION.

IMPORTANT THIS COMMUNICATION AFFECTS YOUR PROPERTY

Amodau a Rhesymau/Conditions and Reasons

1 Approval of the details of the layout, scale and appearance of the building(s) and the landscaping of the site (hereinafter called the reserved matters) for either the residential development and/or the care home shall be obtained from the Local Planning Authority prior to any works commencing on that part of the site.

REASON: The application is in outline only and approval of the reserved matters is required prior to development commencing. However, the reserved matters can be submitted in a phased manner to distinguish the residential development from the care home.

2 The development shall be carried out in accordance with the list of approved plans set out in the table below.

REASON: To ensure the development is carried out in accordance with the approved drawings, for the avoidance of doubt.

3 (a) Application for approval of all the reserved matters shall be made to the Local Planning Authority before the expiration of three years from the date of this permission.

b) The development hereby approved must be begun either before the expiration of five years from the date of this permission, or before the expiration of two years from the date of approval of the last of the reserved matters to be approved, whichever is the later.

REASON: In order to comply with Section 92 of the Town and Country Planning Act 1990.

4 Within 2 months of the date of this planning permission a phasing plan shall be submitted to the Local Planning Authority for approval, setting out a phased timetable of implementation for the provision of service and highway infrastructure within the site. The development shall be implemented in accordance with the approved phasing plan and timetable.

REASON: To ensure that the development of the care home element of this scheme is not prevented or delayed due to a lack of available or accessible service or highway infrastructure.

5 Pursuant to the submission of the reserved matter for layout, a surface water drainage strategy shall be submitted to the Local Planning Authority showing a strategy for how surface water for the whole site will be managed and disposed of. Prior to development commencing (on either the residential development and/or the care home) a detailed scheme to dispose of surface water (including its treatment prior to discharge), the programme for its implementation, the ownership of the sustainable drainage infrastructure and any surface water sewers, relating to the part of the development the reserved matters covers (residential and/or care home) shall be submitted to, and approved in writing by, the local planning authority. The scheme shall be implemented fully prior to that part of the site coming into beneficial use.

REASON: To ensure that surface water on site is managed in a sustainable manner and flood risk is kept to a minimum in accordance with Local Development Plan Policy SD4 LDP Sustainable Drainage and to ensure protection of controlled waters in the local area. Treatment of surface water drainage prior to discharge to watercourse is needed as the site is located within SPZ1.

6 Pursuant to the submission of the reserved matters for layout (for either the residential development and/or the care home), a "lighting design strategy for biodiversity" shall be submitted to and approved in writing by the local planning authority relating to the part of the site the reserved matters covers (Residential Development and/or Care Home). The strategy shall:

a) identify those areas/features on site that are particularly sensitive for barn owl and foraging/commuting bats and that are likely to cause disturbance in or around their breeding sites and resting places or along important routes used to access key areas of their territory, for example, for foraging; and

b) show how and where external lighting will be installed (through the provision of appropriate lighting contour plans and technical specifications) so that it can be clearly demonstrated that areas to be lit will not disturb or prevent the above species using their territory or having access to their breeding sites and resting places. All external lighting shall be installed in accordance with the specifications and locations set out in the strategy, and these shall be maintained thereafter in accordance with the strategy. Under no circumstances should any other external lighting be installed without prior consent from the local planning authority.

REASON: : To safeguard foraging/commuting habitat of Species of Conservation Concern in accordance with Section 6 of the Environment Act (Wales) 2016 and LDP policies EP3 and NE1.

7 Pursuant to the submission of the Reserved Matters application(s) for layout and landscaping for the residential development, detail of methods to avoid and mitigate for the presence of barn owl on site and detail of off-site mitigation for barn owl shall be submitted to and approved in writing by the Local Planning Authority. Avoidance, mitigation and compensation shall build upon the principles in Interim Technical Note: Hedgerow Translocation & Barn Owl Mitigation Rev 2 dated October 2018 and include, but not be limited to:

a) Provision of barn owl nest box on site including specification & position

b) Provision of an additional two barn owl nest boxes off site with at least one being within 200m of the existing roost site including specification & position

c) Planting of vegetation on site to provide screening for barn owl

d) Detail of screening fencing for duration of the construction phase

e) Restriction of the use of green space around the onsite barn owl nest site upon completion of the development

f) Management of grassland around the onsite barn owl nest site

g) Management details of foraging habitat for barn owl including existing trees and grassland off site, no more than 200m from the existing nest site

h) Monitoring scheme for a minimum total period of 5 years

i) Options for modification of mitigation and compensation measures if monitoring indicates a change in behaviour

Clear links shall be made to the Construction Environmental Management Plan for the site and the Green Infrastructure Management Plan. The development shall be carried out in accordance with the approved barn owl mitigation.

REASON: To protect protected and priority species in accordance with Local Development Plan Policy NE1.

8 Pursuant to the submission of the Reserved Matter for landscaping for either the residential development and/or the care home, a Green Infrastructure Management Plan relating to the part of the site that the Reserved Matters covers (for either the residential development and/or the care home) shall be submitted to. The content of the Green Infrastructure Management Plan shall include the the following;

a) Description and evaluation of Green Infrastructure assets to be managed e.g.

- Community Orchard
- Multifunctional Green spaces/corridors
- Suds area
- LEAP
- Woodland areas
- Hedgerows
- Street trees, Parkland trees

- Management of Barn Owl exclusion zone to tie in with the biodiversity condition "detail of barn owl mitigation"

b) Opportunities for enhancement to be incorporated:

- Management of grassland for botanical species diversity and/or protected species including reptiles
- SUDS feature to hold water all year round
- Provision of hibernacula suitable for reptiles/amphibians
- Maintain habitat connectivity through site for species such as hedgehogs
- Dark areas to support bat foraging.
- Tree/hedgerow management

c) Trends and constraints on site that might influence management of above features.

d) Aims and objectives of management.

e) Appropriate management options for achieving aims and objectives.

f) Prescriptions for management actions.

g) Preparation of a work schedule (including an annual work plan capable of being rolled forward over a twenty-year period).

h) Details of the body or organisation responsible for implementation of the plan.

i) Ongoing monitoring and remedial measures.

The Management Plan shall also include details of the legal and funding mechanism(s) by which the long-term implementation of the plan will be secured by the developer with the management body(ies) responsible for its delivery. The plan shall also set out (where the results from monitoring show that conservation aims and objectives of the Green Infrastructure Management Plan are not being met) how contingencies and/or remedial action will be identified, agreed and implemented so that the development still delivers the fully functioning Green Infrastructure objectives of the originally approved scheme. The approved plan will be implemented in accordance with the approved details.

REASON: To maintain and enhance Green Infrastructure Assets in accordance with LDP policies, DES1, S13, GI1, NE1, EP1 and SD4. (Legislative background - Well Being of Future Generations Act 2015, Planning (Wales) Act 2015 Environment (Wales) Act 2016)

9 Pursuant to the submission of reserved matters for layout, a Tree Protection Report in accordance with British Standard 5837:2012 - Trees in relation to Design, Demolition and Construction Recommendations shall be submitted to the Local Planning Authority. The report shall relate to the part of the site that the reserved matters covers (residential development and/or the care home), this will include the following information:

a) A scaled Tree Protection Plan detailing all retained trees and hedges and their root protection areas shown on the proposed layout.

b) An Arboricultural Method Statement.

c) The appointment of an appropriately qualified and experienced Arborist to provide a scheme of arboricultural monitoring.

d) A schedule of pruning operations for access and facilitation purposes.

The approved tree protection measures shall be fully implemented for that phase of development (residential and/or care home) prior to the commencement of development on that phase, and shall be retained as such until construction of that phase is completed.

REASON: To ensure the long-term retention of valuable green infrastructure assets in accordance with Council Policy S13 - Landscape, Green Infrastructure and the Natural Environment.

10 For the implementation of each reserved matters application (for either the residential development and/or the care home), no development shall take place for the site that this reserved matters relates to (with the exception of hedgerow translocation) until a construction environmental management plan (CEMP: Biodiversity) relating to the part of the site the reserved matters covers (Residential Development and/or Care Home) has been submitted to and approved in writing by the local planning authority. The CEMP (Biodiversity) shall include the following.

a) Risk assessment of potentially damaging construction activities.

b) Identification of "biodiversity protection zones".

c) Practical measures (both physical measures and sensitive working practices) to avoid or reduce impacts during construction (may be provided as a set of method statements).

d) The location and timing of sensitive works to avoid harm to biodiversity features.

e) The times during construction when specialist ecologists need to be present on site to oversee works.

f) Responsible persons and lines of communication.

g) The role and responsibilities on site of an ecological clerk of works (ECoW) or similarly competent person.

h) Use of protective fences, exclusion barriers and warning signs.

The approved CEMP shall be adhered to and implemented throughout the construction period strictly in accordance with the approved details, unless otherwise agreed in writing by the local planning authority.

REASON: To protected and maintain priority habitats and safeguard protected and priority species during the construction phase

11 For the implementation of each reserved matters application (for either the residential development and/or the care home), no development shall take place until a foul water drainage scheme to satisfactorily accommodate the foul water discharge from the site has been submitted to and approved in writing by the local planning authority relating to the part of the site the reserved matters covers (residential development and/or the care home). No part of the development shall be brought into use and no dwelling or care home accommodation shall be occupied until the approved foul drainage system (relating to the part of the site that this reserved matters covers) has been constructed, completed and brought into use in accordance with the approved scheme.

REASON: To prevent hydraulic overloading of the public sewerage system, to protect the health and safety of existing residents and ensure no pollution of or detriment to the environment

12 For the implementation of each reserved matters application (for either the residential development and/or the care home), prior to any works commencing on site a Construction Traffic Management Plan (CTMP) shall be submitted to and approved by the local planning authority, relating to the part of the site the reserved matters covers (residential development and/or the care home) which shall include traffic management measures, hours of working, measures to control dust, noise and related nuisances, and measures to protect adjoining users from construction works. The development shall be carried out in accordance with the approved CTMP.

REASON: In the interest of Highway Safety and to protect the amenity of the local residents

13 For the implementation of each reserved matters application (for either the residential development and/or the care home), no development shall be commenced until details of the proposed arrangements for future management and maintenance of the proposed streets within the development relating to the part of the site the reserved matters covers (residential development and/or the care home). have been submitted to and approved by the local planning authority. The streets shall thereafter be maintained in accordance with the approved management and maintenance details until such time as an agreement has been entered into under section 38 of the Highways Act 1980 or a private management and Maintenance Company has been established

REASON: In the interests of highway safety

14 No development shall commence on site until detailed design, safety audits and technical audits for the proposed means of access onto the B4245 have been submitted to and approved by the Local Planning Authority. The development shall be carried out in accordance with the approved details.

REASON: To ensure the access is constructed in the interest of highway safety and Local Development Plan Policy MV1

15 The details submitted pursuant to the reserved matter for landscaping (for either the residential development and/or the care home) should reflect the guidelines set out in the Landscape Strategy and the Strategic Masterplan Rev C and in addition should include:

- means of enclosure;
- details of the hedgerow translocation;
- Details of the access to the barn owl exclusion zone;
- Hard surfacing materials;
- Details of play equipment for proposed LEAP.
- Proposed and existing functional services above and below ground (e.g. drainage details, power etc);
- Communications cables, pipelines etc. indicating lines, manholes, supports and CCTV installations.);
- Soft landscape details shall include: Planting plans, specifications including cultivation and other operations associated with plant and grass establishment, schedules of plants, noting species, sizes, numbers and densities;
- Clarification of access connections beyond the site.

REASON:To ensure the provision afforded by appropriate landscape design and Green Infrastructure LC5, S13, and GI 1 and NE1

16 Prior to development commencing on site, a schedule of landscape implementation and maintenance for a minimum period of five years relating to the part of the site the reserved matters covers (residential development and/or the care home) shall be submitted to and approved by the Local Planning Authority and shall include details of the arrangements for its implementation that shall be integrated into the GI Management Plan. All hard and soft landscape works shall be carried out in accordance with the approved details and in accordance with the appropriate British Standards or other recognised Codes of Good Practice. The works shall be carried out in accordance with the approved implementation plan. Any trees or plants that, within a period of five years after planting, are removed, die or become, in the opinion of the Local Planning Authority, seriously damaged or defective, shall be replaced as soon as is reasonably practicable with others of species, size and number as originally approved.

REASON: To ensure the provision, establishment and maintenance of a reasonable standard of landscape in accordance with the approved designs and to ensure the provision of amenity afforded by the proper maintenance of existing and / or new landscape features

17 For the implementation of each reserved matters application (for either the residential development and/or the care home), no development shall take place until the applicant or his agent or successor in title has secured agreement of a written scheme of environmental mitigation, (relating to the part of the site the reserved matters covers -residential development and/or the care home) which has been submitted by the applicant and approved by the local planning authority. Thereafter the programme of works will be fully carried out in accordance with the requirements and standards of the written scheme.

REASON:

To identify and record any features of archaeological interest discovered during the works, in order to mitigate the impact of the works on the archaeological resource.

18 For the implementation of each reserved matters application, (for either the residential development and/or the care home) no development shall take place until a potable water network scheme (relating to the part of the site the reserved matters covers -residential development and/or the care home) to satisfactorily accommodate the potable water demand from the site has been submitted to and approved in writing by the local planning authority. No part of the development shall be brought into use and no dwelling shall be occupied relating to the site that this Reserved matters covers until the approved water network scheme has been constructed, completed and brought into use in accordance with the approved scheme.

REASON: To provide an adequate water supply

19 The existing boundary hedgerow that runs adjacent to the neighbouring boundaries that adjoin the south west and east of the site boundary shall be retained at a minimum height of 1.8m. None of this hedgerow shall be felled, lopped or topped (excluding regular trimming of hedges) uprooted or wilfully damaged. If any of this hedgerow is removed, or if it dies or is severely damaged, this shall be replaced with others of such a species, number and size and in a position to be agreed in writing with the Local Planning Authority. Any lopping or topping which may prove necessary shall be carried out in accordance with a scheme previously approved in writing by the Local Planning Authority. (For the purposes of clarity this refers to the existing hedgerow that runs adjacent to the common boundary of No 51 Treetops and runs for the entire length along the south west and part of the east boundary of the application site terminating at 49 Arthurs Court).

REASON: To protect valuable tree or other landscape features on the site in the interest of preserving the character and appearance of the visual amenities of the area.

20 Notwithstanding the provisions of Article 3, Schedule 2, Part 2 of the Town and Country Planning (General Permitted Development)(Amendment)(Wales) Order 2013 (or any Order revoking and re-enacting that Order with or without modification) no fence, wall or other means of enclosure other than any approved under this permission shall be erected or placed without the prior written approval of the Local Planning Authority along the south west or east of the site boundary (For the purposes of clarity this refers to the boundary identified in Condition 19 currently demarcated by an existing hedgerow that runs adjacent to the common boundary of No 51 Treetops and runs for the entire length along the south west and part of the east boundary of the application site terminating at 49 Arthurs Court).

REASON: To protect valuable tree or other landscape features on the site in the interest of preserving the character and appearance of the visual amenities of the area.

21 The maximum height of the two storey development will be 9m to ridge, 2.5 storey development will be 10m in height to ridge, three storey development will be 12m in height to ridge. The care home shall have a maximum height of 18m to ridge.

REASON: To protect the visual amenity of the area.

Condition Updates (If any)

Gwybodaeth/Informatives :- None

Polisïau Cynllun Datblygu Lleol Sir Fynwy
Monmouthshire Local Development Plan Policies :-

S3 LDP Strategic Housing Sites

S4 LDP Affordable Housing Provision

S13 LDP Landscape, Green Infrastructure and the Natural Environment

S16 LDP Transport

S17 LDP Place Making and Design

CRF2 LDP Outdoor Recreation/Public Open Space/Allotment Standards and Provision

SAH2 LDP Crick Road, Portskewett

DES1 LDP General Design Considerations

EP1 LDP Amenity and Environmental Protection

GI1 LDP Green Infrastructure

NE1 LDP Nature Conservation and Development

MV1 LDP Proposed Developments and Highway Considerations

MV2 LDP Sustainable Transport Access

LC5 LDP Protection and Enhancement of Landscape Character

SD2 LDP Sustainable Construction and Energy Efficiency

SD4 LDP Sustainable Drainage

Y **Cynlluniau** a gymeradwywyd gyda'r caniatâd hwn yw:
The **Plans** approved with this permission are:

Cyfeirnod Cynllun /Plan Ref No.	**Fersiwn Rhif/Version No.**
16117 (05) 100	
16117 (05) 200	Rev C
16117 (05) 202	Rev A

16117 (05) 204	Rev A
16117 (05) 100	
16117 (05) 102	
Green Infrastructure Management Plan Inc. Landscaping strategy	Ref: 2474.01 (Dated Sept
16117(05) 205 Rev C Strategic Masterplan	
Dementia Friendly Urban Design	
Road Improvements Works to B4245: Sheet 1	
Road Improvements Works to B4245: Sheet 2	
Road Improvements Works to B4245: Sheet 3	
Proposed Road Narrowing on Existing Bridge: B4245	
Proposed Footpath Link Crick Road	
Personal Injury Collision Data 2013-2017	
Proposed Traffic Calming Measures on B4245 & Crick Road with extended 30mph Zone	
Proposed Traffic Calming Measures on B4245	
Proposed Traffic Calming Measures on Crick Road	
Stage 1 Safety Audit (August 2018)	
Interim Technical Note: Hedgerow Translocation & Barn Owl Mitigation (October 2018)	

HYSBYSIAD PWYSIG

RHODDWYD EICH CANIATÂD CYNLLUNIO

DARLLENWCH YR WYBODAETH DDILYNOL YN OFALUS OS GWELWCH YN DDA

Os ydych yn aslant rhowch yr Hysbysiad hwn i'ch cleient gyda'r Caniatâd Cynllunio os gwelwch yn dda

Gall sut y symudwch ymlaen gyda'ch datblygiad effeithio ar eich eiddo, er enghraifft ei werth neu werthiant ac arwain at gamau gorfodaeth os nad ydych yn dilyn y cyngor yma.

Amodau

Darllenwch yr amodau'n ofalus os gwelwch yn dda. Eich cyfrifoldeb chi yw cydymffurfio â nhw.

- Gall rhai amodau olygu fod angen cyflwyno manylion, ee deunyddiau neu dirlunio, cyn i'r gwaith ddechrau neu cyn y gwnelr newid defnydd. Mae'n rhaid i chi sicrhau eich bod yn cydymffurfio gyda holl amodau o'r math yma cyn i'r gwaith ddechrau neu o fewn y cyfnod a nodwyd.
- Bydd methiant i gyflwyno materion sydd eu hangen gan amod yn gwneud eich caniatâd cynllunio yn annilys a gall arwain at gamau gorfodaeth yn eich erbyn.

Cydymffurfio gyda Chynlluniau Cymeradwy

Mae'n rhaid i chi wneud y datblygiad fel y'i cymeradwywyd neu gytuno ar newidiadau.
Bydd eich caniatâd yn annilys os nad ydych yn gwneud y datblygiad yn llwyr yn unol â chynlluniau cymeradwy.

- Bydd angen i chi wneud cais newydd os dymunwch amrywio eich cynllun neu newidiadau yn ganlyniad gofynion eraill.

Gall y Cyngor gymryd camau gorfodaeth a all arwain at erlyniad yn y Llys Ynadon lle medrir gosod cosb o hyd at £20,000. Er mwyn sicrhau eich bod yn osgoi unrhyw un o'r canlyniadau uchod, gofynnir i chi sicrhau eich bod yn cydymffurfio gyda phob agwedd o'ch caniatâd a chynlluniau.

Cadwch yr Hysbysiad yma gyda'ch Caniatâd Cynllunio os gwelwch yn dda
Gwnewch yn siŵr fod gan eich Adeiladwr gopi o'r Cynlluniau a Gymeradwywyd.

NODIADAU

Apeliadau i Lywodraeth Cymru

- Os ydych wedi eich tramgwyddo gan benderfyniad yr Awdurdod Cynllunio Lleol i roi caniatâd cynllunio yn ddarostyngedig i amodau, yna gallwch apelio at Lywodraeth Cymru yn unol ag Adran 78 Deddf Cynllunio Tref a Gwlad 1990.

- Os ydych eisiau apelio, yna mae'n rhaid i chi wneud hynny o fewn **chwe mis** o ddyddiad yr hysbysiad hwn yn defnyddio ffurflen y gallwch ei chael gan yr Arolygiaeth Cynllunio, Parc Cathays, Caerdydd CF10 3NQ.

- Gall Llywodraeth Cymru ganiatáu cyfnod hirach ar gyfer rhoi hysbysiad apêl ond ni fydd fel arfer yn barod i ddefnyddio'r pŵer yma os nad oes amgylchiadau arbennig sy'n esgusodi'r oedi wrth roi hysbysiad o'r apêl.

- Nid yw'n rhaid i Lywodraeth Cymru ystyried apêl os yw'n ymddangos na allai'r Awdurdod Cynllunio Lleol fod wedi rhoi'r caniatâd heb yr amodau y gwnaethant eu gosod gan roi ystyriaeth i ofynion statudol, i ddarpariaethau'r gorchymyn datblygu ac unrhyw gyfarwyddiadau a roddwyd dan y gorchymyn.

- Yn ymarferol nid yw Llywodraeth Cymru yn gwrthod ystyried apeliadau yn unig oherwydd bod yr Awdurdod Cynllunio Lleol wedi seilio eu penderfyniad ar gyfarwyddyd a roddwyd gan Lywodraeth Cymru.

Hysbysiadau Prynu

- Os yw un ai'r Awdurdod Cynllunio Lleol neu Lywodraeth Cymru yn gwrthod caniatâd i ddatblygu tir neu ei roi yn ddarostyngedig i amodau, gall perchennog y tir hawlio na all naill ai wneud defnydd rhesymol fuddiol o'r tir yn ei gyflwr presennol na gwneud y tir yn alluog o ddefnydd rhesymol fuddiol drwy wneud unrhyw waith datblygu sydd wedi neu a fyddai'n cael ei ganiatáu.

    - Yn yr amgylchiadau hyn gall y perchennog gyflwyno hysbysiad prynu i'r Cyngor lle mae'r tir wedi'i leoli. Bydd yr hysbysiad yn ei gwneud yn ofynnol i'r Cyngor brynu ei ddiddordeb yn y tir yn unol â darpariaethau Rhan VI Deddf Cynllunio Tref a Gwlad 1990.

IMPORTANT NOTICE

YOUR PLANNING PERMISSION HAS BEEN GRANTED

PLEASE READ THE FOLLOWING INFORMATION CAREFULLY
If you are an agent please pass this Notice to your client with the Planning Permission

How you proceed with your development may affect your property, for example its value or sale and lead to enforcement action if you do not follow this advice.

Conditions

Please read the conditions carefully. It is your responsibility to comply with them.

- Some conditions may require the submission of details, eg materials or landscaping, *before* work starts or a change of use is made. You must ensure that you comply with all conditions of this type before work starts or within the period specified.
- Failure to submit matters required by condition will make your planning permission invalid and may lead to enforcement action being taken against you.

Compliance With Approved Plans

You must carry out the development as approved or agree changes.
If you do not carry out the development in strict accordance with the approved plans your permission will be invalid.

- If you wish to vary your scheme or changes result from other requirements you will need to make a new application.

The Council can take enforcement action which may lead to prosecution in the Magistrates Courts where a fine of up to £20,000 can be imposed. In order to ensure that you avoid any of the above consequences please ensure that you comply with all aspects of your permission and plans.

Please Keep this Notice with Your Planning Permission
Make Sure Your Builder has a Copy of the Approved Plans

NOTES

Appeals to the Welsh Government

- If you are aggrieved by the decision of the Local Planning Authority to grant planning permission subject to conditions, then you can appeal to the Welsh Government in accordance with Section 78 of the Town and Country Planning Act 1990.

- If you want to appeal, then you must do so within **six months** of the date of this notice using a form which you can get from the Planning Inspectorate, Cathays Park, Cardiff CF10 3NQ.

- The Welsh Government can allow a longer period for the giving of a notice of an appeal but will not normally be prepared to use this power unless there are special circumstances that excuse the delay in giving notice of appeal.

- The Welsh Government need not consider an appeal if it seems that the Local Planning Authority could not have granted the permission without the conditions they imposed having regard to statutory requirements, to the provisions of the development order and to any directions given under the order.

- In practice the Welsh Government does not refuse to consider appeals solely because the Local Planning Authority based their decision on a direction given by the Welsh Government.

Purchase Notices

- If either the Local Planning Authority or the Welsh Government refuse permission to develop land or grant it subject to conditions, the owner of the land may claim that he can neither put the land to a reasonably beneficial use in its existing state nor render the land capable of a reasonably beneficial use by the carrying out of any development which has been or would be permitted.

    - In these circumstances the owner may serve a purchase notice on the Council in whose area the land is situated. This notice will require the Council to purchase his interest in the land in accordance with the provisions of Part VI of the Town and Country Planning Act 1990.

SUBJECT:	**Uploading S106 Capital Sums into 2024/25 Capital Budget**
MEETING:	**Cabinet**
DATE:	**15th May 2024**

DIVISION/WARDS AFFECTED: Caldicot, Magor with Undy, Abergavenny, Mardy

1. PURPOSE:

To authorise the uploading of capital sums from Section 106 Agreements received from the developments specified into the 2024/25 Capital Budget

2. RECOMMENDATIONS that:

2.1 a capital budget of £95,000 be created in 2024/25 to fund play area improvements at the Cas Troggi Open Space in Caldicot, and that this is funded by corresponding contributions of £69,120 from the Section 106 balances held by the council from the S106 Agreement in relation to the former White Hart Public House in Caldicot (Planning Ref: DC/2013/00796) and £25,880 from the Section 106 balances held by the council from the S106 Agreement in relation to the development of land east of Church Road, Caldicot (Planning Ref: DM/2018/00880).

2.2 a capital budget of £144,456 be created in 2024/25 to fund works at one or more of three beneficiary sites in Caldicot (Caldicot Greenway, Caldicot Castle Country Park, Caldicot Town Centre Regeneration Scheme), and that this is funded by a corresponding contribution of £144,456 held by the council from the S106 Agreement in relation to the development of land east of Church Road, Caldicot (Planning Ref: DM/2018/00880).

2.3 the decision on which beneficiary projects the £144,456 funding will be spent be delegated to the Chief Officer for Customer, Culture and Wellbeing in consultation with the Cabinet Member for Equalities and Engagement, this decision to be taken following consultation with the local Caldicot county council members and Caldicot Town Council.

2.4 a capital budget of £24,629 be created in 2024/25 to fund play area improvements at Rockfield Farm, Undy and that this is funded by a corresponding contribution of £24,629 from the Section 106 balances held by the council from the S106 Agreement relating to the development of land at Vinegar Hill, Undy (Parcel A) (Planning Ref: DM/2019/01937).

2.5 a capital budget of £13,422 be created in 2024/25 to fund advance planning works on land at Knollbury to establish increased recreation facilities for the Magor with Undy area and that this is funded by a corresponding contribution of £13,422 held by the council from the S106 Agreement relating to the development of land at Vinegar Hill, Undy (Planning Ref: DM/2019/01937).

2.6 the above amount (specified in para 2.5) be utilised to offset the costs of obtaining planning permission for the recreational use of land adjacent to Rose Cottage, Knollbury, Magor currently held on capital budget code 90847.

2.7 a capital budget of £120,000 be created in 2024/25 for play area improvements at Mardy Playing Field and that this is funded by a corresponding contribution of £120,000 from the Section 106 balances held by the council from the S106 Agreement in relation to the development of land at Deri Farm, Abergavenny (Planning Ref: DC/2014/01360).

2.8 when uploaded into the 2024/25 capital budget, the funding of £120.000 set out in para 2.7 above is transferred to the Llantilio Pertholey Community Council, as owners of the Mardy Playing Field, and that officers work closely with the community council to agree and implement a range of play area improvements.

2.9 A capital budget of £13,230 be created in 2024/25 for play area improvements at Bailey Park, Abergavenny and that this is funded by a corresponding contribution of £13,230 from Section 106 balances held by the council from the S106 Agreement for the development of land at The Hill, Abergavenny (Planning Ref: DC/2015/01585)

3. KEY ISSUES:

3.1 When new residential developments in the county are granted planning permission, this invariably involves the developer entering into a Section S106 Agreement to provide new or upgrade existing play areas, public open spaces and recreation sites. The S106 Agreements contain clauses specifying the areas or sites where the funding is to be used (the beneficiary sites) and the timescale in which the money has to be spent (the spend by dates).

3.2 The agreements are entered into under the provisions of Section 106 of the Town and Country Planning Act 1990 (Amended). These are legally binding agreements and contain contractual commitments for the council and for the owner or developer. In the case of the sites referred to in this report, the developers in each case have met their contractual obligations and the funding set out in Section 2 (recommendations) has all been received by the council.

3.3 It is proposed to spend this funding on the projects specified in the following paragraphs, beginning with para 3.5, so that the council can fulfil its legal obligations as set out in the respective S106 Agreements.

3.4 Members will be aware that in Wales, play is a statutory duty of local authorities and every three years councils have to undertake a detailed play sufficiency assessment, together with an annual review. The proposals outlined in this report relating to play are in line with the

council's adopted play sufficiency assessment. The council has also adopted in principle the Fields in Trust six-acre standard that contains guidance on outdoor play, but it has adopted a more strategic approach to developing playparks in recent years, to avoid a proliferation of small pocket parks, which provide very little in terms of play value.

3.5 The play area at Cas Troggi (also known as the Hall Park Open Space) in Caldicot was installed back in the 1960s/70s. When the council commissioned an independent play value assessment of 110 sites in the county in 2019, the Cas Troggi site was ranked as "poor", scoring a mere 15 out of a possible 84 points. It is proposed to replace the play equipment and enclose the play area, using the funding identified in recommendation 2.1 of this report. The works were scheduled to start in December 2023 but have been delayed due to the wet conditions on site. The footpaths around the play area have been improved and resurfaced, using Active Travel funding in advance of the play equipment installation and landscape improvements have been made to the wider open space at Cas Troggi, utilising Welsh Government green infrastructure funding.

3.6 The £144,456 referred to in para 2.2 is the remaining balance of the offsite recreation contribution from the Church Road (east) development site. It is proposed that this sum is held in the capital budget and utilised towards one or more of the three remaining beneficiary sites, namely Caldicot Greenway, Caldicot Castle & Country Park and Caldicot Town Centre Regeneration, and that a decision on the allocation of this funding is delegated to the relevant Chief Officer and Cabinet Member.

3.7 The sum of £24,629 (para 2.4) will be used to carry out improvements to the play area at Rockfield Farm, as specified in the S106 Agreement.

3.8 The £13,422 referred to in paras 2.5 and 2.6 is the remaining balance of offsite recreation funding received from the Vinegar Hill development and is to be used to offset the current overspend in the capital budget as a result of expenditure incurred on plans and surveys undertaken to support the submission of a planning application for the Knollbury site. It is proposed to utilise this sum to offset the overspend and cover the costs of submitting a formal planning application.

3.9 When planning permission for the Deri Farm development north of Abergavenny was granted, there was limited space available on site to provide a new neighbourhood play area, so provision was made for an offsite contribution to improve the existing play area at Mardy Playing Field, which is a short walk away from the new development. The £120,000 (referred to in paras 2.7 and 2.8) will be sufficient to cover the costs of a substantial upgrade of the exiting play facilities. As Mardy Paying Field is not owned by this council, officers will work with the site

owners (Llantilio Pertholey Community Council) to make sure that the play area improvements are carried out. In addition to the play area contribution, separate contributions were included in the S106 Agreement to improve footpaths in the area between the new houses, Llantilio Pertholey Primary School and the Mardy Playing Field. Those improvements have now been implemented.

3.10 The sum of £13,230 (para 2.9) will be used to carry out improvements to the play area and surfacing at Bailey Park.

4. INTEGRATED IMPACT ASSESSMENT (INCORPORATING EQUALITIES, FUTURE GENERATIONS, WELSH LANGUAGE AND SOCIO ECONOMIC DUTY)

The Integrated Impact Assessment is attached at Appendix 2. This highlights the positive impacts of play and outdoor recreation on children/young people, families and communities.

5. OPTIONS APPRAISAL

In reality, there are no options to appraise – the funding referred to in this report has been given for specific purposes as specified in Section 106 Agreements, under which the council has a contractual obligation.

6. EVALUATION CRITERIA

Progress will be monitored in October 2024 to assess progress with the various projects referred to in this report.

7. REASON

This is a continuation of the council's continued investment, sometimes in partnership with town and community councils and other bodies, in recreation and play to achieve significant community benefits, but there needs to be an approved budget in place to cover the costs incurred.

8. RESOURCE IMPLICATIONS

There are no additional resource implications, as the expenditure involved will be covered by Section 106 balances.

9. CONSULTEES

Cabinet
Local Members
Senior Leadership Team
Chief Officer – Customer, Culture and Wellbeing

10. BACKGROUND PAPERS

10.1 Section 106 Agreement dated 8th January 2019 between MCC and Worthy Developments in relation to White Hart Public House

10.2 Section 106 Agreement dated 17th April 2019 between MCC, Harvington Properties & Others in relation to Church Road Caldicot

10.3 Section 106 Agreement dated 16th June 2022 between MCC and Vistry Homes in relation to land at Vinegar Hill, Undy

10.4 Section 106 Agreement dated 19th January 2018 between MCC and Persimmon Homes Ltd and Others in relation to land at Deri Farm, Abergavenny

10.5 Section 106 Agreement dated 28th September 2016 between MCC, Edenstone Homes and Coleg Gwent in relation to land at The Hill, Abergavenny

Extracts showing the council's legal obligations contained in the above Section 106 Agreements are set out in Appendix A to this report.

11. AUTHOR & CONTACT DETAILS:

Mike Moran, Community Infrastructure Coordinator
Email: mikemoran@monmouthshire.gov.uk

Tel: 07894 573834

APPENDIX A

Extracts from relevant Section 106 Agreements

Cas Troggi Play Area - Paras. 2.1, 2.2, 3.4 and 3.5

Section 106 Agreement dated 8th January 2019 between MCC and Worthy Developments – in particular Clause 1.1, Schedule 3 as follows:

An offsite open space/play contribution in the sum of £69,120 to be used for improvements to the Hall Park Open Space, as this is the closest public open space to the application site

Caldicot Greenway, Country Park and Town Centre Redevelopment

Paras 2.2, 2.3 and 3.6

Section 106 Agreement dated 17th April 2019 between MCC, Harvington Properties & Others – in particular Clause 7.1 of Schedule 1 and Clauses 1.1 and 1.2 of Schedule 3 as follows:

7.1 to pay a sum of £1,566 indexed in respect of each Market Dwelling constructed at the Development (the "Off-Site Recreation Contribution") to be used by the Council to support and develop off-site recreational facilities in the vicinity of the Development, which shall include one or more of the following: the Caldicot Greenway Scheme; Caldicot Castle Country Park; Hall Park Open Space; and the Caldicot Town Centre Regeneration Project.

1.1 Where the council receives any financial contribution from the Owner in respect of any obligations in this Agreement, the Council shall use the financial contribution only for the purpose for which it was paid.

1.2 In the event that any financial contribution received from the Owner in respect of any obligations contained in this Agreement has not been spent or committed for expenditure by the Council within 5 years from the date of receipt the Council shall refund to the Owner any part which has not been spent or committed for expenditure, together with any accrued interest.

Rockfield Farm Play Area - Paras 2.4 and 3.7

Section 106 Agreement dated 16th June 2022 between MCC and Vistry Homes – in particular Clause 3 of Schedule 1 and Clauses 1.1 and 1.2 of Schedule 2 as follows:

3. On or before the Commencement Date to pay to the Council the sum of £23,235 in relation to the play provision towards the cost of providing, expanding or improving a centralised play facility at the existing Rockfield Farm site

Note: the amount received is £24,629 because the contribution was index linked

1.1 I Not to use any part of the Contributions other than for the purposes for which it was paid (whether by the Council or another party

1.2 In the event that any of the Contributions have not been spent or Committed for expenditure by the Council within 5 years following the date of receipt of the Contribution the Council shall refund to the

Owner any part of the Contributions which have not been spent or committed for expenditure, together with accrued interest.

Knollbury Recreation Site – Paras 2.5, 2.6 and 3.8

Section 106 Agreement dated 16th June 2022 between MCC and Vistry Homes – in particular Clause 4 of Schedule 3, as follows:

4.0 On or before the Commencement Date to pay to the Council the following sums in relation to the offsite recreation contributions

a. £3,292 per Private Dwelling
b. £2,469 per Affordable Housing Unit

to be used for the provision or enhancement of recreation/community facilities at the Three Fields site and on land in Knollbury (or the wider local area) to establish increased community recreation facilities there.
Note: the amount of offsite recreation funding received from this development was £235,542 – 222,120 of which was used to part fund the capital costs of the new Community Hub on the Three Fields Site, which leaves a remaining balance of £13,422 to be spent on preparations for the new recreation site at Knollbury

Mardy Playing Field and Play Area – Paras 2.7, 2.8 and 3.9

Section 106 Agreement dated 19th January 2018 between MCC and Persimmon Homes Ltd and Others – in particular Clauses 1 and 2.2 of Schedule 2, as follows:

1. The sum of £120,000 towards improving the existing Local Equipped Area for Play (LEAP) at Mardy Recreation Ground
2.2 The Council agrees with the Landowner to use the Contribution only for improving the LEAP at Mardy Recreation Ground and for no other purpose.

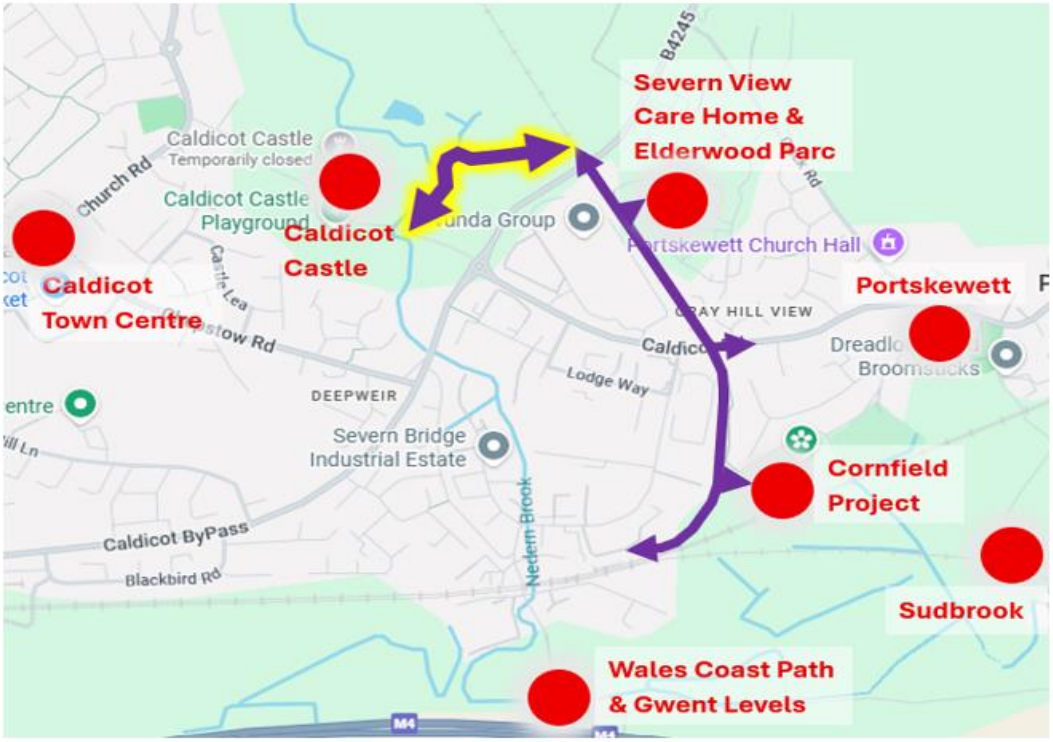
Bailey Park Play Area – Paras 2.9 and 3.10

Section 106 Agreement dated 28th September 2016 between MCC, Edenstone Homes and Coleg Gwent – in particular Clause 2.1 in Schedule 2, as follows:

2.1 The developer will pay £13,230 to be applied towards children's play provision

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Appendix 4 Map and Photos



Key

Proposed MUR

Existing Completed Caldicot Greenway



Caldicot Greenway Portskewett children's football festival July 2025

Appendix 4 Maps and Photos continued





Caldicot Greenway Lighting installed

Caldicot MUR – Stakeholder Consultation Report

Undertaken over the month of August 2025

Engagement Methods Used

- **300+** local resident properties received a letter drop near the country park.
- **23** local community and national groups were contacted via email.
- **23** local businesses were contacted via email.
- **2** public drop-in sessions were held — one at Caldicot Castle Country Park (10th Aug) and one at Caldicot Leisure Centre (11th Aug).
- **Posters** were displayed at Caldicot Hub, public places, and sports clubs.
- **Information boards** were installed at Caldicot Castle Country Park and Caldicot Leisure Centre.
- **Social media posts** were shared to raise awareness.
- **Project website** provided detailed information and updates.
- **Online survey form** was made available for easy participation.
- **Paper survey forms** were placed at the hub and leisure centre.
- **2 workshops** were held — one with Severnside Forum and one with key stakeholders (MCC officers and statutory bodies).

Participation

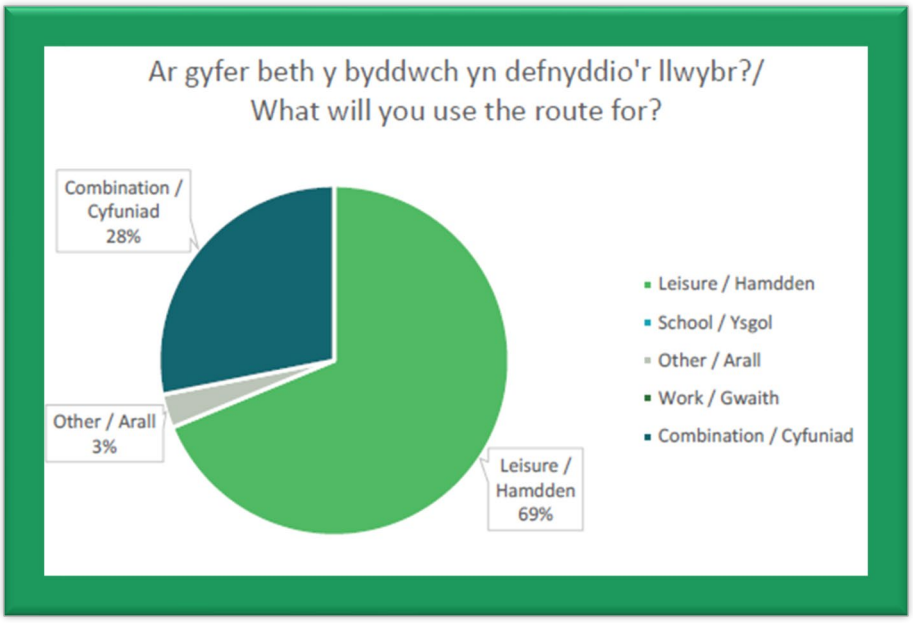
- **33** survey responses were received (26 online, 7 paper).
- **100+** face-to-face interactions took place during public sessions.
- **2** online workshops were conducted with Severnside Forum and MCC/statutory stakeholders.

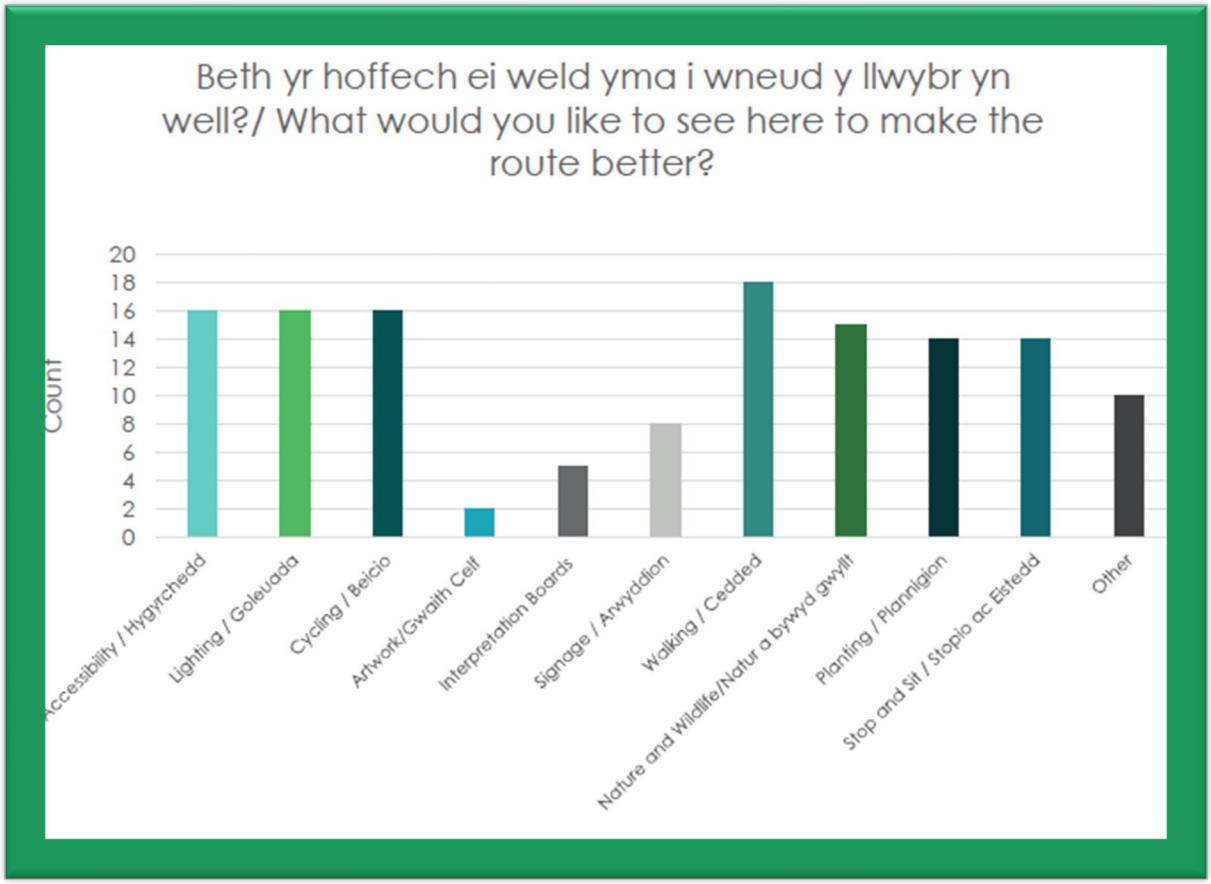
Key Findings & Requirements

- **69%** anticipate using the route for leisure, **28%** for mixed commuting and leisure, and **3%** for other purposes.
- **Overall public response** was positive.
- **Safe, traffic-free access** to local destinations (e.g. Severn View Care Home) was welcomed.
- **Accessibility** is key — flat, even surfaces and seating are essential.
- **Natural setting** with planting and seating was preferred.
- **Lighting** is needed for safety and usability.
- **Clear signage** and interpretation boards were requested.
- **Flooding concerns** were raised.
- **Wider/segregated paths** for shared use were suggested.
- **Heritage-sensitive design** is important.
- **Low-maintenance** requirements should be considered for long-term sustainability.

Conclusion

- **Strong community support** for the proposed route.
- **Accessibility, safety, and landscape integration** are top priorities.
- **Key barriers** include surfacing, gradients, lighting, and potential user conflict.


Ar gyfer beth y byddwch yn defnyddio'r llwybr?/
What will you use the route for?
Combination / Cyfuniad 28%
Other / Arall 3%
Leisure / Hamdden 69%
Leisure / Hamdden
School / Ysgol
Other / Arall
Work / Gwaith
Combination / Cyfuniad


Beth yr hoffech ei weld yma i wneud y llwybr yn well?/ What would you like to see here to make the route better?
Count
20
18
16
14
12
10
8
6
4
2
0
Accessibility / Hygyrchedd
Lighting / Goleuadau
Cycling / Beicio
Artwork/Gwaith Celf
Interpretation Boards
Signage / Arwyddion
Walking / Cerdded
Nature and Wildlife/Natur a bywyd gwyllt
Planting / Plannigion
Stop and Sit / Stopio ac Eistedd
Other

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Caldicot MUR -Phase 1
Consultation Report

Monmouthshire County Council
61281
September 2025





Caldicot MUR -Phase 1

Consultation Report

Monmouthshire County Council

September 2025

Prepared by:
TACP (UK) Ltd
4th Floor James William House
9 Museum Place
CARDIFF
CF10 3BD

Project Number: **61281**

Version: **P3**

Status: **FI**

Version	Status	Completed by	Checked by	Approved by	Date of version
P1	S3	MW	TLW	AK	17/09/2025
P2	FI	MW	TLW	AK	26/09/2025
P3	FI	MW	TLW	AK	01/10/2025

This report will be deemed to be accepted by the client as final if no comments are received within two weeks of issue.

S0 – Work in progress	**S1** – For coordination	**S2** – For information
S3 – For review and comment	**S4** – For approval	**FI** – Final

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List of Abbrevations

Abbrevation	Full Description
MUR	Multi-User Route

1 INTRODUCTION

1.1.1 Burroughs and TACP (UK) Ltd (TACP) have been commissioned by Monmouthshire County Council (MCC) to develop a construction-ready design for the Caldicot Multi-User Route (MUR) Phase 1, a new approx. 500m long active travel route.

1.1.2 The proposed Caldicot MUR-Phase 1 is subject to a planning permission. A pre-application consultation has been completed to allow for local community and key stakeholders early engagement in the scheme development. This report presents the method of the consultation and the received feedback.

1.2 Summary of the Proposal

1.2.1 Caldicot MUR - Phase 1 forms part of an active travel system in Caldicot (Caldicot MUR) and across the Severnside area of the county (the Severnside spinal route). In Caldicot, the spinal route will link residents of the town and its surrounding communities (Caerwent, Portskewett, Crick, Sudbrook, and the broader Severnside area) to local facilities, services, employment hubs, education centres, and retail options. This assists MCC in creating 20-minute neighbourhoods for both current and future residents and promotes cohesive communities where active travel is the preferred option for trips under 3 miles.

1.2.2 Caldicot MUR - Phase 1 will run through Caldicot Castle Country Park, connecting the northern end of the completed and future sections of Caldicot Links (Phase 1 and Phase 2 & 3 respectively) with the existing west-east route through Caldicot Castle Country Park (the proposed Caldicot MUR Phase 2). Figure 1 below identifies the proposed new route through Caldicot Castle Country Park.

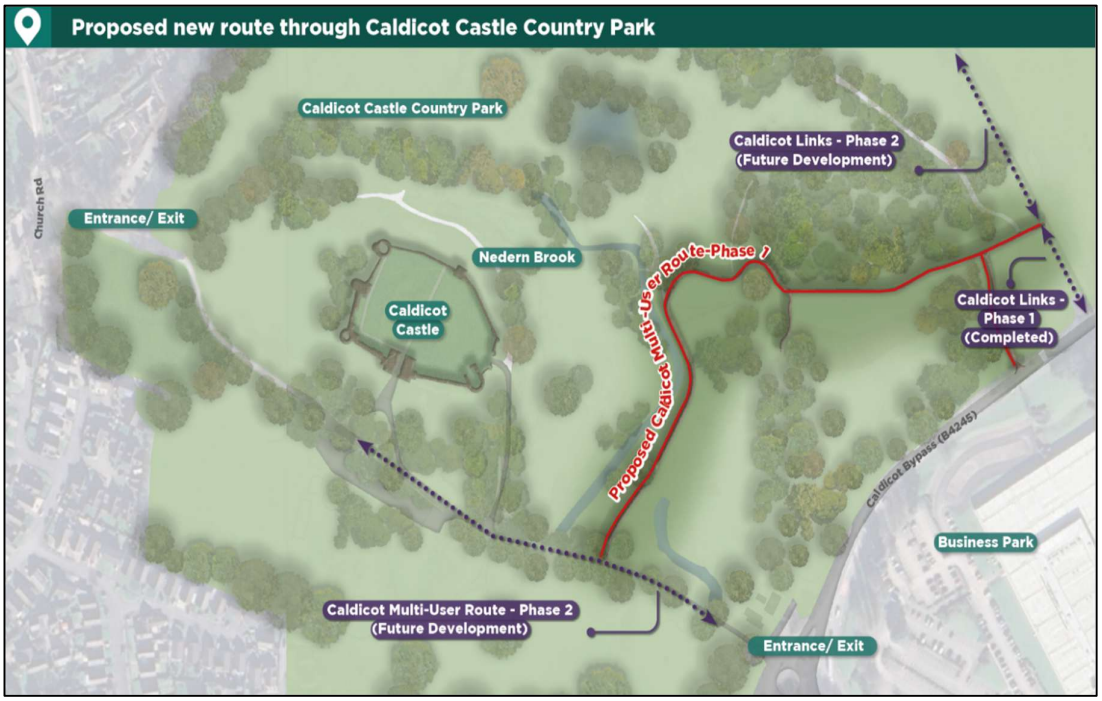


Figure 1: Caldicot MUR Phase 1 Location Plan

2 CONSULTATION METHOD

2.1 Pre-Planning Consultation

2.1.1 Between 1st August 2025 and 31st August 2025, public and stakeholder pre-planning consultation was undertaken for the proposed Caldicot MUR - Phase 1.

2.2 Project Website

2.2.1 A consultation website was set up to provide information about the development (currently available at:

https://storymaps.arcgis.com/stories/1c16bfe448f14763a8e54a195d9f8633).

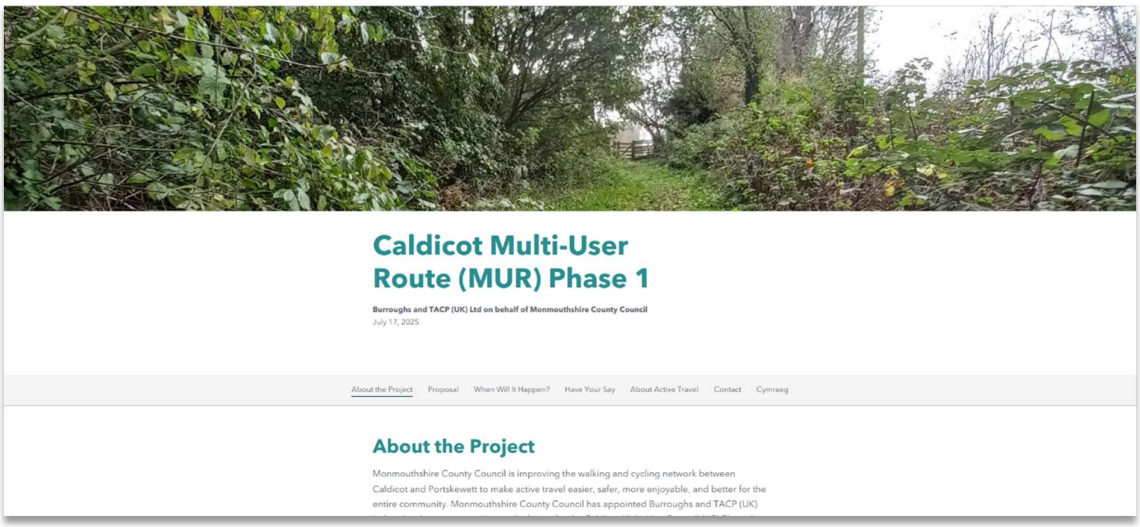


Figure 2: Stakeholder Consultation Webpage

2.2.2 The website also included a survey for community members to provide feedback on the proposed scheme. During the consultation window, this website was accessible through the Monmouthshire MonLife **bit.ly/monlife.caldicot,** a link to which was shared on all consultation materials including posters, information boards, letters and emails and via Monmouthshire County Councils and MonLife social media accounts.

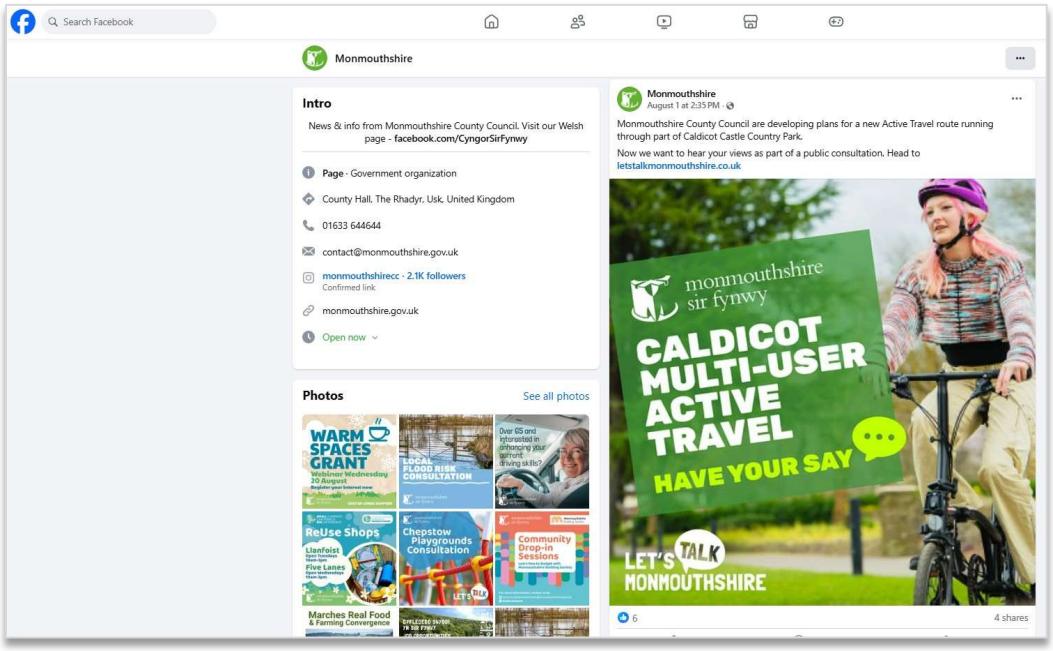


Figure 3: Consultation Social Media Posts

2.3 Consultation Strategy

2.3.1 A range of consultation methods were developed to gather information and feedback from key stakeholders. These approaches ensured diverse perspectives were captured, helping to shape a more inclusive and informed assessment. The consultation process was designed to be transparent, collaborative, and responsive to local needs. The following list identifies the consultation methods utilised in the finalised consultation plan.

Letter drops and Emails

2.3.2 To promote the scheme and invite feedback from the local community, letter drops were undertaken to more than 300 properties around the country park, as well as emails sent to local businesses and groups. Letters (**Figure 4**) were delivered to Church Road, Llanthony Close, Castle Lea, Court House Close, Castle Lodge Crescent and Castle Lodge Close.


Caldicot Multi-User Route - Phase 1
Connecting Eastern Caldicot for Walking, Wheeling and Cycling
Dear Resident,
Proposed new route through Caldicot Castle Country Park
To give us your ideas and feedback please visit the project website
Any input would be appreciated.
The survey will be available online for 4 weeks from the 01/08/2025 to 31/08/2025.
Printed copies of the survey are available for collection from the Hub.
Please return completed surveys to either the Hub or by post.
If you have any further questions please contact us using the details below.
We are very much looking forward to hearing from you!
Kind regards
Burroughs and TACP (UK) Ltd
on behalf of Monmouthshire County Council

Figure 4: Consultation Letter

Posters and Information boards

2.3.3 Posters and information boards were also displayed in public areas, including Caldicot Castle (**Figure 7**), Caldicot Leisure Centre, the community hub (the Hub) **- Figure 5**, and sports clubs. These provided information on the Caldicot MUR - Phase 1 proposals, as well as links to the online website and survey.

Drop-in sessions

2.3.4 The posters and information boards also invited people to attend one of the two public consultation drop-in sessions held on 10th and 11th of August 2025 at Caldicot Castle and Leisure Centre, respectively.

Online Website and Survey

2.3.5 In addition to the online survey shared via the project website as mentioned in section 2.2, paper copies were made available at the Hub to allow those who preferred to submit a physical response to provide their comments.

Workshops

2.3.6 Alongside the public consultation, two workshops were held on the 13th and 19th of August with the Severnside Forum (featuring local elected Members and town and community Councillors) and other key stakeholders including MCC planning team and Natural Resources Wales.

2.3.7 This consultation approach collected responses on key issues from stakeholders and locally impacted people to ensure that their considerations were included in the consultation and decision-making process. The consultation process is a vital part of the planning process ensuring that the project reflects the needs, perspectives and priorities for the relevant stakeholders and communities impacted by the development of the proposed Caldicot MUR - Phase 1.



Figure 5: Caldicot Hub Consultation



Figure 6: Drop-in Session - Caldicot Castle



Figure 7: Information Boards - Caldicot Castle

3 RESULTS

3.1 Surveys

3.1.1 From the consultation period, a total of 33No survey responses were received: 26 online and seven paper submissions. Additional feedback was received during the drop-in sessions – see Section 3.3. **Figure 8** indicates, from the online surveys, areas along the proposed Caldicot MUR- Phase 1, where individuals have left a specific comment relating to features such as seating or signage preferences. The majority of online responses provided a general response to the project as a whole rather than commenting on specific aspects or locations.

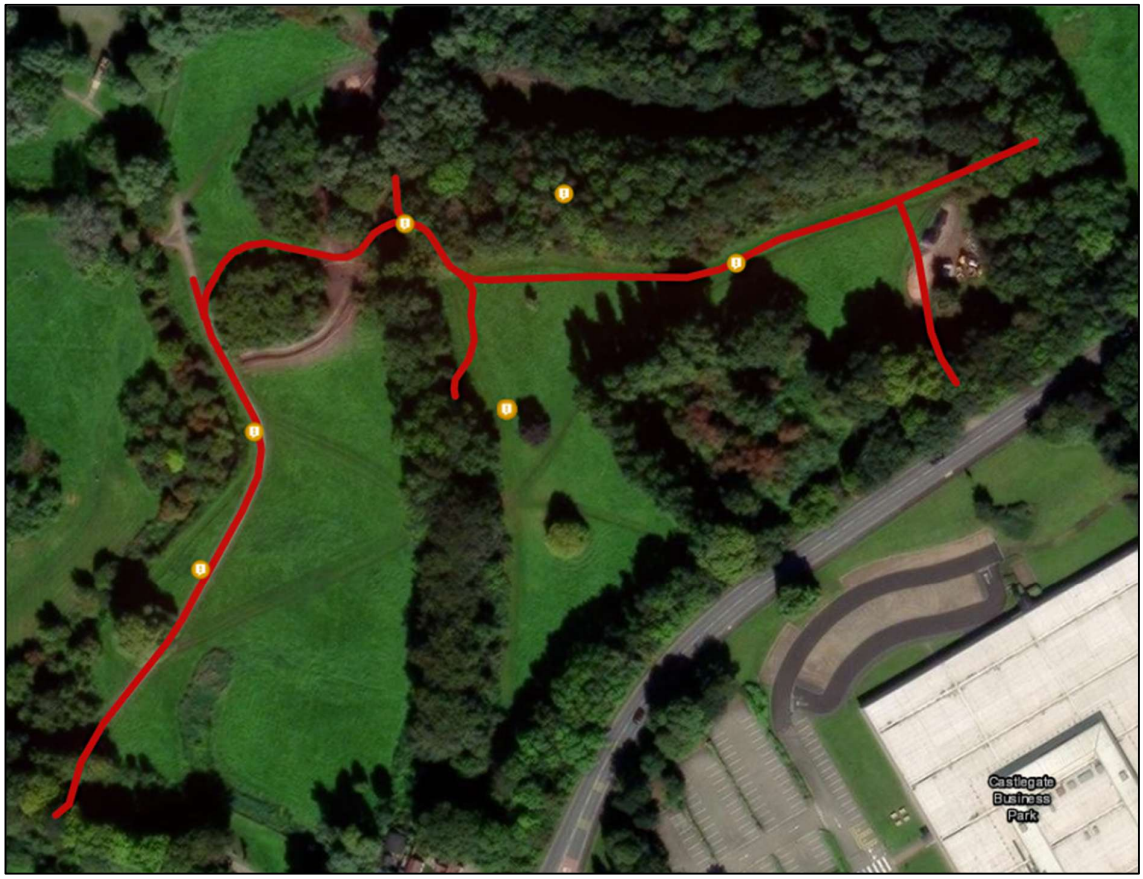


Figure 8: Online Survey Responses - Comment Location Points

3.1.2 The online and paper surveys presented an opportunity to gain perspective on the key issues related to the design and implementation of the Caldicot MUR – Phase 1. The questions were designed to assess the likely utility of the route for likely users as well as potential issues anticipated from the design phase. The questions were also designed to encourage ideas on how to improve the design implementation to prevent any barriers for accessibility.

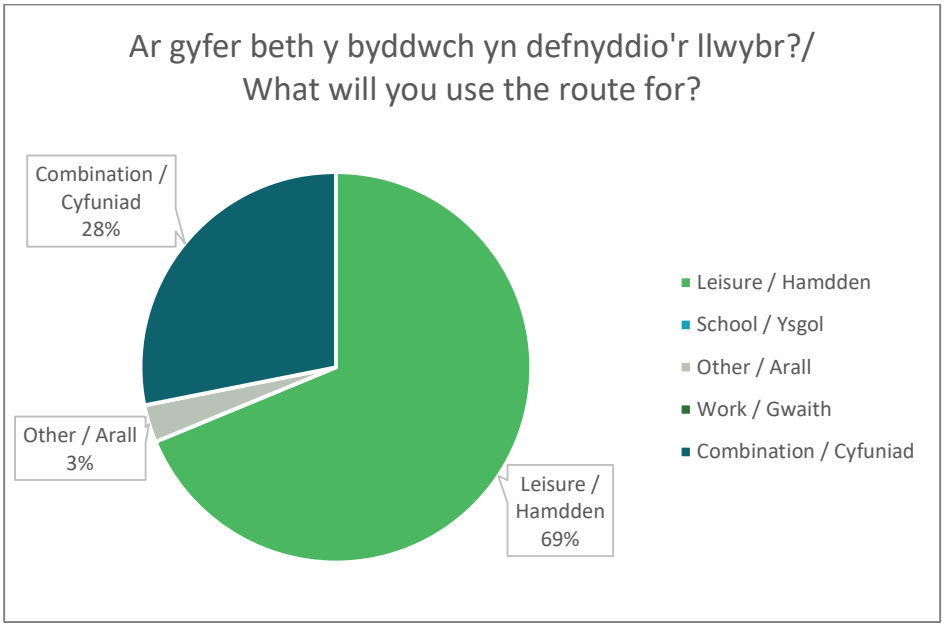


Figure 9: Survey Results - MUR Use

3.1.3 The survey results indicate (see **Figure 9**) that the majority (69%) of the survey participants would use the route primarily for leisure, with a further 28% of respondents indicating that they would use the route for a combination of commuting to work and school, and for leisure. One respondent also stated that they would use the route as part of their work with local elderly residents.

3.1.4 When asked what the respondents would like to see to make the route better, lighting was highlighted as a prominent feature with over half of the survey participants indicating that they would like lighting to be incorporated into the design of the route. The accessibility for cycling and walking was also a primary objective observed during the questionnaire, with approximately 50% of participants highlighting this as something they would want to see the route used for. The visual impact was also a prominent issue throughout the survey, with a request to focus on a natural setting with planting and places to sit, which was attributed as a key consideration to encourage more footfall across the MUR.



Figure 10: Consultation Survey

3.1.5 The survey results also indicate that users value the inclusion of clear and accessible signage and interpretation boards to provide guidance and context for all scheme users. Together, these elements enhance both the aesthetic and functionality of the route, ensuring its welcome to a diverse range of route users. The survey highlighted a flooding risk as a key concern, a sensitive issue based on the local historical context, particularly in relation to the accessibility and safe use of the Caldicot MUR – Phase 1, with concerns raised over accessibility issues during winter months.

3.1.6 When asked what would encourage respondents to utilise the MUR, common responses included multiple seating options of different types along the route. A **"flat" and "even surface"** was identified by multiple respondents as a key draw for the path that would allow those with reduced mobility, or those who rely on a wheelchair, to utilise the path safely.

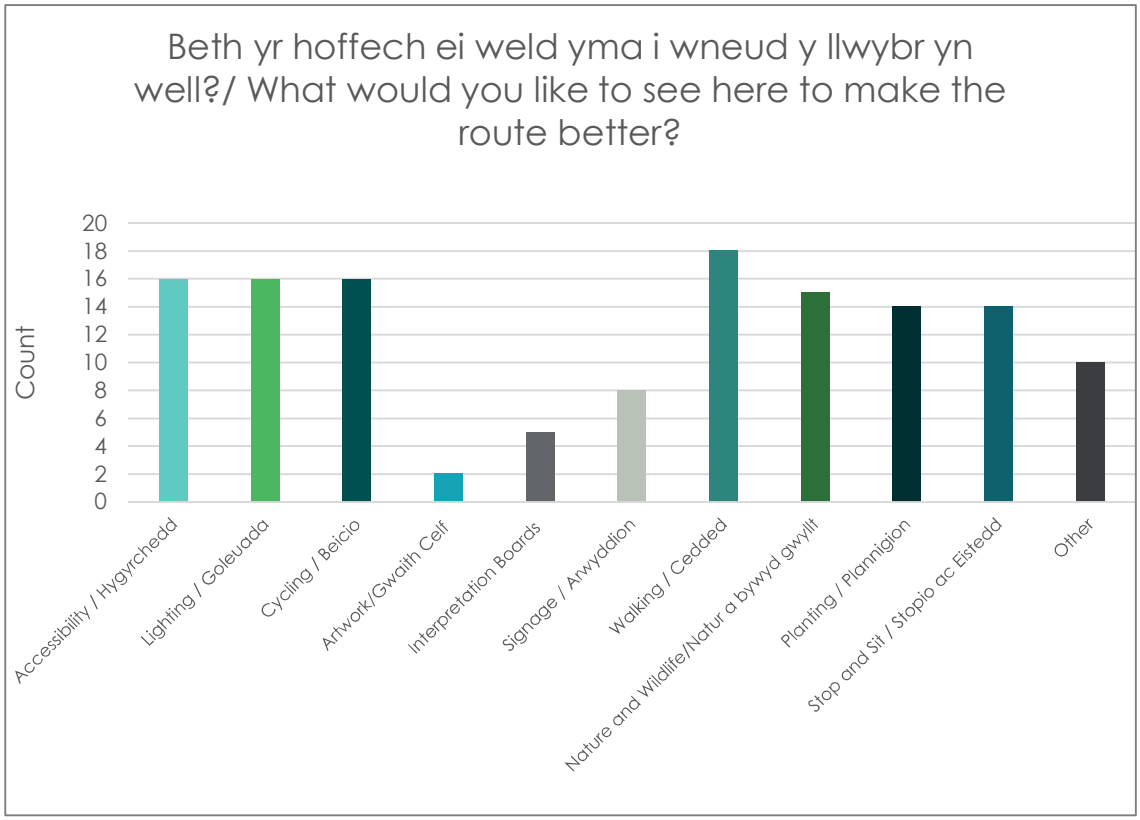


Figure 11: Survey Results - What would encourage MUR use?

3.1.7 A request for lighting along the route was raised by several respondents, stating that it would make them feel safer, with one saying they would use the path during the darker evenings "providing it had lighting throughout".

3.1.8 Respondents were asked if any barriers would prevent them from using the MUR. There were some concerns raised about the shared nature of the path, with some respondents feeling that a wider or even segregated path would make them feel safer and more likely to use the route. They emphasised that any shared use of the path must ensure users are respectful of each other.

3.1.9 A copy of the survey questions is available in **Appendix A**.

Findings Summary

3.1.10 The following points summarise the survey findings:

- 33 responses were received (26 online, 7 paper), with most offering general feedback rather than location-specific comments.
- Leisure was the primary intended use of the route (69%), followed by mixed commuting and leisure (28%).
- Lighting was a commonly requested feature, seen as important for safety and usability during darker hours.
- Accessibility was a major concern with flat, even surfaces and varied seating options highlighted to support users with reduced mobility.
- Respondents expressed that they preferred a natural setting with planting and seating to enhance visual appeal and encourage footfall.
- Clear signage and interpretation boards were valued for improving navigation and inclusivity.
- Flooding risk was flagged as a significant concern, especially for winter accessibility and safety.
- Concerns about shared path usage led to suggestions for wider or segregated paths to improve comfort and safety.

3.2 Stakeholder Workshops

3.2.1 As part of the consultation, two workshops were held on the 13th and 19th of August. The first with members of the Severnside Forum and the second with key stakeholders within Monmouthshire County Council, and representatives from Natural Resources Wales and Transport for Wales. CADW and GGAT were also invited but unable to attend (and no comments received).

3.2.2 These workshops provided the opportunity for stakeholders to put forward any design considerations or concerns listed below

- The need for suitable surfacing and gradients for the route was raised. It was raised that the surface would need to be a bound surface suitable for all users, including walking, cycling and wheeling.
- Concerns were raised about cyclist interactions/the potential for conflict between different route user types.
- The historic setting of the route within the Caldicot Castle Country Park was also raised, highlighting that the design would need to be sympathetic to the heritage of the site.
- The requirement for more proposed seating options was also raised

- Maintenance considerations were raised. Given flooding concerns, it was raised that a permeable surface would not be favourable due to the maintenance required to remove silt following a flooding event. It was acknowledged that the route would be prone to flooding, however the additional access for the route that could be utilised during times of flooding was welcomed.

3.3 Drop-in Sessions

3.3.1 Two public drop-in sessions were advertised via posters, information boards, social media accounts, and the consultation website. These were held on Sunday, 10th August 2025, and Monday, 11th August 2025 at Caldicot Castle and Caldicot Leisure Centre respectively where MCC supported by the project team provided information on the Caldicot MUR -Phase 1 proposals. The first workshop saw approximately 35 interactions with members of the public and the second saw approximately 60-70 interactions.

3.3.2 These facilitated useful discussions with members of the public to understand their needs and provided an opportunity for them to raise any concerns or comments on the proposals.

3.3.3 At both drop-in sessions, feedback was consistent with the responses to the other consultation methods. A common theme was that the surfacing of the path should be suitable for all users, including those with limited mobility or who rely on a wheelchair. The discussions enabled the project team to understand what current barriers there are through the country park (e.g. gates preventing access to mobility scooter users) and to understand how the route would benefit individuals, such as providing a safe route away from traffic to the Severn View Residential Park.

3.3.4 While there were some comments that some people might want to see the money spent elsewhere rather than on a new MUR, the overall response was very positive with the majority of individuals welcoming the proposal and looking forward to using this route in the future.

Findings Summary

3.3.5 The following points summarise the drop-in session findings:

- Accessibility and inclusive surfacing were key concerns.
- Existing barriers like gates limit mobility access.
- Welcomed that the proposed route offers safe, traffic-free access to local destinations.
- Overall public response was positive despite some funding concerns.

4 CONCLUSION

4.1.1 In conclusion, the consultation demonstrates good community engagement, interest and support for the Caldicot MUR - Phase 1. The received feedback should be considered and incorporated into the MUR's design where appropriate. Key elements identified that would increase the likelihood of people using the route are a design that fits well within the landscape, is easily accessible and has opportunities to sit and rest. The main barriers to use would be the surfacing, with a solid surface with limited/no gradient preferred to allow access by those with limited mobility or who utilise an aid to travel. Additionally, safe interactions between different types of users should be considered. Options for lighting should also be considered, as this was raised by a number of respondents, especially if they were to use the route during the darker months.

APPENDICES

Appendix A

Consultation Survey Questions

Q1. Beth yr hoffech ei weld yma i wneud y llwybr yn well?/ What would you like to see here to make the route better?

[Multiple Choice]

- *Hygyrchedd/ Accessibility*
- *Golwg/ Appearance*
- *Gwaith celf/ Artwork*
- *Beicio/ Cycling*
- *Byrddau dehongli/ Interpretation boards*
- *Goleuadau/ Lighting*
- *Natur a bywyd gwyllt/ Nature and wildlife*
- *Mannau i stopio ac eistedd/ Places to stop and site*
- *Planhigion/ Planting*
- *Man cymdeithasol/ Social space*
- *Cerdded/ Walking*
- *Dulliau dynodi llwybr/Arwyddion/ Wayfinding/ Signage*
- *Arall/Other*

Q2. Defnyddiwch y gofod hwn i ddweud mwy wrthym am eich syniad./ Please use this space to tell us more about your idea.

Q3. Beth fyddai'n eich annog i ddefnyddio'r llwybr teithio llesol hwn?/ What would encourage you to use this active travel route?

Q4. A oes rhwystrau a fyddai'n eich atal rhag defnyddio'r llwybr teithio llesol hwn?/ Are there barriers that would prevent you from using this active travel route?

Q5. Ar gyfer beth y byddwch yn defnyddio'r llwybr?/ What will you use the route for?

[Multiple Choice]

- *Gwaith/ Work*
- *Ysgol/ School*
- *Hamdden/ Leisure*
- *Cyfuniad/ Combination*
- *Arall/ Other*

Integrated Impact Assessment Document

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

Name of the Officer completing the evaluation Colette Bosley **E-mail:colettebosley@monmouthshire.gov.uk**	**Please give a brief description of the aims of the proposal** To seek Cabinet approval for the allocation of Section 106 offsite recreation funding received from the Church Road and Crick Road developments in Caldicot and Portskewett, towards projects identified as named beneficiaries within these agreements.
Name of Service area Green Infrastructure	**Date 22/12/2025**

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 scheme when complete will create a multi-user route which provides access for all ages and abilities, including older residents. The route will offer opportunities for everyone to improve their health and wellbeing and be less reliant on motor vehicles.	When the route is complete - there will be no direct negative impacts as the proposal will open up the route to all ages.	The route when complete will comply with current access quality standards.

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Disability	The scheme when complete aims to create a route which is accessible and appealing to all, including those with disabilities so that they can benefit from the opportunity to improve their health and wellbeing and be less reliant on motor vehicles. The scheme will also create better links between communities helping to tackle feelings of isolation and improve access to key services, employment and education.	When the route is complete - there will be no direct negative impacts as the proposal will open up the route to all ages.	The route when complete will comply with current access quality standards.
Gender reassignment	No impact	No impact	No impact
Marriage or civil partnership	No impact	No impact	No impact

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Pregnancy or maternity	The scheme when complete aims to create a route which is accessible and appealing to all, including those with disabilities so that they can benefit from the opportunity to improve their health and wellbeing and be less reliant on motor vehicles. The scheme will also create better links between communities helping to tackle feelings of isolation and improve access to key services, employment and education.	When the route is complete - there will be no direct negative impacts as the proposal will open up the route to all ages.	This enhanced multi-user route when complete will encourage those residents that are pregnant or with young children to engage with the wider community, to try new activities and raise their general levels of fitness and wellbeing while enjoying green space.
Race	No impact	No impact	No impact
Religion or Belief	No impact	No impact	No impact
Sex	No impact	No impact	No impact
Sexual Orientation	No impact	No impact	No impact

2. The Socio-economic Duty and Social Justice

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

	Describe any positive impacts your proposal has in respect of people suffering socio economic disadvantage	Describe any negative impacts your proposal has in respect of people suffering socio economic disadvantage.	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Socio-economic Duty and Social Justice	Caldicot and its surrounding areas has pockets of social deprivation. The Caldicot Multi-user route (MUR) & Caldicot Links (Greenway) route will cross 3 settlements areas including LSOA Caldicot Castle 1 which has been identified in the most recent WIMD as being in the lowest 10-20% for Access to Services in the region. This proposal is part of a wider network of integrated paths and routes that will open up opportunities for those on low incomes to access key services and facilities including leisure, education and employment without the need for a motor vehicle. It will also offer opportunities for improving health and wellbeing at no additional cost.	When the route is complete - there will be no direct negative impacts as the proposal will open up the route to all ages.	When complete the enhanced route will offer new opportunities for those socially disadvantaged residents that wish to engage with the wider community and raise their general levels of fitness and activity. The proposal forms part of a number of new economic opportunities in the Severnside area which aims to invest in infrastructure and raise quality of life.

3. Policy making and the Welsh language.

How does your proposal impact on the following aspects of the Council's Welsh Language Standards:	Describe the positive impacts of this proposal	Describe the negative impacts of this proposal	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts
Policy Making Effects on the use of the Welsh language, Promoting Welsh language Treating the Welsh language no less favourably	Welsh language will be used across signage, interpretation and information on the project which will help to encourage greater use and learning of the language.	There will be no direct negative impacts as the project will support use of the Welsh language at every opportunity.	Monitor useage
Operational Recruitment & Training of workforce	Welsh language will be used in all recruitment opportunities.	There will be no direct negative impacts as the project will support use of the Welsh language at every opportunity.	Monitoring to assess impacts
Service delivery Use of Welsh language in service delivery Promoting use of the language	Welsh language will be used across signage, interpretation and information on the project which will help to encourage greater use and learning of the language.	There will be no direct negative impacts as the project will support use of the Welsh language at every opportunity.	Monitoring to assess impacts

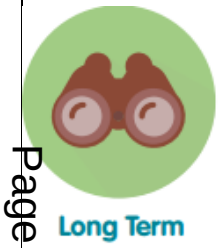
4. Does your proposal deliver any of the well-being goals below? Please explain the impact (positive and negative) you expect, together with suggestions of how to mitigate negative impacts or better contribute to the goal. There's no need to put something in every box if it is not relevant!

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	As part of Cardiff Capital Region's Regeneration Plan, MCC has adopted a strategic decision to unlock new economic opportunities in the south east Severnside area, being the largest area of urban population (c 20,000), with specific emphasis being placed on Caldicot as a priority area for our region. Accessible landscapes help inward investment, which in turn support sustainable prosperous communities. Every £1 of public spend on green spaces levers in £4.20 of private sector investment. This proposal will strengthen connectivity enabling people and businesses and communities to become better engaged, supporting the perception of Caldicot as a vibrant place to live, work and visit.	The positive impacts will be increased by the route's links to the local PROW network and the National Wales Coast Path which both provide local economic opportunities and improve the region's walking and green tourism products.
A resilient Wales Maintain and enhance biodiversity and land, river and coastal ecosystems that support resilience and can adapt to change (e.g. climate change)	The proposal offers an opportunity for us to better understand and manage our green assets. A programme for carbon capture will be supported by strategic tree and habitat management helping to increase the areas resilience to change. We recognize that there may be concerns around the potential negative impacts of construction and increased use of the route. We have identified mitigations which are explained in the following box.	Ecological Impact surveys and secondary species/habitat surveys have identified potential impacts. Mitigation has been incorporated into GA drawings and landscape plans with supporting Green Infrastructure Management Plans.
A healthier Wales People's physical and mental wellbeing is maximized and health impacts are understood	Well connected accessible communities and green spaces are essential components in supporting	

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?
	healthy lifestyles and have an important role in improving wellbeing and mental health. The multi-user, accessible route will allow residents to get involved in sport/leisure activities of their choice at low cost, in a green space and within easy reach of their homes, helping to improve both physical and mental health.	
A Wales of cohesive communities Communities are attractive, viable, safe and well connected	Accessible local landscapes are important to place-making in both urban and rural communities. They contribute to the health, social and economic well-being of individuals and communities and create places that people want to live in. The route will create stronger and safer links for locals and vistors travelling to and from communities to the Caldicot town centre, local schools and key GI assets including Caldicot Castle and Country Park. There will also be opportunities for volunteer engagement. The proposal fits with the wider strategic developments within Caldicot town to ensure the town is coherently designed and developed from a place based perspective.	
A globally responsible Wales	There is growing evidence that Green Infrastructure solutions, such as improved access and enjoyment through key Green corridors, help us to address	Wherever feasible we will recycle existing materials or source them sustainably.

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?
Taking account of impact on global well-being when considering local social, economic and environmental wellbeing	global issues such as climate change in a sustainable way. The proposal will help address flooding, carbon emissions and air pollution through the sustainable management of trees and scrub to absorb heavy rainfall, and provide clean air solutions, helping to save energy. Crucially the route will provide an opportunity for residents to be less reliant on motor vehicles. We recognize that there may be concerns around the potential negative impacts of construction of the route. We have identified mitigations which are explained in the following box.	A CEMP has been produced for the Links to mitigate any impacts as part of the construction period. Similarly a CEMP is being prepared for the MUR. The General Arrangement and Landscape plans have sought to reflect mitigation to address issues raised by all consultees through the planning, SAB and key stakeholders in scheme development. We will continue to ensure all these views are incorporated in scheme design and construction.
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	Accessible landscapes help us to better understand our natural and social heritage. Monmouthshire's landscape is one of its most important assets both socially and economically. The perception of Caldicot and its surrounding settlements as a thriving place to live, work and visit will be strengthened by improving the green connections between settlements and enabling people to better access and connect with their historic and natural environment.	Welsh language will be used across signage, interpretation and information on the project and in all consultation as part of the Stakeholder Engagement process. The multi-user, accessible routes will encourage residents to get involved in sport/leisure activities of their choice at low cost and within easy reach of their homes. The route will also provide a connection to the Living Levels Landscape Partnership project and enable residents and visitors to access the Wales Coast Path and wider Gwent Levels Landscape of Outstanding Historic Interest.
A more equal Wales People can fulfil their potential no matter what their background or circumstances	The route will be accessible to all ages and abilities from the community, supporting them to fufil their potential in health and wellbeing as well as improving opportunities to access services, facilities and employment irrespective of their circumstances.	When complete - We will continue to ensure the routes meet AT standards for access.

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?
 Balancing short term need with long term and planning for the future	This proposal is part of a 10-year plan for Caldicot that is about repurposing and reinvesting in a town that has faced change in recent years. Due to its location near to the second severn crossings there is a need to manage housing growth and demand and reduce car borne journeys through an environment that is based on connected streets and assets. The proposal fits with the wider strategic developments within Caldicot town to ensure the town is coherently designed and developed from a place based perspective. As part of Cardiff Capital Region's Regeneration Plan, MCC has adopted a strategic decision to unlock new economic opportunities in the south east Severnside area, being the largest area of urban population (c 20,000), with specific emphasis being placed on Caldicot as a priority area for our region.	
 Working together with other partners to deliver objectives	We have undertaken community engagement and consultation with stakeholders. The proposals form part of a wider partnership model in Caldicot that the County Council facilitates.	Continuation of stakeholder and partnership meetings will happen during the project development and delivery to ensure members and the public have a say in the development of the proposals, the potential impacts and mitigation.

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?
 Involving those with an interest and seeking their views	Community engagement has been undertaken at key sections of the route e.g. Caldicot and Caerwent – in particular with those communities that may be affected by the construction of the route.	We will continue liaison with residents as the project moves from a proposal to delivery and aim to mitigate their concerns as best as we can. A Construction Design and Management Plan has been developed for the Links and is being developed for the MUR to address sensitive issues – E.g. Noise generation from the contractor will be monitored to ensure it keeps within the decibel threshold levels.
 Putting resources into preventing problems occurring or getting worse	This proposal will contribute to MCC's commitment to making our communities age-friendly and resilient to future demographic changes. By increasing access to physical activity and green spaces it will also contribute to improving the physical and mental health of these communities.	

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?
 Considering impact on all wellbeing goals together and on other bodies	The Caldicot MUR and Caldicot Links routes collectively will link to the National Cycle Network (NCN) Route 4 – the Celtic Trail – at the northern end and the PROW network and onto the Wales Coast Path at the southern end. It provides an opportunity to create a significant linked and connected route between the multiple communities of: Portskewett, Caldicot and Caerwent as well as the consented housing site currently due to start and under construction at Crick Road Caldicot and Sudbrook Paper Mill. The proposal will also provide a strategic connection which compliments the Living Levels Landscape Partnership project and enable residents and visitors to access the Wales Coast Path and wider Gwent Levels Landscape of Outstanding Historic Interest.	

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	Not applicable	Not applicable	Not applicable
Corporate Parenting	Not applicable	Not applicable	Not applicable

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

See Cabinet report and supporting appendix

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?

Positives: The Caldicot Greenway/MUR when complete will be a multi-user route, designed to be accessible and appealing to all ages and abilities to use to increase their levels of health and wellbeing. It will also provide links between communities helping to build stronger connections. **Negatives:** Completion of the route as a fully accessible route may be delayed by reduced funding. We understand that there may be concerns around the potential negative impact on the environment and the surrounding community from construction of the MUR but this will be mitigated through careful design and planning as detailed above.

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
Appointment of consultants and delivery of construction project with secured grant funding	**Feb/March**	**GI Project team Lead**

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

Version No.	Decision making stage	Date considered	Brief description of any amendments made following consideration
1	**Cabinet**	**5/5/24**	See attached
2	**Cabinet**	**21/1/26**	Awaiting decision

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Appendix 8

Caldicot proposed 'Green Route'



Green Route *– No additional funding option, deliverable with existing funding from SPF and AT Core budget estimated £340,000 to include consents construction to B4245 and restoration of compound.*

Proposed Programme delivery

Caldicot Multi-User Route - Timetable

Project delivery:

Planning and SAB applications submitted	Detailed design and tender pack created	Tender out for construction contractor	Confirmation of funding and permissions	Construction contractor award	On site works commence	Works completed
Oct-Sept	Nov	Dec	End Jan	5th Feb	Feb	June

Allocated Funding 25/26:

- £190k Active Travel Fund – To be spent and claimed by 31st March 2026
- £150k SPF – To be spent and claimed by 31st March 2026

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Meeting Minutes: Caldicot Multi-User Route (MUR) and S106 Funding Discussion

Date: 8th December 2025
Time: 4.30pm
Location: Teams
Chair: Sara Burch

Attendees:

Members & Councillors:	MCC Officers:
Angela Sandles	Colette Bosley
Anthony Easson	Craig O'Connor
Carol Carne	Joanne Chase
Jackie Strong	Madeleine Boase
Jill Bond	Mike Moran
John Crook	Nick John
John Woodfield	Nick Tulp
Lisa Dymock	Phil Sutton
Maria Stevens	Stacey Jones
Paul Griffiths	
Peter Strong	
Philip Ellwood	
Phil Murphy	
Rachel Garrick	
Sara Burch	

Apologies:

- Mark (Caldicot Town Council Clerk)

Agenda:

1. Apologies and Introductions
2. Presentation: Funding context
3. Presentation: Update on the Caldicot MUR
4. Discussion: Section 106 Allocations, community priorities, legal constraints
5. Next Steps

Key Discussion Points:

- **Funding Proposal:**

- C.Bosley outlined the proposal to allocate remaining Section 106 funds from Church Road (£144,456) and proportion from Crick Road (£167,000) to address the £310,000 shortfall required for the MUR.
- Explained planning obligations, funding deadlines, and risks of losing external funds if not spent on time.

- **Update on the Caldicot MUR:**
  - P.Sutton described the route design and connectivity it would provide, results of a public consultation (65% support, 23% neutral, 12% opposed) and key issues raised, and potential for phased construction to match available funding.
  - Emphasized need for construction start in February 2026 to use existing secured funding.
- **Legal Constraints:**
  - J.Chase clarified Section 106 funds must be used for projects identified in the S106 legal document and must be viable and ready to deliver within the funding timescales. If funding isn't used it may have to be given back.
- **Community Priorities & Member Views:**
  - P.Ellwood
    - Queried why there was a funding shortfall at this stage in the project.
    - Queried if the MUR compound had to be reinstated in the first phase of works.
    - No need to compare MUR project with Caldicot town centre regeneration. The town centre regeneration might not be successful in today's climate.
    - Would support the MUR.
  - A.Easson
    - Lack of surety of funding is concerning.
    - Caldicot regeneration should take priority. The MUR should be paired back and the already secured funding used on a reduced scheme until more funding is obtained.
    - Caldicot is dying day by day. A country park route will not benefit Caldicot, there will be nothing there to visit.
    - Caldicot town centre is dead and should be the priority.
    - This is not just for access to the Castle. The S106 agreement includes Caldicot regeneration.
  - J.Strong
    - An accessible MUR is important for disabled people and those with mobility issues.
    - Having lots of conversations on the MUR most days when walks through the country park.

        - If the MUR plan is shelved the compound would still need to be reinstated.
        - Really really support the MUR project.
        - The MUR will bring in the RLDP proposed residents into Caldicot.
        - The MUR is the last piece of the jigsaw.
    - L.Dymock
        - Need for toilet block improvements at Portskewett and Sudbrook recreation hall. Estimates a cost of £230-250k. They would be accessible to all.
        - Cornfield & football club could benefit.
        - Sudbrook residents feel cut off.
        - Would support PE comments on town centre regeneration.
    - J.Woodfield
        - Queried whether there was a date for reinstatement of the compound? If could be left out it could offer more flexibility to what can be built of the MUR.
        - There has not been much spend on west side of Caldicot.
        - Could spend the requested £340k elsewhere in Caldicot and put the MUR project on hold.
        - The Crick care home is equally difficult for Caldicot workers to get to, yet Elderwood has just been built. There may be more employees at Crick care home than Severn View, and yet no safe access for them.
    - P.Strong
        - Support full completion of the MUR route that benefits both Caldicot and Portskewett.
        - Agrees with LD on toilet improvements at Portskewett and Sudbrook recreation hall.
        - Raised importance of the required short link to the Severn View care home from the Caldicot Links/Greenway.
        - Can only work within the terms of the S106 agreement. It's recreational money.
        - Skatepark is not within the terms of the S106 agreement.
    - M.Stevens
        - Agrees with JS.
        - Fully support this plan.
    - J.Bond
        - Really fantastic scheme. Agree with JS and PS, but…
        - Need to prioritise other regeneration projects for Caldicot – town centre, skate park, stopping cycling through town centre, covered way through town.

- Has ideas for the town centre and events to bring people in.

Next Steps:

- The purpose of the meeting was a consultation to gather views on the allocation of Church Road and Crick Road Section 106 funds, no final decision was made at this meeting as it was outside the meeting's remit.
- The feedback from this session will be considered at the Cabinet meeting on 21st January 2026, where a decision will be made on the allocation of the two S106 funds.

S106 & Multi-User Route

Purpose :

To seek views on the proposal to allocate funding to the Multi-User Route from S106 Church Road and Crick Road (Elderwood park) developments, where the route and Caldicot Castle CC have already been identified as legal beneficiaries.

Decision : to be taken by Cabinet 22nd January 2026

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S106 & Multi-User Route (MUR) - **Church Rd S106**

Church Rd Development S106 - £170, 336 developer contribution for offsite recreation with 4 named Beneficiaries:

- Caldicot Greenway Scheme
- Caldicot Castle County Park
- Hall Park Open Space
- Caldicot Town Centre Regeneration project

Cabinet decision May 2024

- £25, 880 to upgrade Castroggi (Hall Park Open space) play area.
- Remaining £144, 456 to be allocated for the Greenway, Caldicot Castle CC or Town Centre Regeneration

Decision : delegated to Chief Officer (Customer, Culture& Wellbeing) in consultation with the Cabinet Member for Equalities and Engagement - to be taken following consultation with the local Caldicot county council members and Caldicot Town Council.

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Proposal : Allocation of £144,456 to the Caldicot Greenway Scheme (MUR) linking communities from Portskewett to Caldicot

Funding Context :

- Total MUR Cost £650,000
- Secured £190k Active Travel & £150k SPF
- Shortfall :£310k
- **Church Rd S106 contribution :£144,456**

S106 & Multi-User Route – **Crick Road (Elderwood Park) S106**

Crick Rd Development S106 - £400,000 developer contribution for offsite recreation with 4 named Beneficiaries:

- Development of former MOD railway line as a footway/cycle path, creating links from the property to Caldicot Country Park and the Cornfield project
- Improvements to Caldicot Castle Country Park
- Caldicot Regeneration Scheme
- The Cornfield Project in Portskewett

Decision : to be taken by Cabinet 22nd January 2026

Proposal : Allocation of £167,000 to the Caldicot Greenway Scheme (MUR) linking communities from Portskewett to Caldicot

Funding Context :

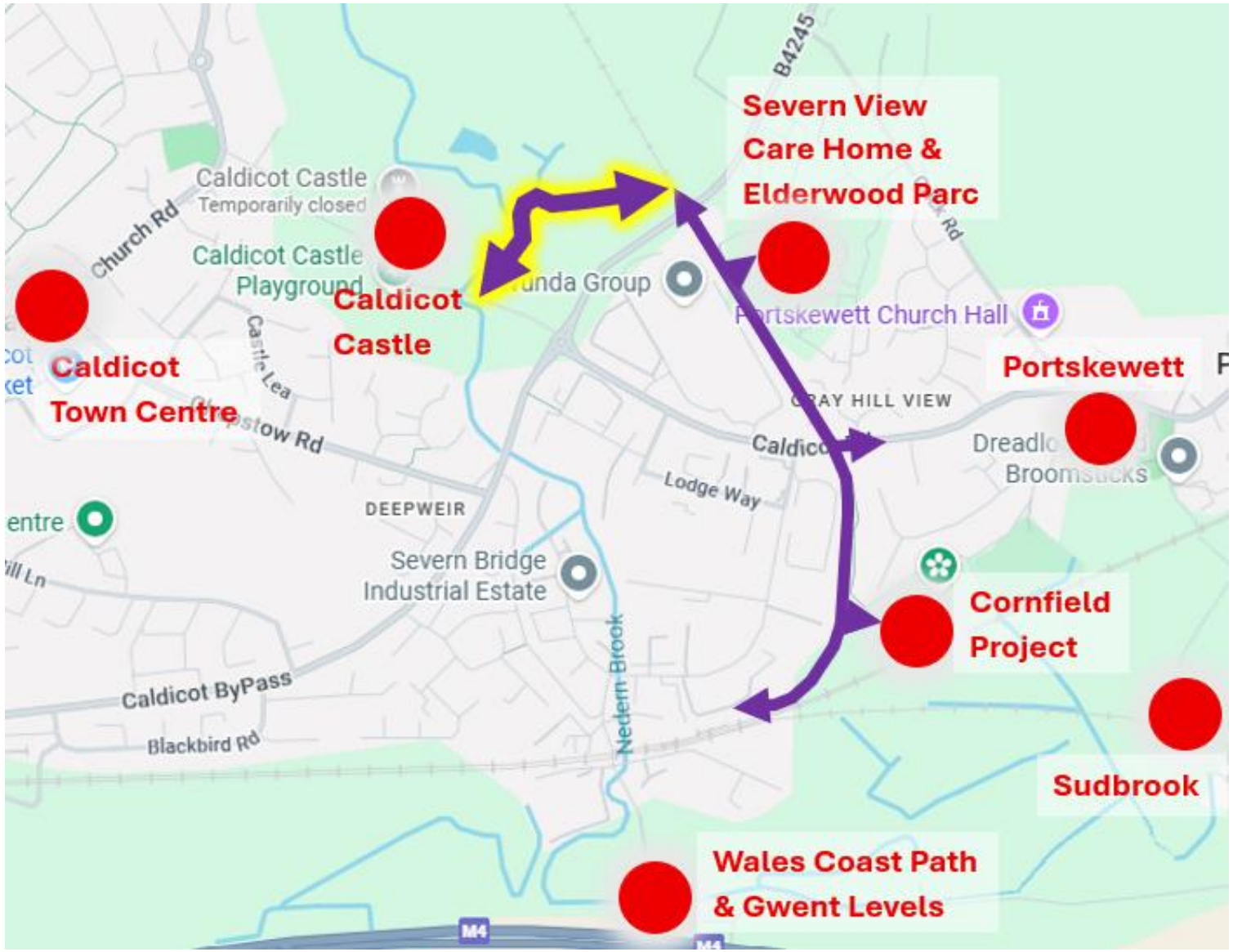
- Total MUR Cost £650,000
- Secured £190k Active Travel & £150k SPF
- Shortfall :£310k
- Church Rd S106 contribution :£144,456
- **Crick Rd S106 contribution : £167, 000**

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Caldicot Multi-User Route - Background

Key Facts:

- Provides a strategic connection between the Caldicot Links and the Country Park and on to Caldicot town centre.
- Approximately 500m long.
- Mostly at existing levels.
- 2.5m wide.
- Max gradient of 1 in 20.
- Tarmac surfaced, western half buff coloured, eastern half standard black top.



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Caldicot Multi-User Route – Public Consultation

460+ people reached through letters, emails, drop-in sessions, and workshops

- **34 survey responses** (online & paper)
- **2 public drop-in sessions** (100+ interactions)
- **2 stakeholder workshops** (20 participants)
- **Letter drop to 300+ nearby homes**
- **Emails to 46 local groups & businesses**







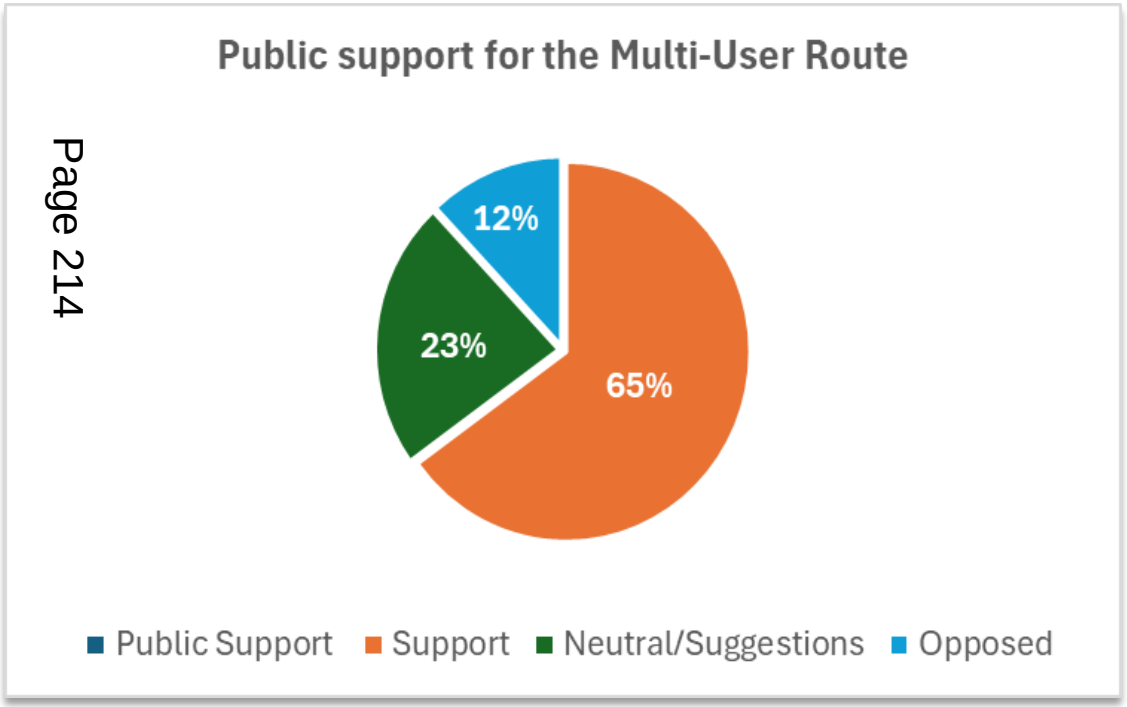


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Caldicot Multi-User Route – Public Consultation

Overwhelming Support : 65% of Respondents supported the project with only 12% opposed.

The majority see the route as a valuable leisure and community assets



"At the moment it's a struggle riding my bike on the uneven surface, I use this to get to work as well as walking."

"It would be fantastic to see the proposed happen in our area to increase footfall and exercising throughout the Caldicot area."

"To be able to take residents/service users for a walk to the castle from Severnview Parc, safely."

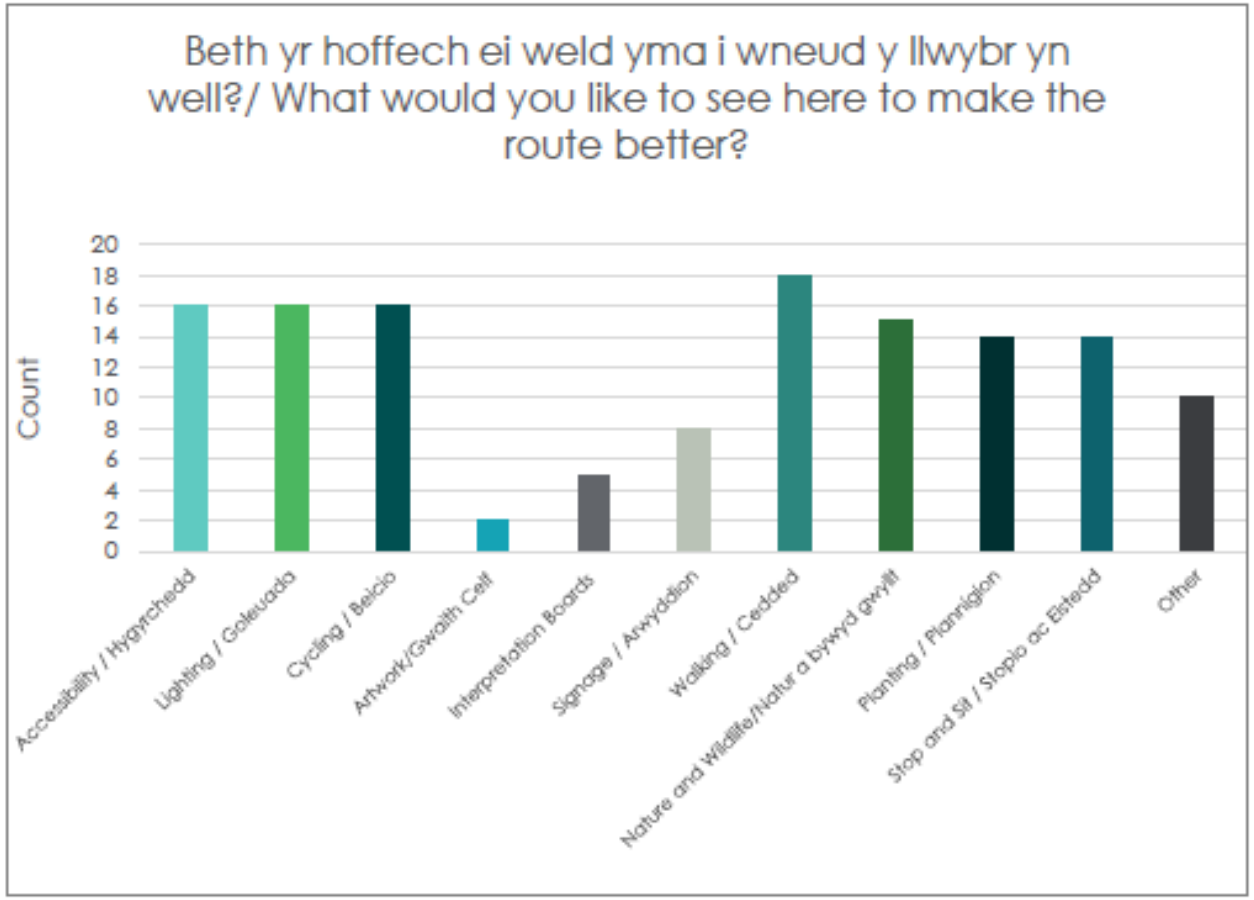
"I use the "Dinham" path most days so anything to add to this further into the castle would be very useful."

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Caldicot Multi-User Route – Public Consultation

Consultation Findings:

- Primary Use: Leisure (69%), Mixed (28%)
- Flat, accessible surfacing
- Inclusive design for mobility aids
- Lighting for safety
- Natural setting with planting & seating
- Clear signage & interpretation boards
- Wider/segregated paths for shared use
- Flooding concerns & maintenance needs



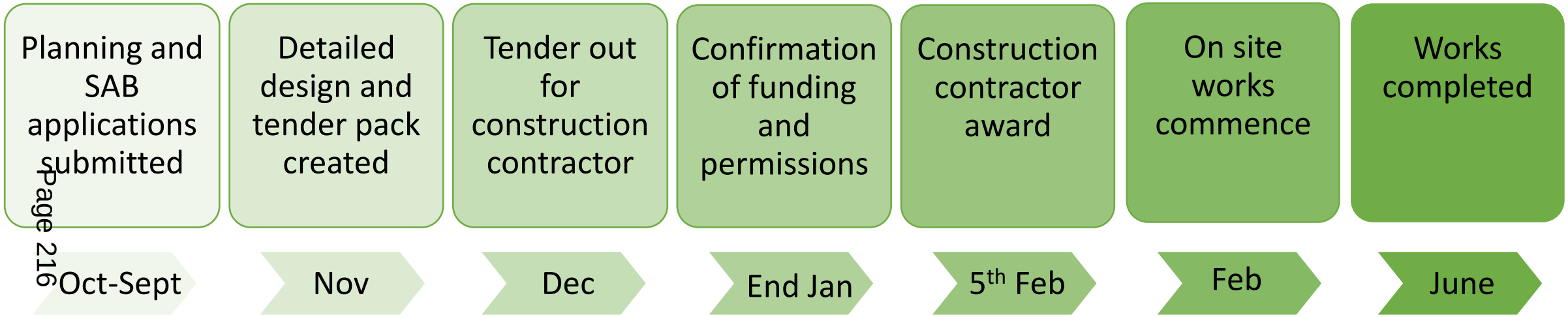
Conclusion:

- Strong community support
- Emphasis on accessibility, safety & landscape integration
- Key barriers: surfacing, lighting, user conflict

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Caldicot Multi-User Route - Timetable

Project delivery:



Allocated Funding 25/26:

- £190k Active Travel Fund – To be spent and claimed by 31st March 2026
- £150k SPF – To be spent and claimed by 31st March 2026

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Caldicot Multi-User Route



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Caldicot Multi-User Route –

Thoughts on

- **Allocation of full £144, 456 Church Road S106 to the MUR**
- **Allocation of £167, 000 Crick Road (Elderwood Park) S106 to the MUR**
- **Proposals for the allocation of the remaining £233,000 from Crick Rd S106**

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SUBJECT:	**DRAFT REVENUE AND CAPITAL BUDGET PROPOSALS 2026/27**
MEETING:	**CABINET**
DATE:	**21st January 2026**
DIVISION/WARDS AFFECTED:	**All**

1 PURPOSE:

1.1 To set out draft revenue and capital budget proposals for financial year 2026/27.

1.2 To commence a period of consultation on draft budget proposals for a four-week period ending 18th February 2026.

2 RECOMMENDATIONS:

2.1 That Cabinet approves the release of its draft ***revenue*** budget proposals for 2026/27 for consultation which will run until 18th February 2026.

2.2 That Cabinet approves the release of its draft ***capital*** budget proposals for 2026/27 and indicative capital budgets for 2027/28 to 2029/30 for consultation as set out in ***appendix 4.***

2.3 That Cabinet note the remaining revenue budget gap of £973,000 at draft budget stage which will need to be resolved in full by the time that the final budget is set by Council in March 2026.

2.4 That Cabinet notes the implications and current uncertainties arising out of Welsh Government's provisional Local Government budget announcement as outlined in this report and agree the response to Welsh Government as outlined at ***appendix 5.***

2.5 That Cabinet recommends the use of capital receipts totalling £2,707,500 to fund revenue costs associated with organisational change that support the draft revenue budget proposals.

2.6 That Cabinet recommends an increase in discretionary fees and charges of at least 3.8% as outlined in ***appendix 6***, reflecting the prevailing rate of inflation in September 2025.

3 Key messages

Key frontline services will see increases in funding **Social care & health 5.6%** **Education 4.7%** **Place & Community Wellbeing 4.5%** **Infrastructure 4.4%**
• **Investment in an additional gulley cleaning team** to increase the frequency of cleaning services across the drainage network in the County
• **Investment in an additional street sweeping team** to increase the frequency of cleaning services to help maintain effective drainage and reduce surface water risks across the County
• An **additional £1m investment in local school budgets** for the second consecutive year to meet the demands that schools are facing in maintaining attendance levels and improving standards. This investment is above meeting in full all pay and pension related pressures in schools
• There will continue to be a focus on tackling inequalities and to protect the most vulnerable in our society. This means **in County support for additional learning needs provision will increase**, helping pupils stay in their local schools
• There will be **investment in our Welsh language education** to progress against the aspirations of the Welsh Education Strategic Plan
• **Investment in the Inspire programme** to offset reductions in grant funding - supporting those at risk of not being in Education, Employment, or Training
• **Additional investment of £1m into Social care** that secures an overall increase in funding of 5.6% and continues to support Adults and Children requiring care
• **Further investment in preventative services within Children's social care** through Family support programmes to offset grant reductions
• **An above inflation increase to Citizens Advice Monmouthshire** to recognise the key role the valued organisation plays in supporting Monmouthshire residents
• **Investment in library books and materials** to improve the quality of provision across the County

- Whilst hard choices have had to be made to protect services, **the services that are available to residents this year will continue to be available in 2026/27**. Waste collections will remain the same. Leisure centres, recycling centres, libraries and community hubs are all remaining open

- **Total additional capital investment of £5.5m** will be made within some of our key infrastructure network, predominantly in **Highways structures including Chainbridge refurbishment, carriageways, footpaths, public rights of way, and our property estate**

- We are committed to protecting our local environment and nature and will be working with our partners **to increase investment in Flood alleviation measures**, and will continue to review our property estate and energy usage **to reduce our carbon footprint**

Welsh Government's updated provisional funding settlement will make a meaningful difference in protecting essential local services

- Monmouthshire will receive an increase of 4.4% in core revenue grant from Welsh Government in 2026/27. In cash terms, after allowing for transfers of specific grants in/out of core funding and for tax base adjustments, this equates to an additional £6.15million in funding

- This represents a significantly improved position than anticipated following the initial draft settlement. It does not cover all of the costs of rising demand for Council services, particularly in Education and Social Care. There therefore remain difficult local budget choices

- We will continue constructive discussions with Welsh Government during the consultation period, pressing the case for rural areas like Monmouthshire which have unique challenges in delivering local services

To partly fund the increased investment in key services noted above, we are intending to change the way some things operate and increase our income

- The draft budget includes £2 million of service efficiencies. Our residents rightly expect us to contain our costs wherever possible and to ensure we are operating as efficiently and effectively as we can

- We plan to increase income through an indicative increase in the rate of council tax of 5.95% and through inflationary increases in charges for on-demand services. This will secure vital funding to protect essential local services. The Council Tax Reduction Scheme (CTRS) is maintained to support those who may otherwise struggle to manage the financial burden

- A cumulative impact assessment has been produced for the draft proposals which enables us to assess the overall potential impact of the budget on residents within our communities, and where any negative impact can potentially be mitigated

Open and robust scrutiny and challenge is an essential part of the budget setting process, and a public consultation process will run from January 21st until February 18th

4 Budget context and summary

4.1 The budget strategy for 2026/27 builds on the foundations established by Cabinet throughout its period of administration. At this stage in the administration cycle, it remains essential that the strategic principles set out in the Medium-Term Financial Strategy (MTFS) continue to guide the budget approach, with the Community & Corporate Plan framework being central to decision-making.

4.2 The strategy adopts a multi-year perspective wherever possible, directing resources to areas of greatest need and opportunity. It reinforces broader reforms and preventative measures designed to secure the longer-term sustainability and resilience of Council services.

4.3 Despite these guiding principles, difficult decisions have been necessary to prioritise services most critical to our communities. These choices ensure the Council remains financially sustainable and operates safely, while continuing to deliver on its strategic ambitions.

4.4 The prevailing economic climate continues to pose challenges for Local Government, as persistent inflation, increased service demand and supply chain pressures result in upward pressure on the cost of delivering local services. Despite a moderation in some cost drivers, issues such as the cost of living crisis and evolving demands within health and social care continue to impact both the community and the Council's financial planning. Notably, these include:

- The wider socio-economic landscape and cost of living challenges that continue to have an impact on our communities, with a consequential increase in demand for Council services, and impact upon income generating services.
- The wider public sector challenges which impact upon Council services, notably within Health where efforts to improve patient pathways impact upon the level and complexity of demand for Social care.
- Headline inflation rates remain above UK Government targets, with some discrete areas of Council services continuing to experience cost pressures on supplies and services.
- In continuing efforts to combat inflation, interest rates have remained higher for longer and above previous UK Government forecasts.

- Expected pay growth remains above previous Government forecasts.
- There remain increased risks around debt recovery.

4.5 Despite these pressures, the Council has demonstrated robust financial management, successfully navigating previous periods of austerity, recession and the pandemic. The 2025/26 budget addressed over £17 million in additional service cost pressures, and recent financial updates show an improved in-year position compared to prior years, with a projected balanced budget, and with contingency budgets intact. Should this positive trend continue through to year-end, the Council will be well-placed to stabilise its reserves and carry solid foundations into the next financial year.

4.6 The financial outlook for 2026/27 remains uncertain, with national and local developments expected to shape the Council's operating environment. Key influences include shifting economic conditions, political uncertainty, policy changes, the prospect of new responsibilities, funding uncertainty, ongoing pay negotiations, and evolving demographic factors.

4.7 Cabinet published their budget setting process and timetable at their meeting on the 19th November 2025. This highlighted an initial budget gap of £11.5m, made up of service cost increases of £17.5m, offset by modelled increases in funding of £6.0m from Council tax, fees and charges for services, and in the level of Welsh Government core grant funding.

4.8 Detailed work has continued since November to update the range of planning assumptions and variables that impact the Council's budget planning:

- The impact of the provisional Welsh Government settlement, announced on 24th November and supplemented on 9th December;
- The Council Tax Base for 2026/27 approved by Individual Cabinet Member decision on 17th December 2025;
- Confirmation of changes to required employer contributions to the Greater Gwent Pension Fund following the most recent actuarial review of the fund position;
- Updated economic forecasts including inflation and the impact of the increases in national and real living wage announced;
- Review of pay award assumptions in light of most recent economic forecasts, and;
- The need to address recurrent and new service cost increases as evidenced through in-year budget monitoring.

5 Provisional Local Government Settlement

5.1 On the 24th November 2025, the Cabinet Secretary for Housing and Local Government announced the Provisional Local Government Settlement for 2026/27.

5.2 The headlines of the Provisional Settlement at an all Wales level were:

- On average, Welsh local authorities will receive a 2.7% increase in core revenue grant funding next financial year.
- Additional funding of £5.5 million was made available to ensure that no local authority would receive less than a 2.3% increase.
- The additional £97 million allocated during 2025/26 for the public sector to meet the UK Government's increased employers' National Insurance costs, and the £37m to meet full year pay awards for teachers, ALN Co-ordinators and local authority staff has been included in the baseline funding for 2026/27.
- There will be an increase in general capital funding by £4m to a total of £204 million to support the inflationary increases in capital projects.

5.3 This announcement was supplemented further on the 9th December with notification that a budget agreement had been reached by Wesh Government providing an additional £112.8 million for local government in Wales, ensuring an overall average increase in funding of 4.5%, with no authority receiving less than 4%.

5.4 The additional funding provided for local services is welcomed and recognises the range of pressures which continue to impact Councils in Wales in providing local support to communities.

5.5 Monmouthshire will receive an increase of 4.4% in core revenue grant in 2026/27. In cash terms, after allowing for transfers of specific grants in/out of core funding and for tax base adjustments, this equates to an additional £6.155 million.

5.6 The level of increase in settlement for Monmouthshire is linked to data underpinning the settlement, including favourable movements in comparative pupil numbers and secondary free school meals numbers. This is offset by less favourable financial distributions resulting from changes to relative population numbers and primary free school meals.

5.7 Total general capital funding will increase by £50,000 or 0.9% to a total of £5,528,000. This funding is not specific to individual capital schemes and will aid in supporting overall capital investment plans for 2026/27, as outlined later in this report.

5.8 There are specific grants that sit outside of the main block grants for revenue and capital that support the delivery of specific policy-led programmes of work determined by Welsh Government. The information on these specific grants is incomplete at provisional stage and remains at an all-Wales level. For those that have been published, these amount to over £1.3 billion for revenue and over £1.08 billion for capital. There are, however, a number of grants where details of indicative levels are still awaited and is therefore an area that will need revisiting once further information is forthcoming.

5.9 Of significance, the Sustainable Waste Management Grant is yet to be confirmed (£16.4 million in 2025/26 at an all-Wales level) and it remains unclear how that grant may be impacted by the allocations of funding to councils from the Extended Producer Responsibility system introduced in 2025/26.

5.10 The draft budget proposals exclude any impact from the potential variation in specific grant levels for 2026/27, unless these are already confirmed. The proposals take account of reductions that have been confirmed in 2025/26 and that are expected to be recurrent in 2026/27 – notably for the Inspire programme (Economic development) and Eliminate programme (Children's social care).

5.11 Welsh Government have continued to work to reduce the administrative burden of specific grant funding to Councils. Whilst no additional specific grants have been transferred into the main Settlement grant for 2026/27, work has been completed or is underway in other grant areas to streamline the amount of monitoring of grants to ensure Welsh Government is only collecting the information which it, with Authorities, need to understand the impact and outcomes of grant programmes.

5.12 The Council's response to the Welsh Government's consultation on the provisional settlement is outlined at ***appendix 5.***

5.13 There is currently no set date for receipt of the Final Settlement, although it is anticipated that this would be no sooner than the publication date of the Welsh Government final budget on 20th January 2026. This will be earlier than in recent years and will allow for earlier certainty regarding funding. In particular, it is hoped that the allocation of the majority of specific grants will be published alongside the final settlement.

6 Budget process

6.1 Cabinet reaffirmed its budget framework and principles for 2026/27 in their report of 19th November 2025. The update recognised that the financial outlook in years ahead remains challenging, and that the budget for 2026/27 therefore needs to be responsible and sustainable, with a view to the medium-term.

6.2 The absolute choice for the proposals is to protect and sustain for now and for the future the services which we know are important to the residents of Monmouthshire without compromising the financial stability of the Council.

6.3 Continuing the policy intent to mitigate the impact of the budget proposals on those most in need holds primacy in the draft budget proposals that follow.

6.4 This is highlighted through the identification of, and investment made to address pressures in Adult's and Children's Social care, within Schools, and in Children's additional learning needs. When implementing any savings in these areas, careful consideration has been

given to minimising impact, and prioritising support for those in greatest need. Service offers have evolved and adapted to ensure the best possible outcomes for individuals in these critical areas.

6.5 Investment in preventative services remains a priority. This is demonstrated most prominently through the ongoing programmes of work within Social care, and in proposing within the draft budget to underwrite grant reductions for the Inspire programme (Economic development) and Eliminate programme (Children's social care).

7 Draft Revenue budget 2026/27

7.1 The updated revenue budget summary for 2026/27 is shown below. This is shown exclusive of precepts for Police and Community Councils to aid in comparability. These precepts are collected by the Council through Council tax on behalf of these organisations and paid directly over to them with no net impact to the Council's overall budget.

2026/27 Draft net revenue budget £000's	Adjusted 2025/26 Budget	Pay inflation	Non-pay inflation	Service cost increases	Service investment	Service efficiencies or income	Service reforms	Fees & charges	Other Adjustment	Proposed 2026/27 Budget	Increase	Increase %
Children, Learning, Skills and Economy	**72,848**	1,965	449	153	1,734	(887)		(6)		**76,256**	3,408	4.7%
Social Care & Health	**77,460**	1,171	1,295	2,387	1,638	(500)	(1,252)	(365)		**81,832**	4,372	5.6%
Infrastructure	**24,875**	622	611	35	200	(122)		(263)		**25,957**	1,083	4.4%
Place & Community Wellbeing	**5,561**	186	63	220		(109)	(40)	(71)		**5,809**	249	4.5%
Resources	**8,623**	292	119	394		(345)		(64)		**9,018**	395	4.6%
People, Performance and Partnerships	**6,130**	197	33	214	166	(17)				**6,723**	593	9.7%
Law & Governance	**3,036**	91	5	133			(16)			**3,249**	213	7.0%
Debt financing, Levies & Insurances	**19,268**	0	109	0		(135)			2,332	**21,574**	2,306	12.0%
Total expenditure	**217,801**	**4,523**	**2,683**	**3,536**	**3,738**	**(2,115)**	**(1,308)**	**(769)**	**2,332**	**230,420**	**12,619**	**5.8%**
Aggregate External Financing (AEF)	**(138,560)**								(6,155)	**(144,715)**	(6,155)	4.4%
Council Tax base and rate	**(78,626)**								(5,449)	**(84,075)**	(5,449)	

Council Tax Premium	**(615)**								(42)	**(657)**	(42)	
Total income	**(217,801)**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**(11,646)**	**(229,447)**	**(11,646)**	
Remaining budget shortfall	**0**									**973**		

7.2 The draft budget proposed recognises the pressures on key frontline services and increases funding for Social Care & Health by 5.6%, for Education by 4.7%, for Place & Community Wellbeing (including Leisure) by 4.5%, and for Infrastructure by 4.4%.

7.3 This includes an additional £1m investment directly in local school budgets for the second consecutive year to meet the demands that schools are facing in maintaining attendance levels and improving standards. This investment is above meeting in full all pay and pension related pressures in schools. This is the equivalent of an additional £95.97 per pupil, between £72,000 and £132,000 additional for Secondary schools, and an additional £20,000 for a 210-place primary school.

7.4 Overall school balances remain in deficit with many schools continuing to progress against agreed deficit recovery plans. There is a strong expectation that through this recurrent additional investment schools and their elected governing bodies will work closely with the Council in setting and robustly managing their budgets, ensuring that they remain focused on achieving financial sustainability while maintaining the quality of educational standards provided. This collaborative approach is essential to address ongoing budgetary challenges and to support the long-term goal of bringing school finances back into balance, thereby safeguarding resources for both current and future pupils.

7.5 Additional investment of £1m into Social care maintains the overall increase in funding of 5.6% and continues to support existing programmes of preventative work and Adults and Children requiring care. This commitment to increased funding ensures that the Council is able to respond proactively to the evolving needs of the community, strengthening the capacity of preventative services while also addressing the complex and growing demands within both Adults and Children's social care. By bolstering these essential services, the Council is laying the groundwork for more resilient support networks, which will underpin broader efforts to tackle inequalities, protect vulnerable groups, and promote overall wellbeing throughout the County.

7.6 The proposed investments in gulley cleaning and street-sweeping services are designed to strengthen the Council's ability to manage surface water and reduce flooding risks across the county. By increasing gulley-cleaning capacity from two teams to three the Council will be able to clean drainage assets more frequently and thoroughly, improving resilience to more frequent and severe weather events.

7.7 Similarly, expanding street-sweeping capacity through the addition of two staff members will ensure more debris is collected before it reaches the drainage system. This proactive approach will help maintain effective water flow, reduce blockages, and minimise surface water issues during adverse weather.

7.8 There will continue to be a focus on tackling inequalities and to protect the most vulnerable in our society. This means our in-County support for additional learning needs provision will increase, alongside further support for vulnerable learners and Social Emotional Mental Health (SEMH) provision.

7.9 Investment is being made in preventative services through:

- The Inspire programme to support those at risk of not being in Education, Employment, or Training (NEET).
- Children's social care through maintaining levels of Family support programmes to offset reductions in grant funding.

7.10 There is further investment in our Foster carer service to retain and recruit valued carers and to recognise their essential skills, patience, time, and the resources that it takes to support some of the most vulnerable children in our County.

7.11 The budget proposes an above inflation increase to the Citizens Advice Monmouthshire grant funding contribution to recognise the valuable role this service plays in supporting local residents.

7.12 There will be an increase in investment in library books and materials which will enhance the quality and accessibility of resources across the County, supporting educational and cultural enrichment for all. This positive step will not only keep our collections current and relevant but also strengthen the standing of this valued service in national rankings under the Welsh Public Library Standards.

7.13 Welsh language provision will see investment to deliver against the Welsh in Education Strategic Plan (WESP). Establishing a dedicated Welsh Language Officer will ensure statutory compliance and strengthen governance, supporting schools in complying with the 2030 requirement for schools to deliver 10% of the curriculum through the medium of Welsh.

7.14 Whilst difficult choices have had to be made in order to protect services, the services that are available to residents this year will remain available in 2026/27. Waste collections will remain the same. Leisure centres, recycling centres, libraries and community hubs are all remaining open.

7.15 In order to conserve an appropriate and prudent level of financial resilience, the draft budget for 2026/27 will continue to avoid any dependency on the use of revenue reserves to support recurrent revenue expenditure. The Council tax premium reserve that has been

developed through the charging of premiums on empty and second homes will be drawn upon to support the costs of Housing and Homelessness, building upon the programmes of work in place for Homelessness prevention and Housing sustainability programmes.

How the cost pressures will be met

7.16 Cabinet has explored all options available to meet the original budget gap including the flexibilities within the grant support from Welsh Government, savings from service efficiencies and reforms, additional income through raising fees and charges, and through council tax base and rate changes. The Council will continue to utilise capital receipts up to a maximum of £2.7 million to meet qualifying revenue expenditure that looks to generate longer term organisational change that enables delivery of services more efficiently and effectively.

7.17 The settlement from Welsh Government provides a grant funding increase of 4.4% or £6.15 million which provides much needed support for services. However, this increase does need to be taken in the context of the £16.8 million of additional costs the Council is managing through the budget process.

7.18 It is proposed that additional income of £0.8m for 2026/27 will be generated through an inflationary increase of 3.8% in discretionary fees & charges for services.

7.19 Services have identified £2.1 million of efficiencies within service delivery and additional opportunities to meet existing costs from alternative funding.

7.20 The remaining sum of £7.7 million can only be met through a combination of service reforms or reductions and through council tax increases.

7.21 Striking the right balance between council tax increases and the reform or reduction in services that support the most vulnerable in our community is not easy and involves inherent choice.

7.22 The draft budget proposes a council tax increase of 5.95%, and when taken alongside growth in the Council tax base numbers introduces additional income of £5.4 million. This equates to an increase of £2.08 per week for a Band D property. We anticipate that 63% of households will meet this charge in full, with the remaining 37% benefiting from a dispensation. The final level of Council Tax will only be decided following the consultation process as part of the final budget proposals.

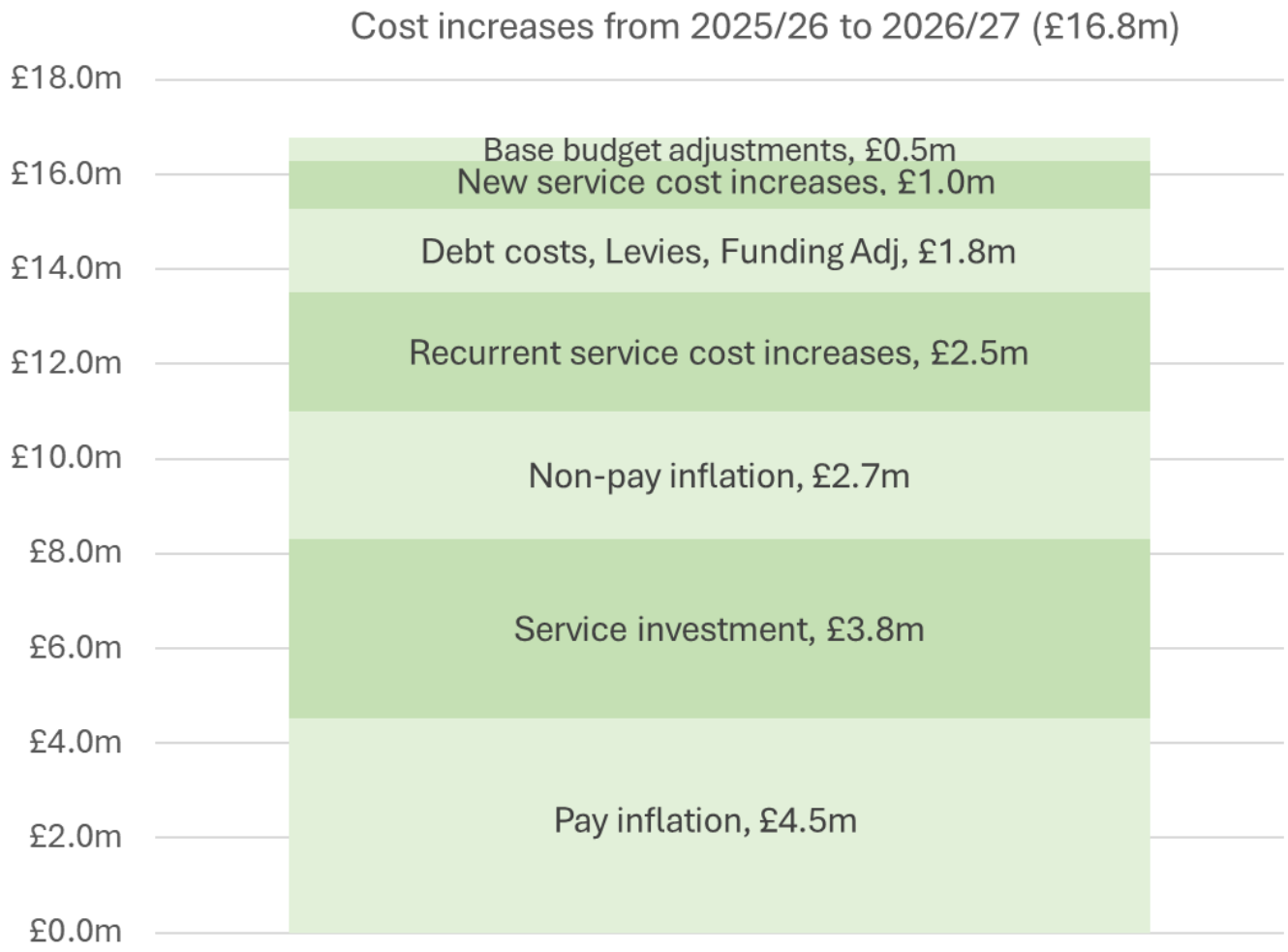
7.23 The remaining shortfall of £2.3 million will be partially met by service reform proposals of £1.25 million which are set out in Section 9 and with further information attached at ***appendix 1***. An assessment of their cumulative impact is provided at ***appendix 2 and 3.***

7.24 This leaves a budget gap at draft budget setting stage of £0.97 million which will need to be resolved in full by the time that the final budget is set by Council in March 2026.

7.25 It is recognised that a budget process is always dynamic and further work will continue to be carried out to review opportunities for further service efficiencies. It is expected that the final Welsh Government settlement due towards the end of January will give further clarity on the level of specific grants and how these may aid in closing the remaining budget gap. The Council's in-year budget position is currently positive and may provide an opportunity to also aid in the final budget setting. There also remain options open to the Council to look at its funding through council tax, fees and charges, and reserves.

8 Details of additional cost pressures for 2026/27

8.1 The revised additional cost pressures estimated for 2026/27, compared to 2025/26 are £16.8m, or 8% of the Council's budget.



8.2 Pay inflation for 2026/27 has been modelled using all-Wales data including evidence provided by the Welsh Local Government Association and feedback from national employers and is anticipated to introduce further budgetary pressure of £4.5 million.

8.3 The draft budget includes an additional £3.8 million of service investment, predominantly within the frontline services of Social care, Education, Additional Learning Needs, preventative services, and in road infrastructure. These are outlined in further detail in ***appendix 1***.

8.4 An inflationary uplift of 2% is applied to non-pay budgets which introduces a £2.7 million additional cost pressure.

8.5 There are recurrent service cost increases of around £2.5 million being experienced in the current 2025/26 financial year that are expected to remain for 2026/27. These are predominantly demand driven and centred around the increasing need for Social care. In addition, there are a small number of services currently experiencing reductions in income that will require budget adjustments as income levels are not expected to immediately recover.

8.6 Alongside this, services have indicated that a further £1.0 million of new demand and inflationary led service pressures are expected to materialise in 2026/27. These predominantly relate to contract increases that are estimated to be over and above the level of inflationary allowance made within the budget modelling.

8.7 Both the recurrent and newly identified service pressures are outlined in further detail in ***appendix 1.***

8.8 Base budget adjustments of £0.5m have been made to the model to reflect technical adjustments in respect of:

- The recurrent shortfall in funding for the increased cost of employer's national insurance contributions of £0.7 million.
- The reversal of previous budget adjustments to reflect changes in assumptions of the level of Waste grants of £2.1 million.
- Offset by;
- The reduction in employer's pension fund contributions of £2.0 million.
- The transfer of grant funding into the Welsh Government main settlement for Teacher pay pressures of £0.3 million.

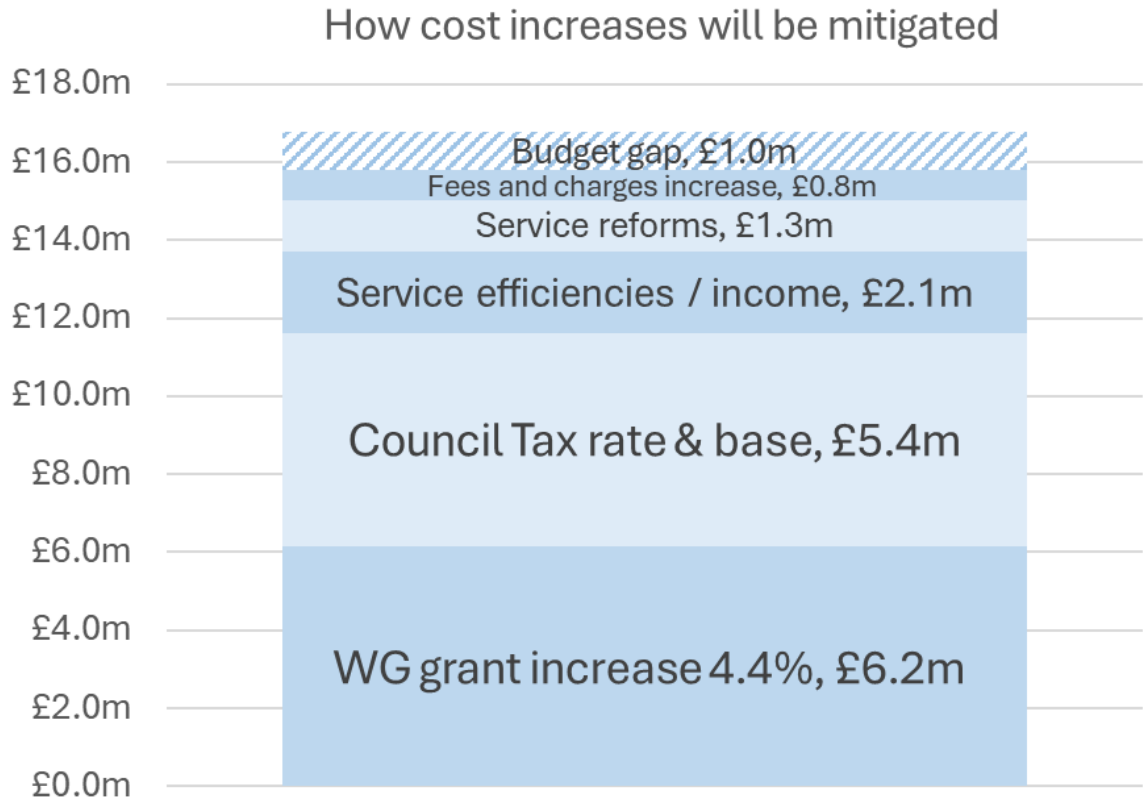
8.9 Debt financing costs are anticipated to increase by £0.8 million following a review of expected interest levels for 2026/27. Budgets that cover payments for external levies respect of Fire, Drainage and National Parks will increase by £0.3 million, offset by reductions in other centrally controlled budgets. Support from capitalisation direction will be reduced by £1 million in line with forecasts of available capital receipts over the medium-term.

Service cost increases and Investment

8.10 Service cost pressures and the need for further investment has been subject to rigorous review culminating in a total of £7.3 million being included as part of the draft budget proposals. A summary table is provided below with more detail provided in ***appendix 1.***

Pressures by Directorate	Recurrent 2025/26 Cost increases	New cost increases	Service Investment	Total
	£000	**£000**		**£000**
Learning, Skills and Economy	55	98	1,734	**1,887**
Social Care & Health	2,062	325	1,638	**4,024**
Infrastructure	0	35	200	**235**
Place & Community Wellbeing	220	0	0	**220**
Resources	130	264	0	**394**
People, Performance and Partnerships	0	214	166	**380**
Law & Governance	50	83	0	**133**
Totals	**2,517**	**1,019**	**3,738**	**7,274**

9 Details of Cost reductions, income flexibilities, and grant funding for 2026/27



Service efficiencies and additional income flexibilities

9.1 The draft budget proposes service efficiencies and use of additional income of £2.17 million. A summary of these proposals by service area is shown below with further details outlined in ***appendix 1***.

Directorate	**2026/27**
	£000
Learning, Skills and Economy	(887)
Social Care & Health	(500)
Infrastructure	(122)
Place & Community Wellbeing	(149)

Resources	(345)
People, Performance and Partnerships	(17)
Law & Governance	(16)
Energy Costs	(135)
Total	**(2,171)**

Service reforms

9.2 The draft budget proposes service reforms of £1.25 million. These relate to continuation of previous programmes of change within Children's social care placement strategy, and within the strategic approach to meeting the demand for Adult domiciliary care.

9.3 **Children's Care Planning & Placement Strategy** - The service will deliver savings by strengthening care planning so that children move into placements better aligned with their assessed needs and at lower cost. This includes maximising the use of in-house foster carers and supporting the wider placement development strategy as new in-county provision becomes operational.

9.4 **Consolidation of vacancies in In-House Adults domiciliary care** - Savings will be achieved by safely consolidating underspent staffing capacity within the in-house domiciliary care workforce. The underspend stems from additional commissioned provider capacity for long-term care at home. The approach supports continued expansion of the reablement service, enabling more individuals to receive short-term, intensive interventions that reduce or delay long-term care needs. This maintains independence, improves wellbeing outcomes, and reduces reliance on more costly long-term packages.

9.5 Further details are outlined in ***appendix 1***.

Fees & Charges

9.6 The Council raises a significant amount of income to support service delivery from charging for discretionary services. The draft budget proposes that these are increased at least in line with the prevailing rate of inflation in the September prior to the financial year. This results in an increase in charges of at least 3.8%, totalling £0.77 million. A summary of these increases by service area is shown below with further details outlined in ***appendix 6***.

Directorate	**2026/27**	**Description**
	£000	
Learning, Skills and Economy	(6)	Licences

Social Care & Health	(365)	Housing, Adult Social care, Public health, Licencing, Registrars, Community meals
Infrastructure	(263)	Traffic & Road Safety, Streetworks, Floods & SuDS, Waste, Grounds, Transport
Place & Community Wellbeing	(71)	Car parking, Building control, Development control
Resources	(64)	Cemeteries, Allotments, Finance
People, Performance & Partnerships	0	
Law & Governance	0	
Total	**(769)**	

Council Tax rate, base and premiums

9.7 A Council tax increase of 5.95% is proposed for 2026/27. For a current Band D property this will equate to a charge of £1,926.45 (Council element only that excludes Community council or Police precept) and would illustratively be an additional £108.19 a year or £2.08 a week.

Illustrative weekly impact of a 5.95% increase in Council tax rate									
Bands	**A**	**B**	**C**	**D**	**E**	**F**	**G**	**H**	**I**
Increase per week	£1.39	£1.62	£1.85	£2.08	£2.54	£3.01	£3.47	£4.16	£4.85

Overall, the Council Tax base calculated for 2026/27 has risen by 0.8% compared to 2025/26. This increase reflects the current level of exemptions and discounts, anticipated changes in dwellings and the inclusion of council tax premiums

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

9.10 The estimated total additional income from Council tax base changes, net of premiums and changes to CTRS (Council Tax Reduction Scheme), is £771,000.

Reserves and Capital Receipts strategy

9.11 Cabinet have been clear in their budget strategy framework that there is a need to maintain a financially sustainable path for the Council including conserving an appropriate and prudent level of financial resilience.

9.12 Reliance on revenue reserves to fund core revenue expenditure should be avoided because they are a finite resource. This means that using reserves in this way immediately creates a funding gap in the budget for the following year.

9.13 The draft proposals include a net draw on earmarked reserves of £104,963 to fund time-limited programmes of work. A breakdown of the estimated contributions to/from earmarked reserves is shown below.

	2025/26 £'000's	2026/27 £'000s
Contributions to Earmarked reserves:		
Council Tax premium reserve	(615)	(657)
Elections Reserve	(50)	(50)
Solar Farm maintenance	(23)	(23)
Waste risk management reserve	(1,790)	(0)
Grass Routes to School Reserve	(5)	(5)
Total contributions to reserves	**(2,483)**	**(735)**
Contributions from Earmarked reserves:		
Redundancy and Pensions Reserve	88	88
Priority Investment Reserve	405	0
ICT Transformation Reserve	4	49
Council Tax premium reserve	253	503
Ukrainian Reserve	200	200
Total contributions from reserves	**950**	**840**
Net total	**(1,533)**	**105**

9.14 The draft budget includes the use of £2.7m of capital receipts to fund the one-off revenue costs associated with organisational change. This approach continues to be reviewed over the medium-term as receipt generation and usage materialises. Drawing on capital receipts in this way reduces the balance available to fund any capital expenditure which may consequently increase the Council's need to borrow to fund the expenditure.

9.15 Over the medium term, overall earmarked reserve levels are expected to remain relatively stable. However, it is important to note that Monmouthshire currently has the lowest reserve cover as a percentage of net revenue budget in Wales. This has necessitated a revised reserves policy that prioritises the protection of revenue reserves to safeguard against both anticipated and unforeseen risks.

Budgeted useable reserve balances					
Financial Year ending	**2026**	**2027**	**2028**	**2029**	**2030**
	£000's	*£000's*	*£000's*	*£000's*	*£000's*
Council Fund					
Council Fund	(10,724)	(10,724)	(10,724)	(10,724)	(10,724)

School Balances	7,062	7,062	7,062	7,062	7,062
Total General Fund balance	**(3,663)**	**(3,663)**	**(3,663)**	**(3,663)**	**(3,663)**
Earmarked Reserves					
Invest to Redesign Reserve	(1,189)	(1,189)	(1,189)	(1,189)	(1,189)
IT Transformation Reserve	(662)	(464)	(361)	(258)	(155)
Insurances & Risk Management Reserve	(925)	(925)	(925)	(925)	(925)
Capital Receipt Generation Reserve	(314)	(314)	(314)	(314)	(314)
Treasury Equalisation Reserve	(590)	(590)	(590)	(590)	(590)
Redundancy and Pensions Reserve	(593)	(505)	(417)	(329)	(240)
Capital Investment Reserve	(250)	(250)	(250)	(250)	(250)
Community & Corporate Plan Priority	(150)	(150)	(150)	(150)	(150)
Programme of Change	(200)	(200)	(200)	(200)	(200)
Pay Inflation	(130)	(130)	(130)	(130)	(130)
Sub Total Earmarked Reserves	**(5,003)**	**(4,717)**	**(4,526)**	**(4,335)**	**(4,144)**
Partnership Reserves	(1,762)	(1,612)	(1,487)	(1,537)	(1,587)
Service Reserves	(3,050)	(3,078)	(3,106)	(3,134)	(3,162)
Council tax premium reserve	(1,457)	(1,611)	(1,791)	(1,998)	(2,233)
Sub Total - other Earmarked reserves	**(6,269)**	**(6,301)**	**(6,384)**	**(6,669)**	**(6,982)**
Total Useable Revenue Reserves	**(14,934)**	**(14,681)**	**(14,573)**	**(14,667)**	**(14,789)**

10 Budgetary Risk and uncertainty

10.1 **Increasing service demand** – levels of demand for high-cost Council services has been volatile over recent years. These stem from cost of living issues coupled with population and demographic changes. These are most acute in Social care, Education and Housing services and will need to be monitored closely as the financial year develops.

10.2 **Funding** - The Provisional Settlement provides some details on specific grants. However, information is at an all-Wales level and with a number of grants indications still awaited. Of significance, the Sustainable Waste Management Grant is yet to be confirmed (£16.4m in 2025/26) and may be impacted by the indicative allocations of funding to councils from the Extended Producer Responsibility system.

10.3 **Annually allocated grant funding** - where annually allocated specific grants remain unconfirmed, any variation in funding levels could directly impact the Council's ability to deliver planned services or projects, potentially requiring the reprioritisation of activities or the identification of alternative funding sources at short notice. There remains an associated risk that staff employed through these grants will not have certainty regarding their roles beyond the end of the financial year which can also impact upon staff retention.

10.4 **Service reforms** - The draft budget requires service reforms of £1.25 million to be delivered which is significantly lower than the levels seen over recent years. Nevertheless, it is essential that these programmes of work are stood up or continued with effect from the start of the financial year in order to deliver a full year impact.

10.5 This will be particularly important within Social Care where reforms totalling £1.25 million will be expected to be delivered within a service which continues to experience challenging levels and complexity of demand, coupled with significant workforce pressures. This is expected to be mitigated by the fact that the reforms are a continuation of the existing programmes of change which are already well underway within the service.

10.6 **Pay awards** - Uncertainty will remain around the pay awards for local government staff and teaching staff. Actual pay awards will not be confirmed nationally by independent pay bodies until later in 2026 and therefore further consideration may need to be given in-year to adjust pay budgets at that time. Whilst the pay award assumptions factored into the budget are set at a level which is seen as prudent, there remains an unknown risk of the effect of the wider economic and political landscape as we move through 2026.

10.7 **Income and Debt recovery** - The ongoing cost-of-living crisis continues to affect household disposable income, which in turn impacts demand and collectability for income-generating Council services.

10.8 **Economic factors** – Any significant variation in inflation and interest rates from forecast levels will impact the cost of goods, services, and borrowing. This will affect both the Councils own direct expenditure and the costs incurred by suppliers and service providers. Although the Consumer Price Inflation (CPI) rate has fallen from the historic peaks seen in recent years, it remains above the Bank of England's 2% target. Current projections indicate that CPI could reduce to approximately 3.2% in 2026/27, but inflation remains highly volatile and sensitive to external factors such as global energy prices, supply chains, and geopolitical events.

10.9 **Labour market** - Labour shortages in areas like social care and in specialist roles are driving up the cost of commissioned services.

11 Draft Capital budget

11.1 The latest iteration of the capital budget strategy was updated and approved by Council in March 2025. Whilst an updated capital strategy for 2026/27 will be considered by Council alongside the treasury strategy at its meeting on 5th March 2025, the underlying principles of the strategy remain fit for purpose and have been used in preparing the draft capital budget proposals.

11.2 The capital strategy requires the capital programme to be financially sustainable without leading to borrowing levels that are unaffordable, unsustainable and imprudent.

11.3 The draft capital budget proposals for 2026/27 continue to support the priorities of the Council and are wholly aligned with the priorities set out in the Community and Corporate Plan. Notably this includes ensuring that resources are aligned to meet the plans for tackling the longer-term challenges that communities and public sector organisations are facing.

11.4 In recent years the capital programme has very much been dominated by the investment in the new Abergavenny 3-19 school which involved total investment of £70m in creating the first operationally Net Zero Carbon 3-19 School in Wales.

11.5 With that investment now falling away from the programme, the current four-year capital programme very much represents a consistent investment into maintaining the Council's infrastructure base through planned investment in:

- Property and county farms maintenance
- Highways infrastructure & transports schemes
- Disabled facilities grants & access for all
- Match funding to leverage external grant opportunities to invest in infrastructure
- Investment in the Cardiff capital city region deal
- Funding of eligible revenue costs associated with service reform, to support the draft revenue budget
- ICT investment

11.6 The Capital programme is impacted by the same external factors impacting upon the revenue budget and outlined in detail earlier in this report. Some discrete areas of inflation, supply chain issues and internal resourcing capacity mean that current capital budgets are being delayed or deliver less for the same amount of budget.

11.7 Whilst the Council's current planned investment in asset infrastructure maintenance partially addresses the need for maintaining the existing estate, a significant backlog remains outside the core capital programme. These pressures stem from an ageing asset base and the ongoing expansion of infrastructure resulting from continued investment over time.

11.8 Over time the risks linked to these backlog pressures increase if existing maintenance programmes are unable to keep pace with requirements. More frequent severe weather events over recent years have added to number and severity of the backlog pressures being faced.

11.9 The budget process for 2026/27 has identified that a number of these backlog pressures are at a stage where significant intervention to address the issues faced will be required over the medium-term financial plan window. A number of these will require full business cases to be brought through the Council process to fully understand the risks, options, funding requirements, and timing of intervention required. These do not naturally lend themselves to being managed within an annual budget setting process and as such will come forward as standalone business cases. The examples of these pressures are discussed more fully in the capital pressures sections that follow.

11.10 **Capital funding**

Grants and contributions

11.11 The provisional settlement outlines that the Council's general capital allocation will be £5.528 million, which represents a £50,000 increase from 2025/26. Whilst the additional capital funding allocated by Welsh Government is welcomed, this does represent less than a 1% increase year-on-year which does not keep pace with inflationary uplifts in existing annual programmes of work.

11.12 The settlement also maintains an additional revenue grant budget allocation to enable Councils to fund further borrowing to support Highways capital pressures.

11.13 Clarification will be required on the specific capital grant funding streams published and where there are initial indications from Welsh Government that these could be removed or consolidated, or that the criteria are being tightened and that may impact on some of the pressures and bids for investment being considered. This may also need further consideration in the final budget proposals.

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

Capital receipts

11.15 The level of capital receipts anticipated over the next 4-year window has not been increased from recent forecasts as the Council awaits the conclusion of the replacement Local Development Plan.

11.16 The Council continues to use the benefit of Welsh Government guidance that allows the Council to make flexible use of capital receipts to meet revenue expenditure associated with service reform. As noted within this report, the 2026/27 revenue budget proposals include the proposed use of capital receipts for this purpose of £2.7m. It is accepted that this is not a sustainable long-term means by which to support the revenue budget but is seen as necessary given the immediate financial challenges.

11.17 This support is currently modelled to taper down to zero by 2029/30, however this will be very much dependent upon the degree to which the service reform that this investment allows results in cashable revenue budget savings over the medium term.

11.18 The table below illustrates the forecast balance on the useable capital receipts reserve over the medium term taking into account current capital receipts forecasts provided by Landlord Services and revised balances drawn to finance forward indicative budgets.

Forecast Useable Capital Receipts	**2025/26**	**2026/27**	**2027/28**	**2028/29**	**2029/30**
	£000	**£000**	**£000**	**£000**	**£000**
Balance as at 1st April	(6,083)	(4,310)	(3,830)	(2,876)	(2,221)

Less: capital receipts used for financing	606	50	50	50	50
Less: capital receipts used to support capitalisation directive	3,770	2,708	1,708	708	0
Capital receipts received	(2,500)	0	0	0	0
Capital receipts forecast	(103)	(2,278)	(803)	(103)	(103)
Forecast Balance as at 31st March	**(4,310)**	**(3,830)**	**(2,876)**	**(2,221)**	**(2,274)**

Borrowing

11.19 Beyond utilising grants and capital receipts, the Council's remaining recourse to fund capital investment is through borrowing. Any borrowing undertaken directly impacts on the revenue budget through principal repayments (via Minimum revenue provision), and interest payments.

11.20 In light of the current pressures on the Council's medium-term revenue budget, and the principles on which any borrowing must be taken of affordability, prudence and sustainability, any further use of borrowing will always need to be carefully assessed. There are a number of prudential indicators which aid in making assessment of the affordability of borrowing, and these will be updated within the Treasury management strategy that will be considered by full Council alongside the budget in March.

11.21 Financing capital investment through borrowing simply transfers the total cost to future revenue budgets. However, deferring capital maintenance can increase total asset lifecycle costs and may necessitate larger one-off investments in later years. Striking the right balance between these issues is never easy and the impact is often obscured in medium-term financial planning, as asset lifespans typically exceed four years.

11.22 **2026/27 Draft Capital budget**

11.23 The draft capital budget for 2026/27 and indicative medium-term programme is shown at ***appendix 4***.

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

11.25 An initial scrutiny exercise has been carried out of these pressures which has resulted in a small number being endorsed for inclusion in the draft budget for 2026/27. These total £5.486 million and represent inescapable pressures that if not funded would result in an unacceptable level of legal or regulatory risk for the Council.

11.26 A total of £4.96 million will be invested over a two-year period in the refurbishment of the existing Chain Bridge which is a Grade II listed structure that carries the B4598 Abergavenny to Usk road over the River Usk at Kemeys Commander. The scheme will include improvements to the bridge to increase its life span and retain the bridge as a key connection between the surrounding local villages. Grant funding of £2.25 million has been secured from the Regional transport delivery plan to support the project.

11.27 An additional £1.69 million will be invested in Highways structures and carriageway resurfacing to address the backlog in maintenance of some of the County's key infrastructure. This will include works to Footways, Bridges, Retaining walls, and road resurfacing to address some of the highest risk pressures.

11.28 Investment of £352,000 will be made to address backlog pressures in the Public rights of way network. This will include improvements to signage, drainage, stiles & gates, and associated bridge repairs.

11.29 At the draft budget stage, funding totalling £4.988 million has been allocated to address these pressures, leaving a funding shortfall of £498,000. Efforts will continue between the draft and final budget stages to identify additional sources of funding to bridge this gap. Potential solutions include clarification of specific grant allocations, repurposing existing capital schemes, or, if necessary, further borrowing as a measure of last resort.

11.30 There remain a number of capital pressures put forward that could not be accommodated within the annual budget cycle. This is due to a number of reasons including:

- further information or clarity being needed on scheme requirements, timings, or costings.
- investment options requiring a more comprehensive evaluation.
- the need for investment outcomes to demonstrate alignment with Community & corporate plan priorities.
- the need to establish funding support through external grant streams to make the scheme financially viable.

11.31 These investments will be progressed over the coming months as better information becomes available and where a full business case can be established that proves the requirement for investment. Any resultant scheme approval will follow established procedures.

11.32 The schedule of capital pressures brought forward is shown below with an indication of the decision made on investment at draft budget stage:

Capital pressure	Priority category	Budget requested £000's	Budget Recommendation £000's	Draft budget decision

Highways & Structures, Carriageways	Health & Safety, Legal and regulatory, Addresses major infrastructure investment	1,692	1,692	Recommended - To be partially funded from additional borrowing headroom provided in settlement
Public rights of way – structural repairs, surveys and closures	Health & Safety, Legal and regulatory, Addresses major infrastructure investment	352	352	Recommend in full
Car parks – resurfacing	Health & Safety, Legal and regulatory, Addresses major infrastructure investment	100	100	Recommend in full
Road Safety Improvements & Signing Upgrades	Health & Safety, Legal and regulatory	32	32	Recommend in full
Flood alleviation	Health & Safety, Legal and regulatory, Addresses major infrastructure investment	19	19	Recommend in full
Property maintenance - Asbestos maintenance	Health & Safety, Legal and regulatory	200	200	Recommend in full
Property maintenance – School condition surveys	Health & Safety, Legal and regulatory	150	150	Recommend in full
Property maintenance – Contract inflation uplifts	Health & Safety, Legal and regulatory	154	154	Recommend in full
Wye Bridge Chepstow - Scour repair and monitoring costs	Health & Safety, Legal and regulatory, Addresses major infrastructure investment	330	330	Recommend in full
Chainbridge refurbishment 2026/27 - £2,457k 2027/28 - £2,500k	Health & Safety, Legal and regulatory, Addresses major infrastructure investment	2,457	2,457	Recommend in full. Year 2 cost to be added to indicative programme
Disabled facility grants – increase in budget from £900k to £2.8m	Spend to save transformational works, Deliver corporate plan priorities	1,900	0	Not recommended – would require a full business case with evidence of outcomes that align with C&C Plan

Gilwern Viaduct Refurbishment	Health & Safety, Legal and regulatory, Addresses major infrastructure investment	4,000	0	Not recommended at this stage – further investigation works required to establish replacement /refurbishment options and develop full business case
Staunton Road Stabilisation	Health & Safety, Legal and regulatory, Addresses major infrastructure investment	6,000	0	Not recommended at this stage – further investigation works required to establish preferred option and develop full business case
Wye Bridge Chepstow - bridge solution	Health & Safety, Legal and regulatory, Addresses major infrastructure investment	2,500	0	Not recommended at this stage – further investigation works required to establish preferred option and develop full business case
Monmouth Wyebridge - Active Travel Bridge	Community & Corporate plan	250	0	Not recommended at this stage – further investigation works required to establish preferred option and develop full business case
Total		**20,136**	**5,486**	

11.33 Initial funding allocations secured to meet the proposed capital investment is as follows:

Funding stream	Value £000's
2026/27 Capital settlement increase	50
2026/27 Settlement increase - Highways borrowing	1,507
Unallocated budget brought forward	610
Reduction in ICT budget identified	21
Contingency budget for 2025/26 unutilised	1,300
Grant funding – Regional transport delivery plan	1,500
Total	**4,988**
Budget shortfall	**498**

11.34 The increase in borrowing for 2026/27 from the levels already budgeted for is £1,507,000, for which full revenue budget funding has been provided by Welsh Government in their provisional revenue settlement. It is important that the overall affordability of borrowing is regularly reviewed by Members, and this will be a feature of the updated Treasury Management Strategy Statement that will be presented to full Council on the 5th March 2026, which will incorporate a range of prudential indicators that look to ensure that the Council's level of borrowing remains prudent, proportionate and sustainable.

11.35 The draft capital programme will continue to be reviewed prior to final budget setting to establish the suitability of schemes, and principally:

- Whether all schemes remain relevant to current Council priorities;
- Are current budgets allocated still realistic given factors such as inflation, supply chain issues and internal capacity to deliver;
- Are there any more urgent schemes coming forward as a result of updated information, changes to backlog pressures, or condition surveys that need to displace existing schemes;
- Whether there are any further external funding opportunities;
- Does the capital programme remain prudent and affordable in light of the wider economic pressures and revenue budget gap;
- Does potential slippage from the 2025/26 capital budget provide opportunities to re-purpose existing budgets to allow one-off investment in immediate capital risks.

Budget consultation & engagement

12.1 The information contained in this report constitutes the draft budget proposals that are now made available for formal public consultation and member scrutiny, including the requirement to consult businesses. The formal consultation period will run for a period of four weeks ending on 18th February 2026.

12.2 Whilst there are comparatively fewer budget proposals than in recent years, the Council remains committed to the consultation process and listening to feedback. It is important that Cabinet gain views on items such as the proposed rate of Council Tax increase, budget investments proposed, including those for schools and social care, and how budget risks are being managed. This will in turn inform the final budget proposals that are to be considered in March.

12.3 This is the opportunity for Council Members, residents, service users, community groups, and other key stakeholders (e.g. town and community councils) to consider the budget proposals and make comments on them. Cabinet will not however, be prepared to recommend anything to Council that has not been subject to a Future Generations Assessment and Equality Impact Assessment, and therefore a deadline to receive alternative budget proposals has been set as 18th February 2026.

12.4 The Council will look to purposefully engage via:

- **Face to face and virtual engagement events – Countywide and targeted**
- **Special budget page on Council website**
- **Online survey and social media campaign**
- **Council scrutiny meetings – Jan-Feb 2026**

12.5 Further information on consultation events will be made available on the Council website here, along with ways for people to engage in and respond during the consultation process.

12.6 Final budget proposals following consultation and receipt of the final settlement will go to the Cabinet meeting on 4th March 2026 and approval of Council Tax and final budget proposals will take place at full Council on 5th March 2026.

13 OPTIONS APPRAISAL:

13.1 Directorates have been required to consider and outline the options that have been considered for each of their budget proposals identified in this report. These have been considered and scrutinised by Departmental Management Teams, Finance teams, the Strategic Leadership Team, and by Cabinet.

13.2 The means of assessing whether the final budget proposals for 2026/27 have been successfully implemented is undertaken throughout the year via regular budget monitoring and periodic reports to Cabinet and then to Select committee for scrutiny.

13.3 Alongside the Community and Corporate Plan, the Council continues to develop and monitor the performance of the Council against service business plans. Taken together these arrangements enable the Council to evaluate its success and progress against its longer-term plans within the resources available.

14 REASONS:

14.1 To agree the draft budget proposals for 2026/27 for consultation purposes.

15 RESOURCE IMPLICATIONS:

15.1 As identified in the report and appendices.

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

16.1 A cumulative impact assessment has been produced for the draft proposals and is attached at ***appendix 2***. This is supported by individual directorate impact assessments shown at ***appendix 3***. This enables the Council to assess the overall potential impact of the budget on people within our communities. It is recognised that the proposals will affect different groups of people in different ways and the impact is evaluated on those people who possess protected characteristics. The Council also considers the cumulative financial impact of the proposals on households at different income levels. Finally, the assessment also looks at the budget through the lens of sustainable development principle established by the Well-being of Future Generations Act.

16.2 It is inevitable that the assessment has identified impacts on some groups of people. Local authorities provide universal services such as highways and waste collections which bring benefits to all. However, many of our services such as education and social care are delivered to proportionately higher numbers of disabled people, younger and older people. The assessment highlights the anticipated positive effects of increasing expenditure on certain groups. For example, the potential positive impact of providing additional funding to support Additional Learning Needs in education and meeting the costs of increasing and more complex cases in adults and children's social care. These will bring benefits to younger, older people and disabled people. It also shows that increased charges for services such as community meals and residential care could have a potential negative impact on some of the people with these protected characteristics.

16.3 The development of the impact assessment has been an iterative process and has been produced alongside the budget proposals. This means that we have been able to understand the potential impacts and adjust our thinking as we have gone along. As a result, we have been able to adjust some proposals or introduce mitigating actions to lessen the impact of some of the difficult decisions we are faced with, on the most vulnerable in our communities. In services such as domiciliary care, national caps applied to charges, and the application of means testing significantly lessens the impact of rising costs on those least able to afford the increases.

16.4 The nature of the services we provide means that almost any change to a council service will have a socio-economic impact. We know, for example, people on lower incomes will be more affected by increased fees and charges. The assessment models the potential financial cost of proposed increased fees and charges on different household compositions and income levels and sets out what these would have been if we had not developed mitigating actions to reduce the effects. For example, it shows that for a household of two adults, with two dependent children and one older person with an income of £36,000, the mitigations we put in place reduced the potential impact from the increased fees and charges to 0.33% of their total income from a starting point of 1.94% of their total income.

16.5 Conducting the assessment alongside the development of the budget has allowed us to identify actions that mitigate the potential negative effects of our proposals on vulnerable people and households on the lowest incomes. It also highlights the anticipated positive effects of increasing expenditure on certain groups. This helps to offset some of the effects. The assessment will be updated to take account of feedback received during the budget consultation.

CONSULTEES:

Strategic Leadership Team
Cabinet

APPENDICES:

Appendix 1	Schedule of service cost increases, investments, efficiencies, and reforms
Appendix 2	Cumulative impact assessment
Appendix 3	Individual directorate impact assessments
Appendix 4	Draft Capital budget summary 2026/27 to 2029/30
Appendix 5	Response to Welsh Government's Local Government provisional settlement
Appendix 6	Schedule of proposed discretionary fees and charges

BACKGROUND PAPERS

None

AUTHORS:

Jonathan Davies
Head of Finance (Deputy S151 Officer)
E-mail: jonathandavies2@monmouthshire.gov.uk

Peter Davies
Strategic Director Resources, Deputy CEO (Section 151 Officer)
E-mail: peterdavies@monmouthshire.gov.uk

Appendix 1 - Schedule of:

(1) Service cost increases
(2) Service investment
(3) Service efficiencies
(4) Service reform

(1) Service cost increases	**Amount £**
Learning, Skills & Economy	
3% uplift to the Local Authority School Improvement Service contribution, this is a joint service with three neighbouring Local Authorities. All partners have agreed to provide the additional contribution to cover inflation.	9,813
The Local Authority has a statutory duty to provide a minimum of 10 hours a week funded early education for all children from the term following their 3rd birthday until they are offered a full time school place from the September following their 4th birthday. The early education can be provided in an LA maintained nursery class or in an approved non-maintained setting; if the place is accessed in a non-maintained setting, this is funded through a ring-fenced element of the Local Authority Education Grant. In Monmouthshire we allow parents to choose the provision that best meets their needs and we are seeing a growing trend towards families choosing non-maintained settings over school nurseries, hence there is an increasing demand on this funding pot and the allocation isn't sufficient to cover the actual expenditure.	55,000

(1) Service cost increases	Amount £
This pressure is a combination of five cost pressures offset by one saving. The pressure are all related to pupils with Additional Learning Needs (ALN). £779,000 relates to the statutory obligation of the Local Authority (LA) to provide funding to support provision for pupils places in mainstream schools with either a school based or LA Individual Development Plan (LDP). An additional £50,000 for pupils requiring short term provision due to high levels of dysregulation due to social emotional and mental health needs. £125,000 to ensure our network of Specialist Resource Base (SRB) are sufficiently staffed and to expand the number of places ensuring pupils with ALN are support close to their homes. £503,234 to support pupils with complex ALN with bespoke packages of support in Monmouthshire, currently their needs cannot be supported through our current model and therefore alternative providers are commissioned. There is a proposal to develop inhouse provision for the majority of these pupils, this will open in the autumn term. (£1,369,000) saving on placement costs for Out of County providers, as investment in our in-house provision via our SRB's has improved more pupils are being supported in county and reducing the need for these placements.	88,234
Social Care & Health	
Provider Fees Impact of NMW / RLW over and above 2% non-pay inflation allowance and £1m additional investment. The directorate commissions with external providers to provide care including: adult placements [learning disability; frail older adults; mental health including later stage dementia; respite and rehabilitation] supported accommodation and children looked after placements [residential and foster placements] care at home [domiciliary care] support contracts Following the UK budget announcements in respect of the RLW and NMW there will be an impact of the level of fees agreed.	289,539
Adult's residential care demand increase. This is the full year effect of 16 additional placements that were incurred during the first half of this current financial year (25/26). This is the cost of people who are already placed in residential homes (funded by the council) in keeping with their assessed needs. This is a cost that can't be mitigated against at this point. Residential placements are only made when it is the most cost-effective way of meeting a person's needs.	727,168

(1) Service cost increases	Amount £
Children's placement demand increase. This is the full year effect of 8 additional children's placements that were made during the first half of this current financial year (25/26). These are children who are accommodated in keeping with their assessed needs and is a cost that can't be mitigated against at this point.	1,165,000
Children's service legal costs increase. We are required to initiate legal proceedings in the family courts when we are unable to secure the safety of children through any other means. A court process is required for the LA to remove a child from the care of their parents. The costs associated with court proceedings has increased over recent years because of the protracted nature of proceedings, the increasing use of counsel and court ordered external experts. The legal budget shows a projected overspend of £370K however, in-year costs are inflated as a result of 2 specific cases.	170,000
Fostering allowances. In-house foster carers receive an annual uplift as per salaried workforce, which supports carer retention. The retention and recruitment of in-house Foster Carers helps to avoid costs associated with independent agency foster care (IFAs) or residential placements.	35,000
Infrastructure	
Street lighting maintenance contract increase - The contract is due for renewal in May 2026. Early projections indicate a 20% increase on current prices, which is significantly higher than the 2% uplift included in the budget model.	35,000
Place & Community Wellbeing	

(1) Service cost increases	Amount £
Planning and Building Control income pressures. Income pressures have arisen due to the progression of all existing LDP (Local Development Plan) sites through the planning process, thereby limiting current opportunities for fee generation. Furthermore, the anticipated increase in income from Welsh Government (WG) fees, originally scheduled for implementation in April 2025, was postponed until December 2025. As a result, there are fewer avenues for generating fees until additional RLDP sites are brought forward. Any delays in processing the new RLDP will further exacerbate these income challenges.	100,000
Car parking income pressures. Income generation is being impacted by vacancies among car parking enforcement officers. Reduced staffing levels limit the directorate's ability to enforce parking regulations, which in turn reduces the income that can be achieved from car parking operations.	60,000
Reduction in Grants supporting statutory operations and staffing - SPF and Active travel. The directorate is facing significant pressure due to a reduction in grant income streams in particular Share Prosperity Fund and Active Travel both of which has historically supported core staffing. Previous successes in securing grant funding have resulted in a high level of dependency on these grants - not only for delivering specific projects, but also for underpinning core operations and staffing. The current economic climate is intensifying these pressures, as there is a noticeable reduction in the funding available to support our services moving forward.	60,000
Resources	
Digital & Data Team - increase in our digital collaboration contribution to SRS due to staffing and non pay inflation uplifts and an investment in an additional data analyst post.	79,000
SRS - increase in annual SRS contribution to cover pay and non pay inflation increases and additional investment in software & licences relating to AI and service transformation. Includes a £49k pressure relating to the Gwent police memorandum of understanding expiring and not being renewed - to be covered by ICT reserve.	110,000

(1) Service cost increases	Amount £
Council Tax - Rising non-pay costs (postage, printing, licences). The non pay expenditure for the Revenues Shared Service is increasing as costs for postage and printing and annual software licences continue to rise. In previous years these have been partly offset by administration grant income from Welsh Government for the RLHRR scheme. However, this income is not expected for 2026/27.	75,000
Exchequer - recurring increase in card payment fees; systems & software development costs	75,000
Commercial investments - costs associated with maintaining void units	55,000
People, Performance, Partnership	
Increase in funding to reflect costs of membership bodies	23,000
Estimated increase in our shared contribution towards the procurement arm, Ardal. This increase is attributable to the full complement of staff now being in operation, which has resulted in higher overall service costs.	50,000
City deal contribution increase	16,000
Impact of job evaluation and staffing level in strategic teams, and reduced grant income to cover core costs within communications. The directorate is managing a consolidated budget pressure of £125,000 relating to staffing and loss of grant income to support core costs. This is driven by the impact of job evaluation on strategic teams, increased staffing costs and reduced grant income within communications. These pressures are structural and will require either additional funding or significant mitigation to avoid recurring overspends and maintain service delivery.	125,000
Law & Governance	
Legal Services - income pressure due to a reduction in recent years in the type of work that generates external fee income, such as projects arising from the Investment Committee. The resulting income shortfall is carried forward each year, creating a recurring budget overspend.	50,000

(1) Service cost increases	Amount £
Members allowances above budgeted pay award, and increase in senior officer remuneration following council-wide pay review. The directorate's budget pressures include an increase of £13,000 in senior officer remuneration following a council-approved pay review, for which no additional budget allocation was provided, resulting in a recurring cost. Additionally, a projected £70,000 rise in members' allowances and superannuation, driven by a higher-than-anticipated pay award and increased membership.	83,000
Total service cost increases	**3,535,754**

(2) Service investment	Amount £
Learning, Skills & Economy	
Investment in the Inspire NEET (not in education, employment or training) prevention programme, which supports: Young people in our four secondary schools who are at risk of becoming NEET, providing support to achieve qualifications and next steps in education, employment & training. Young people experiencing challenges with school attendance, supporting them to re-engage with education. Individuals aged 16 and over who are NEET, helping them progress into further education, employment, or training opportunities.	362,848
Additional staffing to support SEMH needs - The Local Authority has a statutory obligation to provide additional learning provision for all children and young people with an identified additional learning need (ALN). This funding is required to provide staffing for an in-county specialist resource base provision focused at meeting the needs of a small number of children who present with high levels of dysregulation as a result of their additional learning needs (ALN) in the areas of complex autism/ neurodevelopmental and social, emotional and mental health (SEMH) needs. This will reduce the need to utilise alternative educational providers and ensure children and young people with complex social emotional and mental health needs have access to an improved education offer closer to their local communities.	109,846
Appointment of vulnerable learner lead - There is an increase in complexity of the presentation of needs across our schools for children who present with high levels of dysregulation due to social emotional and mental health needs. Subsequently, there is an increase in the use of exclusion, both fixed term and permanent. The Vulnerable Learner Lead provides support to schools and settings with regards to the systems and processes regarding the use of exclusion, to ensure that statutory processes are adhered to and schools are supported (and challenged) to meet the needs of some of our most vulnerable learners, while ensuring the safety of all. This includes collaboration with schools, settings, families and a wide range of multi-agency colleagues to ensure robust risk assessments, reintegration timetables and pastoral support plans (PSPs) are in place, for example. This additional funding is required to increase the level of officer support available to provide advice, guidance and support to schools and settings to prevent, reduce and manage the use of exclusions.	70,000

(2) Service investment	Amount £
Additional emergency planning officer post - The introduction of this proposed additional post ensures the Local Authority can meet its duties and responsibilities under the Civil Contingency Act, in addition to other statutory duties and contributes directly to our whole authority resilience, the post is explicitly supported by the business plan.	42,150
Welsh language provision - The Local Authority has a statutory duty under the Welsh Language (Wales) Measure 2011 to comply with the Welsh Language Standards and deliver the Welsh in Education Strategic Plan (WESP). Establishing a dedicated Welsh Language Officer will ensure statutory compliance and strengthen governance, the role is essential to meet the national priorities under Cymraeg 2050 in supporting schools in complying with the 2030 requirement for schools to deliver 10% of the curriculum through the medium of Welsh.	77,550
Additional staffing - Pupil Referral service. This proposal is to strengthen attendance support in the Pupil Referral Service (PRS) through the appointment of an additional officer and administration support. These additional posts will ensure the statutory obligations and address Estyn priorities following recent inspections.	71,446
Additional investment into schools is in addition to the funding provided for increases in pay. Schools have a collective deficit balance and this looks to help address the situation and to support schools recover to a surplus budget. This funding represents £95.97 per pupil, for secondary schools this is funding of between £72,000 and £132,000 and for a 210 place primary this is £20,000	1,000,000
Social Care & Health	
Maintaining preventative services of Family Support, Eliminate / Transformation posts following grant reduction. Family support services help to reduce risks to children who are identified as being at risk of harm ensuring that wherever possible children remain with their families and communities. Family support helps to avoid the cost of expensive placements and allows the service to achieve savings associated with placement costs through provided the support that children need to safely 'step-down' from expensive placements. The decrease has left some existing posts unfunded meaning that there would be a risk of incurring redundancies if this pressure was not provided for.	437,668

(2) Service investment	Amount £
Mosaic social care case management system - additional system support. Mosaic is the new social care case management system. The pressure has arisen because the newly procured system will require considerably more system admin than our current system FLO / PLANT which was home-built. The level of post implementation system admin has been advised by a subject matter expert(SME). This pressure has been mitigated down through considering how current resource could be turned to system admin.	200,000
Base budget investment into Social care that secures an overall increase in funding of 5.6%	1,000,000
Infrastructure	
Increase gulley-cleaning capacity by expanding from two teams to three (addition of two staff members and one vactor). The Council currently operates two gulley-cleaning teams. From 2026/27, this capacity will increase to three teams through the addition of two staff members and a new vactor unit. Expanding the service will enable more frequent and comprehensive cleaning of the drainage network, helping it better withstand changing weather patterns and the rise in severe weather events. This investment will improve overall drainage performance and reduce the risk of surface water issues across the county.	100,000
Increase our street sweeping capacity through the addition of two staff members. The Council currently operates two street-sweeping teams, and this capacity will be expanded in 2026/27 with the addition of two new staff. Increasing our sweeping capability will ensure that more debris is collected before it is washed into gulleys and drains, helping to maintain effective drainage and reduce surface water issues during periods of adverse weather.	100,000
People, Performance, Partnership	
Customer Relations Team - Increase staffing by 0.6 FTE (£35K) and invest in digital solution (£5K) to meet 135% growth in subject access requests in the past five years.	40,000

(2) Service investment	Amount £
Payroll department - New software required to ensure we can accurately record and pay holiday pay for staff with irregular working patterns following changes to legal position in 2025 which means manual systems are no longer fit for purpose.	20,000
Above inflation increase to **Citizens Advice Monmouthshire grant funding contribution** to recognise the valuable role this service plays in supporting local residents.	21,000
Increase Library books and materials which will enhance the quality and accessibility of resources across the County, supporting educational and cultural enrichment for all. This positive step will not only keep our collections current and relevant but also strengthen the standing of this valued service in national rankings under the Welsh Public Library Standards.	50,000
Staff training - Move to increase investment in staff development to improve retention and aide workforce planning and retention to reduce turnover and improve productivity - phased implementation	35,000
Total service investment	**3,737,508**

(3) Service efficiencies	Amount £
Learning, Skills and Economy	
A number of grants have been received which can be used to support some of the pressure identified for supporting pupils with Additional Learning Needs. Some of the cost pressures identified for supporting pupils with Independent Development Plans can be offset by these grants.	(644,127)
This relates to a one off interest release from a project which has been jointly run in partnership with other Local Authorities. One Local Authority receives a grant for the whole project, any interest generated is distributed to all partners.	(242,760)
Social Care & Health	
Maximising the ability to charge core budget to external grant streams.	(500,000)
Infrastructure	
Fleet Maintenance Savings. -Enhance in-house capability for tachograph calibration, eliminating the need for an external provider -Remove fitter standby time for out-of-hours operations during non-winter months	(17,000)
Infrastructure directorate - Recovery of pay and non-pay increases through external funding streams (capital/Grant) across all of directorate.	(105,000)
Place & Community Wellbeing	
Utilising the New Area Management Structure. The directorate will use the new area management structure to enable cross-cutting support across different services, ensuring the workforce is deployed flexibly to meet operational demands. Implementing some of the phase two objectives resulting in savings of £40,000.	(40,000)

(3) Service efficiencies	Amount £
Leisure centre demand growth. Where appropriate, the directorate will seek to increase income through additional marketing campaigns and an enhanced social media presence, aiming to boost commercial income.	(44,000)
Implementing New Welsh Government Fee Charges for Planning . Implementation of the new Welsh Government (WG) fee charges for planning has been adopted from 1s December 2025. This measure is intended to help offset income pressures in planning services by ensuring that fees are aligned with the latest statutory guidance and cost recovery requirements. The updated fee structure will support the directorate's efforts to maintain financial sustainability and continue delivering statutory planning functions effectively. Expected to reduce the current income pressure within the service by £65k.	(65,000)
Resources	
Resources Directorate - Efficiencies captured across non-pay budgets, directorate wide.	(27,000)
Release of non-pay inflation or headroom in capitalisation from under utilisation of provision made for redundancy costs	(118,000)
Housing benefit penalty reduction - As reliance on B&B usage for temporary accommodation decreases, we have achieved savings on the housing benefit subsidy penalty. Current projections show B&B usage is now below 10 units. If this trend continues into 2026–27, it will generate savings of around £200k.	(200,000)
People Performance Part	
Reduction in software costs within the contact centre	(17,000)
Law & Gov	
Vacancy freeze in Land Charges - A 0.4FTE vacancy in Land Charges will be kept vacant for a further year, offering a saving of £16,000.	(16,000)
Total service efficiencies	**(2,035,887)**

(4) Service reform	Amount £
Social Care & Health	
Children's care planning & placement strategy. This will be achieved through care planning so that children transition to placements that are better suited to their needs as well as being more cost effective. This relies on maximising the use of in-house foster carers and aligns with the placement development strategy as new provisions become operational during the year.	(1,001,939)
Consolidation of vacancies within in-house domiciliary care. There is an underspend in the in-house domiciliary care workforce which can be consolidated safely to achieve this saving. The underspend has arisen due to additional capacity being available through commissioning with providers for long-term care at home packages. The aim is to continue to increase and enhance our reablement service so that more people benefit from short-term intensive (holistic) interventions to reduce, delay or mitigate the level of long-term care that an individual requires. Reablement is central to supporting people to maximise their independence / achieve good wellbeing outcomes.	(250,000)
Total service reform	**(1,251,939)**

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Appendix 2 - Evaluating the Potential Impact of the 2026-27 Budget

Introduction

This report outlines the results of the impact assessment undertaken alongside the budget proposals for the financial year 2026-27. The assessment has two aims:

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

The council has demonstrated robust financial management in recent years in the face of significant financial challenges and budget pressures. In response to these, we are adopting a strategic, evidence-led approach focused on long-term reform, taking a preventative approach, improved financial resilience, and service change, particularly in high-expenditure areas such as Social Care & Health and Children, Learning, Skills & Economy.

The council continues to face ongoing financial challenges as we develop our budget for 2026/27 including low reserves, limited efficiency options, and rising demand. The platform provided by the long-term approach we have taken is supporting us to address these. The proposals we have developed are aligned with the commitments in our Community & Corporate Plan and guided by the budget principles within our Medium-Term Financial Plan.

Our approach considers the whole budget, not just areas that aid in closing the budget gap. This ensures our budget is sustainable and targeted towards delivering better outcomes for residents, including prioritising those who are near to needing statutory support as part of our whole authority approach to wellbeing and prevention. Key frontline services will benefit from increased funding in 2026/27 with Social Care & Health budgets increasing by 5.6% and Education by 4.7%. To partly fund increased investment in key services we are intending to change the way some things operate and increase our income. The draft budget includes proposals for service savings and efficiencies. We know our residents will rightly expect us to contain our costs wherever possible and to ensure we are operating as efficiently and effectively as we can.

In developing our budget proposals we have had to take some difficult decisions. These will affect residents in different ways. We recognise, for example, that changes in social care could be felt more acutely by older people and disabled people. Increased charges for services, such as car parking, will be more of an issue for those on lower incomes. This does not just mean those who are unemployed. People who experience in-work poverty, disabled people or those with protected characteristics may also be affected.

We recognise that there is a correlation between some protected characteristics and an increased risk of poverty. Intersectionality plays a large role; the more protected characteristics a person has, the more likely they are to experience financial hardship.

The development of this impact assessment has been an iterative process. It is produced alongside and in tandem with the budget proposals. This means that we have been able to understand the potential impacts and adjust our thinking accordingly based on the potential impacts on different groups. As a result, we have been able to amend some proposals or introduce mitigating actions to lessen the impact of some of the difficult decisions we are faced with, on the most vulnerable in our communities.

We assessed the impact of our proposals through:

- Part 1 - An overall Integrated Impact Assessment which summarises the effects of all budget proposals which could alter a service or the way that service is delivered. This assesses the potential impact on the national well-being goals and the ways of working enshrined in the Well-being of Future Generations Act and the people and groups who possess the protected characteristics specified under the Equality Act 2010.
- Part 2 - A review of the potential cumulative financial impact on households with different income levels. This helps us particularly understand the potential impact on those experiencing socio-economic disadvantage, in line with the socio-economic duty in Wales.

Many of the proposals have been assessed in impact assessments completed by each of our directorates. These have been developed and considered by Cabinet as proposals have evolved. Ongoing feedback has been used to refine the options being put forward for public consultation. We recognise that people are the experts in their own lives and this consultation could result in additional issues being identified which will further enhance the impact assessment.

Open and robust scrutiny and challenge is an essential part of the budget setting process. The assessment will be updated following the consultation undertaken in January and February 2026.

You can read more about the legal basis for this work and the underpinning methodology in the appendices.

Part 1: Overall Integrated Impact Assessment

This provides an overview of the impact, both positive and negative, of the budget proposals and the mitigating actions we have identified to reduce the effects on vulnerable groups and those with protected characteristics. These mitigations were developed in line with the principles guiding the budget setting process.

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

This is the same tool that accompanies specific directorate budget proposals. It does not highlight every single issue but reveals some of the key impacts of budget proposals and provides scope for continual learning and improvement as proposals are developed. Further details of the assessed impacts of proposals are provided in the full budget papers.

monmouthshire sir fynwy

Integrated Impact Assessment document

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

Name of the Officer: Richard Jones **Phone no:** 01633 740733 **E-mail:** richardjones@monmouthshire.gov.uk	**Please give a brief description of the aims of the proposal:** To deliver a balanced budget while continuing to make progress against the council's longer term aims.
Name of Service area: Chief Executive's	**Date:**

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

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Age	Local authorities provide universal services such as highways and waste collections which bring benefits to all age groups. However, many services such as education and social care are delivered to proportionately higher numbers of younger and older people and as a result these groups are more likely to experience the effects of any changes to services resulting from the budget. The additional funding for schools will enable schools to meet demand pressures and ensure children and young people are supported to achieve their potential. Meeting the funding gap due to a decrease in grant funding in the Inspire Programme will allow for the continuation for the service. This will ensure continued support for children and young people to remain in or return to school or an appropriate educational setting. The commitment to providing additional funding to support pupils with Additional	An increase in the cost of an hourly rate of care could adversely affect some older residents who may rely on the service. The increase may result in some residents accessing a fewer number of hours of care. An increase to residential and nursing fees within Adult's Social Care may negatively affect older residents who access the service. Increased charges may mean some residents can no longer access the service, or may require an increased number of residents and families to 'top-up' their care, if they are to continue to access their chosen care placement. The charge service users pay for Monmouthshire Meals (sometimes known as 'Meals on Wheels') will increase. This subsidised service is currently used by around 220 people. This could affect users, who are those with an assessed care need, and affect older frail adults and their carers. Some people may choose to stop receiving the service. However, there are private providers of community meals type services in the county which could potentially mitigate this	The cost of care in Wales is capped at a weekly maximum of £100 per week, which remains unchanged for 2026/27. The fees charged for residential and nursing care are based on an individual's ability to pay after undergoing a means tested financial assessment. We will ensure the Social Services and Well-being Act charging legislation is adhered to. This ensures that service users are means tested to determine their ability to pay. Increased demand, the fragility of the social care sector and the availability of care staff remain a key risk for Adult Social Care which needs to be considered as part of budget proposals. In the event that proposals result in staffing reductions, we will ensure that the Protection of Employment Policy is adhered to at all times. This will ensure that we are able to redeploy staff wherever possible. Trade Unions will be

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?
	Learning Needs (ALN) will help ensure that children and young people with complex ALN are provided with appropriate provision to meet their identified needs. Increasing the capacity of special resource bases (SRBs) will enable more pupils with ALN to attend, reducing the need for children to travel to out-of-county placements. The appointment of a Vulnerable Learning Lead will further our support for vulnerable pupils in the county and ensure their needs are considered and met. The appointment of an Education Welfare Officer within the pupil referral service (PRS) will support the delivery of the service, ensuring the needs of the children and young people within the PRS are appropriately met. The appointment of an additional teacher to support the delivery of Welsh medium education within the county will help drive forward the council's ambition of increasing Welsh-medium provision to meet demand. Meeting the funding gap due to a decrease in grant funding for non-maintained childcare settings will allow	effect for some users. We recognise that private providers may not deliver to all areas exacerbating issues of geographical inequality.	briefed through meeting of the Joint Advisory Group in January.

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?
	children to continue to access early education which is an important part of their development. Investing in additional resource to support the provision of Social Emotional Mental Health support within schools will ensure children and young people feel supported and able to remain in school. Providing additional funding to meet the costs of placements in both adult and children's social care resulting from higher demand and more complex cases will ensure that both children and young people and older people in receipt of care continue to be supported, helping them to live independently, access vital services, improve their quality of life and maintain close relationships with family and friends. Providing additional funding to uplift social care provider fees will increase the likelihood that independent care providers can continue to operate in our area, helping the council to secure care for vulnerable people. The council is committed to eliminating profit from care for children and young		

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?
	people. Changes to practice in children's placements seek to drive forward this objective, aligned to the Placement Development Strategy, and provide more appropriate and better aligned placements for those children and young people who require them. This would mean less placements of children looked after with independent fostering agencies and result in a financial saving for the council. Meeting the funding gap for Family Support will ensure children are supported to remain with their family wherever possible and within their communities. Additional funding to increase the fees and allowances paid to foster carers will aid the council's aim of increasing the number of local authority foster carers in the county. This will mean that fewer children are placed in private placements or residential children's homes which can often be far from their familiar community and more costly than in-house provision.		The improvements in care planning are reliant on the implementation of the Placement Development Strategy, including developing further and appropriate placements within the council and with foster carers.

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Disability	Many of our services, such as social care, are delivered to proportionately higher numbers of disabled people. The commitment to providing additional funding to support pupils with Additional Learning Needs (ALN) will help ensure that children and young people with complex ALN are provided with appropriate provision to meet their identified needs. Increasing the capacity of special resource bases (SRBs) will enable more pupils with ALN to attend, reducing the need for children to travel to out-of-county placements. Providing additional money to meet funding pressures in adult and children's social care will allow those experiencing physical and learning disabilities as well as ill-health, both mental and physical, to continue to receive support, to live independently and access vital services. Putting in place additional funds to uplift social care provider fees will increase the likelihood that independent care providers can continue to operate in our area, helping the council to secure care for vulnerable people.	As highlighted in the age category, the charge service users pay for Monmouthshire Meals will increase. The service is currently used by around 220 people. This would affect users of the service, including disabled people and their carers. Some people may choose to stop receiving the service. As highlighted in the age category of this assessment we recognise that private providers may not deliver to all geographical areas exacerbating issues of geographical inequality in alternative service provision. An increase in the cost of an hourly rate of at-home care may affect a higher proportion of disabled residents who may be reliant on the service. The increase may result in some residents accessing a fewer number of hours of care. An increase to residential and nursing fees within Adult's Social Care may negatively affect residents with a disability who require certain levels of care. Increases in charges may mean some residents can no longer access the service, and may need to reduce the number of hours of care received.	The cost of care in Wales is capped at a weekly maximum of £100 per week, which remains unchanged for 26/27. The fees charged for residential and nursing care are based on an individual's ability to pay after undergoing a means tested financial assessment. We will ensure the Social Services and Well-being Act charging legislation is adhered to. This ensures that service users are means tested to determine their ability to pay. Increased demand, the fragility of the social care sector and challenges recruiting care staff remain a key risk for Adult Social Care which needs to be considered as part of budget proposals. There are private providers of community meals services in the county which could potentially mitigate this effect for some users.

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?
	Local data highlights that 57% of users of Citizens Advice in Monmouthshire were disabled or had a long-term health condition. Increasing the funding available to this service would ensure these individuals can continue to be supported.		
Gender reassignment	At this stage proposals haven't identified a particular overall impact, either positive or negative, on people who have undergone or are considering gender reassignment.	At this stage, proposals haven't identified a particular overall impact, either positive or negative, on people who have undergone or are considering gender reassignment. We know from research, that people with some protected characteristics are likely to be disproportionately represented in the lower income bands. This means they could be proportionality more likely to be affected by any increases in fees and charges.	None identified at this stage.
Marriage or civil partnership	At this stage proposals haven't identified a particular overall impact, either positive or negative. Same-sex couples who register as civil partners have the same rights as married couples in employment and must be provided with the same benefits available to married couples, such as survivor pensions, flexible working,	At this stage proposals haven't identified a particular overall impact, either positive or negative. We know from research, that people with some protected characteristics are likely to be disproportionately represented in the lower income bands. This means they could be proportionality more likely to be affected by any increases in fees and charges.	None identified at this stage.

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
	maternity/paternity pay and healthcare insurance.		
Pregnancy or maternity	At this stage proposals haven't identified a particular overall impact, either positive or negative. In the provision of services, goods and facilities, recreational or training facilities, a woman is protected from discrimination during the period of her pregnancy and the period of 26 weeks beginning with the day on which she gives birth.	At this stage proposals haven't identified a particular overall impact, either positive or negative. We know from research, that people with some protected characteristics are likely to be disproportionately represented in the lower income bands. This means they could be proportionality more likely to be affected by any increases in fees and charges.	None identified at this stage.
Race	At this stage proposals haven't identified a particular overall impact, either positive or negative, that will differ by race.	At this stage proposals haven't identified a particular overall impact, either positive or negative, that will differ by race. We know from research, that people with some protected characteristics are likely to be disproportionately represented in the lower income bands. This means they could be proportionality more likely to be affected by any increases in fees and charges.	None identified at this stage.
Religion or Belief	At this stage proposals haven't identified a particular overall impact, either positive or negative, that will differ by religion or belief.	At this stage proposals haven't identified a particular overall impact, either positive or negative. We know from research, that people with some protected characteristics are likely to be	None identified at this stage.

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
		disproportionately represented in the lower income bands. This means they could be proportionality more likely to be affected by any increases in fees and charges.	
Sex	Local data shows that approximately 55% of users of citizens advice services are women. An increase in grant funding for this service should have a proportionally higher benefit on this group.	Women make up the majority of both paid and unpaid caring roles. Any reduction in services available for adults with care and support needs will negatively impact on carers; and therefore, the impact will be felt disproportionately on women.	The council will continue to make use of all staff wellbeing resources, including stress risk assessments to understand and mitigate demands placed on staff.
Sexual Orientation	At this stage proposals haven't identified a particular overall impact, either positive or negative that will differ according to sexual orientation.	At this stage, proposals haven't identified a particular overall impact, either positive or negative. We know from research, that people with some protected characteristics are likely to be disproportionately represented in the lower income bands and therefore proportionality more likely to be affected by increases in fees and charges.	None identified at this stage.

2. The Socio-economic Duty and Social Justice

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

	Describe any positive impacts your proposal has in respect of people suffering socio economic disadvantage	**Describe any negative impacts your proposal has in respect of people suffering socio economic disadvantage.**	**What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?**
Socio-economic Duty and Social Justice	The council provides a range of services that support people experiencing socio-economic disadvantage. Any increase in fees and charges for services will have a higher impact on households with the lowest incomes. Many service areas already have mitigations or discounts in place to reduce the socio-economic impact of charges. Uplifting social care provider fees will enable those providing social care to continue pay the real living wage to care workers who are typically on lower incomes. This is in line with the commitment made by the Welsh Government. Children who are looked after and care experienced young people often face socio- economic disadvantages and a paucity of support networks. Practice change in children's services seeks to	Adults with care and support needs, and their carers, can often be economically disadvantaged. As highlighted in the introduction, there is a correlation between some protected characteristics and an increased risk of poverty. The more protected characteristics a person has, the more likely they are to experience financial hardship. The budget contains a proposal to increase charges for domiciliary care from £24 to £26 per hour. (Fees and Charges report). These are currently capped at £100 per week in Wales, which provides a significant mitigation. A further mitigation is provided in the form of means testing, as only those who are assessed as being able to afford this will pay. There will also be increases in fees for residential care.	Charges for domiciliary care are currently capped at £100 per week in Wales. Means testing is also in place so only those who are assessed as being able to afford this will pay. See the Fees and Charges report which is part of the budget proposals for more details. Ensuring that practitioners in social care understand the impact of socio-economic disadvantage on individuals with care and support needs and have the right skills and knowledge to be able to support people in such circumstances (across social care).

	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?
	provide the best support for young people as they approach adulthood through the provision of appropriate accommodation, support and services that should have a positive effect on their longer-term social and economic well-being. The case to invest in foster carer fees and allowances should enable more children in care to remain in the local area. This in turn should contribute towards reducing the inequalities across a whole range of outcomes associated with socio-economic disadvantage. Meeting the funding gap due a decrease in grant funding in the Inspire Programme will allow for the continuation for the service, ensuring vulnerable children and young people in our schools are supported to remain in or return to school or an appropriate educational setting. The appointment of a Vulnerable Learning Lead will further our support for vulnerable pupils in the county, ensuring their needs are considered and met. Meeting the funding gap due to a decrease in grant funding for non-maintained	This will impact on proportionately more older people. These are also means tested providing mitigation to those on the lowest incomes. As highlighted in section one, the price people pay to have Monmouthshire Meals delivered to their homes will increase. Private alternatives are in place for those who cannot or do not want to pay the higher charge. However, we recognise that private providers may not deliver to all geographical areas of our county, exacerbating issues of geographical inequality. Increases to car park charges will have a disproportionate effect on those experiencing socio-economic disadvantage who may have to pay a higher proportion of their income to park near their workplace or when accessing services in town centres. An increase in Council Tax will have a financial impact on all households on lower incomes, as any bills will form a higher proportion of their household	The Council Tax reduction scheme offers some mitigation, council tax is means tested and those who qualify are able to apply for a reduction. Single person

	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?
	childcare settings will allow children to continue to access early education which is an important part of their development. This will also ensure low-income families benefitting from the service can continue to do so, ensuring free or low cost childcare and enabling parents to access work when they otherwise may not be able to. Local data shows that users of the Citizens Advice service are more likely to come from areas suffering economic deprivation. An increase in funding is likely to have a positive effect on this group.	expenditure. As a result, they are likely to feel the impact more acutely. Those who are eligible, are able to apply for a reduction in council tax through the Council Tax reduction scheme which will mitigate the effects of the increase. There is a risk that any budget proposals that increase discretionary charges will have a disproportionate impact on people on low incomes and therefore will widen economic inequality.	households are eligible for a 25% reduction on council tax. An increase in funding for citizens advice is likely to have a positive impact as it will increase support for those suffering economic disadvantage. In the event that proposals result in staffing reductions, we will ensure that the Protection of Employment Policy is adhered to at all times. This will ensure that we are able to redeploy staff wherever possible. Trade Unions will be briefed through the Joint Advisory Group. It is important to assess and understand the impact of our proposals on those in poverty, especially if there is a cumulative impact from a number of proposals. The evidence in this paper helps assess the overall potential impact of the budget on different people within our communities and looks to establish the cumulative financial impact of the budget.

3. Policy making and the Welsh language.

How does your proposal impact on the following aspects of the council's Welsh Language Standards:	Describe the positive impacts of this proposal	Describe the negative impacts of this proposal	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts
Policy Making Effects on the use of the Welsh language, Promoting Welsh language Treating the Welsh language no less favourably.	All proposals will comply with the Welsh language standards applicable to the authority. Investing in the appointment of an additional teacher to support Welsh provision will make a positive contribution to the delivery of the Welsh Education Strategic Plan (WESP), enhancing the delivery of and furthering the promotion of Welsh medium education.	None identified at this stage	All signage and material arising from budget proposals will be compliant with the Welsh Language (Wales) Measure 2011 and Welsh Language Standards.
Operational Recruitment & Training of workforce	We will ensure that new vacancies are assessed and where possible advertised as 'Welsh essential' to increase opportunities for people to engage with the council through the medium of Welsh.	None identified at this stage.	Ensure that new roles are assessed to determine Welsh language requirements. Active promotion of vacancies in Welsh language publications and websites as well as targeted promotion via LinkedIn. Continue to promote and fund language courses to increase the number of learners in line with the aspirations in our Welsh Language Strategy.

Service delivery Use of Welsh language in service delivery Promoting use of the language	Investing in the appointment of an additional teacher to support Welsh provision will make a positive contribution to the delivery of the Welsh Education Strategic Plan (WESP), enhancing the delivery of and furthering the promotion of Welsh medium education.	None identified at this stage	Ensure that appropriate mitigations are put in place at a service level to mitigate the loss of any individuals on our overall ability to provide services in Welsh.

4. **Does your proposal deliver any of the well-being goals below?** Please explain the impact (positive and negative) you expect, together with suggestions of how to mitigate negative impacts or better contribute to the goal.

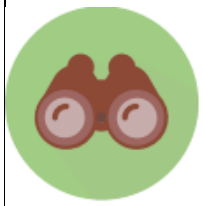
Well-being Goal	**Does the proposal contribute to this goal? Describe the positive and negative impacts.**	**What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?**
A prosperous Wales Efficient use of resources, skilled, educated people, generates wealth, provides jobs	Overall spending on services will increase as a result of this budget. This will ensure that the council is able to continue to run services that meet the needs of people, communities and businesses contributing to all of the national well-being goals as well as the aspirations of our Community and Corporate Plan for Monmouthshire to be a thriving and ambitious place. The proposals include an addition investment in school budgets to meet the demand schools are facing in maintaining attendance levels and improving standards. Several proposals meet additional resource requirements for specialist education support in order to ensure that young people are able to receive the support they require. This could support their future job prospects. Continuing to support the Inspire programme to offset reductions in grant funding, will continue support to young people at risk of not being in Education, Employment, or Training.	None identified at this stage.
A resilient Wales Maintain and enhance biodiversity and ecosystems that support	Tackling climate change is one of the biggest priorities of our organisation. This budget recognises the need for increased spending in a number of areas that will enable us to continue this work.	None identified at this stage.

Well-being Goal	Does the proposal contribute to this goal? Describe the positive and negative impacts.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
resilience and can adapt to change (e.g. climate change)	This includes investment in flood alleviation measures through an additional gulley cleaning team to adapt to changing weather and more frequent extreme weather events.	
A healthier Wales People's physical and mental wellbeing is maximised, and health impacts are understood	Our Community and Corporate Plan commits us to taking action to create healthy and sustainable places where the health inequalities that exist within and between communities have been reduced. The budget continues to invest in a wide range of services that make it possible for us to achieve this. The budget includes investment in social care and the supporting of a range of pressures that safeguard and support the health and well-being of children and young people and adults in the county. Savings are being delivered in social care through the long term children's care planning and placement strategy and consolidation of vacancies within in house domiciliary care that have arisen through commissioning of longer -term care at home packages.	Continue to review the delivery of the children care planning and placement strategy and delivery of care at home and reablement services in adults social care.
A Wales of cohesive communities Communities are attractive, viable, safe and well connected	We are committed to investing in a range of services that contribute to our policy aspirations for Monmouthshire to be a thriving safe and well-connected county where people feel part of their community.	The proposals include an increase in investment to Citizens Advice Monmouthshire to recognise the key role the organisation plays in supporting Monmouthshire residents. These services provide a vital safety net for vulnerable people alongside the provision of services for the whole community.

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 globally responsible Wales Taking account of impact on global well-being when considering local social, economic and environmental wellbeing	Our commitment to tackling climate change by decarbonising our operations is a small part of a wider global effort. A number of service areas will see an additional investment or maintenance of funding levels ensuring that services that reduce our climate emissions are able to be maintained.	None identified at this stage
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	As part of our commitment to making Monmouthshire a thriving and ambitious place we are continuing to support Monmouthshire's towns and visitor attractions making them accessible and welcoming where amenities, events and experiences are attractive for residents, visitors and businesses. Sometimes we have to make changes and look to different ways to keep services running but we continue to think differently keep services operating. Recruiting an additional teacher to support Welsh provision will enable the council to further promote and encourage the use of the Welsh language and Welsh medium education. See Policy making and Welsh language section above for further details.	See Policy making and Welsh language section above for further details.
A more equal Wales	Tackling inequalities, working with and alongside our communities is one of the absolute priorities of the council. This is enshrined in the budget principles	Proposals within the budget is assessed to identify the effects on the most vulnerable in our society. Where we identify changes could have a disproportionate adverse effect on those

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	within the Medium Term Financial Strategy which are the cornerstone of the budget. The budget includes a range or proposals, including continuing the funding for the Inspire programme to off-set reductions in grant funding and increased support for additional learning need provision, that have a focus on tackling inequalities and to protect the most vulnerable in our society. See Protected Characteristics and Socio-Economic Duty sections above for further details.	with protected characteristics or who suffer socio-economic disadvantage we have taken that into account and sought to mitigate the effect by refining the proposals as we have gone along. See Protected Characteristics and Socio-Economic Duty sections above for further details.

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?
 Balancing short term need with long term and planning for the future	The necessity for short-term financial planning in some cases may have an impact on the ability to deliver quality services in the long term. For a number of posts and workstreams across all directorates there is an increasing reliance on grant-funded posts and projects, these are often for fixed term periods in the shorter term. This can be a challenge to their longer-term viability.	The council has developed a Medium-Term Financial Strategy, this provides the strategic framework to guide medium term financial planning. This is helping ensure a focus on the council's long-term policy objectives and its financial capacity.
 Working together with other partners to deliver objectives	Proposals include numerous investments and increased contributions to the various partnerships and collaborations that the council is involved in. These include increased contributions to the Local Authority School Improvement Service, and increased funding to Citizens Advice. Ensuring effective partnership working and collaboration is a priority of the council and is key to delivering its objectives.	Clear expectations and communication established with all partners we collaborate with.
 Involving those with an interest and seeking their views	We are committed to working with and alongside our communities to shape the future of the council and the communities it serves. Overall, these proposals will form part of the budget consultation and will be subject to a full and extensive public consultation and engagement exercise.	Ensure that proposals and the accompanying Integrated Impact Assessments are updated as a result of any further consultation and engagement.

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?
 Putting resources into preventing problems occurring or getting worse	Wherever possible, our actions aim to prevent problems occurring or getting worse. We are investing in services which shift focus from reactive to preventative approaches. We will prioritise supporting those who are near to needing statutory support – individuals at risk and cohorts of residents experiencing levels of deprivation that make them vulnerable to early ill-health. This will improve long-term outcomes and reduce demand in line with the prevention principle. This includes additional funding for Family Support to enable children to remain with their families, where possible, and further funding for adult social care, aligned with the recently developed Prevention Strategy - 'Living Well Monmouthshire'	Continue to review the delivery of the children care planning and placement strategy and delivery of care at home and reablement services in adult social care. Increased demand, the fragility of the social care sector and the availability of care staff remains a key risk for Adult Social Care although some of these issues are outside the council's direct control to address. Ensure the effective implementation of our Living Well Monmouthshire strategy, ensuring that its implementation is aligned across the whole organisation.
 Considering impact on all wellbeing goals together and on other bodies	The council works across multiple areas and many of these proposals can have positive and potentially negative impacts on one another. It is important that as proposals are developed, we seek to balance competing impacts and fully consider the impacts that proposals will have on other organisations.	Use of this cumulative impact assessment will help to identify overall impacts of proposals in an integrated way, as well as sperate assessments specific proposals.

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

	Describe any positive impacts your proposal has	**Describe any negative impacts your proposal has**	**What will you do/ have you done to mitigate any negative impacts or better contribute to positive impacts?**
Safeguarding	Safeguarding is about ensuring that everything is in place to promote the well-being of children and vulnerable adults, preventing them from being harmed and protecting those who are at risk of abuse and neglect. Specific proposals include an assessment of the impact on safeguarding.	Specific proposals include an assessment of the impact on safeguarding, including any potential negative impact on delivering the council's safeguarding responsibilities.	Specific proposals include an assessment on the impact on safeguarding, including mitigation related to the potential impact on delivering the council's safeguarding responsibilities. Safeguarding is at the heart of everything the council does. All staff are trained to a level that is appropriate to their role.
Corporate Parenting, Care Leavers and Care Experienced people	The council has a responsibility to children who are looked after. The council has a corporate duty to consider children looked after especially and promote their welfare (in a way, as though those children were their own). Specific proposals include an assessment on the impact on corporate parenting.	Specific proposals include an assessment on the impact on corporate parenting, including any potential negative impact on delivering the Council's corporate parenting responsibilities.	Specific proposals include an assessment on the impact on corporate parenting, including mitigation related to the potential impact on delivering the council's corporate parenting responsibilities

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

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

Data sources include for example:

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

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

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

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

What are you going to do	When are you going to do it?	Who is responsible
Existing actions have been identified within directorate assessments.	As per budget proposal impact assessments	As per budget proposal impact assessments

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

Version No.	Decision making stage	Date considered	Brief description of any amendments made following consideration
0.1	Strategic Leadership Team and Cabinet	Ongoing during development of proposals	Amendments made within the form

Part 2 - The Cumulative Financial Impact

The Socio-economic Duty requires local authorities to think about how their strategic decisions, affect inequality of outcomes for people who suffer socio-economic disadvantage. Monmouthshire has the highest level of income inequality in Wales and we recognise that any increase in fees and charges for services will have a higher impact on households on the lowest incomes. In addition, we know that there are geographical inequalities in our counties, for example the challenges faced by rural communities are very different from those in towns. Assessing geographical disparities is something we do operationally by targeting services such as housing and social care and this is taken into account in the way that services are delivered.

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

The impact below has been modelled on some of the planned increases in fees and charges. We have used seven different household types, the same as the assessment last year. For each household type we have modelled the cumulative financial impact based on different household incomes. The financial modelling does not include an analysis of people by protected characteristics as that is covered by part one of this report. However, we know from research, that people with some protected characteristics are likely to be disproportionately represented in the lower income bands. Research by the Health Foundation has highlighted that disabled people are two percentage points more likely to be in poverty than non-disabled people. Younger households, at the earlier stages of their careers could be more likely to be on lower incomes. The increases in fees and charges modelled to develop this assessment along with further information on the methodology used are shown in Appendix 2.

Cumulative Financial Impact – Before and after mitigating actions.

Household	Income	Forecast Cost *after* mitigation (percentage of income shown in brackets)	Initial proposed increase *before* mitigation (percentage of income shown in brackets)	The amount of money our mitigating measures reduced costs by
Household 1- 2 Adults, 2 Dependent Children, 1 Older Person	£36,000	£119.09 (0.33%)	£698.39 (1.94%)	£579.29
	£52,000	£173.19 (0.33%)	£698.39 (1.34%)	£525.20
	£56,000	£173.19 (0.31%)	£698.39 (1.25%)	£525.20
	£74,000	£173.19 (0.23%)	£698.39 (0.94%)	£525.20
Household 2 – 2 Adults, 2 Dependent Children	£22,000	£54.09 (0.25%)	£113.39 (0.52%)	£59.29
	£36,000	£108.19 (0.30%)	£113.39 (0.31%)	£5.20
	£40,000	£108.19 (0.27%)	£113.39 (0.28%)	£5.20
	£62,000	£108.19 (0.17%)	£113.39 (0.18%)	£5.20
Household 3 –	£17,000	£0 (0%)	£113.39 (0.67%)	£113.39
	£22,000	£54.09 (0.25%)	£113.39 (0.52%)	£59.29

Household	Income	Forecast Cost *after* mitigation (percentage of income shown in brackets)	Initial proposed increase *before* mitigation (percentage of income shown in brackets)	The amount of money our mitigating measures reduced costs by
1 Adult, 2 Dependent Children	£30,000	£81.14 (0.27%)	£113.39 (0.38%)	£32.25
	£40,000	£81.14 (0.20%)	£113.39 (0.28%)	£32.25
Household 4 – 2 Adults (both aged below 66)	£22,000	£54.09 (0.25%)	£113.39 (0.52%)	£59.29
	£36,000	£108.19 (0.30%)	£113.39 (0.31%)	£5.20
	£40,000	£108.19 (0.27%)	£113.39 (0.28%)	£5.20
	£62,000	£108.19 (0.17%)	£113.39 (0.18%)	£5.20
Household 5 – 2 Adults (both aged over 66)	£22,000	£184.09 (0.84%)	£758.19 (3.45%)	£574.09
	£24,000	£238.19 (0.99%)	£758.19 (3.16%)	£520.00
	£40,000	£238.19 (0.60%)	£758.19 (1.90%)	£520.00
	£52,000	£238.19 (0.46%)	£758.19 (1.46%)	£520.00
Household 6 – 1 Older Person	£12,000	£65.00 (0.54%)	£693.19 (5.78%)	£628.19
	£18,000	£65.00 (0.36%)	£693.19 (3.85%)	£628.19
	£22,000	£119.09 (0.54%)	£693.19 (3.15%)	£574.09
	£40,000	£146.14 (0.37%)	£693.19 (1.73%)	£547.05
Household 7 – 1 Younger Person (working age)	£15,000	£0 (0%)	£113.39 (0.76%)	£113.39
	£24,000	£54.09 (0.23%)	£113.39 (0.47%)	£59.29
	£30,000	£81.14 (0.27%)	£113.39 (0.38%)	£32.25
	£40,000	£81.14 (0.20%)	£113.39 (0.28%)	£32.25

The proposed Council Tax increase of 5.95% will result in an additional monthly cost of £108.19 on a Band D property. If a household is on a low income, they may be eligible for the Council Tax Reduction Scheme which would reduce their Council Tax bill.[1] This is calculated on individual circumstances and the entitlement varies; the model includes reductions of 50% and 100% for certain household incomes. It also includes a 25% single persons discount attributed to some income bands in relevant households. It is unlikely that someone on a low income would be paying for social care and there is a £100 weekly cap for care at home. As incomes rise it would be expected that many households will be living in more expensive properties and would be paying higher rates of council tax. A breakdown of the charges and methodology used to produce the table above can be found in appendix 2.

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

For a household with an income of £36,000, the potential impact on their income from the increased fees and charges is an increased annual spend of £119.09 equating to 0.33% of their total income. The mitigations put in place have ensured that this impact has been reduced from a potential figure of £698.39 or 1.94% of their total income.

For households with incomes of £52,000, £56,000 and £74,000 the mitigated increased fees and charges equate to 0.33%, 0.31% and 0.23% of their total annual income respectively. The mitigations put in place have ensured that this has reduced from 1.34%, 1.25% and 0.94%.

One of the largest increases would be the possible increased cost of community meals, based on the older person within the household modelled as receiving 5 meals a week for a year. Social care charges have also been considered for the older person within the household. However, modelling based on 5 hours of care a week, the increase in cost will be completely mitigated due to the weekly cap of £100 - only those currently receiving 3 hours of care or under will be affected by the increase (+£6 per week/£312 a year). The use of a five-hour care package has been used as part of the cumulative impact assessment modelling by this authority for many years and is retained for the purposes of consistency. However, this is below the average care package in Monmouthshire, therefore the numbers of household requiring less than 5 hours of care a week is small – which means the increase across all households will be mitigated for the vast majority of those receiving care.

A council tax reduction has been modelled against the lowest income threshold, as the model assumes the older person within the household would be receiving pension credit. Other charges modelled for all income bands are the increase in parking charges.

Household 2 - 2 Adults, 2 Dependent Children

For a household with an income of £22,000, the potential impact on their income from the increased fees and charges is an increased annual spend of £54.09 equating to 0.25% of their total income. The mitigations put in place have ensured that this impact has been reduced from a potential figure of £113.39 or 0.52% of their total income.

For households with an income of £36,000, £40,000 and £62,000 the increased fees and charges would be 0.31%, 0.28% and 0.18% of their total annual income respectively. There are minimal changes in costs on these income groups resulting from the mitigations available.

It has been modelled that the lowest household income will be eligible for the council tax reduction scheme at 50%, which would mitigate the 5.95% annual increase of £108.19 to £54.09.

Household 3 - 1 Adult, 2 Dependent Children

For a household with an income of £17,000, there is a potential for no impact on their income from the increased fees and charges following mitigations. The mitigations modelled would mean the impact has been reduced from a potential figure of £113.39 annually or 0.67% of their total income.

For households with incomes of £22,000, £30,000 and £40,000 the increased fees and charges equate to 0.25%, 0.27% and 0.20% of their total annual income respectively. The mitigations put in place would reduce this from 0.52%, 0.38% and 0.28%.

Although the income for this household is likely to be less than that of the 2 Adult with 2 Children household, the increases in fees and charges on the household are very similar for the equivalent income bands. Lower income bands have been included within the model to reflect the possibility of low-income single earner households.

For those earning £22,000 and under, mitigations have been included in the model due to the likelihood of their eligibility for the council tax reduction scheme. The lowest income band (£17,000) has a 100% reduction that negates the 5.95% modelled increase, whereas the £22,000

income household has a 50% reduction which would see an increased cost of £54.09 rather than £108.19. The higher income bands for the household composition have been attributed a 25% single persons discount (£81.14 increase compared to the full £108.19).

Household 4 - 2 Adults (working age)
For a household with an income of £22,000, the potential impact on their income from the increased fees and charges is an increased annual spend of £54.09 equating to 0.25% of their total income. The mitigations put in place would mean that this impact has been reduced from a potential figure of £113.39 or 0.52% of their total income.

For households with incomes of £36,000, £40,000 and £62,000 the increased fees and charges equate to 0.31%, 0.28% and 0.18% of their total annual income respectively. The mitigations available would provide minimal difference to their increased costs.

For the lowest income household of £22,000, mitigation has been included in the model due to the likelihood of their eligibility for the council tax reduction scheme.

This household composition is likely to be less affected than other households as they do not have any dependent children and may not require certain services such as adult social care.

Household 5 - 2 Adults (both aged over 66)
For a household with an income of £22,000, the potential impact on their income from the increased fees and charges is an increased annual spend of £184.09 equating to 0.84% of their total income. The mitigations put in place have ensured that this impact has been reduced from a potential figure of £758.19 or 3.45% of their total income.

For households with incomes of £24,000, £40,000 and £52,000 the mitigated increase in fees and charges would be 0.99%, 0.6% and 0.46% of their total annual income respectively.

This is one of the largest percentages in the model. Most of the increase in cost is from the proposed annual increase in social care costs. The model is based on 5 hours of care received per week, for 52 weeks a year which equates to a £520 increase per year. However, there is a mitigated cost of a £100 cap per week which would mean that the household is already at this limit if they are receiving 5 or more hours a week and would therefore see no additional increase in cost. An increase of £130 per year could also result from community meal charges – based on an assumption that both members of the household would receive 5 meals a week from the service.

At the lowest income for this household modelled, £22,000, there is a modelled potential mitigated cost for council tax of £54.09 - which is an example of a 50% discount, which could be provided via the council tax reduction scheme. Alongside the charges noted above, the model includes a full council tax increase of 5.95% for all but the lowest income household, which would be £108.19 based on a Band D property.

Household 6 - 1 Older Person
For a household with an income of £12,000, the potential impact on their income from the increased fees and charges is an increased annual spend of £65 equating to 0.54% of their total annual income. The mitigations put in place have ensured that this impact has been reduced from a potential figure of £693.19 or 5.78% of their total annual income. This income figure is used as it is broadly in line with the state pension.

For households with incomes of £18,000, £22,000 and £40,000 the increased fees and charges equate to 0.36%, 0.54% and 0.37% of their total annual income respectively. The mitigations put in place have ensured that this has reduced from 3.85%, 3.15% and 1.73%.

The model shows potential mitigations in place for this household, including example potential council tax mitigations of 100% for the two lowest income bands and a 50% reduction for the £22,000 income household (an increase of £54.09 rather than £108.19). The £40,000 household has a 25% single persons discount allocated. This household could incur the increased costs for adult social care, the potential mitigation for the household of the social care cap being reached would limit, or could remove, as modelled, any increase in non-residential care fees. At all income levels the household could incur the potential increased cost for community meals.

Household 7 - 1 Younger Person (working age)

For a household with an income of £15,000, mitigations put in place would mean there is no increase in cost, from a potential figure of £113.39 or 0.76% of their total income.

For households with incomes of £24,000, £30,000 and £40,000 the increased fees and charges equate to 0.23%, 0.27% and 0.2% of their total annual income respectively. The mitigations would mean this is reduced from 0.47%, 0.38% and 0.28%.

All modelled income levels for this household have council tax reduction applied, of either a full or a 50% reduction, or single person discount of 25% applied. The single persons discount of at least a 25% reduction in Council Tax increase would see the 5.95% council tax increase resulting in a £81.14 cost per year rather than £108.19. Proposed increase in car parking costs have also been modelled for this household.

Appendix 1 -The Legal Context

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

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

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

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

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

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

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

The Welsh Language (Wales) Measure 2011 established a legal framework that imposed a duty on Monmouthshire County Council, alongside other public organisations, to comply with standards relating to the Welsh language. The key principles of these standards are that the Welsh language should not be treated any less favourably than the English language and we should promote and facilitate the use of the language.

Appendix 2 – Cumulative Financial Impact methodology

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

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

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

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

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

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

Household 5 – 2 Adults (both aged 66 and over) – Census 2021 data showed that there were over 11,000 residents in Monmouthshire that lived in a single-family household of this composition.

Household 6 - 1 Older Person – 16% (6534) of all household composition households from Census 2021 were single person households, aged 66 years or older.

Household 7 – 1 Adult (working age) - Census 2021 data showed that 14% (5753) of households were made up of one person households that are working age.

The latest information on income levels, wages, benefits and pension rates were used to inform the income level modelled for each household. This shows:

In April 2026, the full new State Pension will rise by £11.05 (+4.8%) to £241.30 a week, which will provide an additional £574.60 a year. The full basic State Pension will also increase to £184.90 a week, an increase of £8.45 a week and £439.40 annually.[2] The annual level of benefit cap for couples (with or without children) or single claimants with a child of qualifying age is unchanged and remains at £22,020 per year, equivalent of £423.46 a week.[3]

Data on income levels will continue to change as wage levels vary, the figures used provide an approximate indication. The National Living Wage is currently £12.21 per hour for those aged 21 and over. For someone working 35 hours per week, this equates to approximately £22,222,20 per year. For someone working 27 hours per week this is approximately £17,142.84 per year. This rate is due to rise to £12.71 per hour from April 2026 for those aged 21 and over[4]. For someone working 35 hours per week, this equates to around £23,132.20 per year. For someone working 27 hours per week, this equates to approximately £17,844.84 per year. The National Minimum Wage for those aged 18-20 will increase from £10 per hour in April 2025 to £10.85 per hour in April 2026, equating to approximately £19,747 per year for those who work 35 hours per week.

As at the financial year 2021-22, 48.2% of lone parents in the UK are employed part-time, and over 3 in 10 are not employed (economically inactive). Women with children are more likely to work part-time, term-time or flexible working hours, compared to fathers or those without children. 47.1% of two parent families have one parent working full-time, and the other working part-time.[5] Average weekly hours of work for part-time workers in the UK is 16.6 hours.[6]

A person is commonly deemed to be in poverty if their household falls below 60% of the UK median household income. The latest data shows the UK median household income is £36,600 (ONS).[7] 60% of this equates to £21,960. The figure for median weekly earnings by residence is £811.80 in Monmouthshire according to NOMIS, this would aggregate to an annual income of £42,214.[8]

Fees and charges

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

Fees and charges	Increase	Mitigation		2 Adults 2 Dependent Children 1 Older Person	2 Adults 2 Dependent Children	1 Adult 2 Dependent Children	2 Adults (working age)	2 Adults (both 66+)	1 Older Person (66+)	1 Younger Person (working age)
Council Tax	5.95% (£108.19 for Band D property)	Single persons discount (-25%) or Council tax reduction scheme (100% discount or 50% discount) modelled for each Household (HH)	T	£108.19	£108.19	£108.19	£108.19	£108.19	£108.19	£108.19
			M	£54.10 (for lowest income HH)	£54.10 (for lowest income HH)	£0 (for lowest income HH) £54.10 (for £22,000 income HH) £81.14 (Single persons discount)	£54.10 (for lowest income HH)	£54.10 (for lowest income HH)	£0 (for lower income bands) £54.10 (for £22,000 income HH) £81.14 (Single persons discount)	£0 (for lowest income bands) £54.10 (for £22,000 income HH) £81.14 (Single persons discount)
Car parking charges	£0.10 for 2 hour stay	Blue badge holders can park for free	T	£5.20	£5.20	£5.20	£5.20	-	-	£5.20
			M							
Community meals	£0.25 per meal	None	T	£65.00	-	-	-	£130.00	£65.00	-
			M							

		Total based on 5 hours of care a week	T	£520.00	-	-	-	£520.00	£520.00	-
Non-residential Social care fees	8.3% (£2 per hour)	Mitigated based on 5 hours or more a week is already at the maximum weekly cost cap of £100, therefore no increase in charge would apply.	M	£0				£0	£0	

The table below lists the rationale followed whilst assigning increased costs and mitigations to the households in the table above. A number of methods have been replicated to be consistent with what has been modelled during previous years cumulative financial impact assessments. Although it is recognised that the rationale may not be applicable to all households within the county, the table is an attempt to model how some residents may be impacted to a greater or lesser extent than others.

Fee and Charge	**Increase**	**Rationale for increase**
Council Tax	5.95% (£108.19 per Band D property)	5.95% increase on a Band D property as per budget proposal. Mitigations have been added to some households based on income and composition. These include a modelled 25% discount on the 5.95% increase (single persons discount). Applying the possible eligibility for the Council tax reduction scheme to the lower income households, a 50% or 100% mitigated cost has been applied to some households based on the income levels modelled. This is an example only, the scheme is calculated on individual circumstances and the entitlement varies.
Car parking charges	£0.10 - 2 hour stay	Cost has been modelled for a single 2 hour stay per week per household
Community meals	£0.25 per meal	Model includes costings for 5 meals per week for 52 weeks. Costs are attributed to households with older people, with the 5 meals per week for every older person in the household.

Non-residential social care fees	£2 per hour	Cost have been modelled for 5 hours of care per week, which is consistent with previous cumulative financial impact modelling. Due to the £100 maximum weekly charge cap, any increase in cost will be mitigated due to the cap being reached - 5 hours a week at £24 in 2025/26 would cost £120 and 5 hours a week at £26 in 2026/27 would cost £130 which would exceed the cap and therefore the £10 increase would be mitigated.

[1] https://www.monmouthshire.gov.uk/home/counciltaxandbenefits/
[2] Benefit and pension rates 2026/27 Benefit and pension rates 2026 to 2027 - GOV.UK
[3] Benefit and pension rates 2026/27 Benefit and pension rates 2026 to 2027 - GOV.UK
[4] National Minimum Wage Rates National Minimum Wage and National Living Wage rates - GOV.UK (www.gov.uk).
[5] Families and the labour market, 2021 Families and the labour market, UK - Office for National Statistics (ons.gov.uk).
[6] Hours worked by part-time workers, Aug – Oct 2025 Average actual weekly hours of work for part-time workers (seasonally adjusted) - Office for National Statistics (ons.gov.uk).
[7] Average household income UK Average household income, UK - Office for National Statistics (ons.gov.uk).
[8] Gross Weekly Pay - All Full Time Workers - Earnings By Residence (NOMIS) Gross Weekly Pay - All Full Time Workers - Earnings By Residence.

Appendix 3 - Directorate impact assessments

Children, Learning, Skills and Economy
Social Care & Health
Infrastructure
Place & Community Wellbeing
Resources
People, Performance and Partnerships
Law & Governance

Name of the Officer Will McLean **Phone no:** **E-mail: WillMcLean@monmouthshire.gov.uj**	**Please give a brief description of the aims of the proposal** **To provide the details of the Children Leaning Skills and Economy Directorate Budget impact assessment.**
Name of Service area Children Learning Skills and Economy	**Date 7th January 2026**

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 *Consider the impact on our community in relation to age, e.g. how do we engage with older and younger people about our services, access issues etc. Also consider what issues there are for employment and training.*	The proposals will provide additional funding to support pupils with Additional Learning Needs (ALN) with significant funding being delegated to schools in addition to funding held centrally. These proposals provide funding to establish a new provision to support pupils with Social Emotional Mental Health (SEMH) needs allowing them to access support nearer to home and reducing the need for costly out of county placements or bespoke packages. Further investment in increasing leadership capacity within the inclusion team to provide advice and support to schools for pupils with complex ALN.	To support these pressures a number of grants are being utilised, this risk is that if these grants do not continue alternative sources of funding will be needed to be found.	The directorate will continue to monitor the grant situation and try to find alternative funding or budget savings elsewhere to support the budget investments.

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Disability *Consider the impact and what issues there are around each of the disability needs groups e.g. access to buildings/services, how we provide services and the way we do this; producing information in alternative formats, employment issues etc.*	The investment in supporting pupils with ALN will ensure more pupils can be supported in mainstream schools and within their local communities. With the proposal of a new provision to support pupils with more complex needs this will ensure pupils are supported in Monmouthshire avoiding costly out of county specialist placements and bespoke packages of support.	To support these pressures a number of grants are being utilised, this risk is that if these grants do not continue alternative sources of funding will be needed to be found.	The directorate will continue to monitor the grant situation and try to find alternative funding or budget savings elsewhere to support the budget investments.
Gender reassignment *Consider the provision of inclusive services for transgender people and groups. Also consider what issues there are for employment and training.*	No impact has been identified at this time.	No impact has been identified at this time.	No impact has been identified at this time.
Marriage or civil partnership *Same-sex couples registered as civil partners have the same rights as married couples and must be provided with the same benefits, such as survivor pensions, flexible working, maternity/paternity pay and healthcare insurance. Consider the impact of your proposal on these rights.*	No impact has been identified at this time.	No impact has been identified at this time.	No impact has been identified at this time.

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?
Pregnancy or maternity *A woman is protected from discrimination during her pregnancy, maternity leave and 26 weeks from the day she gives birth. Including the provision of services, goods and facilities and recreational or training facilities. Consider the impact of your proposal on these protections.*	No impact has been identified at this time.	No impact has been identified at this time.	No impact has been identified at this time.
Race *What will the proposal do to promote race equality with the aim of eliminating unlawful discrimination, promoting equality of opportunity and promoting good relations between different racial groups. Think about the potential to affect racial groups differently. Possible issues include providing translation/interpreting services, cultural issues and customs, access to services, issues relating to Asylum Seeker, Refugee, Gypsy & Traveler, migrant communities and recording of racist incidents etc.*	No impact has been identified at this time.	No impact has been identified at this time.	No impact has been identified at this time.
Religion or Belief *Consider the impact e.g. dietary issues, religious holidays or days associated with religious observance, cultural issues and customs. Also consider what issues there are for employment and training.*	No impact has been identified at this time.	No impact has been identified at this time.	No impact has been identified at this time.

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Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Sex *Consider what issues there are for men and women. Will this impact disproportionately on one group more than another e.g. equal pay, responsibilities for dependents, issues for carers, access to training, employment issues.*	The majority of school based staff are female and part time - where there are proposals to increase job opportunities this will favour females potentially looking for part time work while dependents.	The majority of school based staff are female and part time - where there are proposals to increase job opportunities this will favour females potentially looking for part time work while dependents. The negative impact will be on males and those looking for full time roles.	The safer recruitment policy will be followed for all opportunities to ensure all candidates are treated fairly.
Sexual Orientation *Consider the provision of inclusive services for e.g. older and younger people from the Lesbia, Gay and Bi-sexual communities. Also consider what issues there are for employment and training.*	No impact has been identified at this time.	No impact has been identified at this time.	No impact has been identified at this time.

2. The Socio-economic Duty

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.

Socio-economic disadvantage can be defined as living in less favourable social and economic circumstances than others in society. It also includes social justice, which is about reducing inequalities by working towards more equal distribution of wealth and opportunities so everyone can achieve their full potential.

Consider how the proposal could affect the following vulnerable groups:

Armed Forces Community (including veterans)
Single parents
Vulnerable families
Single adult households
Carers
Students
People living in the most deprived areas
Pensioners
Homeless People
People misusing substances
People who have experienced the asylum system
People involved in the criminal justice system

Socio-economic Duty	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 from socio economic disadvantage.	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts in relation to the Socio-economic disadvantage?

Think of what evidence you have about socio-economic disadvantage and inequalities of outcome in relation to this proposal. Will it impact disproportionately on certain groups? Can the proposals be improved to reduce inequalities of outcome?	The majority of school based staff are female and part time - where there are proposals to increase job opportunities this will favour females potentially looking for part time work while dependents.	The majority of school based staff are female and part time - where there are proposals to increase job opportunities this will favour females potentially looking for part time work while dependents. The negative impact will be on males and those looking for full time roles.	The safer recruitment policy will be followed for all opportunities to ensure all candidates are treated fairly.

3. Policy making and the Welsh language

What are the effects that the proposals would have on the Welsh language, specifically on opportunities for people to use Welsh and on treating the Welsh language no less favourably than English? How could positive effects be increased, or negative effects be mitigated? Explain how you believe the proposals could be improved so as to have positive effects or increased positive effects on opportunities for people to use the Welsh language and on treating the Welsh language no less favourably than the English language.

How does your proposal impact on the following aspects of the Council's Welsh Language Standards:	Describe the positive impacts of this proposal	Describe the negative impacts of this proposal	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts
Policy Making: *Consider what impact this policy decision will have on the Welsh Language. This includes opportunities for people to use the language, opportunities to promote the language and treating the language no less favourably that the English language. Include any data and evidence e.g. WESP, Census Data, Cymraeg 2050, Welsh Language Strategy.*	The funding of a Welsh Language Officer will lead on the Welsh in Education Strategic Plan ensuring that all measures are met, they will also support schools to meet the national priorities under Cymraeg 2050 ensuring that 10% of the curriculum is delivered through the medium of Welsh.	Failing to find funding to appoint a Welsh Language Officer would negatively impact the progress of the Welsh in Education Strategic Plan (WESP)	All grant funding is being reviewed to ensure the pressures identified in the directorate budget, including the Welsh Language Officer can be met.
Operational: **Recruitment & Training of workforce** *Carefully consider whether vacant posts require Welsh language skills as a desirable or essential skill. This is especially pertinent with front line roles as more than 10 % of the population of Monmouthshire speak Welsh. Also, when assessing the need for Welsh language skills keep in mind the existing Welsh language skills within the workforce. In service areas where there is a current lack of Welsh language skills, posts should be advertised as Welsh language essential. Additionally, consider where further training may be needed to increase the number of staff who can speak Welsh and to enhance the skills of current Welsh speakers.*	The Welsh Language Officer will need to be fluent in Welsh, this role will be supporting school staff with Welsh Language Skills and identifying where training is required.	The postholder will need to be fluent in Welsh, this may reduce the job opportunities for those that have some Welsh language skills but can upskill to meet the requirement.	No impact has been identified at this time.
Service Delivery: **Use of Welsh language in service delivery** *When advertising our services you must promote the fact that people can deal with the council in Welsh by phone, email, twitter, Facebook, letters, forms, website transactions etc.*	Appointment of a Welsh Language Officer would have a positive impact on the service delivery of Welsh education. The role will be supporting school staff with Welsh Language Skills and identifying where training is required. They will work	Failing to find funding to appoint a Welsh Language Officer would have a negative impact on the service delivery of Welsh Education.	All grant funding is being reviewed to ensure the pressures identified in the directorate budget, including the Welsh Language Officer can be met.

	closely with schools to promote the Welsh Language curriculum.		

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 Goals	**Describe the positive impacts the proposal has on the wellbeing goal.**	**Describe the negative impacts the proposal has on the wellbeing goal.**	**What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?**
A prosperous Wales *An innovative, productive and low carbon society which recognises global limits and uses resources efficiently (including acting on climate change); a skilled and well-educated population in an economy which generates wealth and provides jobs.*	With the proposal to continue to support funding for the Inspire team this will allow them to continue to work with schools to reduce the number of pupils leaving education with no employment or further education. The team will work with these pupils to identify potential onward career / training opportunities. With the ALN proposals this will allow pupils to be supported nearer to their communities reducing their carbon footprint.	None identified at this time.	All grant funding is being reviewed to ensure support for the Inspire team can continue.
A resilient Wales *Maintains and enhances a biodiverse natural environment with healthy functioning ecosystems that support social, economic and ecological resilience and the capacity to adapt to change (for example climate change).*	The proposal for ALN continues with the vision for Monmouthshire to meet the needs of the majority of pupils within the county, therefore reducing carbon footprint and keeping communities together.	None identified at this time.	By building capacity in Monmouthshire this will allow schools to support more pupils and reduce high-cost placements out of the county.
A healthier Wales *People's physical and mental well-being is maximised and in which choices and behaviours that benefit future health are understood.*	More support for pupils with ALN will ensure better outcomes for those pupils, this will also support the families that care for these pupils.	None identified at this time.	None identified at this time.

Well Being Goals	Describe the positive impacts the proposal has on the wellbeing goal.	Describe the negative impacts the proposal has on the wellbeing goal.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
A Wales of cohesive communities *Communities are attractive, viable, safe and well connected*	The proposal for ALN continues with the vision for Monmouthshire to meet the needs of the majority of pupils within the county, therefore reducing carbon footprint and keeping communities together.	None identified at this time.	By building capacity in Monmouthshire this will allow schools to support more pupils and reduce high-cost placements out of the county.
A globally responsible Wales *Taking account of impact on global well-being when considering local social, economic and environmental wellbeing*	No impact has been identified at this time.	No impact has been identified at this time.	No impact has been identified at this time.
A Wales of vibrant culture and thriving Welsh language *Promotes and protects culture, heritage and the Welsh language, and participation in the arts, and sports and recreation*	The Welsh Language Officer will need to be fluent in Welsh, this role will be supporting school staff with Welsh Language Skills and identifying where training is required. They will work closely with schools to promote the Welsh Language curriculum through a wide range of activities including arts and sport.	The postholder will need to be fluent in Welsh, this may reduce the job opportunities for those that have some Welsh language skills but can upskill to meet the requirement.	No impact has been identified at this time.
A more equal Wales *People can fulfil their potential no matter what their background or circumstances. (This includes the protected characteristics listed in Section 1 above. You can add more detail there. Don't forget to think about the impacts on poverty)*	The investment for ALN will help support pupils to reach their full potential and provide greater opportunities going forward. The continued funding of Inspire will allow support for pupils that are at risk of being not in education employment or training (NEET). All proposals will either increase employment opportunities or avoid redundancies.	To support these pressures a number of grants are being utilised, this risk is that if these grants do not continue alternative sources of funding will be needed to be found.	The directorate will continue to monitor the grant situation and try to find alternative funding or budget savings elsewhere to support the budget investments.

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

Sustainable Development Principles	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?
 Balancing short term need with long term and planning for the future *We are required to look beyond the usual short term timescales for financial planning and political cycles and instead plan with the longer term in mind (guidance says at least 10 years, but preferably 25)*	All proposals are looking at the longer-term opportunities for young people to build provision which is sustainable to meet need and to offer further opportunities for employment and training. There are several job opportunities including a Welsh Language Officer and an Education Welfare Officer which will provide employment on a permanent basis. The proposed investment in school balances will provide schools with investment above the pay pressures to address the deficit budget situation.	A large number of employees within the directorate are funded via grant streams, there is a risk when grants are reduced there will be a funding shortfall which will result in potential redundancies. Every grant is reviewed to ensure that posts can be sustained.
 Working together with other partners to deliver objectives	While there are a number of joint arrangements that the directorate continue to support, the current proposals do not require partners to deliver, all proposals will require working with schools to deliver the objectives.	None identified at this stage
 Involving those with an interest and seeking their views *Who are the stakeholders who will be affected by your proposal? Have they been involved? Do those people reflect the diversity of the area which is served?*	The proposed social emotional mental health establishment will initially operate as a satellite provision with support from another school. However, going forward this will be established as an independent school with its own leadership, to do this full consultation with partners is required.	None identified at this stage

Sustainable Development Principles		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?
	Putting resources into preventing problems occurring or getting worse	The ALN provision will ensure a sustainable provision and will result in cost saving on placement and bespoke package costs, it will also support pupils to achieve their potential close to their communities.	None identified at this stage
	Considering impact on all wellbeing goals together and on other bodies *Focus here on how you will better integrate the Wellbeing Goals impacts on people, economy and environment described above and balance any competing impacts. Think about impacts the proposal may have on other organisations*	All proposals are looking at the longer-term opportunities for young people to build provision which is sustainable to meet need and to offer further opportunities for employment and training. There are several job opportunities including a Welsh Language Officer and an Education Welfare Officer which will provide employment on a permanent basis.	A large number of employees within the directorate are funded via grant streams, there is a risk when grants are reduced there will be a funding shortfall which will result in potential redundancies. Every grant is reviewed to ensure that posts can be sustained.

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

	Describe any positive impacts your proposal has	Describe any negative impacts your proposal has	What will you do/ have you done to mitigate any negative impacts or better contribute to positive impacts?

Safeguarding *Safeguarding in this context applies to children (not yet reached 18th birthday) and adult at risk (identified as a person over the age of 18 and who (a) is experiencing or is at risk of abuse or neglect, (b) has needs for care and support (whether or not the authority is meeting any of those needs), and (c) as a result of those needs is unable to protect himself or herself against the abuse or neglect or the risk of it.) Safeguarding is about ensuring that everything is in place to promote the well-being of children and adults at risk, preventing them from being harmed and protecting those who are at risk of abuse and neglect.*	All the proposals meet safeguarding requirement and will protect young people. The safer recruitment policy will be followed	None identified at this stage	None identified at this stage
Corporate Parenting, Care Leavers and Care Experienced People *This relates to those children who are 'looked after' by the Local Authority either through voluntary arrangements with their parents or through a Court Order. The Council has a corporate duty to consider 'children who are looked after especially and to promote their welfare (in a way, as though those children were their own). It also relates to care experienced people (people who have spent time in care when they were under 18 years old). The Council must consider how to help overcome the disadvantages and discrimination they experience.*	Non identified at this stage	Non identified at this stage	Non identified at this stage

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

This will include your baseline position, measures and studies that have informed your thinking and the recommendation you are making. It should allow you to identify whether any changes resulting from the implementation of the recommendation have had a positive or negative effect. Key strategies and documents that may help you include: Community and Corporate Plan, Asset Management Strategy, Digital and Data Strategy, Medium Term Financial Strategy, People Strategy, Socially Responsible Procurement Strategy: Enabling Strategies See Guidance for more examples.

Community and corporate plan
Grant plans
ALN strategy
Directorate budget
NEETS data

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

This section should summarise the key issues arising from the evaluation. This summary must be included in the Committee Report Template

The main positive benefit is that all the proposals will support pupils with ALN to remain in Monmouthshire and reduce the amount pupils that need to be placed outside Monmouthshire as their needs cannot be met. The proposals will provide employment opportunities including a post for a fluent Welsh speaker. Schools will be supported and receive £1,000,000 investment to help address the deficit budgets. School leavers will be supported to ensure they find on-going training or employment.

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?

10. **VERSION CONTROL: The Integrated Impact Assessment 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 *e.g. budget mandate, DMT, SLT, Scrutiny, Cabinet etc*	Date considered	Brief description of any amendments made following consideration

Name of the Officer completing the evaluation Jane Rodgers **Phone no:** **E-mail: janerodgers@monmouthshire.gov.uk**	**Please give a brief description of the aims of the proposal** Set out a budget for 2026/27 that addresses the pressures raised whilst looking for service reforms & efficiencies to remain within the budget allocated within the Medium-Term Financial Plan.
Name of Service area Social Care, Safeguarding and Health	**Date** 6/1/26

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 *Consider the impact on our community in relation to age, e.g. how do we engage with older and younger people about our services, access issues etc. Also consider what issues there are for employment and training.*	This proposal will impact positively on all age groups from children and younger adults, through to older adults by ensuring the necessary financial resources are in place to meet people's assessed care and support needs. For older adults, the proposal continues to prioritise a reablement approach to providing care and support. Reablement helps people to maximise their independence and stay well at home for longer. For children and families, the proposal ensures that essential family support services will be maintained. This helps children remain within their families and communities wherever possible.	Dependant on the outcome of 2026/27 fee negotiations there is a potential that the number of financial top-ups that are required to support people in residential care may increase.	We will negotiate fairly with care providers using. We will ensure good quality assurance processes are in place and monitor individual outcomes for all people in residential placements.

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Disability *Consider the impact and what issues there are around each of the disability needs groups e.g. access to buildings/services, how we provide services and the way we do this; producing information in alternative formats, employment issues etc.*	Social Health & Care directorate provides services to people (children and adults who have physical disabilities, learning disabilities, chronic illnesses or sensory impairments). The proposal will ensure that resources are available to assess children and adults with disabilities and to ensure that a range of services are in place to support people with what matters to them. The proposal continues to prioritise a reablement approach to providing care and support. Reablement helps people to maximise their independence and stay well at home.	None identified	On-going review, quality assurance processes and monitoring of outcomes for all.
Gender reassignment *Consider the provision of inclusive services for transgender people and groups. Also consider what issues there are for employment and training.*	None identified	None identified	None identified
Marriage or civil partnership *Same-sex couples registered as civil partners have the same rights as married couples and must be provided with the same benefits, such as survivor pensions, flexible working, maternity/paternity pay and healthcare insurance. Consider the impact of your proposal on these rights.*	*None identified*	None identified	None identified

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?
Pregnancy or maternity *A woman is protected from discrimination during her pregnancy, maternity leave and 26 weeks from the day she gives birth. Including the provision of services, goods and facilities and recreational or training facilities. Consider the impact of your proposal on these protections.*	None identified	None identified	None identified
Race *What will the proposal do to promote race equality with the aim of eliminating unlawful discrimination, promoting equality of opportunity and promoting good relations between different racial groups. Think about the potential to affect racial groups differently. Possible issues include providing translation/interpreting services, cultural issues and customs, access to services, issues relating to Asylum Seeker, Refugee, Gypsy & Traveler, migrant communities and recording of racist incidents etc.*	The proposal will ensure that services have sufficient resources to ensure that race equality is maintained, for example through use of translators, services for unaccompanied asylum-seeking children and appropriate workforce training. Care and support plans for children, adults and their families / carers will take account of race and aims to provide care and support in a way that promotes and respects individuality.	None identified	Access to services will be in accordance with Anti-racist Wales, with training and awareness implemented across the service.
Religion or Belief *Consider the impact e.g. dietary issues, religious holidays or days associated with religious observance, cultural issues and customs. Also consider what issues there are for employment and training.*	Care and support plans will take account of a person's beliefs and aims to support a positive sense of identity.	None identified	Access to services will be in accordance with Anti-racist Wales, with training and awareness implemented across the service.

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Sex *Consider what issues there are for men and women. Will this impact disproportionately on one group more than another e.g. equal pay, responsibilities for dependents, issues for carers, access to training, employment issues.*	Services are provided to both male and females regardless and are based on identified care and support needs. There are more females than males who take on caring roles for family members. The proposals do not include a reduction in statutory care and support and therefore have a neutral impact on carers.	The proposals include a deletion of vacant posts which may negatively impact on women more than men. (Because women are more likely to apply for social care roles than men).	Alternative social care practitioner roles are being created within the service. The service continues to commission with external providers (where the workforce is predominantly female).
Sexual Orientation *Consider the provision of inclusive services for e.g. older and younger people from the Lesbia, Gay and Bi-sexual communities. Also consider what issues there are for employment and training.*	Care and support plans take account of a person's sexual orientation and aim to support a positive sense of identity	None identified	Ensure that services and practitioners are skilled and trained to support all.

2. The Socio-economic Duty

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.

Socio-economic disadvantage can be defined as living in less favourable social and economic circumstances than others in society. It also includes social justice, which is about reducing inequalities by working towards more equal distribution of wealth and opportunities so everyone can achieve their full potential.

Consider how the proposal could affect the following vulnerable groups:

Armed Forces Community (including veterans)
Single parents
Vulnerable families
Single adult households
Carers
Students
People living in the most deprived areas
Pensioners
Homeless People
People misusing substances
People who have experienced the asylum system
People involved in the criminal justice system

Socio-economic Duty	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 from socio economic disadvantage.	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts in relation to the Socio-economic disadvantage?
Think of what evidence you have about socio-economic disadvantage and inequalities of outcome in relation to this proposal. Will it impact disproportionately on certain groups? Can the proposals be improved to reduce inequalities of outcome?	The service supports individual children, families, and adults who experience the impact of socio-economic disadvantages. The service tailors care and support plans in line with people's individual goals and/or personal outcomes using a strengths-based approach; signposting and making referrals to a range of organisations according to identified needs. The proposals retain the resources required to ensure that people have access to services that can help them overcome socio-economic disadvantage.	Demand pressures on the service can make it harder to provide the optimal level of service to everyone who requires our advice or assistance.	Ensuring that practitioners understand the impact of socio-economic disadvantages and have the right skills to support in such circumstances. There is an increased emphasis on providing effective early advice and assistance for people seeking help.

3. Policy making and the Welsh language

What are the effects that the proposals would have on the Welsh language, specifically on opportunities for people to use Welsh and on treating the Welsh language no less favourably than English? How could positive effects be increased, or negative effects be mitigated? Explain how you believe the proposals could be improved so as to have positive effects or increased positive effects on opportunities for people to use the Welsh language and on treating the Welsh language no less favourably than the English language.

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!

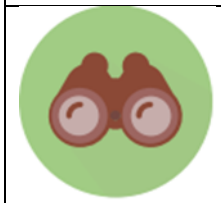
How does your proposal impact on the following aspects of the Council's Welsh Language Standards:	**Describe the positive impacts of this proposal**	**Describe the negative impacts of this proposal**	**What has been/will be done to mitigate any negative impacts or better contribute to positive impacts**
Policy Making: *Consider what impact this policy decision will have on the Welsh Language. This includes opportunities for people to use the language, opportunities to promote the language and treating the language no less favourably that the English language. Include any data and evidence e.g. WESP, Census Data, Cymraeg 2050, Welsh Language Strategy.*	More than Words strategy delivers our responsibility for the Welsh Language	None identified	Ensure that the Welsh language offer is consistently made.
Operational: **Recruitment & Training of workforce** *Carefully consider whether vacant posts require Welsh language skills as a desirable or essential skill. This is especially pertinent with front line roles as more than 10 % of the population of Monmouthshire speak Welsh. Also, when assessing the need for Welsh language skills keep in mind the existing Welsh language skills within the workforce. In service areas where there is a current lack of Welsh language skills, posts should be advertised as Welsh language essential. Additionally, consider where further training may be needed to increase the number of staff who can speak Welsh and to enhance the skills of current Welsh speakers.*	Some training opportunities are provided through Welsh medium Workforce are encouraged to develop Welsh language skills Recruitment material is provided in Welsh	None identified	Additional Welsh speakers in the service would be an advantage to supporting the Welsh offer
Service Delivery: **Use of Welsh language in service delivery** *When advertising our services you must promote the fact that people can deal with the council in Welsh by phone, email, twitter, Facebook, letters, forms, website transactions etc.*	All assessments are offered in Welsh There is access to bi-lingual social work support Welsh language options recorded on case management system	None identified	Additional Welsh speakers in the service would be an advantage to supporting the Welsh offer

Well Being Goals	Describe the positive impacts the proposal has on the wellbeing goal.	Describe the negative impacts the proposal has on the wellbeing goal.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
A prosperous Wales *An innovative, productive and low carbon society which recognises global limits and uses resources efficiently (including acting on climate change); a skilled and well-educated population in an economy which generates wealth and provides jobs.*	The service employs a wide workforce, predominantly women, and supports positive skill development within the social care and health sector including professional qualifications. The proposal ensures that fair fee negotiations can take place with providers who provide care and support services.	None identified	The proposal will ensure that jobs can be preserved within the service.
A resilient Wales *Maintains and enhances a biodiverse natural environment with healthy functioning ecosystems that support social, economic and ecological resilience and the capacity to adapt to change (for example climate change).*	None identified	None identified	None identified
A healthier Wales *People's physical and mental well-being is maximised and in which choices and behaviours that benefit future health are understood.*	The Social Services and Wellbeing (Wales) Act 2014 requires local authorities to provide a range of services designed to promote health and wellbeing and prevent the need for long-term care and support. The service works with individuals to reduce social detriments which impact health and wellbeing. The service works to support individuals to overcome the impact of physical, learning disability, mental health issues, and live fulfilled lives according to what matters to them.	None identified	The proposal will ensure that services can continue to be provided to individuals and carers without significant reduction

Well Being Goals	Describe the positive impacts the proposal has on the wellbeing goal.	Describe the negative impacts the proposal has on the wellbeing goal.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
A Wales of cohesive communities *Communities are attractive, viable, safe and well connected*	The service supports children and adults to remain living safely in their own homes and communities. The service supports adults to make social connections and reduce the impact of loneliness and isolation and children to remain living safely within their families and communities. The service supports young people to develop their friendships, learning, and community activities locally and older adults with a range of preventative services support volunteering and a range of community based, all of which promote cohesive communities.	None identified	Ensure services will continue to be provided to individuals as necessary.
A globally responsible Wales *Taking account of impact on global well-being when considering local social, economic and environmental wellbeing*	None identified	None identified	None identified
A Wales of vibrant culture and thriving Welsh language *Promotes and protects culture, heritage and the Welsh language, and participation in the arts, and sports and recreation*	The service supports and protects the culture, heritage and language of Wales by supporting individuals with care and support needs to live lives that matter to them in their own homes and communities. Care and support plans include supporting individuals to access social, recreational, and sporting activities as part of building resilience and reducing loneliness and isolation. The proposal supports services which assist children to remain living within	None identified	Ensure services will continue to be provided to individuals as necessary.

Well Being Goals	Describe the positive impacts the proposal has on the wellbeing goal.	Describe the negative impacts the proposal has on the wellbeing goal.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
	their homes and communities – helping them to retain and celebrate their Welsh identity.		
A more equal Wales *People can fulfil their potential no matter what their background or circumstances. (This includes the protected characteristics listed in Section 1 above. You can add more detail there. Don't forget to think about the impacts on poverty)*	The service for those with care and support needs to overcome socio-economic disadvantages and the impact of poor health / disability to live fulfilled lives that matter to them.	None identified	Ensure services will continue to be provided to individuals as necessary.

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?
 Long Term Balancing short term need with long term and planning for the future	The proposal has assessed the current service position and considered what resources are required to move forward in maintaining and developing the service so that the needs of children and adults with care and support needs are met. The service is seeking to maintain resources so that preventative services remain in place, and that services aimed at reducing demand and enabling people to live healthier lives are not reduced.	The service is seeking to maintain resources so that preventative services remain in place, and that services aimed at reducing demand and enabling people to live healthier lives are not reduced.

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?
 Working together with other partners to deliver objectives	The Social Services and Wellbeing (Wales) Act 2014 underpins the way that local authority works with its partners work through a range of structures and mechanisms both at a strategic and operational level. We will continue to develop working arrangements with partners to ensure that we are achieving the best outcomes for those required our support within Monmouthshire.	None identified
 Involving those with an interest and seeking their views *Who are the stakeholders who will be affected by your proposal? Have they been involved? Do those people reflect the diversity of the area which is served?*	Ensuring people have their views and voice heard when accessing services underpins what we do. We use assessments and reviews to seek wishes and feelings of those in receipt of services to allow us to make any necessary adjustments as required. We involve stakeholders in how we shape and provide services (for example, through engaging with care leavers or through involving residents within care settings).	Ensure everyone is informed about their rights to access formal advocacy.
 Putting resources into preventing problems occurring or getting worse	The service places a consistent emphasis on early intervention and preventative services.	The mandate will ensure that there are sufficient resources to maintain preventative and early help services

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?
 Considering impact on all wellbeing goals together and on other bodies *Focus here on how you will better integrate the Wellbeing Goals impacts on people, economy and environment described above and balance any competing impacts. Think about impacts the proposal may have on other organisations*	The Social Services and Wellbeing (Wales) Act 2014 requires local authorities to work together with health and other key partners to review wellbeing needs within the local authority area under regional arrangements. These arrangements seek to ensure that services align well, complimenting rather than duplicating across partnerships, so that people are supported to achieve good well-being outcomes.	Ensure that services can continue to be provided to all without any significant reduction.

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

	Describe any positive impacts your proposal has	Describe any negative impacts your proposal has	What will you do/ have you done to mitigate any negative impacts or better contribute to positive impacts?

Safeguarding *Safeguarding in this context applies to children (not yet reached 18th birthday) and adult at risk (identified as a person over the age of 18 and who (a) is experiencing or is at risk of abuse or neglect, (b) has needs for care and support (whether or not the authority is meeting any of those needs), and (c) as a result of those needs is unable to protect himself or herself against the abuse or neglect or the risk of it.) Safeguarding is about ensuring that everything is in place to promote the well-being of children and adults at risk, preventing them from being harmed and protecting those who are at risk of abuse and neglect.*	The proposals will ensure that both children and adults alike are protected and safeguarded through the appropriate provision of services. The proposals ensure that the social care case management system is upgraded onto a sustainable footing, A modern case management system is central to safeguarding children and adults, and for ensuring that processes are implemented in keeping with statutory requirements.	None identified	The proposal ensures that safeguarding services can continue to be provided without significant reduction.
Corporate Parenting, Care Leavers and Care Experienced People *This relates to those children who are 'looked after' by the Local Authority either through voluntary arrangements with their parents or through a Court Order. The Council has a corporate duty to consider 'children who are looked after especially and to promote their welfare (in a way, as though those children were their own). It also relates to care experienced people (people who have spent time in care when they were under 18 years old). The Council must consider how to help overcome the disadvantages and discrimination they experience.*	The proposal ensures that the council continues to meet its corporate parenting responsibilities – providing holistic services to children who are looked after and care leavers. Savings are identified against progression planning for children aligned with the development of increased in-house placements. Children do not transition to new placements unless it is in keeping with their individual outcomes	None identified	The proposal will ensure that services for children looked after, and care leavers can continue without significant reduction.

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

This will include your baseline position, measures and studies that have informed your thinking and the recommendation you are making. It should allow you to identify whether any changes resulting from the implementation of the recommendation have had a positive or negative effect. Key strategies and documents that may help you include: Community and Corporate Plan, Asset Management Strategy, Digital and Data Strategy, Medium Term Financial Strategy, People Strategy, Socially Responsible Procurement Strategy: Enabling Strategies See Guidance for more examples.

Financial and service data

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

This section should summarise the key issues arising from the evaluation. This summary must be included in the Committee Report Template

The proposals seek to maintain the level of services provided and to support the current priorities and objectives including: - **Provision of family support to enable children and young people to live within their families and communities** - **Ensuring that people have access to reablement services when they need to** - **Working with providers to ensure good quality care is available to people** - **Ensuring that people are safeguarded through appropriate specialist systems and processes.**

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?**

10. **VERSION CONTROL: The Integrated Impact Assessment 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** *e.g. budget mandate, DMT, SLT, Scrutiny, Cabinet etc*	**Date considered**	**Brief description of any amendments made following consideration**

Name of the Officer completing the evaluation Debra Hill-Howells **Phone no:** 01633 644281 **E-mail:**debrahill-howells@monmouthshire.gov.uk	**Please give a brief description of the aims of the proposal** This assessment considers the potential implications of the proposed budget savings and investments for 26/27.
Name of Service area Infrastructure Directorate	**Date** 05.01.26

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 *Consider the impact on our community in relation to age, e.g. how do we engage with older and younger people about our services, access issues etc. Also consider what issues there are for employment and training.*	No impacts have been identified at this time	No impacts have been identified at this time	No impacts have been identified at this time
Disability *Consider the impact and what issues there are around each of the disability needs groups e.g. access to buildings/services, how we provide services and the way we do this; producing information in alternative formats, employment issues etc.*	No impacts have been identified at this time	No impacts have been identified at this time	No impacts have been identified at this time
Gender reassignment *Consider the provision of inclusive services for transgender people and groups. Also consider what issues there are for employment and training.*	No impacts have been identified at this time	No impacts have been identified at this time	No impacts have been identified at this time

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Marriage or civil partnership *Same-sex couples registered as civil partners have the same rights as married couples and must be provided with the same benefits, such as survivor pensions, flexible working, maternity/paternity pay and healthcare insurance. Consider the impact of your proposal on these rights.*	No impacts have been identified at this time	No impacts have been identified at this time	No impacts have been identified at this time
Pregnancy or maternity *A woman is protected from discrimination during her pregnancy, maternity leave and 26 weeks from the day she gives birth. Including the provision of services, goods and facilities and recreational or training facilities. Consider the impact of your proposal on these protections.*	No impacts have been identified at this time	No impacts have been identified at this time	No impacts have been identified at this time
Race *What will the proposal do to promote race equality with the aim of eliminating unlawful discrimination, promoting equality of opportunity and promoting good relations between different racial groups. Think about the potential to affect racial groups differently. Possible issues include providing translation/interpreting services, cultural issues and customs, access to services, issues relating to Asylum Seeker, Refugee, Gypsy & Traveler, migrant communities and recording of racist incidents etc.*	No impacts have been identified at this time	No impacts have been identified at this time	No impacts have been identified at this time

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?
Religion or Belief *Consider the impact e.g. dietary issues, religious holidays or days associated with religious observance, cultural issues and customs. Also consider what issues there are for employment and training.*	No impacts have been identified at this time	No impacts have been identified at this time	No impacts have been identified at this time
Sex *Consider what issues there are for men and women. Will this impact disproportionately on one group more than another e.g. equal pay, responsibilities for dependents, issues for carers, access to training, employment issues.*	No impacts have been identified at this time	No impacts have been identified at this time	No impacts have been identified at this time
Sexual Orientation *Consider the provision of inclusive services for e.g. older and younger people from the Lesbia, Gay and Bi-sexual communities. Also consider what issues there are for employment and training.*	No impacts have been identified at this time	No impacts have been identified at this time	No impacts have been identified at this time

2. The Socio-economic Duty

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.

Socio-economic disadvantage can be defined as living in less favourable social and economic circumstances than others in society. It also includes social justice, which is about reducing inequalities by working towards more equal distribution of wealth and opportunities so everyone can achieve their full potential.

Consider how the proposal could affect the following vulnerable groups:

Armed Forces Community (including veterans)
Single parents
Vulnerable families
Single adult households
Carers
Students
People living in the most deprived areas
Pensioners
Homeless People
People misusing substances
People who have experienced the asylum system
People involved in the criminal justice system

Socio-economic Duty	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 from socio economic disadvantage.	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts in relation to the Socio-economic disadvantage?
Think of what evidence you have about socio-economic disadvantage and inequalities of outcome in relation to this proposal. Will it impact disproportionately on certain groups? Can the proposals be improved to reduce inequalities of outcome?	The proposed savings will have a neutral impact as they relate to the full recovery of costs through third party funding streams and undertaking tachograph calibrations by upskilling MCC colleagues. The investment proposals will create four additional posts within the Highways and Grounds team.	The proposed savings will have a neutral impact as they relate to the full recovery of costs through third party funding streams and undertaking tachograph calibrations by upskilling MCC colleagues.	The safer recruitment policy will be followed for all opportunities to ensure all candidates are treated fairly.

3. Policy making and the Welsh language

What are the effects that the proposals would have on the Welsh language, specifically on opportunities for people to use Welsh and on treating the Welsh language no less favourably than English? How could positive effects be increased, or negative effects be mitigated? Explain how you believe the proposals could be improved so as to have positive effects or increased positive effects on opportunities for people to use the Welsh language and on treating the Welsh language no less favourably than the English language.

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!

How does your proposal impact on the following aspects of the Council's Welsh Language Standards:	**Describe the positive impacts of this proposal**	**Describe the negative impacts of this proposal**	**What has been/will be done to mitigate any negative impacts or better contribute to positive impacts**
Policy Making: *Consider what impact this policy decision will have on the Welsh Language. This includes opportunities for people to use the language, opportunities to promote the language and treating the language no less favourably that the English language. Include any data and evidence e.g. WESP, Census Data, Cymraeg 2050, Welsh Language Strategy.*	The proposals will have a neutral impact on the Welsh Language.	The proposals will have a neutral impact on the Welsh Language.	No impacts have been identified at this time
Operational: **Recruitment & Training of workforce** *Carefully consider whether vacant posts require Welsh language skills as a desirable or essential skill. This is especially pertinent with front line roles as more than 10 % of the population of Monmouthshire speak Welsh. Also, when assessing the need for Welsh language skills keep in mind the existing Welsh language skills within the workforce. In service areas where there is a current lack of Welsh language skills, posts should be advertised as Welsh language essential. Additionally, consider where further training may be needed to increase the number of staff who can speak Welsh and to enhance the skills of current Welsh speakers.*	The additional posts will be advertised as Welsh language desirable as a minimum requirement. Those appointed will be able to access free Welsh classes to improve their Welsh language skills.	No impacts identified at this time	No impacts identified at this time
Service Delivery: **Use of Welsh language in service delivery** *When advertising our services you must promote the fact that people can deal with the council in Welsh by phone, email, twitter, Facebook, letters, forms, website transactions etc.*	All information is available through the medium of Welsh. The savings proposals have a neutral impact on the Welsh language	The proposals will have a neutral impact on the Welsh Language	The proposals will have a neutral impact on the Welsh Language

Well Being Goals	Describe the positive impacts the proposal has on the wellbeing goal.	Describe the negative impacts the proposal has on the wellbeing goal.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
A prosperous Wales *An innovative, productive and low carbon society which recognises global limits and uses resources efficiently (including acting on climate change); a skilled and well-educated population in an economy which generates wealth and provides jobs.*	The investment proposals will result in the creation of 4 new and the up-skilling of colleagues to undertake tachograph calibrations.	No impacts identified at this time	No impacts identified at this time
A resilient Wales *Maintains and enhances a biodiverse natural environment with healthy functioning ecosystems that support social, economic and ecological resilience and the capacity to adapt to change (for example climate change).*	The creation of an additional vactor team and a sweeper team will improve our ability to undertake cleaning of highways gulleys and drains and resilience in responding to flooding events.	No impacts identified at this time	No impacts identified at this time.
A healthier Wales *People's physical and mental well-being is maximised and in which choices and behaviours that benefit future health are understood.*	No impacts identified at this time	No impacts identified at this time	No impacts identified at this time
A Wales of cohesive communities *Communities are attractive, viable, safe and well connected*	No impacts identified at this time	No impacts identified at this time	No impacts identified at this time
A globally responsible Wales *Taking account of impact on global well-being when considering local social, economic and environmental wellbeing*	No impacts identified at this time	No impacts identified at this time	No impacts identified at this time
A Wales of vibrant culture and thriving Welsh language *Promotes and protects culture, heritage and the Welsh language, and participation in the arts, and sports and recreation*	No impacts identified at this time	No impacts identified at this time	No impacts identified at this time

Cabinet 25.10.23

Well Being Goals	Describe the positive impacts the proposal has on the wellbeing goal.	Describe the negative impacts the proposal has on the wellbeing goal.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
A more equal Wales *People can fulfil their potential no matter what their background or circumstances. (This includes the protected characteristics listed in Section 1 above. You can add more detail there. Don't forget to think about the impacts on poverty)*	No impacts identified at this time	No impacts identified at this time	No impacts identified at this time

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

Sustainable Development Principles	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?
 Balancing short term need with long term and planning for the future *We are required to look beyond the usual short term timescales for financial planning and political cycles and instead plan with the longer term in mind (guidance says at least 10 years, but preferably 25)*	Climate change is causing more extreme weather events, and investment in additional teams helps to be more prepared for these longer term trends.	Not applicable

Sustainable Development Principles	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?
 Working together with other partners to deliver objectives	Not applicable	Not applicable
 Involving those with an interest and seeking their views *Who are the stakeholders who will be affected by your proposal? Have they been involved? Do those people reflect the diversity of the area which is served?*	Not applicable	Not applicable
 Putting resources into preventing problems occurring or getting worse	The purchase of an additional Vactor will help to prevent potential surface water flooding incidents as a result of blocked drains.	Not applicable

Sustainable Development Principles	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?
 Considering impact on all wellbeing goals together and on other bodies *Focus here on how you will better integrate the Wellbeing Goals impacts on people, economy and environment described above and balance any competing impacts. Think about impacts the proposal may have on other organisations*	Not applicable	Not applicable

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

	Describe any positive impacts your proposal has	**Describe any negative impacts your proposal has**	**What will you do/ have you done to mitigate any negative impacts or better contribute to positive impacts?**
Safeguarding *Safeguarding in this context applies to children (not yet reached 18th birthday) and adult at risk (identified as a person over the age of 18 and who (a) is experiencing or is at risk of abuse or neglect, (b) has needs for care and support (whether or not the authority is meeting any of those needs), and (c) as a result of those needs is unable to protect himself or herself against the abuse or neglect or the risk of it.) Safeguarding is about ensuring that everything is in place to promote the well-being of children and adults at risk, preventing them from being harmed and protecting those who are at risk of abuse and neglect.*	No impacts identified at this time	No impacts identified at this time	Not applicable
Corporate Parenting, Care Leavers and Care Experienced People *This relates to those children who are 'looked after' by the Local Authority either through voluntary arrangements with their parents or through a Court Order. The Council has a corporate duty to consider 'children who are looked after especially and to promote their welfare (in a way, as though those children were their own). It also relates to care experienced people (people who have spent time in care when they were under 18 years old). The Council must consider how to help overcome the disadvantages and discrimination they experience.*	No impacts identified at this time	No impacts identified at this time	Not applicable

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

This will include your baseline position, measures and studies that have informed your thinking and the recommendation you are making. It should allow you to identify whether any changes resulting from the implementation of the recommendation have had a positive or negative effect. Key strategies and documents that may help you include: Community and Corporate Plan, Asset Management Strategy, Digital and Data Strategy, Medium Term Financial Strategy, People Strategy, Socially Responsible Procurement Strategy: Enabling Strategies See Guidance for more examples.

The increased pattern of storm events and the reliance on mutual aid.

We currently use external suppliers to undertake tachograph calibrations, by upskilling staff we can undertake these checks internally reducing both costs and carbon emissions.

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

This section should summarise the key issues arising from the evaluation. This summary must be included in the Committee Report Template

The proposed increased in gulley and sweeping teams will enable us to improve our management of drainage channels and improve our resilience to flooding events.

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?

10. **VERSION CONTROL: The Integrated Impact Assessment 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 *e.g. budget mandate, DMT, SLT, Scrutiny, Cabinet etc*	Date considered	Brief description of any amendments made following consideration

Name of the Officer Craig O'Connor **Phone no:** 07816175737 **E-mail:** CraigO'Connor@monmouthshire.gov.uk	**Please give a brief description of the aims of the proposal** This assessment considers the potential implications of the proposed budget savings and investments for place and community wellbeing in 26/27.
Name of Service area: Place and Community Wellbeing	**Date :** 07th Jan 2026

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 *Consider the impact on our community in relation to age, e.g. how do we engage with older and younger people about our services, access issues etc. Also consider what issues there are for employment and training.*	No impacts have been identified	No impacts have been identified	N/A
Disability *Consider the impact and what issues there are around each of the disability needs groups e.g. access to buildings/services, how we provide services and the way we do this; producing information in alternative formats, employment issues etc.*	No impacts have been identified	No impacts have been identified	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?
Gender reassignment *Consider the provision of inclusive services for transgender people and groups. Also consider what issues there are for employment and training.*	No impacts have been identified	No impacts have been identified	N/A
Marriage or civil partnership *Same-sex couples registered as civil partners have the same rights as married couples and must be provided with the same benefits, such as survivor pensions, flexible working, maternity/paternity pay and healthcare insurance. Consider the impact of your proposal on these rights.*	No impacts have been identified	No impacts have been identified	N/A
Pregnancy or maternity *A woman is protected from discrimination during her pregnancy, maternity leave and 26 weeks from the day she gives birth. Including the provision of services, goods and facilities and recreational or training facilities. Consider the impact of your proposal on these protections.*	No impacts have been identified	No impacts have been identified	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 *What will the proposal do to promote race equality with the aim of eliminating unlawful discrimination, promoting equality of opportunity and promoting good relations between different racial groups. Think about the potential to affect racial groups differently. Possible issues include providing translation/interpreting services, cultural issues and customs, access to services, issues relating to Asylum Seeker, Refugee, Gypsy & Traveler, migrant communities and recording of racist incidents etc.*	No impacts have been identified	No impacts have been identified	N/A
Religion or Belief *Consider the impact e.g. dietary issues, religious holidays or days associated with religious observance, cultural issues and customs. Also consider what issues there are for employment and training.*	No impacts have been identified	No impacts have been identified	N/A
Sex *Consider what issues there are for men and women. Will this impact disproportionately on one group more than another e.g. equal pay, responsibilities for dependents, issues for carers, access to training, employment issues.*	No impacts have been identified	No impacts have been identified	N/A
Sexual Orientation *Consider the provision of inclusive services for e.g. older and younger people from the Lesbia, Gay and Bi-sexual communities. Also consider what issues there are for employment and training.*	No impacts have been identified	No impacts have been identified	N/A

2. The Socio-economic Duty

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.

Socio-economic disadvantage can be defined as living in less favourable social and economic circumstances than others in society. It also includes social justice, which is about reducing inequalities by working towards more equal distribution of wealth and opportunities so everyone can achieve their full potential.

Consider how the proposal could affect the following vulnerable groups:

Armed Forces Community (including veterans)
Single parents
Vulnerable families
Single adult households
Carers
Students
People living in the most deprived areas
Pensioners
Homeless People
People misusing substances
People who have experienced the asylum system
People involved in the criminal justice system

Socio-economic Duty	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 from socio economic disadvantage.	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts in relation to the Socio-economic disadvantage?
Think of what evidence you have about socio-economic disadvantage and inequalities of outcome in relation to this proposal. Will it impact disproportionately on certain groups? Can the proposals be improved to reduce inequalities of outcome?	No impacts have been identified	Any potential increase in services fees and increase in car parking enforcement is likely to have a detrimental impact on people with low incomes.	N/A

3. Policy making and the Welsh language

What are the effects that the proposals would have on the Welsh language, specifically on opportunities for people to use Welsh and on treating the Welsh language no less favourably than English? How could positive effects be increased, or negative effects be mitigated? Explain how you believe the proposals could be improved so as to have positive effects or increased positive effects on opportunities for people to use the Welsh language and on treating the Welsh language no less favourably than the English language.

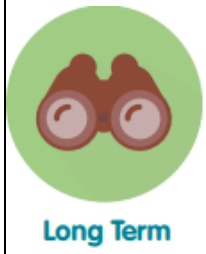
How does your proposal impact on the following aspects of the Council's Welsh Language Standards:	Describe the positive impacts of this proposal	Describe the negative impacts of this proposal	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts
Policy Making: *Consider what impact this policy decision will have on the Welsh Language. This includes opportunities for people to use the language, opportunities to promote the language and treating the language no less favourably that the English language. Include any data and evidence e.g. WESP, Census Data, Cymraeg 2050, Welsh Language Strategy.*	No impacts have been identified	No impacts have been identified	N/A
Operational: **Recruitment & Training of workforce** *Carefully consider whether vacant posts require Welsh language skills as a desirable or essential skill. This is especially pertinent with front line roles as more than 10 % of the population of Monmouthshire speak Welsh. Also, when assessing the need for Welsh language skills keep in mind the existing Welsh language skills within the workforce. In service areas where there is a current lack of Welsh language skills, posts should be advertised as Welsh language essential. Additionally, consider where further training may be needed to increase the number of staff who can speak Welsh and to enhance the skills of current Welsh speakers.*	If any changes to posts are approved, each vacancy will be assessed to determine the Welsh language skills required for the role. All positions will be advertised with Welsh language skills listed as desirable as a minimum requirement.	No impacts have been identified	N/A
Service Delivery: **Use of Welsh language in service delivery** *When advertising our services you must promote the fact that people can deal with the council in Welsh by phone, email, twitter, Facebook, letters, forms, website transactions etc.*	All information across all our platforms is available through the medium of Welsh. The savings proposals have a neutral impact on the Welsh language	The proposals will have a neutral impact on the Welsh Language	N/A

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

Well Being Goals	Describe the positive impacts the proposal has on the wellbeing goal.	Describe the negative impacts the proposal has on the wellbeing goal.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
A prosperous Wales *An innovative, productive and low carbon society which recognises global limits and uses resources efficiently (including acting on climate change); a skilled and well-educated population in an economy which generates wealth and provides jobs.*	Maximizing income and reviewing fees helps sustain local services and jobs. Ongoing growth in leisure services supports local employment. Staff restructure does not result in redundancies.	Increased fees and charges may negatively impact affordability for some residents and businesses.	Monitor the affordability of services and charges.
A resilient Wales *Maintains and enhances a biodiverse natural environment with healthy functioning ecosystems that support social, economic and ecological resilience and the capacity to adapt to change (for example climate change).*	N/A	N/A	N/A
A healthier Wales *People's physical and mental well-being is maximised and in which choices and behaviours that benefit future health are understood.*	Continued promotion and take up of membership of leisure center's promotes physical activity and well-being.	Potential concern of the capacity of leisure centres and recreational services.	Monitor service delivery and user feedback in terms of capacity of leisure centres.
A Wales of cohesive communities *Communities are attractive, viable, safe and well connected*	Expanding car parking enforcement and maintaining community assets supports safer, more attractive communities. Consider technological solutions for car parks.	Increased parking enforcement may be perceived negatively by some residents.	Communicate the rationale for enforcement to ensure highway safety.
A globally responsible Wales *Taking account of impact on global well-being when considering local social, economic and environmental wellbeing*	N/A	N/A	N/A

Well Being Goals	Describe the positive impacts the proposal has on the wellbeing goal.	Describe the negative impacts the proposal has on the wellbeing goal.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
A Wales of vibrant culture and thriving Welsh language *Promotes and protects culture, heritage and the Welsh language, and participation in the arts, and sports and recreation*	N/A	N/A	N/A
A more equal Wales *People can fulfil their potential no matter what their background or circumstances. (This includes the protected characteristics listed in Section 1 above. You can add more detail there. Don't forget to think about the impacts on poverty)*	Staff restructure does not result in redundancies.	Increased fees and fines may disproportionately affect low-income groups.	Monitor the impact of fees increases.

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

Sustainable Development Principles	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?
 Balancing short term need with long term and planning for the future *We are required to look beyond the usual short term timescales for financial planning and political cycles and instead plan with the longer term in mind (guidance says at least 10 years, but preferably 25)*	Aligns with strategic aims including plans for RLDP adoption and longer term highway safety. Increased leisure centre membership will enhance and improve physical well-being of residents.	Ongoing review of long-term risks and opportunities

Sustainable Development Principles	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?
 Working together with other partners to deliver objectives	N/A	N/A
 Involving those with an interest and seeking their views *Who are the stakeholders who will be affected by your proposal? Have they been involved? Do those people reflect the diversity of the area which is served?*	Involvement and consultation aspart of the budget proposals.	Ongoing review and monitoring of the impact of fee increases.
 Putting resources into preventing problems occurring or getting worse	Additional car parking enforcement capacity will improve highway safety.	N/A

Sustainable Development Principles	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?
 Considering impact on all wellbeing goals together and on other bodies *Focus here on how you will better integrate the Wellbeing Goals impacts on people, economy and environment described above and balance any competing impacts. Think about impacts the proposal may have on other organisations*	N/A	N/A

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

	Describe any positive impacts your proposal has	**Describe any negative impacts your proposal has**	**What will you do/ have you done to mitigate any negative impacts or better contribute to positive impacts?**
Safeguarding *Safeguarding in this context applies to children (not yet reached 18th birthday) and adult at risk (identified as a person over the age of 18 and who (a) is experiencing or is at risk of abuse or neglect, (b) has needs for care and support (whether or not the authority is meeting any of those needs), and (c) as a result of those needs is unable to protect himself or herself against the abuse or neglect or the risk of it.) Safeguarding is about ensuring that everything is in place to promote the well-being of children and adults at risk, preventing them from being harmed and protecting those who are at risk of abuse and neglect.*	No impacts have been identified	No impacts have been identified	N/A
Corporate Parenting, Care Leavers and Care Experienced People *This relates to those children who are 'looked after' by the Local Authority either through voluntary arrangements with their parents or through a Court Order. The Council has a corporate duty to consider 'children who are looked after especially and to promote their welfare (in a way, as though those children were their own). It also relates to care experienced people (people who have spent time in care when they were under 18 years old). The Council must consider how to help overcome the disadvantages and discrimination they experience.*	No impacts have been identified	No impacts have been identified	N/A

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

This will include your baseline position, measures and studies that have informed your thinking and the recommendation you are making. It should allow you to identify whether any changes resulting from the implementation of the recommendation have had a positive or negative effect. Key strategies and documents that may help you include: Community and Corporate Plan, Asset Management Strategy, Digital and Data Strategy, Medium Term Financial Strategy, People Strategy, Socially Responsible Procurement Strategy: Enabling Strategies See Guidance for more examples.

Historical and projected budget figures, income generation trends, and cost pressures across key service areas such as Planning, Building Control, Car Parking, and Leisure Services. Anticipated service demand based on recent trends, such as the 35% growth in leisure sector participation over the past 36 months, and projections linked to the adoption of the Replacement Local Development Plan (RLDP). Analysis of current staffing levels and management requirements

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

This section should summarise the key issues arising from the evaluation. This summary must be included in the Committee Report Template

The proposal enables the directorate to maintain essential services despite financial pressures, supporting community wellbeing and local employment. The limited increases in fees and charges may negatively affect residents, particularly low-income groups. The directorate will regularly review the impact of fee changes, service delivery, and income generation to ensure objectives are met and negative effects are minimized.

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

What are you going to do?	When are you going to do it?	Who is responsible?
N/A		

10. **VERSION CONTROL: The Integrated Impact Assessment 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 *e.g. budget mandate, DMT, SLT, Scrutiny, Cabinet etc*	Date considered	Brief description of any amendments made following consideration
1.	*SLT*	09.12.2025	

Name of the Officer completing the evaluation Peter Davies, Deputy Chief Executive **Phone no:** 07398 954828 **E-mail:** peterdavies@monmouthshire.gov.uk	**Please give a brief description of the aims of the proposal** This impact assessment looks to ascertain any impact arising from the draft budget proposals for 2026/27 arising from the Resources directorate, together with mitigating action taken to reduce or eliminate any negative impacts
Name of Service area Resources directorate	**Date** 12th January 2026

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 *Consider the impact on our community in relation to age, e.g. How do we engage with older and younger people about our services, access issues etc. Also consider what issues there are for employment and training.*	No impact has been identified at this time.	No impact has been identified at this time.	Not applicable at this time.
Disability *Consider the impact and what issues there are around each of the disability needs groups e.g. access to buildings/services, how we provide services and the way we do this; producing information in alternative formats, employment issues etc.*	No impact has been identified at this time.	No impact has been identified at this time.	Not applicable at this time.

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 *Consider the provision of inclusive services for transgender people and groups. Also consider what issues there are for employment and training.*	No impact has been identified at this time.	No impact has been identified at this time.	Not applicable at this time.
Marriage or civil partnership *Same-sex couples registered as civil partners have the same rights as married couples and must be provided with the same benefits, such as survivor pensions, flexible working, maternity/paternity pay and healthcare insurance. Consider the impact of your proposal on these rights.*	No impact has been identified at this time.	No impact has been identified at this time.	Not applicable at this time.
Pregnancy or maternity *A woman is protected from discrimination during her pregnancy, maternity leave and 26 weeks from the day she gives birth. Including the provision of services, goods and facilities and recreational or training facilities. Consider the impact of your proposal on these protections.*	No impact has been identified at this time.	No impact has been identified at this time.	Not applicable at this time.

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 *What will the proposal do to promote race equality with the aim of eliminating unlawful discrimination, promoting equality of opportunity and promoting good relations between different racial groups. Think about the potential to affect racial groups differently. Possible issues include providing translation/interpreting services, cultural issues and customs, access to services, issues relating to Asylum Seeker, Refugee, Gypsy & Traveler, migrant communities and recording of racist incidents etc.*	No impact has been identified at this time.	No impact has been identified at this time.	Not applicable at this time.
Religion or Belief *Consider the impact e.g. dietary issues, religious holidays or days associated with religious observance, cultural issues and customs. Also consider what issues there are for employment and training.*	No impact has been identified at this time.	No impact has been identified at this time.	Not applicable at this time.
Sex *Consider what issues there are for men and women. Will this impact disproportionately on one group more than another e.g. equal pay, responsibilities for dependents, issues for carers, access to training, employment issues.*	No impact has been identified at this time.	No impact has been identified at this time.	Not applicable at this time.
Sexual Orientation *Consider the provision of inclusive services for e.g. older and younger people from the Lesbia, Gay and Bi-sexual communities. Also consider what issues there are for employment and training.*	No impact has been identified at this time.	No impact has been identified at this time.	Not applicable at this time.

2. The Socio-economic Duty

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.

Socio-economic disadvantage can be defined as living in less favourable social and economic circumstances than others in society. It also includes social justice, which is about reducing inequalities by working towards more equal distribution of wealth and opportunities so everyone can achieve their full potential.

Consider how the proposal could affect the following vulnerable groups:

Armed Forces Community (including veterans)
Single parents
Vulnerable families
Single adult households
Carers
Students
People living in the most deprived areas
Pensioners
Homeless People
People misusing substances
People who have experienced the asylum system
People involved in the criminal justice system

Socio-economic Duty	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 from socio economic disadvantage.	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts in relation to the Socio-economic disadvantage?
Think of what evidence you have about socio-economic disadvantage and inequalities of outcome in relation to this proposal. Will it impact disproportionately on certain groups? Can the proposals be improved to reduce inequalities of outcome?	No impact has been identified at this time.	No impact has been identified at this time.	Not applicable at this time.

3. Policy making and the Welsh language

What are the effects that the proposals would have on the Welsh language, specifically on opportunities for people to use Welsh and on treating the Welsh language no less favourably than English? How could positive effects be increased, or negative effects be mitigated? Explain how you believe the proposals could be improved so as to have positive effects or increased positive effects on opportunities for people to use the Welsh language and on treating the Welsh language no less favourably than the English language.

How does your proposal impact on the following aspects of the Council's Welsh Language Standards:	Describe the positive impacts of this proposal	Describe the negative impacts of this proposal	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts
Policy Making: *Consider what impact this policy decision will have on the Welsh Language. This includes opportunities for people to use the language, opportunities to promote the language and treating the language no less favourably that the English language. Include any data and evidence e.g. WESP, Census Data, Cymraeg 2050, Welsh Language Strategy.*	No impact has been identified at this time.	No impact has been identified at this time.	Not applicable at this time.
Operational: **Recruitment & Training of workforce** *Carefully consider whether vacant posts require Welsh language skills as a desirable or essential skill. This is especially pertinent with front line roles as more than 10 % of the population of Monmouthshire speak Welsh. Also, when assessing the need for Welsh language skills keep in mind the existing Welsh language skills within the workforce. In service areas where there is a current lack of Welsh language skills, posts should be advertised as Welsh language essential. Additionally, consider where further training may be needed to increase the number of staff who can speak Welsh and to enhance the skills of current Welsh speakers.*	Any resultant staffing changes during 2026/27 will have full regard to any posts that might require Welsh language skills. Due regard will be given to the number of staff who can speak Welsh, with focus particularly in resident and customer facing roles.	No impact has been identified at this time.	Not applicable at this time.
Service Delivery: **Use of Welsh language in service delivery** *When advertising our services you must promote the fact that people can deal with the council in Welsh by phone, email, twitter, Facebook, letters, forms, website transactions etc.*	Services already ensure that where services are being advertised that people can be communicated with in Welsh if required. Nothing by way of the draft budget proposals affects	No impact has been identified at this time.	Not applicable at this time.

	this.		

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 Goals	Describe the positive impacts the proposal has on the wellbeing goal.	Describe the negative impacts the proposal has on the wellbeing goal.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
A prosperous Wales *An innovative, productive and low carbon society which recognises global limits and uses resources efficiently (including acting on climate change); a skilled and well-educated population in an economy which generates wealth and provides jobs.*	No impact has been identified at this time as a direct result of the draft budget proposals for the directorate.	No impact has been identified at this time.	Not applicable at this time.
A resilient Wales *Maintains and enhances a biodiverse natural environment with healthy functioning ecosystems that support social, economic and ecological resilience and the capacity to adapt to change (for example climate change).*	No impact has been identified at this time.	As above	As above
A healthier Wales *People's physical and mental well-being is maximised and in which choices and behaviours that benefit future health are understood.*	No impact has been identified at this time.	No impact has been identified at this time.	Not applicable at this time.
A Wales of cohesive communities *Communities are attractive, viable, safe and well connected*	No impact has been identified at this time.	No impact has been identified at this time.	Not applicable at this time.
A globally responsible Wales *Taking account of impact on global well-being when considering local*	No impact has been identified at this time.	No impact has been identified at this time.	Not applicable at this time.

Well Being Goals	Describe the positive impacts the proposal has on the wellbeing goal.	Describe the negative impacts the proposal has on the wellbeing goal.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
social, economic and environmental wellbeing			
A Wales of vibrant culture and thriving Welsh language *Promotes and protects culture, heritage and the Welsh language, and participation in the arts, and sports and recreation*	No impact has been identified at this time.	No impact has been identified at this time.	Not applicable at this time.
A more equal Wales *People can fulfil their potential no matter what their background or circumstances. (This includes the protected characteristics listed in Section 1 above. You can add more detail there. Don't forget to think about the impacts on poverty)*	No impact has been identified at this time.	No impact has been identified at this time.	Not applicable at this time.

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

Sustainable Development Principles	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?
 Balancing short term need with long term and planning for the future *We are required to look beyond the usual short term timescales for financial planning and political cycles and instead plan with the longer term in mind (guidance says at least 10 years, but preferably 25)*	The draft budget proposals for the directorate look to ensure that the services and enabling functions are sustainable and in meeting both the current and future needs of services, residents and businesses. Ensuring that land and property assets are well managed, utilised and contributing broadly and specifically to meeting net zero and climate and biodiversity ambitions.	None identified at this time.

Sustainable Development Principles	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?
 Collaboration Working together with other partners to deliver objectives	The draft budget proposals and service delivery more generally across the directorate will require close partnership working through existing collaborations (e.g. The Shared Resource Service, Shared Revenue and Benefits Service) or where services are provided through established arrangements to other public sector partners (e.g. Gwent Police). The nature of these arrangements will such as to ensure that the Council and other partners objectives are always met.	None identified at this time as a consequence of the draft budget proposals for the directorate.
 Involvement Involving those with an interest and seeking their views *Who are the stakeholders who will be affected by your proposal? Have they been involved? Do those people reflect the diversity of the area which is served?*	The draft budget proposals will undergo a four-week public consultation that will allow stakeholders to share their views and provide feedback on the proposals. In so far as the directorate budget proposals are concerned no impacts have been identified.	None identified at this time as a consequence of the draft budget proposals for the directorate.
 Prevention Putting resources into preventing problems occurring or getting worse	The directorate budget proposals look to ensure that the enabling functions across the directorate, that support services and the Council more generally in the delivery of its objectives, are both fit for purpose and sustainable.	None identified at this time as a consequence of the draft budget proposals for the directorate.

Sustainable Development Principles	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?
 Considering impact on all wellbeing goals together and on other bodies *Focus here on how you will better integrate the Wellbeing Goals impacts on people, economy and environment described above and balance any competing impacts. Think about impacts the proposal may have on other organisations*	A careful balance always has to be struck between meeting short and long-term needs. However, maintaining sustainability across the services the directorate provides is key notwithstanding the budgetary challenges and pressures that have had to be managed and accommodated by way of mitigating actions.	None identified at this stage.

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

	Describe any positive impacts your proposal has	**Describe any negative impacts your proposal has**	**What will you do/ have you done to mitigate any negative impacts or better contribute to positive impacts?**
Safeguarding *Safeguarding in this context applies to children (not yet reached 18th birthday) and adult at risk (identified as a person over the age of 18 and who (a) is experiencing or is at risk of abuse or neglect, (b) has needs for care and support (whether or not the authority is meeting any of those needs), and (c) as a result of those needs is unable to protect himself or herself against the abuse or neglect or the risk of it.) Safeguarding is about ensuring that everything is in place to promote the well-being of children and adults at risk, preventing them from being harmed and protecting those who are at risk of abuse and neglect.*	No impact has been identified at this time.	No impact has been identified at this time.	Not applicable at this time.
Corporate Parenting, Care Leavers and Care Experienced People *This relates to those children who are 'looked after' by the Local Authority either through voluntary arrangements with their parents or through a Court Order. The Council has a corporate duty to consider 'children who are looked after especially and to promote their welfare (in a way, as though those children were their own). It also relates to care experienced people (people who have spent time in care when they were under 18 years old). The Council must consider how to help overcome the disadvantages and discrimination they experience.*	No impact has been identified at this time.	No impact has been identified at this time.	Not applicable at this time.

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

This will include your baseline position, measures and studies that have informed your thinking and the recommendation you are making. It should allow you to identify whether any changes resulting from the implementation of the recommendation have had a positive or negative effect. Key strategies and documents that may help you include: Community and Corporate Plan, Asset Management Strategy, Digital and Data Strategy, Medium Term Financial Strategy, People Strategy, Socially Responsible Procurement Strategy: Enabling Strategies See Guidance for more examples.

Community and Corporate Plan Medium Term Financial Strategy Asset Management Strategy Digital and Data Strategy Corporate H&S Annual Report Internal Audit plan Directorate budget plan Budget monitoring reports and supporting data Existing contracts and agreements

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

This section should summarise the key issues arising from the evaluation. This summary must be included in the Committee Report Template

Given the nature of the Directorate and its functions and services, and the nature of the budget pressures and mitigating actions taken to bring forward efficiencies and savings there are no significant positive or negative impacts arising from the draft budget proposals for the Resources directorate.

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?
No further actions considered necessary,		

10. VERSION CONTROL: The Integrated Impact Assessment 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** *e.g. budget mandate, DMT, SLT, Scrutiny, Cabinet etc*	**Date considered**	**Brief description of any amendments made following consideration**

Name of the Officer: Matthew Gatehouse **Phone no: 0778 555 6727** **E-mail: matthewgatehouse@monmouthshire.gov.uk**	**Please give a brief description of the aims of the proposal:** Various across the Chief Executive's department incorporating policy, performance and partnerships
Name of Service area: People, Performance and Partnerships	**Date:** 9/1/2026

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 *Consider the impact on our community in relation to age, e.g. how do we engage with older and younger people about our services, access issues etc. Also consider what issues there are for employment and training.*	None identified at this stage. The investments will benefit people of all ages.	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?
Disability *Consider the impact and what issues there are around each of the disability needs groups e.g. access to buildings/services, how we provide services and the way we do this; producing information in alternative formats, employment issues etc.*	National data about users of Citizens Advice services show 29% of people reporting mental health issues which is above the national average. Local data highlights that 57% of users of the service in Monmouthshire were disabled or had a long-term health condition.	None identified at this stage	n/a
Gender reassignment *Consider the provision of inclusive services for transgender people and groups. Also consider what issues there are for employment and training.*	None identified at this stage.	None identified at this stage	n/a
Marriage or civil partnership *Same-sex couples registered as civil partners have the same rights as married couples and must be provided with the same benefits, such as survivor pensions, flexible working, maternity/paternity pay and healthcare insurance. Consider the impact of your proposal on these rights.*	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?
Pregnancy or maternity *A woman is protected from discrimination during her pregnancy, maternity leave and 26 weeks from the day she gives birth. Including the provision of services, goods and facilities and recreational or training facilities. Consider the impact of your proposal on these protections.*	Citizens Advice offers guidance to local people on pregnancy and maternity rights, covering pay, leave, discrimination, and safety at work. Increased funding will enable local people to continue to access this support and advice.	None identified at this stage	n/a
Race *What will the proposal do to promote race equality with the aim of eliminating unlawful discrimination, promoting equality of opportunity and promoting good relations between different racial groups. Think about the potential to affect racial groups differently. Possible issues include providing translation/interpreting services, cultural issues and customs, access to services, issues relating to Asylum Seeker, Refugee, Gypsy & Traveler, migrant communities and recording of racist incidents etc.*	National data suggests the ethnicity of citizens advice mirrors that of the wider population indicating that the impact for this group will not differ from that in the wider population.	See comment in left hand column	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?
Religion or Belief *Consider the impact e.g. dietary issues, religious holidays or days associated with religious observance, cultural issues and customs. Also consider what issues there are for employment and training.*	None identified at this stage	None identified at this stage	n/a
Sex *Consider what issues there are for men and women. Will this impact disproportionately on one group more than another e.g. equal pay, responsibilities for dependents, issues for carers, access to training, employment issues.*	Approximately 55% of users of citizens advice services are women. Any increase in grant funding should have a proportionally higher benefit on this group. A higher proportion of staff working irregular hours are women. This is the staff group who will see the benefits from a new system to record and accurately pay holiday entitlements.	None identified at this stage	Continue to make use of all staff wellbeing resources, including stress risk assessments to understand and mitigate demands placed on staff.
Sexual Orientation *Consider the provision of inclusive services for e.g. older and younger people from the Lesbia, Gay and Bi-sexual communities. Also consider what issues there are for employment and training.*	None identified at this stage.	None identified at this stage	n/a

2. The Socio-economic Duty

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.

Socio-economic disadvantage can be defined as living in less favourable social and economic circumstances than others in society. It also includes social justice, which is about reducing inequalities by working towards more equal distribution of wealth and opportunities so everyone can achieve their full potential.

Consider how the proposal could affect the following vulnerable groups:

Armed Forces Community (including veterans)
Single parents
Vulnerable families
Single adult households
Carers
Students
People living in the most deprived areas
Pensioners
Homeless People
People misusing substances
People who have experienced the asylum system
People involved in the criminal justice system

Socio-economic Duty	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 from socio economic disadvantage.	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts in relation to the Socio-economic disadvantage?
Think of what evidence you have about socio-economic disadvantage and inequalities of outcome in relation to this proposal. Will it impact disproportionately on certain groups? Can the proposals be improved to reduce inequalities of outcome?	Users of citizens advice are more likely to come from those experiencing socio economic disadvantage. Local data shows that users of the service are more likely to come from areas suffering economic deprivation. An increase in funding is likely to have a positive effect on this group with analysis indicating that £6,578,970 of value was generated for local people from the work of this agency.	None identified at this stage	An increase in funding for citizens advice is likely to have a positive impact as it will increase support for those suffering economic disadvantage.

3. Policy making and the Welsh language

What are the effects that the proposals would have on the Welsh language, specifically on opportunities for people to use Welsh and on treating the Welsh language no less favourably than English? How could positive effects be increased, or negative effects be mitigated? Explain how you believe the proposals could be improved so as to have positive effects or increased positive effects on opportunities for people to use the Welsh language and on treating the Welsh language no less favourably than the English language.

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!

How does your proposal impact on the following aspects of the Council's Welsh Language Standards:	**Describe the positive impacts of this proposal**	**Describe the negative impacts of this proposal**	**What has been/will be done to mitigate any negative impacts or better contribute to positive impacts**
Policy Making: *Consider what impact this policy decision will have on the Welsh Language. This includes opportunities for people to use the language, opportunities to promote the language and treating the language no less favourably that the English language. Include any data and evidence e.g. WESP, Census Data, Cymraeg 2050, Welsh Language Strategy.*	None identified at this stage	None identified at this stage	Not applicable
Operational: *Recruitment & Training of workforce* *Carefully consider whether vacant posts require Welsh language skills as a desirable or essential skill. This is especially pertinent with front line roles as more than 10 % of the population of Monmouthshire speak Welsh. Also, when assessing the need for Welsh language skills keep in mind the existing Welsh language skills within the workforce. In service areas where there is a current lack of Welsh language skills, posts should be advertised as Welsh language essential. Additionally, consider where further training may be needed to increase the number of staff who can speak Welsh and to enhance the skills of current Welsh speakers*.	All vacant posts are assessed to determine the Welsh language skills required. Every role is advertised with Welsh language skills listed as either essential or desirable.	None identified at this stage	Not applicable
Service Delivery: **Use of Welsh language in service delivery** *When advertising our services you must promote the fact that people can deal with the council in Welsh by phone, email, twitter, Facebook, letters, forms, website transactions etc.*	None identified at this stage	None identified at this stage	Not applicable

Well Being Goals	Describe the positive impacts the proposal has on the wellbeing goal.	Describe the negative impacts the proposal has on the wellbeing goal.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
A prosperous Wales *An innovative, productive and low carbon society which recognises global limits and uses resources efficiently (including acting on climate change); a skilled and well-educated population in an economy which generates wealth and provides jobs.*	Analysis shows that £6,578,970 of value was generated for local people from the work of Citizens Advice in Monmouthshire. This increases the spending power of local people increasing prosperity. Maintaining funding for the Cardiff Capital Region will ensure it can continue to foster economic growth, innovation, and sustainable development	None identified at this stage	Not applicable
A resilient Wales *Maintains and enhances a biodiverse natural environment with healthy functioning ecosystems that support social, economic and ecological resilience and the capacity to adapt to change (for example climate change).*	None identified at this stage	None identified at this stage	Not applicable
A healthier Wales *People's physical and mental well-being is maximised and in which choices and behaviours that benefit future health are understood.*	Increased funding for Citizens Advice would be expected to have a positive impact on health and well-being. For example, the service is able to help maximise household incomes, improving opportunities for activities associated with improved well-being.	None identified at this stage	Not applicable
A Wales of cohesive communities *Communities are attractive, viable, safe and well connected*	Increased funding for Citizens Advice would be expected to have a positive impact on inequality by raising incomes of those who are less well-off. Greater equality between people is correlated	None identified at this stage	Not applicable

Well Being Goals	Describe the positive impacts the proposal has on the wellbeing goal.	Describe the negative impacts the proposal has on the wellbeing goal.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
	with a range of improved outcomes including community cohesion.		
A globally responsible Wales *Taking account of impact on global well-being when considering local social, economic and environmental wellbeing*	None identified at this stage	None identified at this stage	Not applicable
A Wales of vibrant culture and thriving Welsh language *Promotes and protects culture, heritage and the Welsh language, and participation in the arts, and sports and recreation*	None identified at this stage	None identified at this stage	Not applicable
A more equal Wales *People can fulfil their potential no matter what their background or circumstances. (This includes the protected characteristics listed in Section 1 above. You can add more detail there. Don't forget to think about the impacts on poverty)*	Increased funding for Citizens Advice would be expected to have a positive impact on inequality by raising incomes of those who are less well-off.	None identified at this stage	Not applicable

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

Sustainable Development Principles	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?
 Balancing short term need with long term and planning for the future *We are required to look beyond the usual short term timescales for financial planning and political cycles and instead plan with the longer term in mind (guidance says at least 10 years, but preferably 25)*	The budget proposals consider both immediate pressures and future needs, such as investing in digital solutions, new payroll systems, and staff development. These measures are designed to address current challenges while planning for sustainable service delivery and workforce resilience over the long term.	
 Working together with other partners to deliver objectives	There is a clear emphasis on working with partners such as Ardal (for procurement), SRS (for automation/AI), and Citizens Advice Monmouthshire. The proposals reflect ongoing engagement with stakeholders to identify needs and risks, and to deliver shared objectives.	
 Involving those with an interest and seeking their views *Who are the stakeholders who will be affected by your proposal? Have they been involved? Do those people reflect the diversity of the area which is served?*	Stakeholders, including staff, residents, and service users, are involved through consultation and engagement activities. The proposals are informed by data and feedback from those affected, ensuring that diverse perspectives are considered in decision-making.	

Sustainable Development Principles	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?
 Putting resources into preventing problems occurring or getting worse	Resources are allocated to prevent problems from escalating, for example, by investing in systems to ensure compliance with new holiday pay legislation and supporting the Citizens Advice service to mitigate the impact of economic deprivation. These actions help avoid future legal, financial, and social issues.	
 Considering impact on all wellbeing goals together and on other bodies *Focus here on how you will better integrate the Wellbeing Goals impacts people, economy and environment described above and balance any competing impacts. Think about impacts the proposal may have on other organisations*	The proposals integrate multiple wellbeing goals, including economic prosperity, health, equality, and community cohesion. Funding decisions are made with consideration of their impact on residents, staff, and vulnerable groups, ensuring that the benefits are distributed across the community.	

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

	Describe any positive impacts your proposal has	**Describe any negative impacts your proposal has**	**What will you do/ have you done to mitigate any negative impacts or better contribute to positive impacts?**
Safeguarding *Safeguarding in this context applies to children (not yet reached 18th birthday) and adult at risk (identified as a person over the age of 18 and who (a) is experiencing or is at risk of abuse or neglect, (b) has needs for care and support (whether or not the authority is meeting any of those needs), and (c) as a result of those needs is unable to protect himself or herself against the abuse or neglect or the risk of it.) Safeguarding is about ensuring that everything is in place to promote the well-being of children and adults at risk, preventing them from being harmed and protecting those who are at risk of abuse and neglect.*	None identified at this stage	None identified at this stage	n/a
Corporate Parenting, Care Leavers and Care Experienced People *This relates to those children who are 'looked after' by the Local Authority either through voluntary arrangements with their parents or through a Court Order. The Council has a corporate duty to consider 'children who are looked after especially and to promote their welfare (in a way, as though those children were their own). It also relates to care experienced people (people who have spent time in care when they were under 18 years old). The Council must consider how to help overcome the disadvantages and discrimination they experience.*	Increasing the resources for Subject Access requests will improve responsiveness. A significant proportion of requests come from people who have been in the care system.	None identified at this stage	n/a

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

This will include your baseline position, measures and studies that have informed your thinking and the recommendation you are making. It should allow you to identify whether any changes resulting from the implementation of the recommendation have had a positive or negative effect. Key strategies and documents that may help you include: Community and Corporate Plan, Asset Management Strategy, Digital and Data Strategy, Medium Term Financial Strategy, People Strategy, Socially Responsible Procurement Strategy: Enabling Strategies See Guidance for more examples.

This has been informed by the data highlighted in the above proposal including:

- An upward trend of subject access requests
- Evidence of impact of the Citizen's Advice Service

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

This section should summarise the key issues arising from the evaluation. This summary must be included in the Committee Report Template

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?

10. VERSION CONTROL: The Integrated Impact Assessment 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** *e.g. budget mandate, DMT, SLT, Scrutiny, Cabinet etc*	**Date considered**	**Brief description of any amendments made following consideration**
1	SLT	9/12/25	
2	Informal Cabinet	Dec/Jan	

Integrated Impact Assessment Template

(incorporating Equalities, Socio-economic Duty, Future Generations, Welsh Language Measures, Corporate Parenting)

Name of the Officer completing the evaluation	**Please give a brief description of the aims of the proposal**
James Williams **Phone no: 07568480177** **E-mail: jameswilliams@monmouthshire.gov.uk**	This impact assessment looks to ascertain any negative impact arising from the draft budget proposals for 2026/27 arising from the Law & Governance directorate, together with mitigating action taken to reduce or eliminate any negative impact.
Name of Service area Law & Governance	**Date** **1.12.25**

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 *Consider the impact on our community in relation to age, e.g. how do we engage with older and younger people about our services, access issues etc. Also consider what issues there are for employment and training.*	None identified	None identified	n/a

Disability *Consider the impact and what issues there are around each of the disability needs groups e.g. access to buildings/services, how we provide services and the way we do this; producing information in alternative formats, employment issues etc.*	None identified	None identified	n/a
Gender reassignment *Consider the provision of inclusive services for transgender people and groups. Also consider what issues there are for employment and training.*	None identified	None identified	n/a
Marriage or civil partnership *Same-sex couples registered as civil partners have the same rights as married couples and must be provided with the same benefits, such as survivor pensions, flexible working, maternity/paternity pay and healthcare insurance. Consider the impact of your proposal on these rights.*	None identified	None identified	n/a
Pregnancy or maternity *A woman is protected from discrimination during her pregnancy, maternity leave and 26 weeks from the day she gives birth. Including the provision of services, goods and facilities and recreational or training facilities. Consider the impact of your proposal on these protections.*	None identified	None identified	n/a

Race *What will the proposal do to promote race equality with the aim of eliminating unlawful discrimination, promoting equality of opportunity and promoting good relations between different racial groups. Think about the potential to affect racial groups differently. Possible issues include providing translation/interpreting services, cultural issues and customs, access to services, issues relating to Asylum Seeker, Refugee, Gypsy & Traveler, migrant communities and recording of racist incidents etc.*	None identified	None identified	n/a
Religion or Belief *Consider the impact e.g. dietary issues, religious holidays or days associated with religious observance, cultural issues and customs. Also consider what issues there are for employment and training.*	None identified	None identified	n/a
Sex *Consider what issues there are for men and women. Will this impact disproportionately on one group more than another e.g. equal pay, responsibilities for dependents, issues for carers, access to training, employment issues.*	None identified	None identified	n/a

Sexual Orientation *Consider the provision of inclusive services for e.g. older and younger people from the Lesbia, Gay and Bi-sexual communities. Also consider what issues there are for employment and training.*	None identified	None identified	n/a

2. The Socio-economic Duty

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.

Socio-economic disadvantage can be defined as living in less favourable social and economic circumstances than others in society. It also includes social justice, which is about reducing inequalities by working towards more equal distribution of wealth and opportunities so everyone can achieve their full potential.

Consider how the proposal could affect the following vulnerable groups:

Armed Forces Community (including veterans)
Single parents
Vulnerable families
Single adult households
Carers
Students
People living in the most deprived areas
Pensioners
Homeless People
People misusing substances
People who have experienced the asylum system
People involved in the criminal justice system

Socio-economic Duty	**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 from socio economic disadvantage.**	**What has been/will be done to mitigate any negative impacts or better contribute to positive impacts in relation to the Socio-economic disadvantage?**

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
Think of what evidence you have about socio-economic disadvantage and inequalities of outcome in relation to this proposal. Will it impact disproportionately on certain groups? Can the proposals be improved to reduce inequalities of outcome?	None identified	None identified	n/a

3. Policy making and the Welsh language

What are the effects that the proposals would have on the Welsh language, specifically on opportunities for people to use Welsh and on treating the Welsh language no less favourably than English? How could positive effects be increased, or negative effects be mitigated? Explain how you believe the proposals could be improved so as to have positive effects or increased positive effects on opportunities for people to use the Welsh language and on treating the Welsh language no less favourably than the English language.

Policy Making: *Consider what impact this policy decision will have on the Welsh Language. This includes opportunities for people to use the language, opportunities to promote the language and treating the language no less favourably that the English language. Include any data and evidence e.g. WESP, Census Data, Cymraeg 2050, Welsh Language Strategy.*	None identified	None identified	n/a
Operational: **Recruitment & Training of workforce** *Carefully consider whether vacant posts require Welsh language skills as a desirable or essential skill. This is especially pertinent with front line roles as more than 10 % of the population of Monmouthshire speak Welsh. Also, when assessing the need for Welsh language skills keep in mind the existing Welsh language skills within the workforce. In service areas where there is a current lack of Welsh language skills, posts should be advertised as Welsh language essential. Additionally, consider where further training may be needed to increase the number of staff who can speak Welsh and to enhance the skills of current Welsh speakers.*	None identified	None identified	n/a
Service Delivery: **Use of Welsh language in service delivery** *When advertising our services you must promote the fact that people can deal with the council in Welsh by phone, email, twitter, Facebook, letters, forms, website transactions etc.*	None identified	None identified	n/a

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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 Goals	Describe the positive impacts the proposal has on the wellbeing goal.	Describe the negative impacts the proposal has on the wellbeing goal.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
A prosperous Wales *An innovative, productive and low carbon society which recognises global limits and uses resources efficiently (including acting on climate change); a skilled and well-educated population in an economy which generates wealth and provides jobs.*	None identified	None identified	n/a
A resilient Wales *Maintains and enhances a biodiverse natural environment with healthy functioning ecosystems that support social, economic and ecological resilience and the capacity to adapt to change (for example climate change).*	None identified	None identified	n/a
A healthier Wales *People's physical and mental well-being is maximised and in which choices and behaviours that benefit future health are understood.*	None identified	None identified	n/a
A Wales of cohesive communities *Communities are attractive, viable, safe and well connected*	None identified	None identified	n/a
A globally responsible Wales	None identified	None identified	n/a

Taking account of impact on global well-being when considering local social, economic and environmental wellbeing			
A Wales of vibrant culture and thriving Welsh language *Promotes and protects culture, heritage and the Welsh language, and participation in the arts, and sports and recreation*	None identified	None identified	n/a
A more equal Wales *People can fulfil their potential no matter what their background or circumstances. (This includes the protected characteristics listed in Section 1 above. You can add more detail there. Don't forget to think about the impacts on poverty)*	None identified	None identified	n/a

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

Sustainable Development Principles	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?
 Long Term Balancing short term need with long term and planning for the future *We are required to look beyond the usual short term timescales for financial planning and political cycles and instead plan with the longer term in mind (guidance says at least 10 years, but preferably 25)*	*n/a*	n/a
 Collaboration Working together with other partners to deliver objectives	n/a	n/a
 Involvement Involving those with an interest and seeking their views *Who are the stakeholders who will be affected by your proposal? Have they been involved? Do those people reflect the diversity of the area which is served?*	*N/a*	n/a

Sustainable Development Principles	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?
 Putting resources into preventing problems occurring or getting worse	n/a	n/a
 Considering impact on all wellbeing goals together and on other bodies *Focus here on how you will better integrate the Wellbeing Goals impacts on people, economy and environment described above and balance any competing impacts. Think about impacts the proposal may have on other organisations*	n/a	n/a

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

	Describe any positive impacts your proposal has	**Describe any negative impacts your proposal has**	**What will you do/ have you done to mitigate any negative impacts or better contribute to positive impacts?**
Safeguarding *Safeguarding in this context applies to children (not yet reached 18th birthday) and adult at risk (identified as a person over the age of 18 and who (a) is experiencing or is at risk of abuse or neglect, (b) has needs for care and support (whether or not the authority is meeting any of those needs), and (c) as a result of those needs is unable to protect himself or herself against the abuse or neglect or the risk of it.) Safeguarding is about ensuring that everything is in place to promote the well-being of children and adults at risk, preventing them from being harmed and protecting those who are at risk of abuse and neglect.*	None identified	None identified	n/a

Corporate Parenting, Care Leavers and Care Experienced People *This relates to those children who are 'looked after' by the Local Authority either through voluntary arrangements with their parents or through a Court Order. The Council has a corporate duty to consider 'children who are looked after especially and to promote their welfare (in a way, as though those children were their own). It also relates to care experienced people (people who have spent time in care when they were under 18 years old). The Council must consider how to help overcome the disadvantages and discrimination they experience.*	None identified	None identified	n/a

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

This will include your baseline position, measures and studies that have informed your thinking and the recommendation you are making. It should allow you to identify whether any changes resulting from the implementation of the recommendation have had a positive or negative effect. Key strategies and documents that may help you include: Community and Corporate Plan, Asset Management Strategy, Digital and Data Strategy, Medium Term Financial Strategy, People Strategy, Socially Responsible Procurement Strategy: Enabling Strategies See Guidance for more examples.

The proposals were developed from a review of the budget position and attempting to identify possible savings/income generation. As a internal advisory function, none of the proposals have an impact on service delivery.

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

This section should summarise the key issues arising from the evaluation. This summary must be included in the Committee Report Template

n/a

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

What are you going to do?	When are you going to do it?	Who is responsible?
n/a		

10. **VERSION CONTROL: The Integrated Impact Assessment 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** *e.g. budget mandate, DMT, SLT, Scrutiny, Cabinet etc*	**Date considered**	**Brief description of any amendments made following consideration**

Appendix 4 - Draft 2026/27 Capital budget and indicative forward programme

Capital budget	Approved Budget 2025/26	Draft Budget 2026/27	Indicative Budget 2027/28	Indicative Budget 2028/29	Indicative Budget 2029/30
Expenditure	**£**	**£**	**£**	**£**	**£**
Property Maintenance	1,872,357	2,157,552	1,653,357	1,653,357	1,653,357
Property Maintenance Fees	236,194	236,194	236,194	236,194	236,194
County Farms Maintenance	300,773	300,773	300,773	300,773	300,773
Upgrade School Kitchens	39,725	39,725	39,725	39,725	39,725
Asset Management Schemes	**2,449,049**	**2,734,244**	**2,230,049**	**2,230,049**	**2,230,049**
Abergavenny 3-19 school	12,232,076	0	0	0	0
School Development Schemes	**12,232,076**	**0**	**0**	**0**	**0**
Carriageway major works	1,136,540	1,660,000	1,136,540	1,136,540	1,136,540
Carriageways & Structures - additional improvements	2,743,000	1,312,000	1,312,000	1,312,000	1,312,000
Safety fence upgrades	76,181	0	76,181	76,181	76,181
Footway Reconstruction	197,453	500,000	197,453	197,453	197,453
Reconstruction of bridges & retaining walls	449,041	1,720,580	449,041	449,041	449,041
Chainbridge Refurbishment	0	2,457,000	2,500,000		
Road safety & trafficman programme	161,508	161,508	129,508	129,508	129,508
Signing upgrades & disabled facilities	38,091	38,091	38,091	38,091	38,091
Street Lighting Defect Column Programme	171,408	171,408	171,408	171,408	171,408
Flood Alleviation Schemes	30,427	30,750	11,427	11,427	11,427
Drainage & Gully works	375,000	375,000	375,000	375,000	375,000
Structural Repairs - Public rights of way	437,091	419,800	118,091	118,091	118,091
Survey's and Closures - Public rights of way	90,000	140,000	90,000	90,000	90,000
Car Park Improvements	0	100,000			
Ash Dieback/Dangerous Trees works	170,000	100,000	100,000	100,000	100,000
Infrastructure & Transport Schemes	**6,075,740**	**9,186,137**	**6,704,740**	**4,204,740**	**4,204,740**
Capital Region City Deal	730,200	730,200	730,200	730,200	730,200
S106 Schemes	287,524	0	0	0	0
Regeneration Schemes	**1,017,724**	**730,200**	**730,200**	**730,200**	**730,200**
Disabled Facilities Grant	900,000	900,000	900,000	900,000	900,000
Access for all - Schools	50,000	50,000	50,000	50,000	50,000

Capital budget	Approved Budget 2025/26	Draft Budget 2026/27	Indicative Budget 2027/28	Indicative Budget 2028/29	Indicative Budget 2029/30
Access For All	250,000	250,000	250,000	250,000	250,000
Inclusion Schemes	**1,200,000**	**1,200,000**	**1,200,000**	**1,200,000**	**1,200,000**
ICT Hardware replacement	126,000	139,000	260,000	260,000	260,000
Network Estate replacement	100,000	50,000	50,000	50,000	50,000
SRS capital reserve contribution	61,000	61,000	61,000	61,000	61,000
Business world upgrade transition	40,000	0	0	0	0
Asset Management software transition	51,000	0	0	0	0
Ransomware & security	84,500	136,655	42,000	42,000	42,000
ICT Schemes	**462,500**	**386,655**	**413,000**	**413,000**	**413,000**
Vehicle Leasing	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000
Vehicles Leasing	**1,500,000**	**1,500,000**	**1,500,000**	**1,500,000**	**1,500,000**
Capitalisation Directive	3,707,500	2,707,500	1,707,500	707,500	0
Capitalisation Directive	**3,707,500**	**2,707,500**	**1,707,500**	**707,500**	**0**
Fixed Asset Disposal Costs	50,000	50,000	50,000	50,000	50,000
Match Funding of Grant applications	500,000	500,000	500,000	500,000	500,000
Contingency budget	0	0	610,000	610,000	610,000
Other Schemes	**550,000**	**550,000**	**1,160,000**	**1,160,000**	**1,160,000**
Total Expenditure	**29,194,590**	**18,994,737**	**15,645,490**	**12,145,490**	**11,437,990**

Funding	£	£	£	£	£
Supported Borrowing	(2,432,000)	(2,406,000)	(2,406,000)	(2,406,000)	(2,406,000)
Unsupported Borrowing	(18,068,566)	(6,942,937)	(4,256,990)	(4,256,990)	(4,256,990)
Grants & Contributions	(3,333,524)	(4,692,000)	(3,872,000)	(3,122,000)	(3,122,000)
Reserve Funded	(103,000)	(197,655)	(103,000)	(103,000)	(103,000)
Capital Receipts	(3,757,500)	(2,757,500)	(1,757,500)	(757,500)	(50,000)
Vehicle Lease Financing	(1,500,000)	(1,500,000)	(1,500,000)	(1,500,000)	(1,500,000)
Total Funding	**(29,194,590)**	**(18,496,092)**	**(13,895,490)**	**(12,145,490)**	**(11,437,990)**

(Surplus) / Deficit	**0**	**498,645**	**1,750,000**	**0**	**0**

Appendix 5 – Response to Welsh Government on the Provisional Settlement

Re: Local Government Provisional Settlement 2026/27

Thank you for the opportunity to comment on the Provisional Settlement announced on 24th November 2025.

It is welcomed that the Welsh Government were able to propose a 2.7% average increase in the local government provisional settlement for 2026/27, with a funding floor that looked to ensure that no local authority had an increase of 2.3%.

Furthermore, the resultant budget agreement between Welsh Government and Plaid Cymru confirmed by Welsh Government on the 9th December, that will see local authorities now receiving an average 4.5% increase and no local authority receiving an increase of less than 4.0%, was again well received. Understanding that this will now feature as part Welsh Government's final budget and the final local government settlement.

Taken together this funding to local government assists further to allow the Council to address the burden of pressures and demands on frontline services whilst ensuring that a focus is maintained on prevention and in delivering the Council's core priorities.

Your letter of 24th November acknowledges the challenges local authorities have been facing and continue to face. Difficult local choices still remain in setting the budget for 2026/27, with the Council having to accommodate £17.5m of pressures in its draft budget proposals. Despite this our draft budget proposals continue to focus on tackling inequalities and protecting the most vulnerable in our society, seeing increases in funding with Social care & health increasing by 5.6% and for Education by 4.7%.

We welcome the ongoing and constructive discussions with you and your officials. The improved settlement and the wider flexibilities being considered assist in mitigating any further impact on services as the Council looks to address a remaining budget gap of £1m.

The Council is also having to consider raising council tax to avoid any adverse impacts on social care, schools and frontline services.

On 21st January 2026, Cabinet will publish its draft budget proposals for public feedback and review for a four-week period. At the meeting, Cabinet will note this response to the provisional settlement and that reflects the opinions of members.

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

In response to the consultation on the provisional settlement we would make the following points:

Core funding considerations

a) Monmouthshire relies on council tax to fund its services more than any other council in Wales. Council tax will have to go up again in 2026/27 because of the financial challenges facing the council. Striking the right balance between council tax increases and the reduction of services that support the most vulnerable in our community is not easy and involves inherent choice.

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

b) The overall Welsh Government Settlement for 2026-27 was more than was expected when set against the UK Government's spending review and Autumn Budget.

   We are grateful to Welsh Government in their support to prioritise public services in recent years and for 2026/27. Whilst we continue to carry the same optimism about the future there remains a clear risk about the possibility of further real term reductions in public funding beyond 2026-27 as the concerns around economic growth and stability globally and in the UK continue.

   Multi-year settlements for resource and capital being provided remain essential to support medium-term financial planning by the Council and public services at large in Wales.

   We look forward to any future Welsh Government in turn being able to provide a multi-year indicative local government settlement budget as part of its next budget.

   In the meantime, we urge Welsh Government to make the strongest case possible to UK Government for a fair distribution of funding and further and ongoing support for local authorities and public services in Wales.

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

   Monmouthshire calls on the Welsh Government to base funding on a fairer system, acknowledging the particular challenges counties with both significant rural and elderly communities face when providing services across a diverse geography, and where life circumstances lead to disproportionate impacts of demand upon services.

   We would also highlight that some councils have very high levels of reserves, while Monmouthshire, in common with others, has very low levels of reserves. We suggest that this should also be taken into account in the distribution or allocation of specific grants.

Service issues and risks

d) The Council faces ongoing challenges in meeting the needs of the most vulnerable people within Monmouthshire, as it experiences challenging levels and complexity of demand, coupled with significant workforce pressures. The Council continues to work closely with the Health Board to ensure more people safely return home from hospital and to ease winter pressures on our health and social care system.

The Council will continue to work with the Health Board to identify and progress system changes that allow for improved pathways of care. Notwithstanding this the level of continued and increasing pressure on social care resulting from the health board being supported to enable safe discharge from hospital should be recognized and the strain that it is putting on social care and the Council's finances more widely.

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

e) The Connecting Care Social Care Programme looks to deliver our shared ambition for a modern, integrated care system that improves outcomes for citizens and maximises value for public services across Wales.

I am aware that Cllr Andrew Morgan wrote to you and other relevant Cabinet Secretaries on behalf of the WLGA and local authorities on 8th December to express our increasing concern regarding the absence of confirmation of grant funding for the programme beyond March 2026.

The programme reflects an unprecedented level of partnership across local government, ADSS Cymru, Social Care Wales, and the WLGA. With robust and effective governance in place nationally, regionally and at a local level. All of this to ensure a system solution is implemented and that delivers the immediate and ongoing strategic needs of social care in Wales.

We ask that Welsh Government respond with clarification on the funding and financial contribution to support local authorities through implementation.

f) We fully support the Eliminate agenda as a policy direction that aims to remove profit from the children in care market and improve their outcomes. The transition from a formula to bid based methodology for specific revenue grant funding resulted in a notable year-on-year grant reduction for which the Council has then had to include as part of its budget proposals for 2026/27. Such as to ensure that progress and transition continue to be made.

Any lack of certainty around future funding creates operational and financial uncertainty for local authorities. The operational pressures and ripple effects of this policy continue well beyond that with local authorities having to compete with other strategic priorities for capital monies from the Gwent Regional Programme Board.

We welcome the ongoing engagement by Welsh Government with local authorities and ask that Welsh Government continues to fully recognize the ongoing revenue and capital support needed for local authorities to enable the transition required.

g) Schools and ALN remains an area of significant pressure and concern. The Council is, as part of its draft budget, investing £1m over and above all pay and pension increases into schools. Regardless of the investment the Council is making school budgets remain under significant strain with schools still having to find wider efficiency savings to respond to pressures.

School balances have been in significant decline both across Wales and in Monmouthshire. A number of schools in deficit are having to instigate budget recovery plans. These challenges are at a time when schools will face significant challenges in delivering the new Curriculum for Wales and the ALN and Tribunal Act, as well as improving standards and supporting vulnerable learners.

It is important that Welsh Government continues to support schools in meeting these ongoing pressures through future core settlement funding and specific grants.

h) We welcome the fact that Welsh Government is embedding climate change and the nature emergency into everything it does. Our own commitments and ambitions are fully aligned with this intent. Whilst we see a pipeline of specific grant funding streams (e.g. low carbon heat grant) next year, we continue to seek clarification and understanding of the significant level of funding needed to support and stimulate the transition to net zero. We ask that Welsh Government continue to press UK Government for the funding needed and to allow the public sector to make the necessary and significant transition, as well in supporting and enabling communities and businesses to do the same.

More widely it is welcomed that local government has benefitted from Welsh Government seeing an increase in capital funding for 2026/27, leading to an increase in General Capital Funding (of £50,000 or 0.9%) and the further benefit of revenue base funding introduced into the settlement for 2025/26 to support highway maintenance expenditure.

We do however raise ongoing concern about the capital funding constraints on the Council's infrastructure assets and the ability to address significant and increasing unfunded capital pressures and to allow us to invest in priority areas. We, along with other councils are continuing to have to react to the potential failure of key highways structures and networks, rather than proactively investing to maintain assets to the required standard.

More recently this extends to the impact of recent flood and storm events that have seen separate representations being made and positive engagement with Welsh Government around additional capital funding being provided not only in respect of the response efforts, but the resultant repair and recovery work needed.

Finally, we would ask Welsh Government to review the threshold under the EFAS (Emergency Financial Assistance Scheme). Currently any local authority must

meet the full cost of the emergency response up to a threshold equating to 0.2% of its budget requirement. Whilst understanding the threshold is cumulative and can apply to multiple events in any one financial year we feel the threshold should be lowered (e.g. to 0.1% of budget requirement) given the scale and frequency of such extreme weather events is increasing as we suffer the adverse effects of climate change.

Other Notable Matters

i) Monmouthshire agrees with the Welsh Government's aim to reduce unnecessary bureaucracy and move grants into the de-hypothecated settlement. The continued commitment to reduce the administrative burden on local authorities is welcomed.

We very much welcome the ongoing constructive dialogue taking place with WG officials and supported by Cabinet Secretaries to entertain and offer flexibility with grant funding terms and eligibility criteria such as to ensure that policy aims and ambitions of both Welsh Government and local authorities are not hindered and where funding criteria are not always meeting with local circumstances and delivery constraints.

Moreover, early notification of grant awards will go a long way to help with budget planning for next year. Of significance, the Sustainable Waste Management Grant is yet to be confirmed for 2026/27 which alongside allocations of funding to councils from the Extended Producer Responsibility system is creating unhelpful budget risk and uncertainty ahead of the Council's budget being approved for next year.

j) Whilst the pay award assumptions factored into the budget are set at a level which is seen as prudent uncertainty remains around the pay awards for local government staff and teaching staff. Actual pay awards will not be confirmed nationally by independent pay bodies until later in 2025 and therefore future consideration might need to be given in-year to adjust pay budgets.

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

k) Businesses are facing ongoing challenges with risk around economic growth and stability, and inflation and rising costs. The continued support for businesses is welcomed as outlined by the Cabinet Secretary for Finance and Welsh Language on 3rd December.

Notwithstanding the transitional relief afforded to business resulting from the revaluation exercise undertaken, the reduction and changes to NDR multipliers for 2026-27, and the reliefs and support being maintained, initial analysis we have undertaken illustrates remaining and material impacts on large employers and hospitality businesses.

We ask Welsh Government to analyse the impacts of the changes introduced and give serious and active consideration to any further targeted support or relief needed.

The ongoing support for businesses that represent the lifeblood of the Welsh economy is essential. Given there are no current plans for any wider structural reform of the business rates system in Wales our primary concern is that without the necessary support and targeted reliefs to businesses we are likely to see impacts that will have a lasting damage on the businesses, towns and high streets in Wales.

The Council is extremely grateful to the Cabinet Secretary and her officials for her "listening ear" and their continued engagement and support. Championing local government and ensuring that it receives a fair and equitable share of the funding available. Again we see this reflected in an improved funding settlement for local government.

Notwithstanding the optimism concerns remain that the growing demands and expectations on local council services in Wales will continue to be met. Monmouthshire and all of local government in Wales wants to continue working closely with the Minister to ensure local government finances are put on a sustainable footing and to deliver the services that our communities need.

We share common goals of reducing inequality and poverty, and addressing the climate and nature emergency. With prevention at the heart of what we do. There is a clear and collective acknowledgement of the challenges faced by residents, businesses and public services and we look forward to working with Welsh Government through the social partnership that binds us together as public services.

Yours sincerely,

Councillor Ben Callard – Cabinet Member for Resources

Appendix 6: Proposed discretionary fees and charges schedule

Service Area	Service being charged for	Charging Policy	Charges for 2025/26 £:p	Proposed Charges for 2026/27 £:p	% Increase
INFRASTRUCTURE					
Traffic & Road Safety	Road Closures		£2,660.00	£2,770.00	4.10%
	Access Markings & Events Signings		Various	Various	
Streetworks	Scaffolding Licence		£104.00	£108.00	3.80%
	Skip Licence		£104.00	£108.00	
	Section 50 Licence		£979.00	£1,016.00	
	Section 171 Licence		£434.00	£450.00	
	Pavement Café Licences				
	FPN & RASWA Fees	FPN and RASW inspections	Various	Various	
Highways Development	Street Name & Numbering		£65.00	£67.50	3.80%
			£168.00	£174.00	
			£Varies – Multiple Plot/Properties	£Varies – Multiple Plot/Properties	
	Highways Inspection Fees/278 fees/external/capital	Inspection fee increases from 8% of cost of works to 10%	Various	Various	3.80%
		Drop kerbs	£168	£174	
	Land Search Income		£51.00	£53.00	3.80%

Service Area	Service being charged for	Charging Policy	Charges for 2025/26 £:p	Proposed Charges for 2026/27 £:p	% Increase
Floods & SUDS	Ordinary Watercourse Consent Fees		£50.00	£50.00	3.80%
	SABs Pre-Application Advice	Level 1 - Pre-App written advice (Rate by hectare area)	£198.00-£741.00	£206.00-£769.00	
		Level 2 - Pre-App written advice + 1 meeting	£264.00-£908.00	£274.00-£943.00	
		Pre-App Site Meeting (per Hr)	£80.00	£83.00	
		Pre-App Additional Advice (Per Hr)	£60.00	£62.00	
	SABs Application	Set By Statute (rate by hectare area)	£420.00-£1,750.00	£420.00-£1,750.00	0%
Waste	Sale of Garden Bags to residents	Garden waste bags to residents	£55 / bin	£55 / bin	0%
	Red recycling	Charge for collection and disposal	Various: £16.92 1100L bin, £10.15 660L bin, £6.60 360L bin, £5.40 240L bin	Various: £17.56 1100L bin, £10.54 660L bin, £6.85 360L bin, £5.61 240L bin	
	Red recycling	Re-usable sack/box collection and disposal	£1.75	£1.82	
	Purple recycling	Charge for collection and disposal	Various: £6.60 360L bin, £5.40 240L bin	Various: £6.85 360L bin, £5.61 240L bin	

Service Area	Service being charged for	Charging Policy	Charges for 2025/26 £:p	Proposed Charges for 2026/27 £:p	% Increase
	Purple recycling	Re-usable sack/box collection and disposal	£1.75	£1.82	3.80%
	Glass recycling	Charge for collection and disposal	Various: £10.73 240L bin, £5.57 140L bin	Various: £11.14 240L bin, £5.78 140L bin	
	Glass recycling	Re-usable sack/box collection and disposal	£1.75	£1.82	
	Food recycling	Charge for collection and disposal	Various: £8.90 240L bin, £6.64 140L bin	Various: £9.24 240L bin, £6.89 140L bin	
	Food recycling	Re-usable sack/box collection and disposal	£1.75	£1.82	
	Non-recyclable waste	Charge for collection and disposal	Various: £30.69 1100L bin, £23.37 660L bin, £19.46 360L bin, £15.48 240L bin	Various: £31.86 1100L bin, £24.26 660L bin, £20.20 360L bin, £16.07 240L bin	
	Non-recyclable waste	Single use bag collection and disposal	£3.40	£3.53	
	Waste transfer notes	One per customer	£42.00	£43.60	
	Small business packages	Charge for collection and disposal (Glass, food, recycling bags)	£425	£441	
Grounds	Re-Use Shops	Sales	Various	Various	3.8%

Service Area	Service being charged for	Charging Policy	Charges for 2025/26 £:p	Proposed Charges for 2026/27 £:p	% Increase
Transport	Private MOTs	Fixed nationally	£54.85 for a Car MOT - Price Fixed centrally. Prices increase depending on size of vehicle	£54.85 for a Car MOT - Price Fixed centrally. Prices increase depending on size of vehicle	0%
PLACE & COMMUNITY WELLBEING					
Leisure Centre	**Swimming**				
	Adult		4.90	5.00	3.8% Rounded
	Adult - Staff	25% discount on full price	3.70	3.75	3.8% Rounded
	Adult - PTL	50% discount on full price	2.45	2.50	3.8% Rounded
	FIT4Life Membership	50% discount on full price	2.45	2.50	3.8% Rounded
	Junior Under 4 Years	Free	0.00	0.00	
	Junior under 18 yrs		2.70	2.80	3.8% Rounded
	Junior under 18 yrs - PTL	50% discount on full price	1.35	1.40	
	Senior 60+ yrs		2.70	2.80	3.8% Rounded
	Senior 60+ yrs - PTL	50% discount on full price	1.35	1.40	3.8% Rounded
	20 for 15 (Snr)		40.50	42.00	3.8% Rounded
	Family Swim		12.60	13.00	3.8% Rounded
	Inflatable Fun Session		4.20	4.30	3.8% Rounded
	Inflatable PTL	50% discount on full price	2.10	2.15	3.8% Rounded

Service Area	Service being charged for	Charging Policy	Charges for 2025/26 £:p	Proposed Charges for 2026/27 £:p	% Increase
	Masters Swim (ALC & CLC)		5.10	5.30	3.8% Rounded
	Masters Swim - PTL	50% discount on full price	2.50	2.65	3.8% Rounded
	Spa		11.80	12.25	3.8% Rounded
	Sauna/Steam		3.00	3.10	3.8% Rounded
	Aqua-Natal		5.40	5.60	3.8% Rounded
	Abergavenny, Caldicot and Chepstow Pool Hire & Lifeguard (per hour)				
	Weekday rate		86.00	88.5	3.8% Rounded
	Saturday rate		92.50	95	3.8% Rounded
	Sunday rate		97.50	100	3.8% Rounded
	Monmouth Pool & Lifeguard Costs				
	Weekday rate		101.50	103.5	3.8% Rounded
	2 Lanes		31.20	41.4	3.8% Rounded
	Lifeguard Weekday		23.50	23.5	3.8% Rounded
	Lifeguard Saturday		30.00	30	3.8% Rounded
	Lifeguard Sunday		35.00	35	3.8% Rounded
	Sports Sessions & Courses				

Service Area	Service being charged for	Charging Policy	Charges for 2025/26 £:p	Proposed Charges for 2026/27 £:p	% Increase
	The Monmouthshire Games (8.30am - 4.30pm)		21.00	21.00	No Increase
	The Monmouthshire Games (8.30am - 4.30pm) (days) PTL		10.50	10.50	No Increase
	The Monmouthshire Games (8.30am - 4.30pm) (days) Sibling (25% discount)		15.75	15.75	No Increase
	The Monmouthshire Games Card (8.30am - 4.30pm) (10 sessions 25% discount)		157.50	157.50	No Increase
	Sports Tots Sessions - Taster and One Off sessions		3.20	3.30	3.8% Rounded
	Sport Camps (Weekly) - 8 week provision		26.20	27.20	3.8% Rounded
	The Monmouthshire Games - Gymnastics		7.10	7.40	3.8% Rounded
	Dry Side Activities				
	Wiggle & Giggle (under 12 months)	Free	0.00	0.00	
	Wiggle & Giggle (12-23 months & sibling)		1.50	1.60	3.8% Rounded
	Wiggle & Giggle (24 months to 4 years)		2.20	2.30	3.8% Rounded
	Playcentre under 12mths	Free	0.00	0.00	
	Playcentre (under 3 years)		3.90	4.10	3.8% Rounded
	Playcentre (over 3 years)		5.20	5.40	3.8% Rounded

Service Area	Service being charged for	Charging Policy	Charges for 2025/26 £:p	Proposed Charges for 2026/27 £:p	% Increase
	Play Centre Meal Deal		7.20	7.50	3.8% Rounded
	Fitness Suite Memberships		Various	Various	No Increase
	Casual Use Fitness Suite				
	Student (30 days)		30.00	31.00	3.8% Rounded
	Adult		7.70	8.00	3.8% Rounded
	Adult - Staff	25% discount on full price	5.80	6.00	3.8% Rounded
	Adult - PTL	50% discount on full price	3.80	4.00	3.8% Rounded
	FIT4Life	50% discount on full price	3.80	4.00	3.8% Rounded
	Junior under 18 yrs		3.80	4.00	3.8% Rounded
	Junior PTL	50% discount on full price	1.90	2.00	3.8% Rounded
	Senior 60+ yrs		3.80	4.00	3.8% Rounded
	My Journey Casual (Body Blitz, Programme, Programme Review)		7.70	8.00	3.8% Rounded
	Site Personal Trainer Monthly Fee		300.30	310.00	3.8% Rounded
	Easyline				
	Easyline Single Rate		5.90	6.10	3.8% Rounded
	FIT4Life Easyline		2.90	3.05	3.8% Rounded
	Fitness Classes				
	Single Rate Only		5.90	6.10	3.8% Rounded

Service Area	Service being charged for	Charging Policy	Charges for 2025/26 £:p	Proposed Charges for 2026/27 £:p	% Increase
	PTL	50% discount on full price	3.00	3.05	3.8% Rounded
	FIT4Life		3.00	3.05	3.8% Rounded
	10-4-8 Classes		47.50	48.80	3.8% Rounded
	Children's Fitness				
	NRG (11 - 13 years)		3.80	4.00	3.8% Rounded
	NRG PTL	50% discount on full price	1.90	2.00	3.8% Rounded
	NRG +1		3.80	4.00	3.8% Rounded
	Racket Sports				
	Squash (per court, 45 mins)		8.00	8.30	3.8% Rounded
	Badminton (per court, 55 mins)		10.75	11.15	3.8% Rounded
	Table Tennis (per table, 55 mins - includes bat hire)		8.00	8.30	3.8% Rounded
	Hire of Equipment				
	Racquet Hire		1.60	1.70	3.8% Rounded
	Sports Hall Ball		1.60	1.70	3.8% Rounded
	Sports Hall & Rooms (55 mins)				
	Sports Hall		43.00	44.60	3.8% Rounded
	½ Sports Hall		21.50	22.30	3.8% Rounded
	Sports Hall Commercial		71.00	73.70	3.8% Rounded

Service Area	Service being charged for	Charging Policy	Charges for 2025/26 £:p	Proposed Charges for 2026/27 £:p	% Increase
	½ Sports Hall Commercial		35.50	36.85	3.8% Rounded
	Gymnasium/Classroom		22.60	23.50	3.8% Rounded
	Gymnasium/Classroom Commercial		36.50	37.90	3.8% Rounded
	Aerobics/Dance Studio/School Hall		25.80	26.80	3.8% Rounded
	Aerobics/Dance Studio/School Hall Commercial		42.50	44.00	3.8% Rounded
	Raglan Village Hall (Existing Bookings)		12.30	12.80	3.8% Rounded
	Raglan Village Hall (New Bookings)		14.80	15.40	3.8% Rounded
	Astro Turf Pitches (per booking, 55 mins)				
	Full Pitch		54.90	57.00	3.8% Rounded
	½ Pitch		27.45	28.50	3.8% Rounded
	Match Rate (per booking, 2 hours)		70.00	72.60	3.8% Rounded
	3G Pitch				
	Full Pitch		75.30	78.20	3.8% Rounded
	½ Pitch		37.65	39.10	3.8% Rounded
	Match Rate (Monmouthshire Junior Football League / East Gwent Football League)		89.30	92.70	3.8% Rounded
	3G Training Pitch Monmouth				
	3G Pitch Training		27.45	28.50	3.8% Rounded

Service Area	Service being charged for	Charging Policy	Charges for 2025/26 £:p	Proposed Charges for 2026/27 £:p	% Increase
	Multi Use Games Area (MUGA), (per booking, 55 mins)				
	Basketball, Football, Netball, Training Area (double court)		21.50	22.30	3.8% Rounded
	Tennis (single court)		6.40	6.60	3.8% Rounded
	Grass Pitches (per booking, 1 hour - includes Cricket Pitch)				
	Adult (football & rugby) - use for Lower Meadow in Abergavenny as well		43.00	44.60	3.8% Rounded
	Junior (football & rugby) - use for Lower Meadow in Abergavenny as well		21.50	22.30	3.8% Rounded
	Adult Match Rate (per booking, 2 hours) - use for Lower Meadow in Abergavenny as well		64.50	67.00	3.8% Rounded
	Junior Match Rate (per booking, 2 hours) - use for Lower Meadow in Abergavenny as well		32.20	33.50	3.8% Rounded
	Changing/Showers Only				
	Shower (Per person)		2.70	2.80	3.8% Rounded
	Group Shower - one room		17.20	17.90	3.8% Rounded
	Group Shower - two rooms		34.40	35.70	3.8% Rounded
	Parties		Various	Various	3.8% Rounded
	Room Hire		Various	Various	3.8% Rounded
	Hire of Facilities		Various	Various	3.8% Rounded

Service Area	Service being charged for	Charging Policy	Charges for 2025/26 £:p	Proposed Charges for 2026/27 £:p	% Increase
Shirehall	Lettings (Room Only)		Various	Various	3.8% Rounded
	Sale of goods & equipment	Varies depending on purchase price	Various	Various	Depending on Purchase price
	Market Rents	SLA with Monmouth TC	Various	Various	0%
Countryside	Rights of Way Orders	Recovery of Actual Costs	Various	Various	3.8%
	Recharges External Bodies	Recovery of Actual Costs	Various	Various	3.8%
Old Station Tintern	Old station Tintern Car Parking		£2.30-£4.40	£2.40-£4.50	3.8% Rounded
	Old station Tintern Sales	Variable event charges and shop sales	Various	Various	4%
	Old station Tintern Catering		Various	Various	Depending on Purchase price
Caldicot Castle	Cafeteria		Various	Various	Depending on Purchase price
	Pay & Display Income		£2.30-£4.40	£2.40-£4.50	3.8% Rounded
	General Events		Various	Various	3.8% Rounded
	Sale of goods & equipment		Various	Various	Depending on Purchase price
Chepstow TIC	Cafeteria		Various	Various	Depending on Purchase price

Service Area	Service being charged for	Charging Policy	Charges for 2025/26 £:p	Proposed Charges for 2026/27 £:p	% Increase
	Sales VAT		Various	Various	Depending on Purchase price
Museums	Sales Non Vat		Various	Various	Depending on Purchase price
	Refreshments		Various	Various	Depending on Purchase price
	Hire of Facilities		Various	Various	3.8% Rounded
	Educational Events		Various	Various	3.8% Rounded
Car Parking	Charges	Pay and Display Income	£2.20 - 2 hr. stay, £2.60 - 3 hr. stay, £3.30 - 4 hr. stay, £6.80 all day. £6.80 daily charge Tuesday only at Byefield Lane. £2.20 daily tariff charge at Drill Hall, Chepstow, Cinderhill Street, Monmouth and Rowing Club, Monmouth car parks. £5.50 day Tariff - £25.00 6 day Tariff - £30 Sunday tariff first 2 hours free then £1.40 for the remainder of the day	£2.30 - 2 hr. stay, £2.70 - 3 hr. stay, £3.50 - 4 hr. stay, £7.00 all day. £7.00 daily charge Tuesday only at Byefield Lane. £2.30 daily tariff charge at Drill Hall, Chepstow, Cinderhill Street, Monmouth and Rowing Club, Monmouth car parks. £5.70 day Tariff - £26.00 6 day Tariff - £30 Sunday tariff first 2 hours free then £1.40 for the remainder of the day	3.8% Rounded

Service Area	Service being charged for	Charging Policy	Charges for 2025/26 £:p	Proposed Charges for 2026/27 £:p	% Increase
		Contravention Fees	£25/£50 – Low Contravention Fee £35/£70 - High Contravention Fee	£25/£50 – Low Contravention Fee £35/£70 - High Contravention Fee	Statutory Fees Set by WG
		Residential Street Permits	£83	£86	3.8%
		Residential Off Street Permits	£83	£86	3.8%
		Season Ticket Off Street – Car Park Specific. (Drill Hall, Cinderhill)	£190	£195	3.8% Rounded
		Season Tickets Off Street - Long Stay	£600 pa. £300 6 months or £150 3 months	£620 pa. £310 6 months or £155 3 months	3.8% Rounded
		Season Tickets Off Street - Short Stay	£737 pa. £368 6 months or £184 3 months	£765 pa. £382 6 months or £191 3 months	3.8% Rounded
		Rents letting of car parks	Various	Various	3.80%
		Recovery Fees	Various	Various	3.80%
		Wayleaves & Easements	Various	Various	3.80%
Planning	Building Control Fees	Varies depending on type and size of work	Various	Various	3.80%
Planning	Development Control	Pre planning advice non statutory			

Service Area	Service being charged for	Charging Policy	Charges for 2025/26 £:p	Proposed Charges for 2026/27 £:p	% Increase
		FAST TRACK PLANNING APPLICATIONS R1 COMPLETION/PRE-PURCHASE CERTIFICATES R1 Section 106 Admin Fee Planning Performance Agreements Planning Searches Planning Applications - amending applications	Various	Various	3.8% increase on any fees controlled internally
RESOURCES DIRECTORATE					
Cemeteries	Cemeteries Service Charge INTERMENT IN EARTHEN GRAVE: PERSONS 17 YEARS OF AGE OR UNDER:	Discretionary			
	Stillborn and non viable foetuses (New ERB)		No Charge /No Charge	No Charge /No Charge	
	New single depth grave in children's section (New ERB)		No Charge /No Charge	No Charge /No Charge	
	New Single Depth (New ERB)		No Charge /No Charge	No Charge /No Charge	
	New Double Depth (New ERB)		No Charge /No Charge	No Charge /No Charge	

Service Area	Service being charged for	Charging Policy	Charges for 2025/26 £:p	Proposed Charges for 2026/27 £:p	% Increase
	New Treble Depth (New ERB)		No Charge /No Charge	No Charge /No Charge	
	PERSONS 18 YEARS OF AGE AND OVER:				
	New Single Depth (New ERB)		2026/4052	2103/4206	
	New Double Depth (New ERB)		2373/4746	2464/4927	
	New Treble Depth (New ERB)		3856/7712	4003/8006	
	Re-opened grave to single depth - (New ERB)		1386/2772	1439/2878	
	Re-opened grave to single depth (Transfer ERB)		1284/2568	1333/2666	
	Re-opened grave to double depth - (New ERB)		1804/3608	1873/3746	
	Re-opened grave to double depth - (Transfer ERB)		1703/1703	1768/1768	
	Cremated remains in Garden of Remembrance		876/1752	910/1819	
	Re-opened cremated remains - (New ERB)		876/1752	910/1819	
	Re-opened cremated remains (Transfer ERB)		809/809	840/840	
	Cremated Remains in new full grave		1479/2958	1536/3071	
	BRICKED GRAVE:				3.8%

Service Area	Service being charged for	Charging Policy	Charges for 2025/26 £:p	Proposed Charges for 2026/27 £:p	% Increase
	Single Depth		2541/5082	2638/5276	
	Double Depth		3460/6920	3592/7183	
	Treble Depth		4373/8746	4540/9079	
	RESERVATION OF GRAVE SPACE				
	Normal				
	Cremated Remains		232/464	241/482	
	RIGHT TO ERECT MEMORIALS				
	Normal Grave Space				
	All memorials for Children's Interments				
	Headstones		295/590	307/613	
	Memorial Vases or Tablets		186/372	194/387	
	Re-Erection of Memorial following safety testing failure				
	Replacement of existing memorial		118/236	123/245	
	Cremation Plots				
	Memorial Vases or Tablets		186/372	194/387	
	ADDITIONAL INSCRIPTIONS ON MEMORIALS		118/118	123/123	
	Re- guilding of existing Inscriptions on all memorials		118/118	123/123	

Service Area	Service being charged for	Charging Policy	Charges for 2025/26 £:p	Proposed Charges for 2026/27 £:p	% Increase
	EXCLUSIVE RIGHT OF BURIAL FOR FULL GRAVE PLOT				
	Initial Issue		811/1622	842/1684	
	Each subsequent transfer		709/709	736/736	
	EXCLUSIVE RIGHT OF BURIAL FOR CR PLOT				
	Initial Issue		553/1106	575/1149	
	Each subsequent transfer		486/486	505/505	
	Form of Assignment		48/48	50/50	
Allotments	Allotment plots	Annual Increase	£34	£35	3.8% rounded
Central Finance	External Fees	Staff Time Recovery	Various	Various	3.80%
PEOPLE PERFORMANCE & PARTNERSHIPS					
People & HR	Training	External Training (Raglan Training Centre)	Various	Various	
SOCIAL CARE, SAFEGUARDING & HEALTH					
Housing	Careline Alarms non business	Weekly equipment rental	£5.00 per week per client	£5.00 per week per client	0%
	Careline Installation Charges	Charge for equipment installation	£50 per installation	£50 per installation	0%
ADULT SERVICES					

Service Area	Service being charged for	Charging Policy	Charges for 2025/26 £:p	Proposed Charges for 2026/27 £:p	% Increase
Non residential fees	Actual charge based on Financial Assessment in line with legislation within the SSWB Act 2014	Means tested assessment based on client's ability to pay in line with the Authority's Social Care Charging Policy and the SSWB Act (Wales) 2014 legislation	£24 for an hourly rate of care, day care session or respite night, up to the lower of a client's assessed charge or the weekly maximum cap of £100. Increase based on continued cost of care increases especially staff costs with the National Minimum Wage rising by 6.7% in 2025/26, an increase of 6.7% in the Real Living Wage for 2025/26, plus an holistic increase in employers National Insurance of 7.96% for 2025/26.	£26 for an hourly rate of care, day care session or respite night, up to the lower of a client's assessed charge or the weekly maximum cap of £100. Increase based on continued cost of care increases especially staff costs with the National Minimum Wage rising by 8.5% for under 21's and 4.1% for over 21's in 2026/27 and an increase of 6.7% in the Real Living Wage for 2026/27, plus employer on costs that also increased following the 2025/26 budget.	8.33%
Residential/Nursing Fees which includes Part III own care home being Severn View and Budden Crescent	Actual charge based on Financial Assessment in line with legislation within the SSWB Act 2014	Actual charge based on means tested Financial Assessment in line with the Authority's Social Care charging Policy and the SSWB Act (Wales) 2014 legislation	Based on individual ability to pay after undergoing a means tested financial assessment. The budget increase reflects announced rise in pensions by the UK Chancellor of 4.1% in 2025/26	Based on individual ability to pay after undergoing a means tested financial assessment. The budget increase reflects announced rise in pensions by the UK Chancellor of 4.8% in 2026/27	4.80%

Service Area	Service being charged for	Charging Policy	Charges for 2025/26 £:p	Proposed Charges for 2026/27 £:p	% Increase
Public Health	Fee Income	As below	see below	see below	0.00%
	Commercial licences	As below	see below	see below	0.00%
	Commercial Fee Income	As below	see below	see below	3.80%
	Food Safety training	Set internally based upon market rates			
	Discretionary Advisory Visits		74.75	77.59	3.80%
	Veterinary Inspection Recharge	Riding Establishments Act 1970	325.44	337.81	3.80%
	Riding Establishments	Law requires no more than cost recovery			
	Petrol Station Permits/Licenses	Fixed by Government	Petrol Station Permits/Licenses. As of April 2024 The Health and Safety and Nuclear (Fees) (Amendment) and Gas Safety (Miscellaneous Amendment) Regulations 2024 came into force. Operators can pay between 1-10 years in advance	Remain as 25/26: <2500 litres £48 for each year of certificate. >2500 - 50000 litres £65 for each year of certificate. >50000 litres £137 for each year of certificate.	
	Registration for acupuncture, tattooing and ear piercing	Local Govt (misc Provisions) Act 1982		New regulated charge - to be determined in due course	

Service Area	Service being charged for	Charging Policy	Charges for 2025/26 £:p	Proposed Charges for 2026/27 £:p	% Increase
	Local Authority Pollution, Prevention and Control		Local Authorities has not been consulted or informed of any proposed charges to fee structures so assume the say as for 2023/24	Remain as 25/26:	
	Application fee	Mobile plant 1st and 2nd application		Low £637, Medium £1,020, High £1,530	
		3rd to 7th application		Low £381, Medium £610, High £914	
		8th and subsequent application		Low £195, Medium £311, High £467	
		Reducing fee activities dry cleaning or standalone PVR1 or PVRII		Low £76, Medium £155, High £232	
		PVR 1 and 2 activities carried on at same service station		Low £111, Medium £222, High £333	
		Any other reduced fee activity		Low £223, Medium £359, High £542	
		any reduced fee activity		Low £762, Medium £1,145, High £1,723	
	Private water supplies (fees set by Council but within max fig defined by EC directive)	Private water supplies per risk assessment (Required every 5 years)	23/24 - £250 1st risk assessment, repeat assessment £170 if on site visit required.	£276 1st risk assessment; £188 repeat risk assessment if a site visit required.	

Service Area	Service being charged for	Charging Policy	Charges for 2025/26 £:p	Proposed Charges for 2026/27 £:p	% Increase
		Sampling (each visit)	As per 22/23 - £100 per visit inclusive of invoice plus: Analysis of sample on a direct recharge basis up to a maximum of £25 if taken under regulation 10 or 11. Analysis of sample on a direct recharge basis up to a maximum of £110 if taken during monitoring for Group A parameters. Analysis of sample on a direct recharge basis up to a maximum of £600 if taken during monitoring for Group B parameters.	Remain as 25/26: £100 per visit inclusive of invoice plus: Analysis of sample on a direct recharge basis up to a maximum of £25 if taken under regulation 10 or 11. Analysis of sample on a direct recharge basis up to a maximum of £110 if taken during monitoring for Group A parameters. Analysis of sample on a direct recharge basis up to a maximum of £600 if taken during monitoring for Group B parameters.	
		Investigation (each supply)	162	171	
Trading Standards.	Licences	As below			
	Fee Income		As below	As below	
	Explosive Licences				
	New 1 Year	Set by HSE	£111	£111	
	Renewal 1 Year		£55	£55	
	New 2 Year		£143	£143	

Service Area	Service being charged for	Charging Policy	Charges for 2025/26 £:p	Proposed Charges for 2026/27 £:p	% Increase
	Renewal 2 Year		£87	£87	
	New 3 Year		£176	£176	0%
	Renewal 3 Year		£122	£122	
	New 4 Year		£210	£210	
	Renewal 4 Year		£155	£155	
	New 5 Year		£242	£242	
	Renewal 5 Year		£188	£188	
	Weights & Measures	Weights & Measures Act 1963			
	Fee per TSO		£93.86	£93.86	
	Fee per TO		£38.00	£38.00	
Licensing	Licenses	As below			3.80%
	Hackney Licenses	Fees set by Licensing Committee but must operate within laid down EC directive limits	The 2025/26 licensing fees will be set by the Licensing and Regulatory Committee on 28th January 2025	The 2025/26 licensing fees will be set by the Licensing and Regulatory Committee on 27th January 2026	
	Lottery and Gambling Licensing	Fixed by Govt Fixed by Govt			
	Other Licenses	Fees set by Licensing Committee but must operate within laid down EC directive limits			

Service Area	Service being charged for	Charging Policy	Charges for 2025/26 £:p	Proposed Charges for 2026/27 £:p	% Increase
Registrars					3.80%
	Approved Venue - Marriage & Civil Partnership		mon- weds: 471.50. thurs & fri: 497.50 sat: 517.50 sun & BH: 583.50	mon- weds: 487.50. thurs & fri: 515.50 sat: 535.50 sun & BH: 605.50	
	Old Parlour		mon-fri: 274.50 sat: 324.50 sun & BH: 583.5	mon-fri: 284.50 sat: 337.50 sun & BH: 605.5	
	License for approved venues - New		1,575	1,575	
	License for approved venues - Renewal		1,270	1,270	
	Registrars attendance @ service (Registrar - Superintendent)	Set by General Register Office			
ADULT SERVICES					
Community Meals	Community Meals & Day centre meals		£6.50 per meal, increase in line with rising food, raw ingredient prices and salary increases	Increase in line with inflation as at September 2025 of 3.8% to £6.75 per meal	3.80%
Mardy Park	Catering		£6.50 per meal, increase in line with rising food, raw ingredient prices and salary increases	Increase in line with inflation as at September 2025 of 3.8% to £6.75 per meal	3.80%
	Mardy Park room hire		To increase in line with CPI as at October 2024 of 1.7%	Increase in line with inflation as at September 2025 of 3.8%	3.80%

Service Area	Service being charged for	Charging Policy	Charges for 2025/26 £:p	Proposed Charges for 2026/27 £:p	% Increase
Finance	Appointeeships		Increase in line with CPI as at October 2024 of 2% to £17.60 per month	Increase in line with inflation as at September 2025 of 3.8% to £18.27 per month	3.80%
Trading Standards	Licences		No opportunity to increase fees further as max reached in legislation	see below which is a longer term aspiration over a long period of time	3.80%
	Fee Income				
	Animal Licences				
	Boarding Establishment	Animal Boarding Establishments Act 1963	£169.00	£290 - £320	
	Dog Breeding	Dog Breeding (Wales) Regulations 2014	£169.00	£380 - £550	
	Home Boarding		£82.00	£210 - £290	
	Dangerous Wild Animals	Dangerous Wild Animals Act 1976	£214.00	£360 - £370	
	Selling Animals as Pets	LAIA Regs '21	£119.00	£340 - £470	
	Zoo			£3000 - £3500	