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County Hall
Rhadyr
Usk
NP15 1GA

Wednesday, 2 September 2026

Notice of Meeting

Draft Agenda

Governance and Audit Committee

Thursday, 10th September, 2026 at 2.00 pm,
The Council Chamber, County Hall, The Rhadyr, Usk, NP15 1GA

***Please note that a 30 minute pre-meeting will take place at 1.30pm for
Committee Members and Audit Officers***

AGENDA

Item No	Item	Pages
1.	Apologies for Absence	
2.	Declarations of Interest	
3.	Public Open Forum	
4.	To note the Action List.	1 - 2
5.	Internal Audit quarterly progress report (Q2)	3 - 24
6.	Whistleblowing Policy and Guidance	25 - 58
7.	2026/27 Q1 - Treasury report	59 - 84
8.	DRAFT STATEMENT OF ACCOUNTS 2025/26 - CHARITABLE TRUST FUNDS	85 - 128
9.	Audit Wales: Review of Housing Adaptations	129 - 154
10.	Audit Wales: Recruitment and Retention Challenges	155 - 172
11.	MCC Grants Report 2023-24 and 2024-25	173 - 186
12.	Draft Self-Assessment 2025/26	187 - 298

13.	Governance and Audit Committee Forward Work Plan	299 - 300
14.	To approve the minutes of the previous meeting	301 - 304
15.	To consider whether to exclude the press and public from the meeting during consideration of the following items of business in accordance with Section 100A of the Local Government Act 1972, as amended, that it involves the information as defined in Paragraph 14 of Part 4 of Schedule 12A to the Act (proper officers view attached)	305 - 308
16.	Cyber Resilience	309 - 316
17.	Date of Next Meeting: 29th September 2026 at 2.00pm.	

Paul Matthews
Chief Executive

MONMOUTHSHIRE COUNTY COUNCIL CYNGOR SIR FYNWY

THE CONSTITUTION OF THE COMMITTEE IS AS FOLLOWS:

Andrew Blackmore

Colin Prosser

Rhodri Guest

Michael Thomas

County Councillor Sara Burch

County Councillor Tony Easson

County Councillor David Jones

County Councillor Malcolm Lane

County Councillor Phil Murphy

County Councillor Peter Strong

County Councillor Ann Webb

County Councillor Rachel Garrick

Cantref;

Dewstow;

Crucorney;

Mardy;

Caerwent;

Rogiet;

St Arvans;

**Caldicot
Castle;**

**Labour and Co-Operative
Party**

Welsh Labour/Llafur Cymru

Independent Group

Welsh Conservative Party

Welsh Conservative Party

Welsh Labour/Llafur Cymru

Welsh Conservative Party

**Labour and Co-Operative
Party**

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Welsh Language

The Council welcomes contributions from members of the public through the medium of Welsh or English. We respectfully ask that you provide us with 5 days notice prior to the meeting should you wish to speak in Welsh so we can accommodate your needs.

Governance and Audit Committee Public Open Forum Guidance

Our Governance and Audit Committee meetings are live streamed and a link to the live stream will be available on the meeting page of the Monmouthshire County Council [website](#)

If you would like to share your thoughts on any matters being discussed by Governance and Audit Committee, you may attend the meeting in person (or join remotely via Microsoft Teams), or submit written representations (via Microsoft Word, maximum of 500 words).

The deadline for submitting representations to the Council is 5pm three clear working days in advance of the meeting. All representations received will be made available to the committee members prior to the meeting.

The amount of time afforded to each member of the public to speak is at the Committee Chair's discretion. We ask that contributions are no longer than 4 minutes.

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

If you would like to suggest future topics for consideration by Governance and Audit Committee, please do so by emailing GACRegistertoSpeak@monmouthshire.gov.uk

Aims and Values of Monmouthshire County Council

Our purpose

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

Objectives we are working towards

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

Our Values

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

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

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

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

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

Role of the Pre-meeting

1. Why is the Committee considering this agenda item? (relevance and materiality)
 2. What is the Committee's role and what outcome do Members want to achieve?
 3. Is there sufficient information to achieve this? If not, who could provide this?
 4. What are the confidential views of the auditors on relevant matters?
- Discuss members' views/ key concerns with the papers and agree priorities

Potential Questions/Considerations for the Meeting

Internal Audit (IA)

1. What is the IA functional model and is it fit for purpose?
2. Does IA have sufficient authority and influence across the Authority?
3. Is IA suitably resourced and empowered? Is the annual IA plan appropriate? On what do we make this judgement?
4. Do Chief Officers demonstrably accept and champion the role of IA? How do they do this?
5. Are IA findings acted upon energetically by Officers? How is this demonstrated? Do we effectively challenge and hold officers to account for implementing IA findings?
6. How can we be confident that the internal control environment remains appropriate?
7. Do we have confidence in overall IA effectiveness? On what do we base this?
8. Is the annual/ periodic IA opinion plausible?
9. Do we have sufficient visibility over the work, output and effectiveness of allied IA teams, e.g. TCBC?

External Audit (EA)

1. Is the EA team (financial and performance) credible?
2. Are we confident over the arrangements for developing the EA annual work plan/ timetable and is it aligned to our understanding of key risks?
3. Do Chief/ senior officers engage appropriately with EA? How is this demonstrated?
4. Is there a constructive relationship between IA, EA (and other inspectorates)? How is this evidenced?
5. Have relevant officers demonstrably considered the results/ conclusions of EA national and specific reports?
6. Do we have good visibility over emerging issues identified by EA?
7. In respect of ISA260 and equivalent EA financial reports, do officers clearly demonstrate understanding of issues raised and have a credible plan to resolve issues for next financial year?
8. Does EA have confidence in MCC's Officers and governance arrangements?

Governance

1. Is there a codified and cohesive description of MCC's overall governance arrangements? Is it fit for purpose?
2. Is there clarity over the governance of the various oversight and scrutiny arrangements for (and effectiveness of) material partnerships and collaborations?
3. Is there clarity over the apportionment of responsibilities and decision making authorities?
4. How are governance/ control breaches identified and reported?
5. Are we confident that the arrangements for material expenditure (tendering, contracting and capital procurement) are robust?
6. Do we have confidence in whistleblowing (and similar arrangements) for raising concerns?

Corporate Risks

1. Have key accountabilities for the identification, assessment, monitoring and management of risks been adequately defined and implemented?
2. Has the approach to risk management been designed and implemented effectively?
3. How can the Committee be confident that the Corporate Risk Register captures all significant risks facing the Authority?
4. Are the risk mitigation action plans credible and sufficient so as to achieve the desired outcomes?

Budgeting/ Financial Risk/ Reserves

1. Is there a clearly defined, governed and checkpointed process and timetable for developing the Authority's budget?
2. Is there an appropriate suite of financial risk related policies? Are they suitable?
3. Are the key financial/ operational assumptions understood, credible, documented and stress tested?
4. Does the Finance function have suitable capabilities and capacity to manage financial risk/ meet statutory requirements and obligations to the Council?
5. Do we have confidence that the budgetary process is likely to produce a plausible budget/ MTFP?
6. Are there suitable arrangements in place to manage and report on overall financial performance?

Financial Statements/ Misstatement Risk

1. Is there a shared understanding as to the purpose of the Committee in reviewing draft financial statements?
 - a. Are the Notes to the Accounts reasonable?
 - b. Are the narrative reports, including the Annual Governance Statement reasonable and accord with the committee's view?
2. Are we comfortable with EA's work and audit opinion?

Questions for the Committee to conclude...

Do we have the necessary information to form conclusions/make recommendations/ escalate matters to the executive, council, relevant scrutiny committee?

Do we need to follow up? If so, how?

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Governance and Audit Committee Action List
4th June 2026

Action	Subject/ Meeting	Officer	Outcome	Due date	Action Status	Recommended to close Action Yes/No
1	Audit Wales Report: Arrangements for commissioning services and council management response	Richard Jones	Ensure that the commissioning framework (in development) is brought to Governance and Audit Committee at a suitable stage for scrutiny	15 th October 2026	OPEN	No
2						

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SUBJECT:	INTERNAL AUDIT Progress Report for Quarter 1 (2026/27) & Quarter 3 Agile Audit Plan (2026/27)
DIRECTORATE:	Resources
MEETING:	Governance & Audit Committee
DATE:	September 2026
DIVISION/WARDS AFFECTED:	All

1. PURPOSE

To consider the adequacy of the internal control environment within the Council based on the outcomes of internal audit reviews and subsequent conclusions issued to the 30th June 2026.

To consider the performance of the Internal Audit Section over the first 3 months of the 2026/27 financial year and the audit reviews to be undertaken during the 3rd quarter of the year.

2. RECOMMENDATION(S)

1. That the Committee note the audit conclusions issued.
2. That the Governance & Audit Committee 'Call-In' the Strategic Director for Social Care & Safeguarding to a future meeting to discuss the reasons for the second consecutive unfavourable audit conclusions in relation to the Safeguarding of Children's Money, and to seek assurance that appropriate controls will be implemented urgently.
3. That the Committee note the progress made by the Section towards meeting the 2026/27 Internal Audit Strategy and Agile Internal Audit Plan along with the performance indicators at the 3 month stage of the financial year which are currently just below the profiled target.
4. That the Committee approve the Agile Internal Audit 'Rolling Plan' covering Quarter 3 2026/27.

3. KEY ISSUES

- 3.1 Audit work has started in line with the 2026/27 Internal Audit Strategy, agreed by the Governance & Audit Committee in February 2026. The Agile Internal Audit Rolling Plan was agreed for quarter 1 in February 2026.

- 3.2 The Global Internal Audit Standards (GIAS) came into force for the UK public sector in April 2025 replacing the Public Sector Internal Audit Standards. A self-assessment and gap analysis of compliance to the new standards has been completed and an action plan is in place to ensure the team fully meet the requirements. The self-assessment will be updated during quarter 2 of the 2026/27 financial year.
- 3.3 The year end opinion for 2026/27 will be based on the audit work undertaken during the year, cumulative audit knowledge from previous years on key financial systems along with any assurance gained from other parties where relevant.
- 3.4 Attached as Appendix 1 to this report is the Internal Audit & Counter Fraud Update Report from the Chief Internal Auditor covering the period until the 30th June 2026.
- 3.5 The report included as Appendix 1 covers the following 5 areas.
1. Results from Internal Audit Reviews (Q1 2026/27)
 2. Follow-up of Previous Audit Recommendations
 3. Quarterly Internal Audit Plan (Q3 2026/27)
 4. Counter Fraud Investigations and Outcomes
 5. Performance Indicators
- 3.6 Within the results from Internal Audit Reviews completed during Quarter 1 2026/27, two audit reviews concluded with limited assurance opinions. The Safeguarding of Children's Money review received a consecutive limited assurance opinion, and it is therefore recommended that the relevant Strategic Director be called before the Committee to provide assurance on the action being taken to address the identified weaknesses. The Social Value Procurement review also received a limited assurance opinion. Full details of the findings arising from both reviews are set out in Appendix 1.
- 3.7 The proposed Quarter 3 Internal Audit Plan has been developed on a risk-based basis. In determining the programme of work, consideration has been given to the Council's Strategic Risk Register, emerging themes and management requests, alongside the key non-negotiable audit reviews agreed within the 2026/27 Internal Audit Strategy and the follow-up of previously agreed audit actions.
- 3.8 Consultation on the proposed Quarter 3 Plan will be completed with the Strategic Leadership Team ahead of its submission to the Governance and Audit Committee for approval. This will provide an opportunity to confirm that the plan remains aligned with the Council's current risk profile, organisational priorities and any developing assurance requirements.

4. SERVICE MANAGEMENT RESPONSIBILITIES

- 4.1 Chief Officers, Heads of Service and Service Managers are responsible for addressing any weaknesses identified in internal systems and demonstrate this by including their management responses within the audit reports. When management agree the audit action plans, they are

accepting responsibility for addressing the issues identified within the agreed timescales.

- 4.2 Ultimately, managers within MCC are responsible for maintaining adequate internal controls within the systems they operate and for ensuring compliance with Council policies and procedures. All reports, once finalised, are sent to the respective Chief Officers and Heads of Service for information and appropriate action where necessary.

5. RESOURCE IMPLICATIONS

None.

6. CONSULTEES

Deputy Chief Executive / Strategic Director – Resources (S151 Officer)
Strategic Leadership Team

Results of Consultation:

N/A

7. BACKGROUND PAPERS

Internal Audit Strategy 2026/27
Agile Internal Audit Rolling Plan Q1 2026/27
Agile Internal Audit Rolling Plan Q2 2026/27

8. AUTHORS AND CONTACT DETAILS

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INTERNAL AUDIT & COUNTER FRAUD UPDATE REPORT

CHIEF INTERNAL AUDITOR

2026/27 Quarter 1 Update
2026/27 Quarter 3 Rolling Plan





QUARTERLY REPORT CONTENT

1. Results from Internal Audit Reviews
2. Follow-up of Previous Audit Recommendations
3. Quarterly Internal Audit Plan
4. Counter Fraud Investigations and Outcomes
5. Performance Indicators





SUMMARY OF AUDITS CONCLUSIONS

Each Internal Audit report contains a conclusion (opinion) which is an overall assessment of the control environment reviewed.

The conclusions used are those recommended by CIPFA within their paper Internal Audit Engagement: Setting Common Definitions.

CONCLUSION	DESCRIPTION
SUBSTANTIAL ASSURANCE	A sound system of governance, risk management and control exists, with internal controls operating effectively and being consistently applied to support the achievement of objectives in the area audited.
REASONABLE ASSURANCE	There is a generally sound system of governance, risk management and control in place. Some issues, non-compliance or scope for improvement were identified which may put at risk the achievement of objectives in the area audited.
LIMITED ASSURANCE	Significant gaps, weaknesses or non-compliance were identified. Improvement is required to the system of governance, risk management and control to effectively manage risks to the achievement of objectives in the area audited.
NO ASSURANCE	Immediate action is required to address fundamental gaps, weaknesses or non-compliance identified. The system of governance, risk management and control is inadequate to effectively manage risks to the achievement of objectives in the area audited.



SUMMARY OF AUDITS YEAR TO DATE

The number of Audit Conclusions issued since 01st April 2026 to the end of quarter 1 (30th June 2026).

Conclusion	Number
Substantial Assurance	2
Reasonable Assurance	1
Limited Assurance	2
No Assurance	0
Unqualified (Grant Claim)	0
Qualified (Grant Claim)	0
Total Conclusions issued	5



SUMMARY OF AUDITS COMPLETED

Assurance work and Conclusions issued in draft since the last update report.

It has been agreed that where an Unfavourable Conclusion has been issued further information will be provided to G&AC on the following slides (if applicable).

Audit Title	Conclusion	Status
School Admissions & Appeals	Substantial Assurance	Draft
Osbaston Primary School	Substantial Assurance	Final
Caldicot Castle (Follow-Up)	Reasonable Assurance	Final
Safeguarding of Children's Monies	Limited Assurance	Final
Social Value Procurement	Limited Assurance	Draft
Additional Payments (Schools)	Non-Opinion	Final
Enterprise Car Club – Early Consultancy	Non-Opinion	Final
Annual Governance Statement	Non-Opinion	Draft



SUMMARY OF AUDITS UNFAVOURABLE CONCLUSION

Safeguarding of Children's Monies – Limited Assurance

The follow-up review concludes that arrangements for safeguarding children's monies remain at **Limited Assurance**. None of the eight significant recommendations from the May 2024 audit had been fully implemented: four were partially implemented and four were not implemented.

Key unresolved risks include 141 Junior ISAs totalling £39,271.82 remaining under Authority administration for young people no longer in care or aged 18, incomplete pathway planning and settlement records, and the absence of a fully consulted and approved financial policy. A new significant weakness was also identified because the Authority had not progressed with making the promised £5 weekly savings contributions into these accounts.

RISK RATING	DESCRIPTION	TOTAL IDENTIFIED
CRITICAL	Major or unacceptable risk which requires immediate action.	0
SIGNIFICANT	Important risk that requires attention as soon as possible.	8
MODERATE	Risk partially mitigated but should still be addressed.	1



SUMMARY OF AUDITS UNFAVOURABLE CONCLUSION

Safeguarding of Children's Monies – Limited Assurance

Ref.	SIGNIFICANT
1.02	The Authority did not have a fully consulted upon and approved Financial Policy for Children Looked After.
3.02	Appropriate and effective action if not been taken on receipt of the statements from the Share Foundation.
3.03	As per the 22 nd January 2026 Share Foundation Statement the Authority was administering 141 Junior ISA's totalling £39,271.82 who were no longer under local authority care or had turned 18 years of age. Young People had not been paid money they were entitled to.
3.04	There was no evidence available to confirm that Young People, Parents/Guardians or Carers were made aware of the existence of a Junior ISA account at the appropriate time.
3.05	Pathway Plans were not in place for all eligible young people. Reviews of those plans that were in place were not being undertaken at the required frequency.
4.01	A record was not maintained of all Young People who have Duty of Care Settlements where a Monmouthshire County Council employee was acting as the Litigation Friend.
4.02	Social Workers / Personal Assistants were not always aware of the financial settlements held by the Court Funds Office on behalf of the Children Looked After or Young People.
New	The Authority had not made the £5 per week savings contributions promised to Children Looked After.

Ref.	MODERATE
1.03	Young People should be formally advised to seek independent financial advice ahead of their 18 th Birthday.



SUMMARY OF AUDITS UNFAVOURABLE CONCLUSION

Social Value Procurement – Limited Assurance

The audit identified some elements of the Council's approach to social value that provide a basis for the intended control framework; however, these arrangements were not consistently supported by effective implementation in practice.

Corporate strategies, procurement procedures and an evaluation methodology were in place, and social value had been incorporated into the significant procurement exercises reviewed.

However, the limited use of the Thrive Social Value Reporting System, gaps in records and weaknesses in monitoring arrangements reduced the extent to which these processes could demonstrate effective oversight and delivery of social value outcomes. The use of frameworks and quarterly newsletters provided some structure for defining and communicating social value activity, but these arrangements did not fully mitigate the wider issues identified during the audit.

RISK RATING	DESCRIPTION	TOTAL IDENTIFIED
CRITICAL	Major or unacceptable risk which requires immediate action.	0
SIGNIFICANT	Important risk that requires attention as soon as possible.	10
MODERATE	Risk partially mitigated but should still be addressed.	4
STRENGTH	No risk. Sound operational controls and processes confirmed.	9



SUMMARY OF AUDITS UNFAVOURABLE CONCLUSION

Social Value Procurement – Limited Assurance

Ref.	SIGNIFICANT
2.05	A signed version of the contract could not always be located.
2.06	Although a contract register was published, this did not comprehensively cover all contracts which the Authority had in place.
2.07	No Social Value commitment has been attached to any procurement exercise less than £250k. There was no evidence that Social Value had been considered for contracts greater than £75k in value.
2.08	A schedule of penalties had not been established and included within contractual documentation.
2.09	A significant underperformance on delivering the committed Social Value was identified with no documented action taken to rectify the situation.
3.03	Despite the existence of a social value system / portal (Thrive) it did not contain all current contracts.
3.04	Access to Thrive had not been granted to all relevant individuals, limiting their ability to effectively monitor agreed Social Value activity.
3.05	There was no evidence of oversight and management of Social Value commitments by either Contract or Category Managers.

Ref.	MODERATE
1.04	No dedicated training had been provided to procurement managers or contract managers on how to achieve and monitor Social Value outcomes.
2.12	Collaborative contracts with other Ardal partners were not always sought, potentially missing out social value opportunities.
3.08	Invitation to Tender (ITT) documentation only required social value targets for the initial contract term and did not set out a documented approach for agreeing / contracting social value commitments for any extension period(s).
3.09	Although quarterly newsletters were produced and published on the Ardal website sharing stories around social value delivered, these were not circulated through the Authority.



SUMMARY OF AUDITS IN PROGRESS

*Audit work currently in progress
where no draft report has yet been
issued.*

This is as of 11/08/26

Audit Title	IA Plan	Fieldwork % Complete			
		25%	50%	75%	100%
Fuel Cards (2025/26)	C/F 2025/26				
Goytre Primary (2025/26)	C/F 2025/26				Issued Q2
Commercial Waste (2025/26)	C/F 2025/26				Issued Q2
Purchasing Cards Follow-up	2026/27 Q1				
Licensing	2026/27 Q1				
Grounds Maintenance	2026/27 Q1				
Data Protection / SharePoint Implementation	2026/27 Q2				
Caldicot Castle (Admin Processes)	2026/27 Q2				
Enterprise Car Scheme	2026/27 Q2				
Secondments	2026/27 Q2				
School Exclusions	2026/27 Q2				
New Children's Home	2026/27 Q2				
Housing Support Grant	2026/27 Q2				



SUMMARY OF AUDITS IN PROGRESS

Audit work agreed within the agile audit plan for previous quarters which has not yet commenced and the reason why a delay has occurred.

This is as of 11/08/26

Audit Title	IA Plan	Reason
Corporate Safeguarding	2026/27 Q1	Agreed with Strategic Director to delay the review until Q4 due to process changes being implemented.
Seven View Park	2026/27 Q1	Amended to Q3 start due to change in site management.
Raglan VC Primary School	2026/27 Q1	Amended to Q3 start due to IA Resource
Planning Obligations (S106)	2026/27 Q2	Agreed to amend this review to 2027/28 Q1 due to the delay in the Replacement Local Development Plan (RLDP) examination process.
Health & Safety	2026/27 Q2	Agreed with Strategic Director to delay review to Q4.



SUMMARY OF AUDITS CONTINUOUS ASSURANCE

Value-added audit work is internal audit activity that improves organisational performance by providing meaningful assurance, practical insights, and recommendations that enhance governance, risk management, and operational effectiveness.

Advice is often delivered by email, through Microsoft Teams calls, or as part of an internal audit review. The Audit team also contributes to several programme boards, including the New Social Care Management System and the Information Governance Group, to provide insight.

Area
Financial, Internal Control and Governance Advice
Monitoring Implementation of Previous Recommendations & Management Actions
New Social Care Management System
Social Care Provider Financial Assessments
Annual Governance Statement
Information Governance Group - Standing Member
Systems Admin Network - Standing Member
Procurement Network - Standing Member
Corporate Induction
National Fraud Initiative
NAFN Fraud Alerts
Fleet Management Board - Standing Member



FOLLOW-UP AUDITS PREVIOUSLY UNFAVOURABLE

The requirement for follow-up sits within the Global Internal Audit Standards **Domain V: Performing Internal Audit Services**, specifically under **Principle 15 – Communicate Engagement Conclusions and Monitor Action Plans**.

Unfavourable audit opinions (Limited or No Assurance) are formally followed up to confirm that agreed actions have been implemented and controls improved. A revised conclusion will be issued and reported to the G&AC.

For Substantial or Reasonable Assurance opinions, responsible officers must complete a self-assessment, which Internal Audit may validate through testing.

Follow-up reviews are scheduled based on the date of the final report allowing enough time for management actions to be implemented and then embedded.

Year	Audit Title	Original Opinion	Status
2023/24	Employee Mileage	Limited	Limited
	General Expenses	Limited	Limited
	Children Looked After Savings	Limited	Limited
2024/25	Procurement Cards	Limited	Fieldwork
	Bank Imprest - Severn View	Limited	2026/27 Q3
	Supply Staff at Schools	Limited	2026/27 Q3
	Contract Management	Limited	2026/27 Q4
	Pupil Referral Service	Limited	2026/27 Q3
2025/26	My Mates	Limited	2026/27 Q4
	H&S Building Compliance	Limited	2026/27 Q4
	Deprivation of Liberty Safeguards	Limited	2026/27 Q4
	King Henry VIII 3-19 School	Limited	2026/27 Q4
	Caldicot Castle	No Assurance	Reasonable
2026/27	Social Value Procurement	Limited	2027/28 Q1



AUDIT PLAN

NON-NEGOTIABLES

As agreed within the Internal Audit Strategy 2026-27, there are a number of areas to be considered within each Quarterly Internal Audit plan considered to be non-negotiables.

The table opposite details these areas and when a review of the area can be next expected.

Audit Title	Directorate	Type of Review	Last Reviewed	Next Review
Payroll	People, Policy & Performance	Assurance	2022/23	2027/28
Budgetary Control (Revenue)	Resources	Assurance	2021/22	2027/28
Budgetary Control (Capital)	Resources	Assurance	2025/26	2028/29
Procurement	Resources	Assurance	2024/25	2026/27 Q1
Creditors	Resources	Assurance	2023/24	2027/28
Procurement Cards	Resources	Assurance	2025/26	2027/28
Debtors	Resources	Assurance	2025/26	2028/29
Council Tax	Resources	Assurance	2023/24	2027/28
National Non Domestic Rates (NNDR)	Resources	Assurance	2022/23	2026/27 Q3
Housing Benefits	Resources	Assurance	2023/24	2028/29
Health & Safety	Resources	Assurance	2019/20	2026/27 Q4
Safeguarding	Social Care & Safeguarding	Assurance	2020/21	2026/27 Q4
Annual Governance Statement	Cross Cutting	Assurance	Annual	Annual
Financial Advice	Cross Cutting	Added Value	Ongoing	Ongoing
Financial Assessments (Social Care Providers)	Social Care & Safeguarding	Added Value	Ongoing	Ongoing



AUDIT PLAN QUARTER 3

Based on the ongoing rolling Internal Audit Plan, the Chief Internal Auditor has identified the areas scheduled for review during this quarter.

A risk-based internal auditing approach has been applied to prioritise the team's workload for the period. These priorities may be adjusted if organisational needs or risk levels change.

Audit Title	Directorate	Type of Review	Risk
Treasury Management	Resources	Assurance	High
National Non Domestic Rates (NNDR)	Resources	Assurance	High
Pupil Referral Service (Follow- up)	CLSE	Assurance	High
Supply Teachers (Follow-up)	CLSE	Assurance	Medium
School Building Usage	CLSE	Assurance	Medium
Ysgol y Ffin	Schools	Assurance	Medium
Schools Control Risk Self Assessments	Schools	Assurance	Medium
Children's Services Imprest Account	Social Care	Assurance	Medium
SWTRA	Infrastructure	Assurance	High
Outdoor Adventure	Place & Community Wellbeing	Assurance	Medium
MonLife Control Risk Self-Assessments	Place & Community Wellbeing	Assurance	Medium
Member Allowances & Expenses	Law & Governance	Assurance	Medium



COUNTER FRAUD

CURRENT INVESTIGATIONS

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These are the investigations or pieces of Counter Fraud work which were ongoing at the end of the quarter.

After an initial review, some concerns may be deemed not to require any further action. Others may be investigated directly by Internal Audit, or the team may provide support to other Council officers who are appointed as the formal Investigating Officer.

Year	Investigation Title	Reason for Investigation	Status
2025/26	Employee E (School Based)	Inappropriate payments & non-compliance with Policy	Ongoing
2026/27	Employee F (Place & Community Wellbeing)	Theft	Ongoing
	Complaint A	Independent investigation required	Ongoing



COUNTER FRAUD INVESTIGATION OUTCOMES

These are investigations or proactive pieces of Counter Fraud work completed which have been deemed as being closed at the end of the quarter.

Where necessary, concerns may be passed to outside agencies such as the Police, Social Care Wales or the Education Workforce Council.

Year	Investigation Title	Reason for Investigation	Outcome
	No outcomes to report during Q1		



INTERNAL AUDIT PERFORMANCE INDICATORS

These are the performance indicators agreed within the Internal Audit Strategy 2026/27.

The suite of indicators are new for this year and due to this there is no comparable data from previous years.

	2026/27	Target	Q1	Q2	Q3	Q4
1	Audits completed to draft within 4 months	90%	100%			
2	Number of Audit Conclusions issued during the quarter	8	5			
3	Number of Audit Conclusions issued during the rolling 12 month period	35	33			
4	Clients satisfied with service received	100%	100%			
5	Number of staff	6 FTE	6 FTE			
6	Frequency of Plan Updates reported to GAC & SLT	Quarterly	Target Met			
7	Recommendations either fully or partially implemented within 12 months	90%	PI not yet captured – work in progress.			
8	Response to fraud allegations or requests for advice	2 days	Same day			

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SUBJECT:	WHISTLEBLOWING POLICY AND GUIDANCE REVIEW
MEETING:	GOVERNANCE AND AUDIT COMMITTEE
DATE:	SEPTEMBER 2026

1. PURPOSE:

The purpose of this report is to provide the Governance and Audit Committee with information in relation to the current review of Monmouthshire County Council's Whistleblowing Policy and Guidance.

2. RECOMMENDATION:

That the Committee supports the revised and reformatted versions of Monmouthshire County Council's Whistleblowing Policy and Guidance documents, enabling the documents to be approved and subsequent communication to be shared with all employees, to raise awareness.

3. KEY ISSUES:

All Monmouthshire County Council's HR policy and guidance documents have been reviewed and transferred to a revised format and structure, in the past 18 months, or are due to be reviewed and transferred by the end of October 2026. The purpose of this is to ensure that the information available in Monmouthshire County Council's HR policies is more concise, accessible and focussed, and by expanding the content in Monmouthshire County Council HR guidance documents, this is then more relevant and supportive of colleagues and people leaders, at varying stages of employment related processes. It is hoped that this revised approach will enable colleagues and people leaders to find employment related processes easier to navigate and subsequently apply to circumstances they are experiencing.

Monmouthshire County Council's Whistleblowing Policy was last reviewed and updated in 2024. The current review commenced in May 2026, and consultation has been undertaken with relevant officers and trade union representatives, including presentation and discussion at the Joint Advisory Group meeting on Monday 6th July 2026, as outlined in the version control tables in the policy and guidance documents. The following amendments were made to the Whistleblowing Policy and Guidance documents, following consultation:

- Including reference to additional legislation
- Replacing the term "in good faith" with "reasonable belief and public interest"

- Adding new sections on protected disclosures (including a list of external contacts with an explanation of legal conditions), “Acting on Suspensions” and Data Protection and Security
- Making it clearer that the Designated Officer should contact Human Resources, in the first instance of a concern being raised, for advice on the process to be followed
- Including a caveat on timescales to complete investigations (i.e. indicative timescales)
- Referring to malicious complaints potentially resulting in disciplinary action, up to and including dismissal
- Providing a more detailed explanation around anonymous complaints and confidentiality.

4. REASONS:

Monmouthshire County Council and school governing bodies expect the highest standards of conduct from all employees and therefore encourage employees and others with serious concerns about any aspect of the Council/school’s work to come forward and voice those concerns in a safe environment.

In line with the Council’s commitment to openness and accountability, employees are encouraged to raise concerns. Such concerns will be taken seriously, investigated and appropriate action taken in response. The Whistleblowing Policy and Guidance are designed to ensure that concerns about wrongdoing or malpractice can be raised without fear of victimisation, subsequent discrimination, disadvantage or dismissal.

The policy and guidance aim to:

- Encourage an individual to feel confident to raise a serious concern at the earliest opportunity
- Provide a route for an individual to raise concerns and to receive feedback on any action taken
- Provide reassurance that an individual will be protected from reprisals or victimisation, if they have made a disclosure in good faith.

5. BACKGROUND PAPERS:

None

6. AUTHOR:

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monmouthshire
sir fynwy

Whistleblowing (Joint)

GUIDANCE





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1. Purpose

The purpose of this Whistleblowing Guidance is to enable employees to raise concerns about serious wrongdoing, malpractice, or unsafe practice in a safe, confidential and supportive manner. This guidance aims to provide information and support to colleagues and managers on the application of the Whistleblowing (Joint) Policy and should be read in conjunction with that policy.

The Council/School Governing Body is committed to openness and integrity. This Guidance explains how to raise concerns and what will happen next.

This Guidance aims to encourage individuals to speak up where they have concerns that wrongdoing has occurred, is occurring or likely to occur, and to ensure that such concerns are taken seriously and investigated properly.

The Council/School Governing Body recognises that early disclosure of concerns helps to prevent harm, identify risks, and maintain trust with colleagues, service users and the wider community.

This Guidance applies to concerns about serious wrongdoing affecting the Council or the public interest and is separate from other procedures such as the Resolution Policy, which is intended for personal employment related issues.

2. Roles and Responsibilities

Monmouthshire County Council will be responsible for:

- Raising awareness of the Whistleblowing Policy and Guidance to all colleagues.
- Providing safe reporting routes to ensure that colleagues know who to contact and feel confident that their concern will be received appropriately.
- Ensuring concerns are handled confidentially and shared on a need-to-know basis.



- Making clear about situations where confidentiality cannot be maintained (for example in legal or safeguarding matters).
- Only sharing information on a strictly need to know basis.
- Assessing all whistleblowing concerns promptly and ensuring that appropriate investigations are carried out in a fair, proportionate, and independent manner, where possible.
- Providing feedback on progress and outcomes of any investigation.
- Reviewing this Guidance (and Policy) to ensure legal compliance and best practice.

Colleagues will be responsible for:

- Familiarising themselves with the application of the Whistleblowing Policy and Guidance.
- Raising concerns promptly where they reasonably believe that serious wrongdoing or malpractice, or unsafe practice has occurred, is occurring or likely to occur, and where the concern is in the public interest.
- Using the procedures set out in this Whistleblowing Guidance to raise concerns through the appropriate reporting channels.
- Understanding the differences between whistleblowing and grievances.
- Providing information honestly and responsibly, ensuring that concerns are raised in good faith and not for personal gain or with malicious intent.
- Cooperating with any investigation.
- Respecting confidentiality including not discussing a whistleblowing matter with colleagues or others unless authorised to do so.
- Attending training or awareness sessions as and when necessary.

Leaders will be responsible for (in addition to their responsibilities as colleagues):

- Understanding and being aware of this Whistleblowing Guidance and of their role in receiving and escalating concerns appropriately.
- Responding promptly to a whistleblowing concern, taking the concern seriously, listening carefully and acting in a non-judgemental manner.
- Acknowledging receipt of the concern.
- Maintaining confidentiality and sharing information on a need-to-know basis only.



- Being clear with the individual about situations where confidentiality cannot be maintained, (for example where required by law, safeguarding duties or serious risk).
- Ensuring that concerns are referred to the appropriate senior manager, HR and/or safeguarding lead, or designated whistleblowing contact.
- Protecting the whistleblower from detriment, ensuring that no action or behaviour results in victimisation, harassment or unfair treatment as a result of raising a concern.
- Seeking advice and support from HR or other appropriate services when handling whistleblowing matters, particularly where the concern is complex, or involves, legal, safeguarding or disciplinary considerations.
- Cooperating with investigations, including providing information and support as required.
- Providing feedback to the individual raising the concern, while respecting confidentiality.
- Ensuring that colleagues are aware of the support mechanisms, including HR and Trade Union Representatives, and other sources of advice.
- Attending relevant training to ensure that they are confident and competent in handling whistleblowing concerns in line with policy, guidance and legal requirements.

HR colleagues will be responsible for:

- Providing support and advice to managers and colleagues on the application of the Whistleblowing Policy and Guidance.
- Supporting managers in handling whistleblowing concerns, particularly where issues involve complex employment, legal, safeguarding or disciplinary considerations.
- Ensuring confidentiality is maintained, in line with data protection requirement, while recognising that may need to be breached in limited circumstances (e.g. by law, safeguarding or serious risk).
- Advising on protection from detriment, helping to ensure that whistleblowers are not subject to victimisation, harassment or unfair treatment, as a result of raising a concern.
- Liaising with specialist services, including safeguarding leads, if appropriate.
- Supporting and advising on investigations including ensuring a fair process, consistent with employment law and aligned to the Council's policies and procedures.



- Maintaining appropriate records relating to whistleblowing concerns, in accordance with data protection and record keeping requirements (please see section 9 of this guidance for information).
- Reviewing this Guidance (and Policy) to ensure legal compliance and best practice.

Safeguarding colleagues will be responsible for:

- Managing a whistleblowing concern that indicates a child or vulnerable adult is at risk.
- Enabling concerns to be escalated to external bodies, if appropriate and necessary.
- Providing advice and support to individuals raising a safeguarding concern under this Whistleblowing Guidance (and Policy).

Trade Union or Workplace Representatives will be responsible for:

- Providing advice, support and representation to their members.
- Working with managers, HR and colleagues to ensure the application of this Guidance (and Policy) and protection of individuals.
- Maintaining confidentiality but also understanding that confidentiality can be broken to protect the safety of individuals.

3. Definitions

Statutory protection for employees who whistle blow is provided by the legislation, Public Interest Disclosure Act 1998 (“PIDA” - amended by the Enterprise and Regulatory Reform Act 2013). The PIDA protects employees against victimisation if they make a protected disclosure within the meaning of the PIDA and speak out about concerns around conduct or practice within the Council/school which is potentially illegal, corrupt, improper, unsafe, and unethical or which amounts to malpractice.



4. Policy Process – What Will Happen?

Types of Issues/Disclosures that can be raised

In legislation, protection under the Public Interest Disclosure Act (PIDA) only arises in relation to protected disclosures. The types of qualifying disclosures that can be made include the following:

- a) a criminal offence - has been committed, is being committed, or is likely to be committed.
- b) a breach of a legal obligation - that a person has failed, is failing, or is likely to fail to comply with any legal obligation to which they are subject.
- c) a miscarriage of justice has occurred, is occurring, or is likely to occur.
- d) someone's health and safety is being or is likely to be endangered.
- e) the environment has been, is being, or is likely to be damaged.
- f) sexual harassment - if someone is sexually harassed by a manager/colleague/unwanted behaviour of a sexual nature.
- g) That information tending to show any of (a) to (f) above has been concealed or is likely to be deliberately concealed.

In addition to the above, and as further examples, this guidance also covers whistleblowing relating to alleged:

- unlawful conduct
- miscarriages of justice in the conduct of statutory or other processes
- failure to comply with a statutory or legal obligation
- potential maladministration, misconduct, or malpractice
- abuse of authority
- unauthorised use of public or other funds, fraud, bribery, or corruption
- breaches of financial regulations or policies



- mistreatment of any person
- action that has caused or is likely to cause physical danger to any person or risk serious damage to Council or School property
- sexual, physical, or emotional abuse of employees, service users, or pupils
- unfair discrimination or favouritism
- behaviour which is discriminatory towards someone with a protected characteristic under the Equality Act 2010
- racist incidents or acts, or racial harassment or intimidation
- attempts to prevent disclosure of any of the issues listed.

A disclosure will not be a qualifying disclosure if the person making it commits an offence by making it.

A protected disclosure can be made to one of the following recipients (subject to certain conditions), these are:

- The worker's employer
- A legal adviser
- Other bodies, e.g. Police, Member of Parliament (MP), media
- A regulatory body, e.g. HSE, Audit Wales, ICO

The circumstances in which disclosures may be made vary depending upon the intended recipient of the information. The most likely recipient of information from Council and or School employees concerning misconduct will be the Council or School Governing Body as the employer of the worker in question.

If the whistleblower does not feel able to raise a concern internally, they may choose to raise concerns in the public interest externally with prescribed bodies. These are listed in the 'Reporting concerns to external bodies' section of this guidance. Before deciding to do this, whistleblowers should be aware when making an external report that to qualify for the protections available under the Public Interest Disclosure Act, additional conditions need to



be met.

To be protected by the Public Interest Disclosure Act (PIDA), a worker wishing to make a disclosure must make sure that they reasonably believe that the disclosure tends to show a relevant failure and that the disclosure is in the public interest.

If a disclosure is made to:

- the employer, it must arise from a reasonable belief that the alleged malpractice has occurred, is occurring or likely to occur
- a regulator, e.g. Health and Safety Executive, in addition it must be honestly and reasonably believed that the information and any allegations contained are substantially true
- other bodies such as the Police, media, MP etc, in addition to the tests for regulatory disclosure, no personal gain will be made from the disclosure and in all circumstances, that it is reasonable for the disclosure to be made.

If a disclosure is made to “**other bodies**”, further preconditions apply. It must be:

- reasonably believed that the whistleblower would be victimised if the matter were raised internally
- reasonably believed that the disclosure related to a criminal offence
- the case that there is no prescribed regulator, and it was believed that relevant information would be concealed or destroyed
- that the concern has already been raised with the employer or regulator or
- that the concern is of an exceptionally serious nature.

How to raise a concern



Wherever possible, employees are encouraged to use relevant Council procedures to report issues in an open and transparent way. In the first instance, concerns from employees should normally be raised with their line manager, individually or as a group. Similarly, non-employees (e.g. agency workers or contractors) should raise a concern in the first instance with the contact at the Council/School, usually the person to whom they directly report.

In some cases, the nature or sensitivity of the concern means that this may not be appropriate. If individuals feel that they cannot raise a concern with their immediate manager or normal Council contact, they may feel a whistleblowing disclosure is the most appropriate option.

Concerns should ideally be raised in writing to enable the Council/School Governing Body to review concerns effectively. Whistleblowers should give the background and history of the issues, giving relevant details such as names and dates, if possible, and the reason why they are particularly concerned about the situation.

Whistleblowers may ask for a private meeting with the person to whom they wish to raise a concern. If they wish, individuals can be accompanied by a trade union representative or work colleague to any meetings in connection with the concerns being raised.

If an individual wishes to make a whistleblowing disclosure, or discuss their concerns, the following officers should be their first point of contact:

CONCERN RELATES TO:	REPORT TO (who becomes the Designated Officer)
General concern/Employee/Volunteer	Line Manager/Headteacher
Line Manager	Head of Service/Head teacher



Head of Service/Head teacher	Chief Officer/Strategic Director/Chair of Governors
Chief Officer/Strategic Directors	Chief Executive (Tel: 01633 644 644)
Chair of Governors	Vice Chair of Governors
Chief Executive	Leader of the Council (Tel: 01633 644 644)
Whole Governing Body	Strategic Director - Children, Learning, Skills and Economy (Tel: 01633 644 644)
County Councillor	Monitoring Officer (Tel: 01633 644 644)
Malpractice about child/children in a school*	Strategic Director - Social Care and Safeguarding (Tel: 01633 644 644)
Malpractice about an adult(s) at risk*	Strategic Director - Social Care and Safeguarding (Tel: 01633 644 644)



Financial Irregularity/Impropriety	Chief Internal Auditor (Tel: 01633 644 644)
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*** If the concern is a safeguarding concern about a child or adult at risk (rather than about potential malpractice), this should be reported to Monmouthshire Children's Services or Adult Services respectively via normal Child Protection /Safeguarding Procedures: Tel: 01633 644 644.**

If the concern needs to have Police or other statutory authority involvement, the whistleblowing process will be halted until the statutory authorities have completed their investigations and confirmed that it is appropriate to continue with the whistleblowing process. This must take place even if the statutory authorities take the decision not to pursue a criminal investigation.

Normally, the person who the concern is raised with, or reported to, becomes the Designated Officer. The Designated Officer is responsible for making initial enquiries about the matter and for keeping all parties informed of progress and advising of the outcome. It may be necessary for the Council/School Governing Body to appoint a person, as the Designated Officer, other than the person to whom the allegation or concern was raised with/reported to.

The Designated Officer should, in the first instance, contact Human Resources, to make them aware that a concern has been raised, provide details of the concern and receive advice on the process to be followed.



Acting on Suspicions

Do

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

Do Not

- **Confront the suspect or convey concerns to anyone other than those authorised:** Never attempt to question a suspect yourself, this could alert a fraudster or accuse an innocent person.
- **Try to investigate:** Never attempt to gather evidence yourself unless it is about to be destroyed; gathering evidence must consider legal procedures in order for it to be useful.
- **Be afraid of raising your concerns:** The Public Interest Disclosure Act 1998 (PIDA) and the Council's Whistleblowing Policy protect employees who have reasonable concerns. This guidance has been written to take account of the Public Interest Disclosure Act 1998 (PIDA). You will not suffer discrimination or victimisation by following the correct procedures.

What the Council/School Governing Body will do

A key principle for the Council/School Governing Body will be the public interest. To be fair to all employees, initial enquiries will be made by the Designated Officer, with support from Human Resources, to decide whether an investigation is appropriate and if so, what form it should take. The concern raised may require the following:



- enquiry internally in the Council/School.
- need to be passed to the Police if it relates to alleged criminal activity.
- need to be passed to Internal Audit if the complaint is about financial management or financial propriety.
- need to be referred through established child protection/safeguarding procedures.

At this stage concerns/allegations are neither considered founded or unfounded, pending an investigation if deemed necessary.

Timescales

The Designated Officer will normally provide a written acknowledgement to the whistleblower **within 5 working days** (except in the case of anonymous allegations), acknowledging the concern has been received and:

- indicating how it is proposed to deal with the matter
- giving an estimate of how long it will take to provide a final response
- advising of the support available whilst matters are investigated
- outlining whether further investigations will take place and if not, why not.

The Designated Officer will write to the whistleblower and the individual(s) against whom the concern(s) has been raised, to acknowledge receipt and to indicate that the procedures have been commenced.

Depending on the nature of the concern/allegation, provision of a final response may take longer than 5 working days. If this is the case, the Designated Officer will notify all individuals in writing, providing an indication when the enquiry will be completed.

Where possible, enquiries will be completed within **10-15 working days** from the date of receipt of the initial written response from the Designated Officer. If the enquiry extends beyond the timescales above all individuals concerned will be notified in writing by the Designated Officer, providing an indication of when the enquiry will be completed.



The Designated Officer might investigate the concerns raised themselves or the Designated Officer might appoint an independent investigator to do so. As part of this process, the person who investigates the concerns raised will:

- Look into the concern - seeking evidence and interviewing witnesses as necessary
- Maintain confidentiality wherever possible (but there is not a 100% guarantee that the whistleblower can remain anonymous)
- If appropriate, refer the matter to Audit, if the complaint is about financial management or financial propriety in schools
- If appropriate, for concerns of criminal behaviour refer the matter to the Police
- If appropriate, for concerns of child protection or vulnerable adults, refer the matter through the established child protection/safeguarding procedures.

The amount of contact time between the whistleblower and the Designated Officer or person appointed to investigate the issues will depend on the nature of the matters raised, the potential difficulties involved and the clarity of information provided. It is likely that the whistleblower will be interviewed to ensure that their disclosure is fully understood.

Any meeting with the whistleblower can be arranged away from the workplace, if needs be, and a trade union representative or workplace colleague may accompany, for support. The whistleblower needs to be assured that their disclosure has been properly addressed. Unless there are legal reasons why this cannot be done, the whistleblower will be kept informed of the progress and outcome of any investigation. Following completion of the enquiry/investigation process, the Designated Officer or independent investigator will make a written report normally within **5 working days**. This report will contain findings and make recommendations for the Designated Officer (if an independent investigator has been appointed) or the appropriate committee of the School Governing Body to consider.

The report will not contain the name of the whistleblower, unless the individual has expressly stated that they wish to be named.



The Council/School Governing Body acknowledges that whistleblowers should feel confident that their concerns have been properly handled. Therefore, on conclusion of any investigation, unless there are legal reasons why this cannot be done, the whistleblower and the person(s) against whom the allegation is made, will be told the outcome of the investigation and what action has been taken/is proposed. The amount of information shared will be at the discretion of the Designated Officer/Investigating Officer, in conjunction with HR advice. If no action is to be taken, the reason for this will be explained. In addition, matters raised as part of the investigation may:

1. be referred to the Police
2. be referred to the External Auditor
3. form the subject of an independent inquiry
4. be referred to an alternative policy (e.g. Disciplinary Policy or Resolution Policy)
5. be resolved as an agreed action without the need for investigation.

Please note: All timescales in this guidance are indicative rather than definitive and may change based on the complexity of the investigation or referral to an alternative policy.

Reporting concerns to external bodies

If the whistleblower does not feel able to raise their concerns internally, they may choose to raise concerns externally with prescribed persons or bodies (details are provided in the 'Types of Issues/Disclosures that can be raised' section of this guidance). If a whistleblower does take the matter outside of the Council/School, they should be careful not to disclose confidential information and ensure that they comply with the requirements of the Public Interest Disclosure Act (PIDA), so that they do not lose the protection of the Act against dismissal or other detriment.

If a whistleblower has reported a matter internally but is not satisfied that the concern has been properly dealt with, they should first raise it with the Designated Office. If still



unsatisfied, and it is necessary and in the public interest, the whistleblower may also consider raising concerns externally to prescribed persons or bodies.

The full list of prescribed persons and bodies can be found on the UK government website at: Whistleblowing: list of prescribed people and bodies - GOV.UK (www.gov.uk). This includes:

- HM Revenue and Customs
- The Auditor General for Wales
- The Director of the Serious Fraud Office
- The Children's Commissioner for Wales
- Social Care Wales
- Older People's Commissioner for Wales
- Public Services Ombudsman for Wales
- The Information Commissioner
- The Health and Safety Executive
- Natural Resources Wales
- The Equality and Human Rights Commission

If instead of going to a prescribed person a worker chooses to make a disclosure to an "other body" such as the media or a Member of Parliament (MP), they should note that the conditions set out in this guidance apply.

Those who receive payment for a disclosure (which may be relevant in dealings with the media) are unlikely to receive the protection outlined in this guidance (and policy).



5. Support For You

The Council/School Governing Body have a duty of care to their employees. Support for the individuals involved in this process is key to fulfilling this duty.

For those individuals who raise concerns and for those individuals who may have concerns raised about them, the Council/ School Governing Body will do all it can to help them throughout the process. Support for employees will include the offer of access to counselling and or referral to occupational health, for advice and support.

Individuals will be advised to contact their Trade Union representative, or a workplace colleague (not involved in the area of work to which the concern relates) for additional support. Individuals will also be offered an additional, independent point of contact for support during the process.

Any meetings that may be required as part of the process can be arranged away from the workplace if necessary and individuals have the right to be accompanied by their trade union representative or workplace colleague.

6. Safeguarding Whistleblowers – Our Assurances to You

Any individual who raises a genuine concern under this policy, will be protected from detriment, victimisation, or adverse treatment arising from this disclosure. It won't matter if the whistleblower is mistaken, provided they have reasonable belief and they are acting in the public interest.

Any individual who is found to have threatened or retaliated against a whistleblower in any way may be subject to disciplinary action, in line with the Council's/School Governing Body



Disciplinary Policy and Procedures. This assurance cannot be extended to an individual who maliciously raises a matter they know to be untrue.

Your legal rights

This guidance has been written to take account of the Public Interest Disclosure Act 1998 (PIDA) which protects workers making disclosures about certain matters of concern, when those disclosures are made in accordance with the Act's provisions and in the public interest. The Act makes it unlawful for the Council/School Governing Body to dismiss anyone or allow them to be victimised on the basis that they have made an appropriate lawful disclosure in accordance with the Act.

Harassment and Victimisation

The Council/School Governing Body is committed to good practice and high standards and to being supportive of employees/workers.

The Council/School Governing Body recognises that the decision to report a concern can be a difficult one to make. If a whistleblower honestly and reasonably believes what they are saying is true, they should have nothing to fear because they will be doing their duty to their employer, their colleagues and those for whom they are providing a service.

Harassment or victimisation of any kind against a whistleblower will not be tolerated and will be treated as a serious disciplinary offence and action will be taken against those responsible which may result in formal action up to and including summary dismissal, in line with the Council's/School's Disciplinary Policy and Procedures.

Confidentiality

All concerns will be handled confidentially in line with the Whistleblowing Policy. Further details on confidentiality can be found in the Whistleblowing Policy and in Section 8 (Anonymous Allegations) of this guidance.



7. Untrue or Vexatious Allegations

If an allegation is made which is believed to be in the public interest, but it is not confirmed by further enquiry or by an investigation, no action will be taken against the person who raised the initial concern. If, however, the enquiry/investigation shows that untrue concerns were malicious and/or vexatious or made frivolously or made for personal gain, then the Council/School Governing Body disciplinary process may be instigated which may result in dismissal from the Council/School.

8. Anonymous Allegations

Any disclosures made under this process will be treated seriously, and actions taken in accordance with the Whistleblowing Policy and Guidance. If asked to treat the matter in confidence, the identity of the whistleblower will not be revealed and we will do our best to respect the request as far as possible, restricting to “a need-to-know basis”.

In circumstances, where it is not possible to resolve the concern without revealing the whistleblower’s identity, the whistleblower will be advised first, and protective measures will be put in place before proceeding with any investigation. The same consideration of confidentiality should be afforded to the people/persons at the centre of the concern, as far as appropriate.

The best way to raise a whistleblowing concern is to do so openly, and when making a protected disclosure, the whistleblower is asked to give us a name. Reasons for this is so that we can protect your rights, and it’s harder to do this if we don’t know who you are. Additionally, if the nature of the protected disclosure is such that rather than an investigation (or prior to an investigation), immediate action could be taken, this would be agreed with the whistleblower.

At the end of any investigation we would like to tell the whistleblower (as far as the law allows us to), the outcome and steps taken or that we are going to take. We may also want to discuss a proposed action plan with the whistleblower before taking the action.

Although the Council/School Governing Body encourages whistleblowers to provide contact details, they can still raise a concern anonymously and raising a concern anonymously is



preferred to silence about a potential wrongdoing. However, whistleblowers should be aware that if concerns are reported anonymously, they may find it hard to argue that any subsequent unfair treatment was as a result of the whistleblowing.

Potential whistleblowers should be aware that the protection of confidentiality may not apply where an individual intentionally reveals their identity in the context of a public disclosure.

It is recognised that the prospect of whistleblowing can place considerable stress on an individual. If employees are contemplating making a whistleblowing complaint, they may wish to seek advice from a third party such as a trade union representative or Human Resources.

The Council/School suggests a whistleblower wishing to remain anonymous should consider using an anonymous email account so that the Council/School Governing Body can respond and communicate details of the investigation. Anonymous whistleblowers may wish to keep copies of all correspondence to demonstrate that a concern was raised.

Anonymous concerns will be considered under the Whistleblowing Policy, especially concerns raised relating to the welfare of children or vulnerable adults. In relation to determining whether an anonymous allegation will be taken forward the Council/School Governing Body will take the following factors into account:

- the seriousness of the issue raised.
- the credibility of the concern.
- the likelihood of confirming the allegation from attributable sources and obtaining information provided.

If an employee raises a concern following the correct procedure and in the reasonable belief that it is in the public interest, the employee raising the concern will be protected. The Public Interest Disclosure Act (PIDA) protects workers who make a protected disclosure of information concerning certain types of matters relating to their employment, from being dismissed or penalised as a result of the disclosure.



9. Data Protection and Security

The provisions of the Data Protection Act 1998 must be observed during the whistleblowing process, particularly in disclosure, use and processing of personal information.

The Council's/Schools Governing Body processes all reported data in strict compliance with General Data Protection Regulation (GDPR) and Data Protection Act (2018) Policy. Whistleblowing files will be stored, with restricted access. Access will be limited to authorised individuals. To protect privacy and retaliation, the identity of the whistleblower will remain confidential and will be redacted from any third party subject access requests. Case records will be retained following the conclusion of an investigation to meet legal and regulatory requirements and in accordance with the Council's/School's Governing Body Retention Policy in relation to Whistleblowing.

10. How The Matter Can Be Taken Further

External Contacts regarding whistleblowing:

- GOV.UK website: www.gov.uk/whistleblowing
- ACAS: 0300 123 1100 or [Get advice from the Acas helpline | Acas](#)
- Citizen's Advice: www.citizensadvice.org.uk
- Public Concern at Work: 020 7404 6609 or www.pcaw.org.uk
- Education Workforce Council: 02920 460099 or www.ewc.wales
- Care and Social Services Inspector for Wales: 0300 7900 126 or www.cssiw.org.uk
- The Auditor General for Wales: 02920 320500 or [Whistleblowing | Audit Wales](#)
whistleblowing@audit.wales



- Children's Commissioner for Wales: [01792 765600](tel:01792765600) or www.childcomwales.org.uk
post@childcomwales.org.uk
- The Office of the Information Commissioner: 02920 678400 or <https://www.ico.gov.uk>
- The Police
- Your local councillor or AMs or MPs
- Health & Safety Executive: [HSE - Working with Wales: HSE in Wales](#)

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Version Control

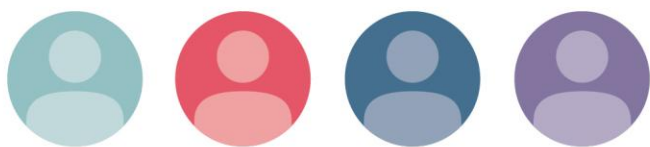
Title	Whistleblowing Guidance (Joint)
Owner	Human Resources
Approved by	TBC
Date	April 2026
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Review Date	2028 - 2030
Status	Draft
Consultation	Head of Litigation and Deputy Monitoring Officer Audit Manager Equality and Welsh Language Manager Trade Union Representatives Workforce Development Manager Head of Systems and Payroll Health and Safety Manager Governance and Audit Committee Safeguarding Manager



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sir fynwy

Whistleblowing (Joint) POLICY

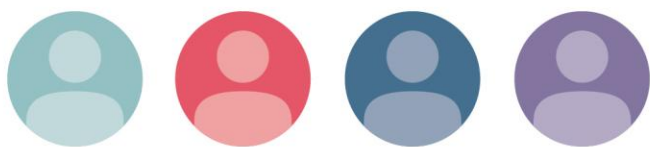




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1. Policy Brief - When do I use this policy?

1.1 Monmouthshire County Council and school governing bodies are committed to achieving the highest possible standards of conduct and service and the highest possible ethical standards in public life and in all its practices and will treat whistleblowing as a serious matter. Whistleblowing is defined as:

‘The action someone takes to report wrongdoing at work that affects others’
([The law - Whistleblowing at work - Acas 2026](#)).

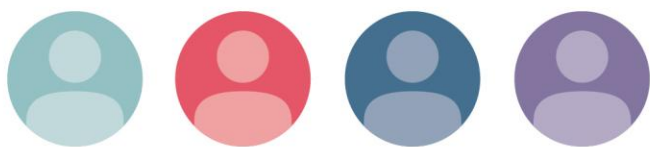
1.2 In line with the council and school governing bodies’ commitment to openness and accountability, colleagues and others are encouraged to raise concerns, in a safe environment, about any aspect of the council and/or school’s work which will be taken seriously, investigated, and appropriate action taken in response. The Whistleblowing Policy is designed to ensure that concerns about wrongdoing or malpractice can be raised without fear of victimisation, subsequent discrimination, disadvantage or dismissal.

1.3 The Whistle Blowing Policy aligns with our values of:

Openness: We are committed to fostering an open culture where colleagues feel safe and supported to raise concerns. We encourage honest communication and treat all disclosures with seriousness and transparency.

Fairness: We treat every individual fairly and consistently when handling whistleblowing concerns. All disclosures will be considered objectively, without prejudice or bias, and in line with our legal and ethical responsibilities.

Flexibility: We recognise that individuals may require different forms of support when raising concerns. We will take a flexible approach to the process and communication, ensuring that colleagues can speak up in the way that is safest and most appropriate for them.



Teamwork: We work collaboratively across teams and departments to ensure that concerns are addressed effectively and responsibly. We value shared responsibility in creating a safe environment and take collective action to prevent and respond to wrongdoing.

Kindness: We prioritise respectful relationships and clear communications in all interactions, including supporting colleagues who raise concerns under this policy.

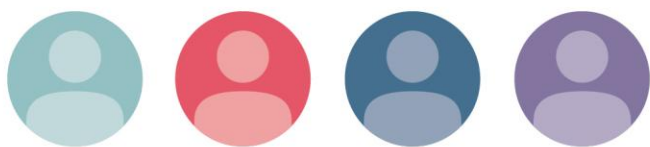
1.4 Monmouthshire County Council recognises its responsibilities under the following legislation:

- Employment Rights Act 1996, as amended
- The Trade Union and Labour Relations (Consolidation) Act 1992
- The Public Interest Disclosure Act 1998
- The Equality Act 2010
- The Bribery Act 2010
- The Enterprise and Regulatory Reform Act 2013
- UK General Data Protection Regulations (UK GDPR) and Data Protection Act 2018
- Employment Rights Act 2025.

2. Policy Scope – What does this policy cover?

2.1 The policy is designed to ensure that colleagues raise any concerns about wrongdoing or malpractice within the Council/ School without fear of victimisation, subsequent discrimination, disadvantage or dismissal. The policy aims to:

- Encourage colleagues to feel confident in raising serious concerns at the earliest opportunity and to question and act upon concerns about practice, so that they can be properly investigated.
- Provide avenues for colleagues to raise those concerns and receive feedback on any action taken.



- Ensure that colleagues receive a response to their concerns and that they are aware of how to pursue them if you are not satisfied.
- Provide reassurance that colleagues will be protected from possible reprisals or victimisation if they have made disclosure with reasonable belief and within the meaning of the PIDA (Public Interest Disclosure Act 1998, amended by the Enterprise and Regulatory Reform Act 2013).

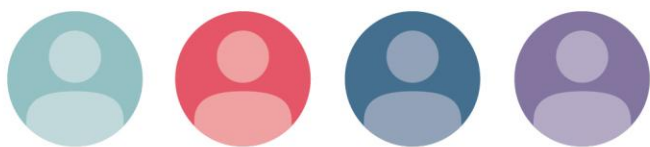
2.2 The policy applies to all:

- Employees of Monmouthshire County Council/School Governing Bodies
- Employees of contractors working for the council/school
- Those providing services under a contract or other agreement with the council/school
- Voluntary workers working with the council/school.

2.3 This Policy should be read in conjunction with the Council's:

- Codes of Conduct for employees and County Councillors
- Dignity at Work Policy and Guidance (Joint)
- Disciplinary Policy and Guidance (Corporate/Schools)
- Resolution and Guidance Policy (Joint) and Guidance (Corporate/Schools)
- Sexual Abuse and Domestic Violence Policy and Guidance (Joint)
- Volunteering Policy (Joint)
- Whistleblowing Guidance (Joint).

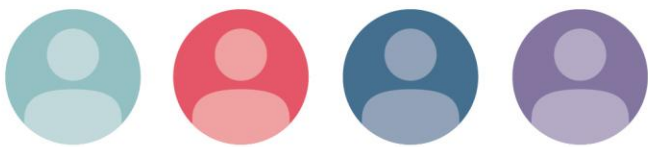
2.4 If a colleague is the subject of an employee relations process, ongoing processes will not be halted as result of whistleblowing.



2.5 In its application, this policy seeks to ensure that there is no discrimination against colleagues either directly or indirectly on grounds prohibited by the Equality Act 2010 which covers age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex or sexual orientation.

3. Confidentiality

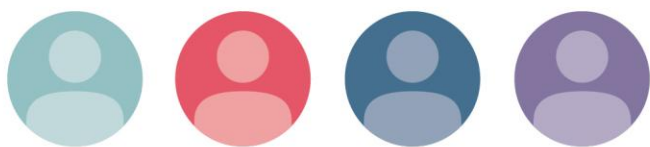
- 3.1 The Council/School Governing Body aims to ensure that whistleblowers feel able to voice whistleblowing concerns under this policy. However, if colleagues wish to raise concerns confidentially, Monmouthshire County Council will make every effort to ensure whistleblowing protections are applied and that the whistleblower(s) identity is not shared with anyone other than those involved in investigation the concerns raised. If it becomes necessary for anyone else to know the identity of the whistleblower(s), to adequately investigate the concerns, this will be discussed with the whistleblower(s) first.
- 3.2 In some circumstances, for example in disciplinary processes, it may not be possible to act because of a disclosure without asking the whistleblower(s) to come forward as a witness(es). If this is agreed to, the whistleblower(s) will be offered advice and support.
- 3.3 The Council/School Governing Body will not place colleagues under pressure to give their name and will give due consideration to proceeding with investigating the concern based on an anonymous allegation.



4.Support – Who can I contact?

- HR Colleagues - humanresources@monmouthshire.gov.uk
- Chief Internal Auditor - 01633 644 644
- External Counselling Service - contact HR Colleagues
- Safeguarding - 01633 644 644
- Trade Union Officer

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Version Control

Title	Whistleblowing Policy (Joint)
Owner	Human Resources
Approved by	TBC
Date	March 2026
Version Number	1. Whistleblowing Policy (2004) 2. Whistleblowing Policy (2013) 3. Whistleblowing Policy (2016) 4. Whistleblowing Policy (2024) 5. Whistleblowing Policy (Joint) (2026)
Review Date	2028 – 2030
Status	Draft
Consultation	Head of Litigation and Deputy Monitoring Officer Audit Manager Equality and Welsh Language Manager Trade Union Representatives Workforce Development Manager Head of Systems and Payroll Health and Safety Manager Governance and Audit Committee Safeguarding Manager



REPORT

SUBJECT:	TREASURY MANAGEMENT ACTIVITY UPDATE - QUARTER 1 2026/27
MEETING:	Governance & Audit Committee
DATE:	10 September 2026
DIVISIONS/WARD AFFECTED:	All

1. **PURPOSE:**

- 1.1. The Prudential Code and CIPFA treasury guidance require local authorities to produce annually a Treasury Management Strategy Statement and Prudential Indicators on their likely financing and investment activity, and to ensure that the appropriate governance function that oversees the treasury management activities of the Authority is kept informed of activity quarterly.
- 1.2. The Authority's treasury management strategy for 2026/27 was approved by Council on 26th February 2026. Over the first quarter of the year the Authority has borrowed and invested substantial sums of money and is therefore exposed to financial risks including the loss of invested funds and the revenue effect of changing interest rates. The successful identification, monitoring and control of risk remains central to the Authority's treasury management strategy.
- 1.3. This report represents the first update of treasury management activity during 2026/27.

2. **RECOMMENDATIONS:**

- 2.1. That Governance & Audit Committee considers the 2026/27 Treasury Management Outturn report, including performance against the approved Treasury Management Strategy and compliance with treasury limits and prudential indicators, in order to discharge its delegated scrutiny and assurance responsibilities on behalf of Council.

3. **KEY ISSUES:**

3.1. **Key data metrics at quarter end:**

Type	Metric	Q1 2526	Q2 2526	Q3 2526	Q4 2526	Q1 2627
External	Bank of England base rate	4.25%	4.00%	3.75%	3.75%	3.75%
External	UK Consumer Prices Index	3.6%	3.8%	3.4%	3.3%	2.6%
External	10-year UK gilt yield	4.49%	4.70%	4.48%	4.86%	4.77%
Internal	Borrowing	£208.2m	£179.2m	£182.8m	£197.6m	£186.8m
Internal	Borrowing Average rate	3.93%	3.72%	3.69%	3.77%	3.93%
Internal	Investments	£37.0m	£11.7m	£12.0m	£17.7m	£19.7m

Internal	Investment Average rate	4.40%	4.57%	4.56%	4.33%	3.98%
Internal	Credit score/rating	AA- / 4.50	AA- / 4.44	AA- / 4.45	A+ / 4.51	AA- / 4.15

3.2. Key messages:

Treasury management activities undertaken during the first quarter of 2026/27 complied fully with the CIPFA code and the limits and indicators set out in the Authority's approved Treasury Management Strategy.

The Authority's average cost of borrowing increased slightly over the quarter from 3.77% at year end to 3.93% at the end of the quarter.

Cash balances increased over the quarter from £17.7m to £19.7m. During quarter 1, the Authority's investment balances ranged between £13.0m and £42.2m, reflecting the timing of income receipts and expenditure, and achieved an average return of 3.98% at quarter end.

Investments in externally managed pooled funds generated £65k of income during the year, equivalent to a 6.22% income return, together with a £150.6k unrealised capital gain.

Accumulated unrealised capital losses over the lifetime of these pooled fund investments stand at £27.5k, for which the Authority maintains an adequate treasury risk reserve to mitigate against any future realisation.

The Authority continues to invest in a specific Environmental, Social and Governance (ESG) investment product and prioritises it where returns remain competitive. At 30 June 2026 this product returned 3.78% compared with an average rate of 3.88% for all Money Market Funds.

4. ECONOMIC SUMMARY

- 4.1. **Economic Overview:** The quarter was dominated by the escalation of the Middle East conflict, which disrupted global energy markets following strikes on Iran and the temporary closure of the Strait of Hormuz. This led to higher oil and gas prices and increased inflationary pressures, although energy prices eased later in the quarter as peace negotiations began. Despite these challenges, UK inflation fell from 3.3% in March to 2.8% in May, while core inflation also declined, suggesting that higher energy costs had not yet fed through broadly into the wider economy.
- 4.2. **UK Economic and Monetary Policy Developments:** Although the Bank of England had been expected to reduce Bank Rate from 3.75%, it kept rates unchanged throughout the quarter due to inflation remaining above its 2% target. The Monetary Policy Committee judged that a weakening economy and softer labour market conditions would help absorb the energy price shock without triggering sustained inflation. UK GDP grew by 0.6% in Q1 2026, but momentum weakened during the quarter, with falling business activity, softer employment conditions, lower vacancies and rising unemployment indicating slowing economic growth.
- 4.3. **Financial Markets and Credit Conditions:** Financial markets were volatile, with bond yields and equity prices initially reacting negatively to heightened geopolitical tensions before recovering as expectations of further interest rate rises diminished. UK gilt yields fluctuated significantly during the quarter, influenced by both monetary policy expectations and domestic political uncertainty. Credit

conditions remained stable overall, with bank credit default swap (CDS) spreads rising briefly during the conflict before returning to pre-conflict levels. Credit rating upgrades by Fitch and Moody's strengthened the outlook for many banks, and Arlingclose maintained confidence in the creditworthiness of institutions on its counterparty list while continuing to monitor market volatility closely.

5. **BORROWING ACTIVITY**

Lender	31 Mar 2026 Balance £m	31 Mar 2026 Weighted Average Rate %	31 Mar 2026 Weighted Average Maturity (years)	Balance Movement	30 Jun 2026 Balance £m	30 Jun 2026 Weighted Average Rate %	30 Jun 2026 Weighted Average Maturity (years)
Public Works Loan Board	158.7	3.7	15.2	(11.5)	147.1	3.6	16.1
Banks (LOBO)	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Welsh Gov Interest Free	5.9	0.0	2.4	(0.2)	5.7	0.0	2.4
Local authorities /Other	33.0	4.7	0.1	1.0	34.0	4.1	0.6
Total borrowing	197.6	3.77	12.3	(10.8)	186.8	3.6	12.8

- 5.1. The Authority maintained its borrowing strategy focused on affordability and long-term debt stability, continuing to rely on internal borrowing where possible. Gilt yields remained volatile and ended the year up. Public Works Loan Board (PWLB) rates fluctuated across maturities, with 10-year loans ranging from 4.77% to 5.45%, and short-term borrowing costs from other local authorities broadly aligned with the Base Rate at 4.0% to 4.50%. The Authority's average short-term borrowing rate decreased slightly over the quarter, reflecting lower market rates.
- 5.2. As of 30th June 2026, the Authority's total borrowing stood at £186.8m, a decrease of £10.7m from 31st March 2026. The decrease in total borrowing reflects timing differences, as new temporary loans were drawn shortly before the maturity of the loans they were intended to replace.
- 5.3. The Authority continues to balance securing low interest costs with maintaining flexibility to adjust borrowing in line with evolving long-term plans, ensuring a prudent and responsive approach to debt management.

6. **INVESTMENT ACTIVITY**

- 6.1. During the first quarter, the Authority's investment balances ranged between £13.0m and £42.2m, reflecting timing differences between income receipts and expenditure.

Investment Type	31 Mar 2026 Balance £m	Net Movement £m	30 Jun 2026 Balance £m	30 Jun 2026 Income Return %	31 Mar 2026 Weighted Average Maturity Days
Banks & building societies (unsecured)	(2.0)	0.0	(2.0)	Average 3.76% (4.33% 25/26)	Up to 180 days
Government (incl. local authorities)	(3.0)	(6.0)	(9.0)		
Money Market Funds (MMFs)	(8.7)	4.0	(4.7)		
Multi asset income, Pooled funds	(4.0)	0.0	(4.0)	4.83% (5.39% 25/26)	N/A
Total investments	(17.7)	(2.0)	(19.7)	3.98% (4.33% 25/26)	

6.2. Bank Rate was held at 3.75% over the first quarter with short term interest rates largely being around this level. The rates on DMADF deposits ranged between 3.70% and 3.79% and money market rates between 3.60% and 3.90%.

6.3. **Externally Managed Pooled Funds:** £4m of the Authority's investments are invested in externally managed strategic pooled multi-asset and property funds where short-term security and liquidity are lesser considerations, and the objectives instead are regular revenue income and longer-term price stability.

6.4. These funds provide an important diversification for the Authority and generated £65k (6.22%) income return, together with a £150.6k (3.48%) unrealised capital gain over the year.

6.5. Accumulated unrealised capital losses over the lifetime of the investment stand at £27.5k. The Authority maintains an adequate treasury risk reserve to mitigate against the risk that capital losses on pooled funds become realised and consequently result in a charge against the Council Fund.

7. **Environmental, Social and Governance**

7.1. During the first quarter, the Council has continued to review its investment portfolio against two ESG charters that organisations can voluntarily sign up for to ensure that all are meeting minimum level of ESG responsibility.

7.2. The authority continues to hold an ESG specific Investment product. This fund aims to provide security of capital and liquidity while focussing on the performance of the underlying issuers on a range of environmental, social and governance.

7.3. At 31st March 2026, the Authority's ESG-specific Money Market Fund returned 3.78% compared to an average rate of 3.88% for all Money Market Funds.

8. **NON-TREASURY INVESTMENTS:**

- 8.1. The Authority held a net book value of £29.53m of such non-financial asset investments at the 31st March 2026 (£29.19m as at 31st March 2025) made up of:

	Budgeted (Surplus) / deficit 2026/27 £000's	Carrying Value 31 Mar 2026 £000's	Return 2026/27 %	Return 2024/25 %
Oak Grove Solar Farm	(347)	5,938	5.84	8.47
Newport Leisure Park & service loan	(332)	16,418	2.02	1.70
Castlegate Business Park	217	7,177	-3.02	-4.22
Total	(462)	29,533	1.56	1.61

- 8.2. At this early stage of the financial year, there is insufficient information to produce a reliable forecast of the 2026/27 performance of the Authority's non-treasury investments. Performance will continue to be monitored against the approved budgets and expected returns for Oak Grove Solar Farm, Newport Leisure Park and Castlegate Business Park.

- 8.3. A further update, including the latest forecast position where available, will be provided through the period 1 financial monitoring report. The period 1 financial monitoring report is due to progress through the committee cycle in late September and October 2026.

9. **Compliance with treasury limits and indicators**

- 9.1. The Section 151 officer reports that all treasury management activities undertaken during the year complied fully with the CIPFA code and the limits and indicators as set out in the Authority's approved Treasury Management Strategy.

10. **CONSULTEES**

Cabinet Member – Resources

Head of Finance

Deputy Chief Executive, Strategic Director Resources (Section 151 Officer)

Arlingclose Limited – External Treasury management advisors to Monmouthshire CC

11. **APPENDICIES**

Appendix 1 – 2026/27 Treasury Management Quarter 1 Report

12. **AUTHORS**

Daniel Francis
Finance Business Partner
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Phone: (01633) 644895

2026/27 Treasury Management Report – Quarter 1 (as at 30th June 2026)

Section 1	External market conditions
Section 2	Movement in treasury balances
Section 3	Borrowing activity during the year
Section 4	Investment Activity during the year
Section 5	Environmental, Social and Governance
Section 6	Non-treasury investments
Section 7	Treasury budget performance.
Section 8	Compliance with prudential indicators and treasury limits

1. External market conditions

- 1.1. Economic background: The main feature of the quarter was the continuation of the Middle East conflict, started on 28th February with strikes by Israel and the US on Iran. The conflict led to the closure of the Hormuz Strait, a waterway through which around 20% of the world's oil and liquified natural gas flows, resulting in sharp rises in energy and other commodity prices. Towards the end of the quarter, the US and Iran came to an agreement to negotiate a peace settlement, which prompted a reduction in energy commodity prices, albeit remaining higher than pre-war.
- 1.2. Coming close on the heels of the last energy price shock in 2022 following Russia's invasion of UK, central bank policymakers and financial markets reacted quickly to reflect the new reality for monetary policy. In the UK, the headline consumer price inflation (CPI) rate was widely expected to fall back to 2% in April, with changes to government energy policy announced in the budget reducing energy bills and therefore headline inflation rates. Instead, the sharp rise in petrol prices occurring from the war maintained the CPI rate well above target at 2.8%.
- 1.3. Having been expected to cut Bank Rate from 3.75%, the Bank of England's Monetary Policy Committee (MPC) instead held Bank Rate steady throughout the quarter. Despite sending hawkish signals with each monetary policy decision, and the voting split changing from a 9-0 hold in March to a 7-2 hold in June, the majority of committee members appear to believe the UK economy and labour market were soft enough to absorb the price shock without producing the persistent inflationary conditions seen in 2022, which led to Bank Rate rising to 5.25%. This appears to be backed up by business surveys towards the end of the quarter suggesting that business pricing pressures, while elevated, are abating.
- 1.4. Against expectations, UK headline CPI decreased over the quarter, from an annual rate of 3.3% in March to 2.8% in May, but still well above the Bank of England's 2% target. The core measure of CPI inflation also decreased, from 3.1% to 2.6% over the same period. Upside pressure in inflation generally reflected fuel prices, but many other categories experienced disinflation, providing some evidence that higher energy prices were not immediately feeding into a wider subset of products.
- 1.5. Data released during the period showed the UK economy expanded by 0.6% in the first quarter of the calendar year, following three previous quarters of weaker growth. However, monthly GDP data showed a contraction of 0.1% in April as weaker confidence affected spending and investment decisions. Purchasing managers' index (PMI) data indicated that softer growth was also likely in May and June, with the services PMI denoting a small contraction in activity from both months.

- 1.6. Labour market data showed a continued softening in employment conditions, as weaker private sector earnings growth was reported for the period February to April 2026. The unemployment rate for April was 4.9%, PAYE employment was down over the year, and the number of vacancies continued to fall. The looser labour market is supporting the MPC's decision not to tighten monetary policy, with the likelihood of wage growth rising in line with inflation appearing remote.
- 1.7. Arlingclose, the authority's treasury adviser, maintained its central view that Bank Rate remain at 3.75%, and that the Bank of England would focus on the spare capacity in the economy, notably the labour market, rather than the upside risk of persistent inflation. The balance of risks over the near term, however, is deemed to be to the upside as signs of second round inflationary effects will prompt policymakers to raise interest rates. Over the medium term, the balance of risk for Bank Rate shifts to the downside, with tighter monetary policy, higher prices and weaker growth presenting downside risks for inflation.
- 1.8. The US Federal Reserve also held interest rates steady the period, maintaining the Fed Funds Rate at 3.50%-3.75%. The decision in June was the sixth consecutive month where no changes were made to the main interest rate. US CPI jumped to 4.2% in May on the back of higher gasoline prices, raising the possibility that policy under new Fed Chair Kevin Warsh may lead to higher rather than lower rates.
- 1.9. The European Central Bank (ECB) hiked rates in June, the first rise since September 2023. The ECB noted heightened uncertainty in the near-term from the effects of the war, including higher inflation and potentially weaker growth. The June hike to 2.40% represented an insurance move to maintain inflation around the 2% target.
- 1.10. **Financial markets:** After the sharp deterioration early in the quarter, sentiment in financial markets showed signs of improvement during the period as hopes for an end to the US/Israel war with Iran increased. However, bond and equity markets remained volatile. Early in the period bond yields rose sharply due to tighter monetary policy expectations, but yields steadily declined as it became apparent central banks, including the Bank of England, were not going to immediately hike policy rates. Equity markets sold off sharply in March but gained back some of the previous declines, particularly in US markets, where AI-related sentiment remained strong.
- 1.11. Political uncertainty in the UK due to poor local election results for the Labour party placed upward pressure on medium and longer-term gilt yields. The eventual resignation of Keir Starmer and likely accension of Andy Burnham reduced some uncertainty and prompted a decline in yields.
- 1.12. Over the quarter, the 10-year UK benchmark gilt yield started at 4.86% and ended at 4.77% having hit 5.20% in late April. The 20-year gilt yield was slightly more stable, starting at 5.45% and finished at 5.42%, after peaking at 5.79% in May. The Sterling Overnight Rate (SONIA) averaged 3.73% over the quarter to 30th June.
- 1.13. **Credit review:** Arlingclose maintained its advised recommended maximum unsecured duration limit on the majority of the banks on its counterparty list at 6 months. Other banks remain on 100 days
- 1.14. During the quarter, Fitch upgraded numerous banks due to a rating methodology change, which placed greater emphasis on resolution regimes, loss-absorbing debt buffers and depositor protection. It also changed the reference obligations used for Issuer Default Ratings and introduced more differentiated notching between deposits, senior preferred, senior unsecured and senior non-preferred debt ratings.

- 1.15. Moody's also made changes to the ratings of European banks following the passing of EU legislation introducing full depositor preference across the bloc which places deposits ahead of senior unsecured debt in the creditor hierarchy. This resulted in upgrades to the ratings to several counterparties on Arlingclose's recommended list.
- 1.16. Credit default swap (CDS) prices on UK banks spiked through late March/early April following escalation in the Iran war but eased back over the rest of the quarter to end at broadly pre-conflict levels.
- 1.17. European banks' CDS prices followed a similar pattern, albeit some German banks were modestly higher compared to the previous quarter. Trade tensions between Canada and the US caused Canadian bank CDS prices to rise over the quarter and remain elevated compared to earlier Q1 2026 while Australian and Singaporean lenders were broadly unchanged.
- 1.18. Overall, at the end of the period CDS prices for all banks on Arlingclose's counterparty list remained within limits deemed satisfactory for maintaining credit advice at current durations.
- 1.19. Financial market volatility is expected to remain a feature, at least in the near term, and credit default swap levels will be monitored for signs of ongoing credit stress. As ever, the institutions and durations on the Authority's counterparty list recommended by Arlingclose remain under constant review.

2. Movement in Treasury balances

- 2.1. The underlying need to borrow for capital purposes is measured by the Capital Financing Requirement (CFR), while usable reserves and working capital are the underlying resources available to offset the CFR or for investment.

Table 1: Balance Sheet Summary

	31.3.26 £m	Movement £m	30.6.26 £m
General Fund CFR	226.8	9.1	235.9
Less: *Other debt liabilities	(1.8)	0.0	(1.8)
Borrowing CFR	225.0	9.1	234.1
Less: External borrowing	(197.6)	10.8	(186.8)
Net External borrowing	27.5	19.9	47.3
Less: Usable reserves	(42.5)	0.0	(42.5)
Less: Working capital	(2.7)	(21.8)	(24.5)
(Net Investments)	(17.7)	(2.0)	(19.7)

* finance leases, PFI liabilities and transferred debt that form part of the Authority's total debt

- 2.2. The Authority pursued its strategy of keeping borrowing and investments below their underlying levels for the quarter, known as internal borrowing. Table 1 above highlights that at the end of the quarter the Authority was internally borrowed by £47.3m, meaning that reserves and working capital were being used in lieu of external borrowing.
- 2.3. At the end of the quarter the Authority had net investments of £19.7m. Balances over the period ranged from between £13.0m and £42.2m due to timing differences between income and expenditure and borrowing activity.
- 2.4. The treasury management position at 30th June 2026 and the change during the year is shown in Table 2 below.

Table 2: Borrowing and Investment Summary

	31.3.26 Balance £m	31.3.26 Rate %	Movement	30.6.26 Balance £m	30.6.26 Rate %
Long-term borrowing	138.9	3.51	(6.7)	132.2	3.47
Short-term borrowing	58.7	4.39	(4.0)	54.7	3.97
Total borrowing	197.6	3.77	(10.7)	186.8	3.61
Long-term investments	0.0	N/A	0.0	0.0	N/A
Short-term investments	(3.0)	4.02	(6.0)	(9.0)	3.76
Pooled Funds	(4.0)	5.39	0.0	(4.0)	4.83
Cash and cash equivalents	(10.7)	Included in ST above	4.0	(6.7)	Included in ST above
Total investments	(17.7)	4.33	(2.0)	(19.7)	3.98
Net Borrowing	179.9		(12.8)	167.1	

- 2.5. The authorities net borrowing position has slightly decreased over the quarter. This is due to temporary increases in cash balances as significant amounts of Council funding are front-loaded into the earlier periods of the financial year.

3. Borrowing activity during the year

- 3.1. The Authority's borrowing strategy continues to address the key issue of affordability without compromising the longer-term stability of the debt portfolio and, where practicable, to maintain borrowing and investments below their underlying levels, known as internal borrowing.
- 3.2. Gilt yields have varied during the period but overall have decreased slightly. Oil prices have reduced and inflationary figures in the UK have not risen by as much as markets initially expected. Concerns about the tepid UK economy have also lessened expectations of future rate rises which has lowered gilt yields.
- 3.3. The PWLB certainty rate for 5-year maturity loans was 5.16% at the beginning of the period and 5.07% at the end. The lowest available 5-year maturity certainty rate was 5.04% and the highest was 5.49%. In contrast rates for 20-year maturity loans ranged from 6.02% to 6.50% during the period, and 50-year maturity loans from 5.89% to 6.35%. After coming down from a characteristic spike seen around financial year end, the cost of short term borrowing from other local authorities has remained a little above Base Rate, at between 4.0% and 4.5%, throughout the period.
- 3.4. CIPFA's 2021 Prudential Code is clear that local authorities must not borrow to invest primarily for financial return and that it is not prudent for local authorities to make any investment or spending decision that will increase the capital financing requirement, and so may lead to new borrowing, unless directly and primarily related to the functions of the Authority. PWLB loans are no longer available to local authorities planning to buy investment assets primarily for yield unless these loans are for refinancing purposes.
- 3.5. The Authority currently holds commercial investments that were purchased prior to the change in the CIPFA Prudential Code. The Authority is not planning to purchase any investment assets primarily for yield within the next three years and so is able to access PWLB borrowing if considered cost effective.

- 3.6. The Authority's short-term borrowing cost has reduced slightly over the period in line with Base Rate and short-dated market rates. The average rate on the Authority's short-term loans at 30th June 2026 on £54.7m was 3.97%, this compares with 4.39% on £58.7m loans 3 months ago.
- 3.7. At 30th June 2026 the Authority held £186.8m of loans, a decrease of £10.7m from 31st March 2026, as part of its strategy for funding previous and current years' capital programmes. Outstanding loans on 30th June are summarised in Table 3 below.

Table 3: Borrowing Position

	31.3.26 Balance	31.3.26 Weighted Average Rate	31.3.26 Weighted Average Maturity (years)	Balance Movement	30.6.26 Balance	30.6.26 Weighted Average Rate	30.6.26 Weighted Average Maturity (years)
	£m	%			£m	%	
Public Works Loan Board	158.7	3.7	15.2	(11.5)	147.1	3.6	16.1
Banks (LOBO)	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Welsh Gov Interest Free	5.9	0.0	2.4	(0.2)	5.7	0.0	2.4
Local authorities /Other	33.0	4.7	0.1	1.0	34.0	4.1	0.6
Total borrowing	197.6	3.77	12.3	(10.8)	186.8	3.61	12.8

- 3.8. The Authority's chief objective when borrowing has always been to strike an appropriately low risk balance between securing low interest costs and achieving cost certainty over the period for which funds are required, with flexibility to renegotiate loans should the Authority's long-term plans change being a secondary objective.
- 3.9. The weighted average maturity of loans continues to reduce as shorter term funding has represented better value for a significant period. This will continue to be monitored to ensure that the Council is not overly exposed to volatility in interest rates by needing to refinance large amounts of loans at any one time.
- 3.10. **Long-dated Loans:** No long-term loans taken during the period.
- 3.11. **Forward Starting Loans:** No loans taken during the period.
- 3.12. The Authority currently holds commercial investments that were purchased prior to the change in the CIPFA Prudential Code. The Authority is not planning to purchase any investment assets primarily for yield within the next three years and so is able to access PWLB borrowing if considered cost effective.

4. Investment activity during the quarter

- 4.1. The CIPFA Treasury Management in the Public Services Code of Practice and Cross-Sectoral Guidance Notes (revised in 2021) defines treasury management investments as investments that arise from the organisation's cash flows or treasury risk management activity that

ultimately represents balances that need to be invested until the cash is required for use in the course of business.

- 4.2. The Authority holds significant invested funds during the year, representing income received in advance of expenditure plus balances and reserves held. During the quarter, the Authority's investment balances ranged from between £13.0m and £42.2m due to timing differences between income and expenditure. The investment position at the end of the quarter was:

Table 6: Treasury Investment Position

	31.3.26 Balance	Net Movement	30.6.26 Balance	30.6.26 Income Return	30.6.26 Weighted Average Maturity Days
	£m	£m	£m	%	
Banks & building societies (unsecured)	(2.0)	0.0	(2.0)	Average 3.76%	Up to 180 days
Government (incl. local authorities)	(3.0)	(6.0)	(9.0)		
Money Market Funds (MMFs)	(8.7)	4.0	(4.7)		
Multi asset income, Pooled funds	(4.0)	0.0	(4.0)	4.83%	N/A
Total investments	(17.7)	(2.0)	(19.7)	3.98%	

- 4.3. Both the CIPFA Code and government guidance require the Authority to invest its funds prudently, and to have regard to the security and liquidity of its treasury investments before seeking the optimum rate of return, or yield. The Authority's objective when investing money is to strike an appropriate balance between risk and return, minimising the risk of incurring losses from defaults and the risk of receiving unsuitably low investment income.
- 4.4. The Authority expects to be a long-term borrower and new treasury investments are therefore primarily made to manage day-to-day cash flows using short-term low risk instruments. The existing portfolio of strategic pooled funds will be maintained to diversify risk into different asset classes and boost investment income.
- 4.5. The rates on DMADF deposits ranged between 3.7% and 3.79% and money market rates between 3.6% and 3.8%.
- 4.6. The combination of risk and return metrics are shown in the extracts from the Arlingclose quarterly investment benchmarking in the table below.

Table 7: Investment Benchmarking – Treasury investments managed in-house

	Credit Score	Credit Rating	<u>Bail-in Exposure</u>	Weighted Average Maturity (days)	Rate of Return
					%
MCC 31 Mar 2026	A+	4.51	78%	20	4.33
MCC 30 Jun 2026	AA-	4.15	42%	14	3.98
Similar LAs	AA-	4.32	46%	79	3.90
All LAs	A+	4.59	66%	11	3.95

- 4.7. **Externally Managed Pooled Funds:** £4m of the Authority's investments are invested in externally managed strategic pooled multi-asset and property funds where short-term security and liquidity are lesser considerations, and the objectives instead are regular revenue income and longer-term price stability.
- 4.8. These funds provide an important diversification for the Authority and generated £65k (6.22%) income return, together with a £150.6k (3.48%) unrealised capital gain during the first month.
- 4.9. Accumulated unrealised capital losses over the lifetime of the investment stand at £27.5k. The Authority maintains an adequate treasury risk reserve to mitigate against the risk that capital losses on pooled funds become realised and consequently result in a charge against the Council Fund.
- 4.10. Most major asset classes delivered positive returns over quarter 1 of 2026/27, although markets remained volatile and sensitive to geopolitical developments, energy prices and changing expectations for interest rates. The quarter generally represented a recovery from the weakness seen towards the end of 2025/26, when markets were unsettled by the escalation of conflict between the US, Israel and Iran. As tensions in the Middle East began to ease and oil prices fell back, investor sentiment improved and most asset prices recovered.
- 4.11. Equity markets generally performed strongly over the quarter, supported by improving risk appetite, resilient corporate earnings and continued enthusiasm for technology and AI-related investment. Emerging markets performed most strongly, with UK equities also delivering positive returns, although lagging overseas markets. This partly reflected the more defensive composition of the UK market and its exposure to falling commodity prices (such as oil).
- 4.12. Bond markets produced more modest but generally positive returns. Government bond markets were affected by competing influences. Higher energy prices and geopolitical uncertainty initially raised concerns about inflation, while later falls in oil prices and softer economic data helped support expectations that global central banks may still ultimately be able to reduce interest rates over time. UK gilts came under pressure (prices falling, yields increasing) with expectations of Bank Rate increases, plus domestic political uncertainty rising, but yields declined during June following the apparent 'conclusion' of the war, reduction in energy prices and decline in interest rate expectations, finishing the quarter at similar levels to the start.
- 4.13. UK commercial property capital returns were broadly flat to modestly negative over the quarter, with performance continuing to be driven primarily by income rather than capital growth. Although the commercial property market has stabilised compared with the more difficult conditions seen in recent years, economic uncertainty, elevated financing costs and movements in gilt yields continued to weigh on investor sentiment. Rental income therefore remained the main contributor to total return, while capital values remained subdued.
- 4.14. Because these funds have no defined maturity date, but are available for withdrawal after a notice period, their performance and continued suitability in meeting the Authority's medium to long-term investment objectives are regularly reviewed. Strategic fund investments are made in the knowledge that capital values will move both up and down on months, quarters and even years; but with the confidence that over the longer term that total returns will exceed cash interest rates.
- 4.15. **Statutory override:** The statutory override on accounting for gains and losses in pooled investment funds has been extended up until the 1st April 2029 for investments already in place before 1st April 2024. The override does not apply to any new investments taken out on

or after 1st April 2024. The Authority maintains a treasury management risk reserve which currently holds £590,000 to mitigate the impact of such risks materialising.

- 4.16. **Minimum Revenue Provision (MRP):** Legislation has been passed giving the Authority the option, but not the obligation, to reduce the MRP charge for the financial year 2026/27. Nil MRP, or MRP lower than what would be considered the normal minimum charge, is allowable for this year only. Any MRP not made in 2026/27 must be made over a maximum of 10 future years. In view of these revenue savings leading to additional invest costs / lost investment income and higher MRP costs in subsequent years the Authority has decided not to use this provision.

5. Environmental, Social and Governance

- 5.1. During the first quarter of the year the investment portfolio has been assessed against two charters that organisations can voluntarily sign up for to ensure that all are meeting minimum level of ESG responsibility. These are shown in the table below:

Table 8: ESG Charter Signatories

	UN Principles for Responsible Investment	Uk Stewardship Code 2020
Aberdeen Standard	✓	✓
Aegon	✓	✓
CCLA Investment Management	✓	✓
Federated (Prime Rate) Liquidity Fund	✓	✓
Goldman Sachs	✓	✓
HSBC Global Asset Management	✓	✓
LEGAL AND GENERAL MMF	✓	✓
Morgan Stanley	✓	✓
Ninety-One	✓	✓
Royal London Asset Management	✓	✓
State Street Investment Management	✓	✓

- 5.2. An updated list of signatories to the two charters is provided by the Authority's treasury advisors each quarter and will continue to be monitored. Any counterparties not signed up to all three charters will be removed from the Authorities investment portfolio.
- 5.3. At 30th June 2026 the Authorities ESG specific Money Market Fund returned 3.78% compared to an average rate of 3.88% for all Money Market Funds.
- 5.4. In response to the ethical investment motion agreed by Council on 18 September 2025, the Council reviewed its own treasury investment portfolio and engaged with its treasury advisers and investment managers. The review identified no direct holdings in individual defence contractors, arms manufacturers or military companies. The Council also sought an update from the Greater Gwent (Torfaen) Pension Fund, recognising the Fund Committee's separate fiduciary responsibilities, and noted the revised Wales Pension Partnership Responsible Investment Policy and exclusions framework implemented from 1 April 2026. Ongoing monitoring and engagement on responsible investment matters will continue.

6. Non-Treasury Investments

- 6.1. The definition of investments in CIPFA's revised 2021 Treasury Management Code covers all the financial assets of the Authority as well as other non-financial assets which the Authority holds primarily for financial return.
- 6.2. Investments that do not meet the definition of treasury management investments (i.e. management of surplus cash) are categorised as either for service purposes (made explicitly to further service objectives) and/or for commercial purposes (made primarily for financial return).
- 6.3. Investment Guidance issued by DLUHC and Welsh Government also broadens the definition of investments to include all such assets held partially or wholly for financial return.
- 6.4. The Authority held a net book value of £29.53m of such non-financial asset investments at the 31st March 2026 (£28.19m as at 31st March 2025) made up of:

	Budgeted (surplus) / deficit 2026/27 £000's	Carrying Value 31.03.26 £000's	Budgeted Return 2026/27 %	Net return 2025/26 %
Oak Grove Solar Farm	(347)	5,938	5.84	8.47
Newport Leisure Park & service loan	(332)	16,418	2.02	1.7
Castlegate Business Park	217	7,177	-3.02	-4.22
Total	(452)	29,533	1.56	1.61

- 6.5. These investments continue to represent an important income diversification for the Council and contributes towards the overall funding of services.
- 6.6. At this early stage of the financial year, there is insufficient information to produce a reliable forecast of the 2026/27 performance of the Authority's non-treasury investments. Performance will continue to be monitored against the approved budgets and expected returns for Oak Grove Solar Farm, Newport Leisure Park and Castlegate Business Park.
- 6.7. A further update, including the latest forecast position where available, will be provided through the period 1 financial monitoring report. The period 1 financial monitoring report is due to progress through the committee cycle in late September and October 2026.
- 6.8. The Authority also holds a portfolio of legacy non-financial asset investments that have been held for over a decade and are retained for income generation, capital gain or to support wider economic development or broader policy objectives. Income generation for these agricultural, retail and industrial assets are a secondary consideration and as such return against original investment would be considered negligible.

7. Treasury performance

7.1. The Authority measures the financial performance of its treasury management activities both in terms of its impact on the revenue budget and its relationship to benchmark interest rates, as shown in table 9 below.

Table 9: Budget performance

	Forecast 30.06.25 £000's	Budget £000's	Over / (under) Budget £000's
Interest Payable			
PWLB	5,364	5,607	(243)
Market loans	0	0	0
Short term loans	2,127	2,128	0
Other Activities (Internal Arrangements)	158	118	39
Total Interest payable on borrowing	7,649	7,735	(86)
Interest Receivable			
Invested cash short term	(596)	(804)	208
Pooled Funds	(184)	Included above	(184)
Finance lease income	(48)	Included above	(48)
Total income from Investments	(827)	(804)	(23)
Total	6,097	6,931	(109)

8. Compliance with treasury limits and indicators

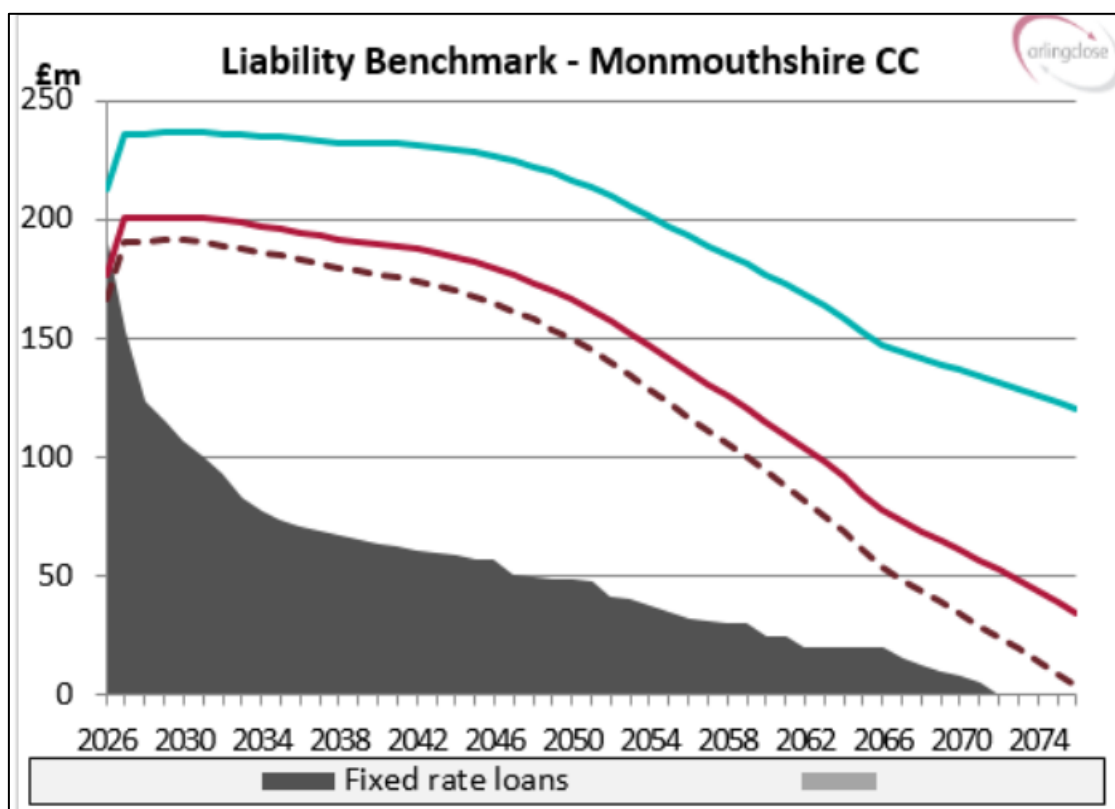
- 8.1. The Section 151 officer reports that all treasury management activities undertaken during the quarter complied fully with the CIPFA code and the limits and indicators as set out in the Authority's approved Treasury Management Strategy.
- 8.2. **Liability Benchmark:** This indicator compares the Authority's actual existing borrowing against a liability benchmark that has been calculated to show the lowest risk level of borrowing. The liability benchmark is an important tool to help establish whether the Council is likely to be a long-term borrower or long-term investor in the future, and so shape its strategic focus and decision making. It represents an estimate of the cumulative amount of external borrowing the Council must hold to fund its current capital and revenue plans while keeping treasury investments at the minimum level required to manage day-to-day cash flow.

Table 10: Liability Benchmark

	31.3.26 Actual	31.3.27 Forecast	31.3.27 Forecast	31.3.28 Forecast	31.3.29 Forecast
Loans CFR	226.8	235.9	236.4	236.6	236.6

Less: Balance sheet resources	(39.2)	(45.5)	(45.5)	(45.5)	(45.5)
Net loans requirement	187.6	190.4	190.9	191.1	191.1
Plus: Liquidity allowance	10.0	10.0	10.0	10.0	10.0
Liability benchmark	197.6	200.4	200.9	201.1	202.1
Current loan profile	(197.6)	(186.8)	(122.6)	(114.3)	(105.6)
Borrowing requirement	0.0	13.6	78.3	86.8	95.5

- 8.3. This indicates that if capital plans remains accurate the Council will have a borrowing requirement over the medium term of £95.5m. This projection forms the basis for future borrowing strategy and will be a consideration should any value loan opportunities present themselves in the market.
- 8.4. Following on from the medium-term forecast above, the long-term liability benchmark assumes capital expenditure funded by borrowing is in line with the medium-term financial plan, minimum revenue provision on new capital expenditure is based on the annuity method, and expenditure and reserves all increasing by inflation of 2.5% p.a. This is shown in the chart below together with the maturity profile of the Authority's existing borrowing.



- 8.5. The gap between the dotted red line and the grey shaded area of the chart represents the forecast difference between the estimated borrowing requirement and the Council's current loans profile. If capital expenditure plans remain accurate, the gap represents a borrowing requirement which will need be met by new and replacement loans over time.
- 8.6. **Borrowing limits:** Compliance with the [authorised limit](#) and [operational boundary](#) for external debt is demonstrated in the table below.

Table 11: Borrowing Limits

	2026/27 Maximum during the year £m	30.6.26 Actual £m	2026/27 Operational Boundary £m	2026/27 Authorised Limit £m	Complied? Yes/No
Borrowing	197.3	186.8	255.5	270.9	Yes
PFI, Finance Leases & Other LT liabs	1.8	1.8	17.8	18.8	Yes
Total debt	199.03	188.6	273.3	289.7	Yes

8.7. **Note:** Since the operational boundary is a management tool for in-year monitoring it is not significant if the operational boundary is breached on occasions due to variations in cash flow, and this is not counted as a compliance failure.

8.8. **Maturity Structure of Borrowing:** This indicator is set to control the Authority's exposure to refinancing risk. The upper and lower limits on the maturity structure of all borrowing were:

Table 12: Maturity Structure of borrowing

Maturity	30.6.26 Actual	Lower Limit	Upper Limit	Complied?	31.3.26 Actual (For comparison)
Under 12 months	29%	0%	50%	Yes	30%
12 months and within 24 months	6%	0%	30%	Yes	8%
24 months and within 5 years	12%	0%	30%	Yes	12%
5 years and within 10 years	15%	0%	30%	Yes	15%
10 years and within 20 years	8%	0%	30%	Yes	7%
20 years and within 30 years	13%	0%	30%	Yes	12%
30 years and within 40 years	6%	0%	30%	Yes	6%
40 years and within 50 years	11%	0%	30%	Yes	10%
50 years and above	0%	0%	30%	Yes	0%

Table 13: Investment Limits

	Maximum in quarter	2026/27 Limit	Complied? Yes/No
The UK Government	£16.0m	Unlimited	Yes
Local Authorities per counterparty	£0m	£4m	Yes
Secured Investments	£0m	£4m	Yes
Banks per counterparty, rating A- or above	£3m (£4m total for the Councils operational bank)	£3m (£4m total for the Councils operational bank)	Yes
Building societies (unsecured)	£0m	£2m	Yes
Registered providers (e.g. Housing)	£0m	£2m	Yes

Associations (unsecured)			
Money Market Funds	£4m	£4m	Yes
Any group of pooled funds under the same management	£2m	£5m	Yes
Real estate investment trusts	£0m	£5m	Yes
Covered or Supranational bonds	£0m	£5m	Yes
Other Investments	£0m	£2m	Yes

8.9. **Security:** The Authority has adopted a voluntary measure of its exposure to credit risk by monitoring the value-weighted average credit rating and credit score of its investment portfolio. This is calculated by applying a score to each investment (AAA=1, AA+=2, etc.) and taking the arithmetic average, weighted by the size of each investment. Unrated investments are assigned a score based on their perceived risk.

Table 14: Credit Risk

	30.6.26 Actual	2026/27 Target	Complied?
Portfolio average credit	AA-/4.15	A-/5.0	Yes

8.10. **Principal Sums Invested for Periods Longer than a year:** The purpose of this indicator is to control the Authority's exposure to the risk of incurring losses by seeking early repayment of its investments. The limits on the long-term principal sum invested to final maturities beyond the period end were:

Table 15: Principal invested for period longer than a year

Price risk indicator	2025/26	2026/27	2027/28	No fixed date
Limit on principal invested beyond year end	£5m	£4m	£2m	£10m
Complied?	Yes			

8.11. For context, the changes in interest rates during the quarter were:

	01/04/26	30/06/26
Bank Rate	3.75%	3.75%
1-year PWLB certainty rate, maturity loans	4.93%	4.77%
5-year PWLB certainty rate, maturity loans	5.16%	5.07%
10-year PWLB certainty rate, maturity loans	5.62%	5.55%
20-year PWLB certainty rate, maturity loans	6.14%	6.09%
50-year PWLB certainty rate, maturity loans	6.00%	5.98%

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

Authorised Limit	The affordable borrowing limit determined in compliance with the Local Government Act 2003 (English and Welsh authorities) and the Local Government in Scotland Act 2003. This Prudential Indicator is a statutory limit for total external debt. It is set by the Authority and needs to be consistent with the Authority's plans for capital expenditure financing and funding. The Authorised Limit provides headroom over and above the <i>Operational Boundary</i> to accommodate expected cash movements. Affordability and prudence are matters which must be taken into account when setting this limit. (see also <i>Operational Boundary</i>, below)
Balances and Reserves	Accumulated sums that are maintained either earmarked for specific future costs or commitments or generally held to meet unforeseen or emergency expenditure.
Bail-in	Refers to the process which the banking regulatory authorities will use to restructure a financial institution which is failing or likely to fail. Unsecured creditors of and investors in that financial institution will participate in its restructure who will, as a consequence, incur a non-recoverable loss (commonly referred to as a 'haircut') on their obligation/investment. Local authority investments with banks and building societies such as term deposits, certificates of deposit, call accounts and non-collateralised bonds are unsecured investments and are therefore vulnerable to bail-in.
Bank Rate	The official interest rate set by the Bank of England's Monetary Policy Committee and what is generally termed at the "base rate". This rate is also referred to as the 'repo rate'.
Bond	A certificate of debt issued by a company, government, or other institution. The bond holder receives interest at a rate stated at the time of issue of the bond. The price of a bond may vary during its life.
Capital Expenditure	Expenditure on the acquisition, creation or enhancement of capital assets
Capital Financing Requirement (CFR)	The Council's underlying need to borrow for capital purposes representing the cumulative capital expenditure of the local authority that has not been financed.
Capital growth	Increase in the value of the asset (in the context of a collective investment scheme, it will be the increase in the unit price of the fund)
Capital receipts	Money obtained on the sale of a capital asset.
CIPFA	Chartered Institute of Public Finance and Accountancy
Constant Net Asset Value (CNAV)	Also referred to as Stable Net Asset Value. A term used in relation to the valuation of 1 share in a fund. This means that at all times the value of 1 share is £1/€1/US\$1 (depending on the currency of the fund). The Constant NAV is maintained since dividend income (or interest) is either added to the shareholders' account by creating shares equal to the value of interest earned or paid to the shareholder's bank account, depending on which option is selected by the shareholder.
Collective Investment Schemes	Funds in which several investors collectively hold units or shares. The assets in the fund are not held directly by each investor, but as part of a pool (hence these funds are also referred to as 'Pooled Funds'). Unit Trusts and Open-Ended Investment Companies are types of collective investment schemes / pooled funds.

Corporate Bonds	Corporate bonds are bonds issued by companies. The term is often used to cover all bonds other than those issued by governments in their own currencies and includes issues by companies, supranational organisations and government agencies.
Corporate Bond Funds	Collective Investment Schemes investing predominantly in bonds issued by companies and supranational organisations.
CPI <i>Also see RPI</i>	Consumer Price Index. (This measure is used as the Bank of England's inflation target.)
Credit Default Swap (CDS)	A Credit Default Swap is similar to an insurance policy against a credit default. Both the buyer and seller of a CDS are exposed to credit risk. Naked CDS, i.e. one which is not linked to an underlying security, can lead to speculative trading.
Credit Rating	Formal opinion by a registered rating agency of a counterparty's future ability to meet its financial liabilities; these are opinions only and not guarantees.
Cost of carry	When a loan is borrowed in advance of requirement, this is the difference between the interest rate and (other associated costs) on the loan and the income earned from investing the cash in the interim.
Credit default swaps	Financial instrument for swapping the risk of debt default; the buyer effectively pays a premium against the risk of default.
Diversification / diversified exposure	The spreading of investments among different types of assets or between markets in order to reduce risk.
Derivatives	Financial instruments whose value, and price, are dependent on one or more underlying assets. Derivatives can be used to gain exposure to, or to help protect against, expected changes in the value of the underlying investments. Derivatives may be traded on a regulated exchange or traded 'over the counter'.
ECB	European Central Bank
Federal Reserve	The US central bank. (Often referred to as "the Fed")
Floating Rate Notes	A bond issued by a company where the interest rate paid on the bond changes at set intervals (generally every 3 months). The rate of interest is linked to LIBOR and may therefore increase or decrease at each rate setting
GDP	Gross domestic product – also termed as "growth" in the economy. The value of the national aggregate production of goods and services in the economy.
General Fund	This includes most of the day-to-day spending and income. (All spending and income related to the management and maintenance of the housing stock is kept separately in the HRA).
Gilts (UK Govt)	Gilts are bonds issued by the UK Government. They take their name from 'gilt-edged': being issued by the UK government, they are deemed to be very secure as the investor expects to receive the full face value of the bond to be repaid on maturity.
Housing Revenue Account (HRA)	A ring-fenced account of all housing income and expenditure, required by statute

IFRS	International Financial Reporting Standards
Income Distribution	The payment made to investors from the income generated by a fund; such a payment can also be referred to as a 'dividend'
Investments - Secured - unsecured	Secured investments which have underlying collateral in the form of assets which can be called upon in the event of default Unsecured investments do not have underlying collateral. Such investments made by local authorities with banks and building societies are at risk of bail-in should the regulator determine that the bank is failing or likely to fail.
Liability Benchmark	Term in CIPFA's Risk Management Toolkit which refers to the minimum amount of borrowing required to keep investments at a minimum liquidity level (which may be zero).
LOBOs	LOBO stands for 'Lender's Option Borrower's Option'. The underlying loan facility is typically long term and the interest rate is fixed. However, in the LOBO facility the lender has the option to call on the facilities at predetermined future dates. On these call dates, the lender can propose or impose a new fixed rate for the remaining term of the facility and the borrower has the 'option' to either accept the new imposed fixed rate or repay the loan facility.
LVNAV (Low Volatility Net Asset Value)	From 2019 Money Market Funds will have to operate under a variable Net Value Structure with minimal volatility (fluctuations around £1 limited to between 99.8p to 100.2p)
Maturity	The date when an investment or borrowing is repaid.
Maturity profile	A table or graph showing the amount (or percentage) of debt or investments maturing over a time period. The amount or percent maturing could be shown on a year-by-year or quarter-by-quarter or month-by-month basis.
MiFID II	MiFID II replaced the Markets in Financial Instruments Directive (MiFID I) from 3 January 2018. It is a legislative framework instituted by the European Union to regulate financial markets in the bloc and improve protections for investors.
Money Market Funds (MMF)	Pooled funds which invest in a range of short term assets providing high credit quality and high liquidity.
Minimum Revenue Provision	An annual provision that the Authority is statutorily required to set aside and charge to the Revenue Account for the repayment of debt associated with expenditure incurred on capital assets
Non-Specified Investments	Term used in the Communities and Local Government Guidance and Welsh Assembly Guidance for Local Authority Investments. It includes any investment for periods greater than one year or those with bodies that do not have a high credit rating, use of which must be justified.
Net Asset Value (NAV)	A fund's net asset value is calculated by taking the current value of the fund's assets and subtracting its liabilities.
Operational Boundary	This is the limit set by the Authority as its most likely, i.e. prudent, estimate level of external debt, but not the worst case scenario. This limit links directly to the Authority's plans for capital expenditure, the estimates of the Capital Financing Requirement (CFR) and the estimate of cashflow requirements for the year.

Permitted Investments	Term used by Scottish Authorities as those the Authority has formally approved for use.
Pooled funds	See Collective Investment Schemes (above)
Premiums and Discounts	In the context of local authority borrowing, (a) the premium is the penalty arising when a loan is redeemed prior to its maturity date and (b) the discount is the gain arising when a loan is redeemed prior to its maturity date. If on a £1 million loan, it is calculated* that a £100,000 premium is payable on premature redemption, then the amount paid by the borrower to redeem the loan is £1,100,000 plus accrued interest. If on a £1 million loan, it is calculated that a £100,000 discount receivable on premature redemption, then the amount paid by the borrower to redeem the loan is £900,000 plus accrued interest. PWLB premium/discount rates are calculated according to the length of time to maturity, current market rates (plus a margin), and the existing loan rate which then produces a premium/discount dependent on whether the discount rate is lower/higher than the coupon rate. *The calculation of the total amount payable to redeem a loan borrowed from the Public Works Loans Board (PWLB) is the present value of the remaining payments of principal and interest due in respect of the loan being repaid prematurely, calculated on normal actuarial principles. More details are contained in the PWLB's lending arrangements circular.
Private Finance Initiative (PFI)	Private Finance Initiative (PFI) provides a way of funding major capital investments, without immediate recourse to the public purse. Private consortia, usually involving large construction firms, are contracted to design, build, and in some cases manage new projects. Contracts can typically last for 30 years, during which time the asset is leased by a public authority.
Prudential Code	Developed by CIPFA and introduced on 01/4/2004 as a professional code of practice to support local authority capital investment planning within a clear, affordable, prudent and sustainable framework and in accordance with good professional practice.
Prudential Indicators	Indicators determined by the local authority to define its capital expenditure and asset management framework. They are designed to support and record local decision making in a manner that is publicly accountable; they are not intended to be comparative performance indicators between authorities.
PWLB	Public Works Loans Board. It is a statutory body operating within the United Kingdom Debt Management Office, an Executive Agency of HM Treasury. The PWLB's function is to lend money from the National Loans Fund to local authorities and other prescribed bodies, and to collect the repayments.
Quantitative Easing	In relation to the UK, it is the process used by the Bank of England to directly increase the quantity of money in the economy. It "does not involve printing more banknotes. Instead, the Bank buys assets from private sector institutions – that could be insurance companies, pension funds, banks or non-financial firms – and credits the seller's bank account. So the seller has more money in their bank account, while their bank holds a corresponding claim against the Bank of England (known as reserves). The end result is more money out in the wider economy". Source: Bank of England
Registered Provider of Social Housing	Formerly known as Housing Association

Revenue Expenditure	Expenditure to meet the continuing cost of delivery of services including salaries and wages, the purchase of materials and capital financing charges
RPI	Retail Prices Index. A monthly index demonstrating the movement in the cost of living as it tracks the prices of goods and services including mortgage interest and rent. Pensions and index-linked gilts are uprated using the CPI index.
SORP	Statement of Recommended Practice for Accounting (Code of Practice on Local Authority Accounting in the United Kingdom).
Specified Investments	Term used in the CLG Guidance and Welsh Assembly Guidance for Local Authority Investments. Investments that offer high security and high liquidity, in sterling and for no more than 1 year. UK government, local authorities and bodies that have a high credit rating.
Supported Borrowing	Borrowing for which the costs are supported by the government or third party.
Supranational Bonds	Instruments issued by supranational organisations created by governments through international treaties (often called multilateral development banks). The bonds carry an AAA rating in their own right. Examples of supranational organisations are those issued by the European Investment Bank, the International Bank for Reconstruction and Development.
Treasury Management Code	CIPFA's Code of Practice for Treasury Management in the Public Services.
Temporary Borrowing	Borrowing to cover peaks and troughs of cash flow, not to fund spending.
Term Deposits	Deposits of cash with terms attached relating to maturity and rate of return (interest)
Unsupported Borrowing	Borrowing which is self-financed by the local authority. This is also sometimes referred to as Prudential Borrowing.
Usable Reserves	Resources available to finance future revenue and capital expenditure
Variable Net Asset Value (VNAV)	A term used in relation to the valuation of 1 share in a fund. This means that the net asset value (NAV) of these funds is calculated daily based on market prices.
Working Capital	Timing differences between income/expenditure and receipts/payments
Yield	The measure of the return on an investment instrument

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AGENDA ITEM TBC

SUBJECT:	DRAFT STATEMENT OF ACCOUNTS 2025/26 – CHARITABLE TRUST FUNDS
MEETING:	Governance and Audit Committee
DATE:	10th September 2026
DIVISIONS/WARD AFFECTED:	All

1. PURPOSE:

1.1 This report has been prepared to provide Governance and Audit Committee Members with an opportunity to review and provide comments on the:

- Draft 2025/26 Welsh Church Act Fund Accounts (**Appendix 1**)
- Draft 2025/26 Monmouthshire Farm School Endowment Trust Fund Accounts (**Appendix 2**)
- Draft 2025/26 Llanelly Hill Social Welfare Centre Accounts (**Appendix 3**)

2. RECOMMENDATIONS:

2.1 That the Governance & Audit Committee review the 2025/26 draft Statement of Accounts for the above bodies and provide comments or proposed amendments which will be considered alongside the external audit process and prior to the final publication.

3. KEY ISSUES

3.1 The Authority acts as lead or investment trustee for a number of charitable trust funds.

3.2 The accounts for these funds are prepared in accordance with the applicable Charities Statement of Recommended Practice and Financial Reporting Standard 102, together with the Charities Act 2011. The precise reporting and external scrutiny requirements vary between the individual charities, as set out in their respective accounts.

4. Welsh Church Act Fund

Background

4.1 Monmouthshire County Council acts as lead trustee for the Welsh Church Act Fund, a charitable trust covering the Council administrative areas of Blaenau Gwent, Caerphilly, Monmouthshire, Torfaen, and the City of Newport.

4.2 The primary object of the Fund is to assist public groups and individuals for educational, social, recreational, and other charitable benefit purposes. Grants are available from the fund for capital or revenue purposes. Capital grants may be awarded to assist organisations in the furnishing and upkeep of buildings. Revenue grants are designed to further the aims of societies and to assist individuals in their various pursuits.

- 4.3 An annual budget for grant allocations to each Council is agreed by Monmouthshire's full Council in March preceding the financial year and is split between the five administrative bodies on a population basis. Each individual Council approves grant applications and pay monies in line with their own financial regulations.
- 4.4 The overall grant allocation from the fund in each financial year is considered in line with the long-term financial viability of the trust and to maintain the ability to generate funds in future years for distribution by maintaining sufficient capital assets.
- 4.5 In line with the requirements of lead trustee, Monmouthshire County Council is responsible for preparing the draft accounts as presented in **Appendix 1** and these will be subject to external audit by Audit Wales, and subsequently a final version will be considered for approval by this committee at a future meeting. Following final approval, the accounts will be lodged with the Charity Commission by the end of January 2027.

Activity in year

- 4.6 The Fund has increased in value by £96,172 during the year (£7,995 loss in 2024/25). This increase is primarily due to unrealised investment assets revaluation gains.
- 4.7 Income during the year principally comprised of investment income of £225,149 which is broadly consistent with the returns of £219,160 generated in 2024/25.
- 4.8 Resources expended during the year amounted to £223,069 (£208,961 in 2024/25) and principally comprised grant distribution payments of £215,688 (£191,153 in 2024/25). This increase was due to Newport City Council having allocated in 2025/26, grant balances that had been brought forward from previous financial years.
- 4.9 Net gains on the capital value of investments held amounted to £104,092 (£18,454 net loss in 2024/25). The gain reflects movements in the market value of the Charity's diversified investment portfolio at 31 March 2026. Investment values remain subject to financial market conditions and may fluctuate over time.
- 4.10 The Trustee's policy is to maintain investments at a level that provides sufficient annual income to fund the Charity's charitable expenditure. The level of funds held at 31 March 2026 was £5,306,071 (£5,209,899 at 31 March 2025).

5. Monmouthshire Farm School Endowment Trust Fund

Background

- 5.1 Monmouthshire County Council acts as Trust administrator and Investment custodian for the Monmouthshire Farm School Endowment Trust Fund.
- 5.2 The primary object of this charitable trust is to make awards to students in need of assistance to attend Usk Agricultural College (Coleg Gwent), or at the discretion of the governing body, any other college, institution, or university to pursue courses of study in agricultural subjects.
- 5.3 The draft accounts presented will be subject to independent examination by Audit Wales and will subsequently be considered by the trustees prior to lodging with the Charity Commission by the end of January 2027.

Activity in year

- 5.4 The Fund increased in value by £17,964 during the year (£29,204 increase in 2024/25).

- 5.5 Total income was £30,161 (£38,669 in 2024/25), comprising investment income of £29,904 (£38,157 in 2024/25) and £257 (£512 in 2024/25) from the Roger Edwards Educational Trust. The lower investment income reflected the withdrawal of the M&G Charibond fund, the transfer between investment vehicles and the timing of reinvestment with Royal London.
- 5.6 Expenditure was £9,904 (£10,017 in 2024/25), primarily comprising grants payable of £7,474 (£7,474 in 2024/25), in line with the Charity's objects. An unrealised investment loss of £2,293 was recognised, compared with a £552 gain in 2024/25.
- 5.7 The current strategy is to maintain sufficient funds to meet the needs of beneficiaries. Investment income forms the main basis of the following year's grant allocations, supporting continuity while seeking to preserve the Fund's capital and maintain the Charity as a going concern.

6. Llanelly Hill Social Welfare Centre

Background

- 6.1 The Llanelly Hill Social Welfare centre is a registered charitable trust owned and run by a board of trustees and supported by Monmouthshire County Council.
- 6.2 Historically, due to the comparatively small size of the Trust and the values involved, the statement of accounts did not require external scrutiny. Income increased above the £25,000 threshold in 2025/26 and, following confirmation from Audit Wales, the draft accounts will therefore be subject to independent examination. Audit Wales expects to undertake the examination alongside the Council's other charity work during November to December 2026. The independent examination threshold increases to £40,000 for financial years ending on or after 30 September 2026; therefore, provided the Trust's income remains below £40,000 in 2026/27, an independent examination will not be required for that year.

Activity in year

- 6.3 The trust has generated income of £57,270 during the year (£24,018 in 2024/25) primarily from income generating activities at the centre. Also included is grant funding received during 2025/26 of £11,658 from the Monmouthshire County Council, which has allowed for the appointment of an additional project manager to support activities at a cost £13,923 for the year.
- 6.4 Management and maintenance expenditure was £57,270 (£25,268 in 2024/25), resulting in no net movement in funds during 2025/26. The year-end fund balance therefore remained at £65,222.

7. REASONS

- 7.1 To consider the accounts as presented enabling the external audit and independent inspection process to be undertaken and reported in due course.

8. RESOURCE IMPLICATIONS

- 8.1 As outlined in the respective accounts to be found in the Appendices.

9. CONSULTEES

Deputy Chief Executive (Section 151 Officer)

10. BACKGROUND PAPERS

Appendix 1 - Draft 2025/26 Welsh Church Fund Accounts

Appendix 2 - Draft 2025/26 Monmouthshire Farm School Endowment Trust Fund Accounts

Appendix 3 - Draft 2025/26 Llanelly Hill Social Welfare Centre Accounts

11. AUTHORS:

Jonathan S. Davies
Head of Finance (Deputy Section 151 Officer)

12. CONTACT DETAILS

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Tel: (01633) 644114

**The Monmouthshire County Council
Welsh Church Act Fund**

**Annual Report and Financial Statements for the year
ended the 31 March 2026**

Registered Charity Number: 507094

**The Monmouthshire County Council Welsh Church Act Fund
Annual Report for year ended 31 March 2026**

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**The Monmouthshire County Council Welsh Church Act Fund
Annual Report for year ended 31 March 2026
Trustee, Officers, and Advisors**

Trustee

Monmouthshire County Council

Secretary

James Williams
Chief Officer, Law & Governance (Monitoring Officer)
Monmouthshire County Council

Registered Office

County Hall
The Rhadyr,
Usk
NP15 1GA

Auditors

Auditor General for Wales
1, Capital Quarter,
Tyndall Street,
Cardiff
CF10 4BZ

Solicitor

James Williams
Chief Officer, Law & Governance (Monitoring Officer)
Monmouthshire County Council

Investment Custodian

Monmouthshire County Council

General Management

Mr Peter Davies
Deputy Chief Executive & Strategic Director – Resources,
Section 151 Officer
Monmouthshire County Council

Bankers

Barclays Bank
1-5 St David's Way
St David's Centre
Cardiff
CF10 2DP

The Monmouthshire County Council Welsh Church Act Fund
Annual Report for year ended 31 March 2026
Report of the Trustee for the year ended 31 March 2026

The Trustee presents its annual report and the audited financial statements for the year ended 31st March 2026 of The Monmouthshire County Council Welsh Church Act Fund ('the Charity').

The information with respect to the Trustee, officers and advisors set out on page 1 forms part of this report.

The financial statements have been prepared in accordance with the Statement of Recommended Practice: Accounting and Reporting by Charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) issued on the 1st January 2019 and the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS 102) and the Charities Act 2011 and the UK Generally Accepted Practice as it applies from the 1st January 2015.

Structure, Governance and Management

The Charity is governed by the Welsh Church Act 1914 and the Welsh Church Act (Designation and Specification) Order 1996 and is registered with the Charity Commissioners under charity number 507094.

The Charity covers the Council administrative areas of Blaenau Gwent, Caerphilly, Monmouthshire, Torfaen, and the City of Newport, with Monmouthshire County Council being designated as the host Authority. The Monmouthshire Welsh Church Act Fund was established on 1 April 1996, from the former Gwent Welsh Church Act Fund and part of the former Mid Glamorgan Welsh Church Act Fund.

Monmouthshire County Council as the Corporate Body is the Trustee for the Welsh Church Fund and therefore there are no policies and procedures adopted for the induction and training of trustees. The trustees also have regard to the Charity Commission's guidance on public benefit.

The management of the Charity Fund is undertaken by officers of the Council, and a calculated proportion of their time is charged to the Fund.

Objectives

The primary object of the Charity for each year, as stated in its governing document, is to assist public groups and individuals for educational, social, recreational, and other charitable benefit purposes. Grants are available from the Fund for capital or revenue purposes. Capital grants may be awarded to assist organisations in the furnishing and upkeep of buildings. Revenue grants are designed to further the aims of societies and to assist individuals in their various pursuits.

Grants' allocation policy

An annual budget set by the Trustee for grant payments is split between the administrative areas of Blaenau Gwent, Caerphilly, Monmouthshire, Torfaen, and Newport on a population basis.

The Monmouthshire County Council Welsh Church Act Fund Annual Report for year ended 31 March 2026

A Committee set up by the Trustee approves grant applications on a basis in line with full Council meetings or as deemed required by the participating authorities. Grants are made in pursuance of the Charity's objectives.

The grant allocation of each financial year is considered in line with the long-term financial viability of the trust and to maintain the ability to generate funds in future years for distribution by maintaining sufficient capital assets.

Review of activities and future developments

The Statement of Financial activities for the year is set out on page 11 of the financial statements. A summary of the financial results and the work of the Charity are set out below.

The Statement of Financial activities has increased in value by £96,172 during the year, (£7,995 loss in 2024/25). This increase is primarily due to unrealised investment income valuations as at the 31st of March.

Income is principally comprised of investment income of £225,149 which is broadly consistent with the returns of £219,160 generated in 2024/25. The Charity has utilised the Trustee's own investment managers to manage the other individual market investments, thus, controlling management fees and therefore maximising returns whilst at the same time maintaining a balanced capital risk strategy.

Resources expended during the year amounted to £223,069 (£208,961 in 2024/25) and principally comprised grant distribution payments of £215,688 (£191,153 in 2024/25). This slight increase was due to Newport Council having allocated in 2025/26, grant balances that had been brought forward from previous financial years.

Net gains on investments held amounted to £104,092 (£18,454 net loss in 2024/25). This unrealised investment gain was due to charitable investment funds performing on a more consistent basis during the financial year with less exposure to global conflicts. The 'Trusts' current investment strategy of diversifying the portfolio across several investment categories has enabled a certain degree of stability amid the volatility in the financial markets. The long-term projections on these charity fund investments as indicated by the Trustees' Treasury consultants continue to offer a balanced risk portfolio between income generation and asset growth.

Assumptions made about the future and other major sources of estimation uncertainty

The Statement of Accounts contains estimated figures that are based on assumptions made by the Charity about the future or that are otherwise uncertain. Estimates have been made considering historical experience, current trends, and other relevant factors. However, because balances cannot be determined with certainty, actual results could be materially different from the assumptions and estimates.

The Monmouthshire County Council Welsh Church Act Fund

Annual Report for year ended 31 March 2026

The items in the Charity's Balance Sheet at 31st March 2026 for which there is a significant risk of material adjustment in the forthcoming financial year are as follows:

The revaluation of investment property and property funds

Valuation techniques are used to determine the carrying amount of pooled property funds and investment property. Investment assets have been revalued as at the 31st of March 2026 reporting date.

Changes in the valuation assumptions used, together with significant changes in rental growth could affect (increase or decrease) the fair value of property-based investments. As the investments are held on a long-term strategy basis, the fund does not foresee any long-term negative effect in the generation of future income streams.

Income generation

The Charity's investment income was £225,149 compared to £219,160 in 2024/25. The diverse external pooled fund investment strategy that replaced the pooled investment strategy with Monmouthshire County Council has continued to produce consistent returns in the financial markets due to investment in a few specific charitable investment funds as well as income generation funds. This income generation forms the main basis of the following years grant allocations to ensure continuity and non-degradation of the funds capital assets and to perpetuate the charity as a 'going concern.'

Bad debt provision

There are no bad debts arising in the year of account.

Investment powers, policy, and performance

Under the terms of the Trust Deed, the Trustee has general powers of investment, subject to the provisions of The Trustee Act 2000. The investment policy of the Trust is to maximise the rate of investment return, whilst employing a risk strategy that minimises any potential reduction in the capital value of the Fund.

The Trustee reviewed its investment strategy and produced an investment and fund strategy for 2025/26, which was approved by Monmouthshire County Council in its capacity as sole and corporate trustee, on 5th March 2025.

Financial market investments have been restated at the financial year-end to reflect their current open market value.

Changes in fixed assets

The fixed asset investments were re-valued in the 2025/26 financial year in line with the Investment Asset policy of revaluation every year.

Reserves

The Trustee's policy is to maintain the level of investments at a level that provides sufficient annual income to fund the Charity's charitable expenditure. The level of

The Monmouthshire County Council Welsh Church Act Fund

Annual Report for year ended 31 March 2026

funds held at 31st March 2026 is £5,306,071 (£5,209,899 in 2024/25). The Trustee reviewed its Fund strategy and produced an investment and fund strategy for 2025/26, which stated that the purpose of reserves is to maintain investments such that they realise sufficient income to provide grants to organisations at a consistent level. Whilst the strategy is to ensure that there is no long-term detrimental effect on overall reserve balances, recommendations made by the Charity Commission has resulted in grants allocations being made in line with investment returns.

Governance of the Charity

Representative Councillors from each of the five administrative areas of Blaenau Gwent, Caerphilly, Monmouthshire, Torfaen, and Newport are appointed by their respective councils annually to form a committee to oversee fund management. Members are appointed to the committee for the term of the Council.

Risk management

The Trustee has undertaken a review of the major risks to which the Charity is exposed, and its risk management and internal control procedures should be updated to ensure that systems are in place to mitigate the risks identified. The risk assessment was considered by Monmouthshire County Council on 5th March 2025 and activity during the financial year was carried out with regard to this assessment.

Auditors

The Auditor General for Wales was appointed as auditor to the Welsh Church Act Fund in 2007/08. Given their role as statutory auditors for Monmouthshire County Council, it is considered administratively efficient and cost effective to maintain the Auditor General for Wales as the auditor of the Welsh Church Act Fund.

Statement of Trustee's responsibilities

The Trustee is responsible for preparing financial statements for each financial year, which give a true and fair view, in accordance with United Kingdom Generally Accepted Accounting Practice, of the state of affairs of the charity and its financial activities for that period.

In preparing those financial statements, the Trustee is required to:

- select suitable accounting policies and then apply them consistently.
- make judgements and estimates that are reasonable and prudent.
- state whether applicable accounting standards and statements of recommended practice have been followed, subject to any departures disclosed and explained in the financial statements; and
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in operational existence.

The Trustee confirms that it has complied with the above requirements in preparing the financial statements.

**The Monmouthshire County Council Welsh Church Act Fund
Annual Report for year ended 31 March 2026**

The Trustee is responsible for keeping accounting records which disclose with reasonable accuracy at any time the financial position of the charity and to enable it to ensure that the financial statements comply with the Charities Act 2011. It is also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

The Trustee certifies that:

- as far as it is aware, there is no relevant information of which the Charity's auditors are unaware; and
- as Trustee of the Charity, it has taken all the steps that it ought to have taken in order to make itself aware of any relevant audit information and to establish that the Charity's auditors are aware of that information.

By order of the Trustee

**Mr Peter Davies
Deputy Chief Executive & Strategic Director - Resources
S151 Officer - Monmouthshire County Council**

Date:

The Monmouthshire County Council Welsh Church Act Fund
Annual Report for year ended 31 March 2026

The independent auditor's report of the Auditor General for Wales to the trustees of Monmouthshire County Council Welsh Church Act Fund

Opinion on financial statements

I have audited the financial statements of Monmouthshire County Council Welsh Church Act Fund for the year ended 31 March 2025 under the Charities Act 2011.

The financial statements comprise the Statement of Financial Activities, Balance Sheet and Statement of Cash Flows and related notes, including the material accounting policies.

The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102 The Financial Reporting Standard applicable in the UK and Republic of Ireland (United Kingdom Generally Accepted Accounting Practice).

In my opinion the financial statements:

- give a true and fair view of the state of affairs of the charity as at 31 March 2025 and of its incoming resources and application of resources for the year then ended;
- have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice; and
- have been prepared in accordance with the Charities Act 2011.

Basis for opinion

I conducted my audit in accordance with applicable law and International Standards on Auditing in the UK (ISAs (UK)) and Practice Note 10 'Audit of financial statements and regularity of public sector bodies in the United Kingdom'. My responsibilities under those standards are further described in the auditor's responsibilities for the audit of the financial statements section of my report.

My staff and I are independent of the charity in accordance with the ethical requirements that are relevant to my audit of the financial statements in the UK including the Financial Reporting Council's Ethical Standard, and I have fulfilled my other ethical responsibilities in accordance with these requirements. I believe that the audit evidence I have obtained is sufficient and appropriate to provide a basis for my opinion.

Conclusions relating to going concern

In auditing the financial statements, I have concluded that the use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work I have performed, I have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on the body's ability to continue to adopt the going concern basis of accounting for a period of at least twelve months from when the financial statements are authorised for issue.

My responsibilities and the responsibilities of the trustees with respect to going concern are described in the relevant sections of this report.

Other Information

The other information comprises the information included in the annual report other than the financial statements and my auditor's report thereon. The trustees are responsible for the other information contained within the annual report. My opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in my

The Monmouthshire County Council Welsh Church Act Fund
Annual Report for year ended 31 March 2026

report, I do not express any form of assurance conclusion thereon. My responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or knowledge obtained in the course of the audit, or otherwise appears to be materially misstated. If I identify such material inconsistencies or apparent material misstatements, I am required to determine whether this gives rise to a material misstatement in the financial statements themselves. If, based on the work I have performed, I conclude that there is a material misstatement of this other information, I am required to report that fact.

I have nothing to report in this regard.

Matters on which I report by exception

I have nothing to report in respect of the following matters in relation to which the Charities (Accounts and Reports) Regulations 2008 require me to report to you if, in my opinion:

- I have not received all of the information and explanations I require for my audit;
- sufficient accounting records have not been kept, or returns adequate for my audit have not been received from branches not visited by my team;
- the financial statements are not in agreement with the accounting records and returns; or
- the information given in the financial statements is inconsistent in any material respect with the trustee's report.

Responsibilities of the trustees for the financial statements

As explained more fully in the statement of trustee's responsibilities set out on page 18, the trustees are responsible for:

- maintaining sufficient accounting records;
- the preparation of the financial statements in accordance with the applicable financial reporting framework and for being satisfied that they give a true and fair view;
- internal controls as the trustees determine is necessary to enable the preparation of financial statements to be free from material misstatement, whether due to fraud or error;
- assessing the charity's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the trustees anticipate that the services provided by the charity will not continue to be provided in the future.

Auditor's responsibilities for the audit of the financial statements

I have been appointed as auditor under section 144 of the Charities Act 2011 and report in accordance with regulations made under section 154 of that Act.

My objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes my opinion. Reasonable assurance is a high level of assurance but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

Irregularities, including fraud, are instances of non-compliance with laws and regulations. I design procedures in line with my responsibilities, outlined above, to detect material misstatements in respect of irregularities, including fraud.

**The Monmouthshire County Council Welsh Church Act Fund
Annual Report for year ended 31 March 2026**

My procedures included the following:

- Enquiring of management and those charged with governance, including obtaining and reviewing supporting documentation relating to Monmouthshire County Council Welsh Church Act Fund's policies and procedures concerned with:
 - identifying, evaluating and complying with laws and regulations and whether they were aware of any instances of non-compliance;
 - detecting and responding to the risks of fraud and whether they have knowledge of any actual, suspected or alleged fraud; and
 - the internal controls established to mitigate risks related to fraud or non-compliance with laws and regulations.
- Considering as an audit team how and where fraud might occur in the financial statements and any potential indicators of fraud. As part of this discussion, I identified potential for fraud in the following area: posting of unusual journals;
- Obtaining an understanding of Monmouthshire County Council Welsh Church Act Fund's framework of authority as well as other legal and regulatory frameworks that the Monmouthshire County Council operates in, focusing on those laws and regulations that had a direct effect on the financial statements or that had a fundamental effect on the operations of Monmouthshire County Council Welsh Church Act Fund; and
- Obtaining an understanding of related party relationships.

In addition to the above, my procedures to respond to identified risks included the following:

- reviewing the financial statement disclosures and testing to supporting documentation to assess compliance with relevant laws and regulations discussed above;
- enquiring of management about actual and potential litigation and claims;
- reading minutes of meetings of those charged with governance;
- in addressing the risk of fraud through management override of controls, testing the appropriateness of journal entries and other adjustments; assessing whether the judgements made in making accounting estimates are indicative of a potential bias; and evaluating the business rationale of any significant transactions that are unusual or outside the normal course of business.

I also communicated relevant identified laws and regulations and potential fraud risks to all audit team members and remained alert to any indications of fraud or non-compliance with laws and regulations throughout the audit.

The extent to which my procedures are capable of detecting irregularities, including fraud, is affected by the inherent difficulty in detecting irregularities, the effectiveness of the Monmouthshire County Council Welsh Church Act Fund's controls, and the nature, timing and extent of the audit procedures performed.

A further description of the auditor's responsibilities for the audit of the financial statements is located on the Financial Reporting Council's website www.frc.org.uk/auditorsresponsibilities. This description forms part of my auditor's report.

Other auditor's responsibilities

I communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and significant audit findings, including any significant

The Monmouthshire County Council Welsh Church Act Fund
Annual Report for year ended 31 March 2026
deficiencies in internal control that I identify during my audit.

Adrian Crompton
Auditor General for Wales
29 January 2026

1 Capital Quarter
Tyndall Street
Cardiff
CF10 4BZ

The Monmouthshire County Council Welsh Church Act Fund
Annual Report for year ended 31 March 2026

Statement Of Financial Activities (SOFA) for the year ended 31 March 2026

	Notes	2025/26 Unrestricted Funds £	2024/25 Unrestricted Funds £
Income & Endowments from:			
Investment income	2	225,149	219,160
Other incoming resources		0	260
Total income & Endowments		225,149	219,420
Resources Expended			
Raising funds:			
Investment Property Professional fees		(130)	(367)
Management and administration		(5,922)	(6,611)
		(6,052)	(6,978)
Charitable expenditure			
Costs of activities in furtherance of the Charity's objects			
Grants payable	3,4	(215,688)	(191,153)
Management and administration		(2,770)	(2,695)
Other			
Governance Costs	5	(8,559)	(8,135)
Total Resources Expended		(223,069)	(208,961)
Gains/(losses) on investment assets		104,092	(18,454)
	9,10		
Net Income /(Expenditure)		96,172	(7,995)
Net movement in funds			
Fund balances brought forward April 2025		5,209,899	5,217,894
Fund balances carried forward 31 March 2026	13	5,306,071	5,209,899

All incoming resources and resources expended are derived from continuing activities. There are no recognised gains or losses other than those disclosed above.

The Monmouthshire County Council Welsh Church Act Fund
Annual Report for year ended 31 March 2026
Balance Sheet as at 31 March 2026

	Notes	2025/26	2024/25
		Total	Total
		Funds	Funds
		£	£
Fixed assets			
Investment Land	9	530,950	488,365
Investments	10	4,806,723	4,551,097
		5,337,673	5,039,462
Current assets			
Debtors: amounts falling due within one year	11	70,926	65,186
Cash at bank	8	107,927	287,249
		178,853	352,435
Current Liabilities			
Creditors: amounts falling due within one year	12	(210,454)	(181,997)
Net current assets or liabilities		(31,601)	170,438
Net assets or liabilities		5,306,071	5,209,899
The Funds of the Charity: [08]			
Unrestricted Funds	13	5,306,071	5,209,899
Total Charity funds		5,306,071	5,209,899

These accounts were approved by the Trustee on **28th January** 2027 and signed on their behalf by:

By order of the Trustee

Mr Peter Davies
Deputy Chief Executive & Strategic Director - Resources
S151 Officer - Monmouthshire County Council

Date:

The Monmouthshire County Council Welsh Church Act Fund
Annual Report for year ended 31 March 2026
Statement of Cash flows as at 31 March 2026

	Total Funds £	Prior Year Funds £
Cash flows from operating activities		
<i>Net cash provided by operating activities</i> <i>'Note 7'</i>	(206,214)	(313,221)
Cash flow from investing activities		
Dividends and rents from investments	221,011	219,160
Proceeds from sale of investments	605,881	655,876
Purchase of investments	(600,000)	(500,000)
<i>Change in cash and cash equivalents in the reporting period</i>	(179,322)	61,815
<i>Cash and cash equivalents at the beginning of the reporting period</i>	287,249	225,434
<i>Cash and cash equivalents at the end of the reporting period</i>	107,927	287,249

The Monmouthshire County Council Welsh Church Act Fund

Annual Report for year ended 31 March 2026

Notes to the financial statements for the year ended 31 March 2026

1 Principal accounting policies

The financial statements have been prepared in accordance with the Statement of Recommended Practice: Accounting and Reporting by Charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) issued on 1st January 2019 and the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS 102) and the Charities Act 2011.

The trust constitutes a public benefit entity as defined by FRS 102. The trustees consider that there are no material uncertainties about the Trust's ability to continue as a going concern.

A summary of the principal accounting policies, which have been applied consistently, are set out below.

Basis of accounting

The financial statements are prepared in accordance with the historical cost convention, as modified by the inclusion of investments and tangible fixed assets at market value. During the year, the Charity reviewed its accounting policies in accordance with FRS 102 'Accounting Policies'. No accounting policies have been changed as a result.

Incoming Resources

All income is accounted for on an accrual's basis.

Cash Balances

Cash is sums of money available for immediate use by the Welsh Church Fund. Such items are deemed to be cash balances held in the Fund's bank accounts (less unrepresented cheques). The Welsh Church Fund does not hold Cash in Hand.

Resources expended

All expenditure is accounted for on an accrual's basis. Where costs cannot be directly attributed to headings, they have been allocated to activities on a basis consistent with use of the resources.

Grants payable

Grants payable are accounted for in full as liabilities of the Charity when approved by the Trustee and accepted by the beneficiaries.

Management and administration

Management and administration costs include expenditure on administration of the Charity and, an appropriate apportionment of overheads based upon a time allocation.

Governance Costs

Governance costs comprise costs involving the compliance with constitutional and

The Monmouthshire County Council Welsh Church Act Fund

Annual Report for year ended 31 March 2026

statutory requirements. These costs relate to audit fees payable to the appointed external auditor.

Irrecoverable VAT

Any irrecoverable VAT is charged to the statement of financial activities or capitalised as part of the cost of the related asset, where appropriate.

Recognition of liabilities

Liabilities are recognised when an obligation arises to transfer economic benefits as a result of past transactions or events.

Debtors/ Creditors

Where revenue and expenditure have been recognised but cash has not been received or paid, a debtor or creditor for the relevant amount is recorded in the Balance Sheet. Where debts may not be settled, the balance of debtors is written down and a charge made to revenue for the income that might not be collected.

Fund accounting

Funds are unrestricted funds which are available for use at the discretion of the Trustee in furtherance of the general objectives of the Charity and which have not been designated for other purposes.

Investment Land and Property

Capitalisation, Replacement and Valuation

The Trust's policy is to revalue its investment land on an annual basis in line with the Charities SORP. Valuations will also be undertaken where identified that there have been material movements between formal valuations, as holdings are Investment Land not tangible fixed assets.

All land Investments were valued internally by a qualified land surveyor as at 31st March 2026 and all assets held at year-end are included in the accounts at that valuation date. Vacant properties are valued at open market value.

Depreciation

Land is not depreciated. The Fund currently has no buildings on the fixed asset register.

Investments

Any realised and unrealised gains and losses on revaluation or disposals of investments are included in the statement of financial activities. The Authority is authorised to invest any surplus income or dispose of any investments when it deems appropriate. Investments are strategically placed in external pooled fund investment funds specifically designed for charitable organisations. The basis of valuation on the market-based investments held with CCLA, M&G, AEGON, Royal London and Schroder's, is the open market value of the unit holdings on the 31st of March 2026 multiplied by the units held. Investment performance is reviewed periodically considering prevailing economic changes. M&G has withdrawn the Charibond fund from the investment market and was therefore redeemed during the financial year and re-invested with Royal London. The value of the 'pooled' investment with Monmouthshire County Council is the cash value as at the 31st of March 2026.

The Monmouthshire County Council Welsh Church Act Fund
Annual Report for year ended 31 March 2026

Fees and similar income

Fees receivable and charges for services and use of premises are accounted for in the period in which the service is provided.

Cash flow statement

The Charity has produced a cash flow statement under Financial Reporting Standard 102 under section 7 on the basis that it meets the relevant conditions and size criteria specified in the Companies Act.1985.

2 Investment income

	2026	2025
	£	£
Investments with Monmouthshire County Council	22,169	29,907
Investment Property Rental Income	4,138	4,138
External Investments	198,842	185,115
	225,149	219,160

3 Grants Payable

	2026	2025
	£	£
Grants have been paid to the following administering Local Authorities for them to make to groups and individuals on behalf of the Fund:		
Monmouthshire County Council	37,840	33,200
Torfaen County Borough Council	29,138	50,668
Newport City Council	56,583	20,947
Blaenau Gwent County Borough Council	25,453	23,796
Caerphilly County Borough Council	66,674	62,542
	215,688	191,153

The management and administration cost of the fund and the grants distributed were £8,692 during the year.

The Monmouthshire County Council Welsh Church Act Fund
Annual Report for year ended 31 March 2026

4 Analysis of Grants

	Grants to Organisations	Grants to Individuals
	£	£
The Advancement of Education	2,550	900
The Advancement of Religion	80,425	0
The Relief of Poverty	17,341	11,797
Other Purposes Beneficial to the Community	102,675	0
Total	202,991	12,697

Unspent balances are retained for distribution in subsequent financial years. Grants to Churches and other religious establishments totaled £80,425 and Community Organisations £102,675 respectively during the financial year. Grants of essential equipment and furnishings to the value of £11,797 were allocated to individuals for the relief of families deemed to be in poverty. No organization or individual received more than one grant award during 2025/26.

5 Governance Costs

	2026 £	2025 £
Auditor's remuneration	8,559	8,135
	8,559	8,135

No indemnity insurance for Trustee's liability has been purchased by the Charity however the Fund is covered by Monmouthshire County Councils' fidelity guarantee insurance. Insurance covers financial losses incurred, as a result of fraudulent acts conducted by Authority employees but does not cover the Trustee for any wrong decisions that may have been made.

6 Taxation

The Charity is a registered charity, and as such is entitled to certain tax exemptions on income and profits from investments, and surpluses on any trading activities carried on in furtherance of the Charity's primary objectives, if these profits and surpluses are applied solely for charitable purposes.

The Charity is not separately registered for VAT because it falls within the Local Authority's VAT Registration as corporate trustee and accordingly, all their expenditure is recorded exclusive of any VAT incurred.

7 Reconciliation of net income/ (expenditure) to net cash flow from operating activities as at 31 March 2026

	Current Year £	Prior Year £
<i>Net income/(expenditure) for the reporting period (as per the statement of financial activities)</i>	96,172	(7,995)
Adjustments for non-cash transactions		
(Gains) / losses on investments	(104,092)	18,454
Dividends, Interest & Rents from investments	(221,011)	(219,160)
(Increase) / decrease in debtors / bad debts	(5,740)	(12,891)
Increase / (decrease) in creditors	28,457	(91,628)
Net cash provided and (used in) operating activities	(206,214)	(313,221)

8 Analysis of cash and cash equivalents as at 31 March 2026

	Current Year £	In Year Movement £	Prior Year £
Cash at bank	107,927	(179,322)	287,249
Total cash and cash equivalents	107,927	(179,322)	287,249

The Monmouthshire County Council Welsh Church Act Fund
Annual Report for year ended 31 March 2026
9 Investment Land and Property

	Total
	£
Valuation	
At 1 April 2025	488,365
Disposals	0
Revaluation	42,585
At 31 March 2026	530,950
Depreciation	
At 1 April 2025	0
Charge in year	0
Disposals	0
At 31 March 2026	0
Net book Value	
At 1 April 2025	488,365
At 31 March 2026	530,950

Tangible Investment assets solely consist of freehold land. Valuations were conducted in accordance with the valuation policy in the 2025/26 financial year and thereafter on an annual rolling basis.

10 Investments

	2026	2025
	£	£
CCLA - COIF Property Fund	936,272	925,421
Royal London	593,859	0
M&G Charibond Fund	0	602,303
Schroders Income Maximiser	414,667	386,075
M&G Charifund	624,371	528,307
CCLA - COIF Investment Fund	1,203,269	1,315,413
AEGON	534,285	493,578
Invested with Monmouthshire County Council	500,000	300,000
	4,806,723	4,551,097

The Trust has externally managed investments held with M&G, AEGON, Royal London, Schroeder's, and CCLA. The investment with Monmouthshire County Council is managed by the Authority's treasury management team, aided by there

The Monmouthshire County Council Welsh Church Act Fund

Annual Report for year ended 31 March 2026

appointed external treasury management advisors. Returns from Monmouthshire County Council are generated on a "pooled" basis. The average rate of interest generated was 4.19% for 2025/26 (4.94% for 2024/25).

None of the Investments are held outside of the territorial limits of the United Kingdom and the cost of the revaluations is contained within the charity management fee charged annually from Monmouthshire County Council.

11 Debtors

	2026 £	2025 £
Amounts falling due within one year		
<i>Prepayment & accrued income</i>		
Investment Income	70,926	65,186
Other Debtors	0	0
MCC Bank Transfer	0	0
<i>Trade debtors</i>		
Rental income	0	0
Bad debt provision for loss of rental income	0	0
<i>Other Debtors</i>		
HM Revenue and Customs	0	0
187,818 Other Debtors	0	0
	70,926	65,186

All investment interest due from the trustee was paid in year in 2025/26.

12 Creditors

	2026 £	2025 £
Amounts falling due within one year		
Grant creditors	187,818	164,753
Other creditors	22,836	17,244
	210,454	181,997

Grant creditors are recognised as the amounts awarded by the five constituent authorities of the Welsh Church Fund unpaid at the financial year-end. Other creditors are fees reimbursable for professional services utilised during the financial year by the Charity.

13 Funds

Balance 1 April 2025	Incoming Resources resources Expended	Other Unrealised Gain / (Loss)	Balance 31 March 2026
----------------------------	--	--------------------------------------	-----------------------------

The Monmouthshire County Council Welsh Church Act Fund
Annual Report for year ended 31 March 2026

	£	£	£	£	£
Unrestricted funds	5,209,899	225,149	(233,069)	104,091	5,306,071

14 Related party transactions

During the year transactions with related parties arose as follows:

	2026		2025	
	Receipts	Payments	Receipts	Payments
	£	£	£	£
Monmouthshire County Council	22,169	6,052	29,908	7,294

Members of Monmouthshire County Council ('The Trustee') have direct control over the Welsh Church Fund's financial and operating policies. Where work or services have been commissioned, or where grants were made during the financial year in which members had an interest, members have a duty to declare such an interest. The Welsh Church Fund must ensure that grants allocated were in full compliance with the Authority's standing orders and that grants were made with proper consideration of declarations of such interests.

During the financial year, members who declared an interest did not take part in any discussion or decision relating to grants made or works or services commissioned. Details of all interests declared are recorded in minutes or relevant meetings and recorded in the Register of Members' Interest, open to public inspection at County Hall, Usk.

There are outstanding balances for expenditure of £5,772 with Monmouthshire County Council. The Trust also held a £500,000 investment fund balance with Monmouthshire County Council at the year-end.

15 Trustee's Expenses, Remuneration and Benefits

No Expenses, Remuneration or Benefits were incurred during the year of account

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Monmouthshire Farm School Endowment Trust Fund

Annual report for the year ended 31 March 2026

Registered Charity Number: 525649

Monmouthshire Farm School Endowment Trust Fund
Annual report for the year ended 31st March 2026

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Monmouthshire Farm School Endowment Trust Fund
Annual report for the year ended 31st March 2026

Trustees, officers and advisers

Trustees

P Murphy
Monmouthshire County Council

D W H Jones
Monmouthshire County Council

M Cross
Blaenau Gwent County Borough Council

Dr W O C Symondson
University of Wales College Cardiff

R Clark
Torfaen County Borough Council

M Groucutt
Monmouthshire County Council

J MacKenna
Monmouthshire County Council

M Stevens
Monmouthshire County Council
(started in year)

L Wright
Monmouthshire County Council

P James
University College Wales Aberystwyth

H Morgan
Director Usk Campus – Coleg Gwent

C. Andrews
Caerphilly County Borough Council

Investment custodian
Monmouthshire County Council

Secretary
James Williams
Monitoring Officer
Monmouthshire County Council

Bankers
Barclays Bank
1-5 St David's Way
St David's Centre
Cardiff
CF10 2DP

Registered Office

County Hall, The Rhadyr, Usk, NP15 1GA

Solicitors
James Williams
Monitoring Officer
Monmouthshire County Council

Independent Examiners
Audit Wales, 1 Capital Quarter, Tyndall Street Cardiff
CF10 4BZ

Monmouthshire Farm School Endowment Trust Fund

Annual report for the year ended 31st March 2026

Report of the Trustees for the year ended 31st March 2026

The Trustees present their annual report and the independently examined financial statements for the year ended 31st March 2026 of The Monmouthshire Farm School Endowment Trust Fund. The information with respect to the Trustees, officers and advisers set out on page 2 forms part of this report. The financial statements have been prepared in accordance with the Financial Reporting Standards applicable in the UK and Ireland (FRS102) issued on 16th July 2014 and Charities Act 2011. The financial statements comply with the Charity's trust deed.

Status and administration

The Charity is governed by the 1959 Principal Scheme as amended by the Altering Scheme of 1971, although the governing body may rightly claim a history stretching back to 1894. The Fund is registered with the Charity Commission under Charity number 525649. The Trustees also have regard to the Charity Commission's guidance on public benefit.

Objects

The primary object of the Charity, as stated in its governing document, is to make awards to students in need of assistance to attend Usk Agricultural College, or at the discretion of the governing body, any other college, institution or university to pursue courses of study in agricultural subjects. The governing body can use its discretion to apply any unawarded income to provide funding towards the cost of facilities or amenities at Usk College which would benefit these students. The grants awarded have allowed the beneficiaries to pursue land-based courses to enhance career opportunities. The area of benefit is clearly defined; household income is a consideration when making the award. The total grant awards were £7,474 (£7,474 in 2024/25).

Review of activities and future developments

The statement of financial activities for the year is set out on page 6 of the financial statements. A summary of the financial results and the work of the Charity is set out below.

The Fund has increased slightly in value by £17,964 (£29,204 increase in 2024/25) over the financial year as investment income was down compared to 2024/25, as investment funds were switched between investment vehicles due to the M&G Charibond Investment fund being withdrawn from the market, with a delay in the re-investment with Royal London.

Income consists of dividends and interest from investments and cash held of £29,904 (£38,157 in 2024/25), and £257 (£512 2024/25) in respect of the annual payment from the Roger Edwards Educational Trust. Expenditure of £9,904 (£10,017 in 2024/25) primarily comprised grants payable of £7,474 (£7,474 in 2024/25) in line with the Charity's objects. An unrealised investment loss of £2,293 (£552 gain in 2024/25) was made in relation to investments held.

The current strategy is to ensure that there are sufficient funds to meet the needs of beneficiaries. This income generation forms the main basis of the following year's grant allocations to ensure continuity and non-degradation of the fund's capital assets and to perpetuate the Charity as a going concern.

Investment powers, policy and performance

Under the terms of the Trust Deed, the Trustees have general powers of investment, subject to the provisions of the Trustee Act 2000. The Trustees have reviewed their investment strategy and produced an investment and fund strategy for 2024/25 which was approved by Monmouthshire County Council in its capacity as Trust administrator on 6th March 2024. Investments are strategically placed in low-risk investments. Investment performance is reviewed periodically in light of prevailing economic changes.

Grant making policy

Grants are made in pursuance of the Charity's objectives in assisting students in need to attend Usk Agricultural College, or at the discretion of the governing body, any other college, institution or university to pursue courses of study in agricultural subjects.

Changes in fixed assets

The movements in fixed asset investments during the year are set out in note 7 to the financial statements.

Monmouthshire Farm School Endowment Trust Fund

Annual report for the year ended 31st March 2026

Reserves

The Fund consists primarily of the sale proceeds of the Former Monmouthshire Farm School by the governing body of the school to Monmouthshire County Council. The Fund is entitled to receive an annual payment from The Roger Edwards Educational Trust (Charity Number 525638) equivalent to two thirds of the net annual investment and rental income accrued to the Trust.

The Trust has reviewed its fund strategy and produced an investment and fund strategy for 2025/26 which states that it is the Trust's policy to maintain funds at approximately the current level and utilise the annual income received to fund its charitable expenditure. This was approved by Monmouthshire's full Council on the 6th of March 2025.

Governance of the Charity

Representative Trustees appointed by Monmouthshire County Council have a term of office equivalent to the term of a County Council (five years); the other representative Trustees have a term of office of three years, and the co-opted Trustees have a term of office of five years. County Council Trustees are elected to the board of Trustees. Trustees that represent other organisations are internally appointed. The Trustees are listed on page 2.

Risk management

Monmouthshire County Council as appointed administrator of the Trust Fund periodically reviews the major risks to which the Charity is exposed as part of the Authority's overall risk management processes. The Roger Edwards Educational Trust has historically provided significant income to this trust to be used for the distribution of grants. This income is received after the independent examination of the accounts and therefore this is usually late in the financial year. A risk assessment policy was approved by Monmouthshire's full Council on 6th March 2025.

Independent examiners

Audit Wales are the appointed independent examiners to the Charity.

Trustees' responsibilities

The Trustees are required by Charity law to prepare financial statements for each financial year, which give a true and fair view of the state of affairs of the Charity and of the net incoming/outgoing resources of the Charity as at the end of the financial year.

The Trustees confirm that suitable accounting policies have been used and applied consistently, and reasonable and prudent judgements and estimates have been made in the preparation of the financial statements for the year ended 31st March 2026. The Trustees also confirm that applicable accounting standards have been followed and that the financial statements have been prepared on the going concern basis.

The Trustees are responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the Charity and enable them to ensure that the financial statements comply with the Charities Act 2011. They are also responsible for safeguarding the assets of the Charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

By order of the Trustees

Trustee:

Date:

Monmouthshire Farm School Endowment Trust Fund
Annual report for the year ended 31st March 2026

Report of the independent examiner to the Trustees of
Monmouthshire Farm School Endowment Trust Fund

This will be updated once the independent examination is completed.

Monmouthshire Farm School Endowment Trust Fund
Annual report for the year ended 31st March 2026

Statement of financial activities (Sofa) for the year ended 31st March 2026

	Notes	2026 Unrestricted Funds £	2025 Unrestricted Funds £
Income & Endowments from:			
Investment income	2	29,904	38,157
Income from Roger Edwards Educational Trust		257	512
Total income & Endowments		30,161	38,669
Resources Expended			
Charitable expenditure			
Costs of activities in furtherance of the Charity's objects			
Expenditure on charitable activities	3	(7,474)	(7,474)
Other expenditure	3 & 4	(2,430)	(2,543)
Total Resources expended		(9,904)	(10,017)
Gains / (losses) on investment assets	5	(2,293)	552
Net Income		17,964	29,204
Net movement in funds			
Fund balances brought forward 1 April 2025		663,192	633,988
Fund balances carried forward 31 March 2026		681,156	663,192

All incoming resources and resources expended are derived from continuing activities. There are no recognised gains or losses other than those disclosed above.

Monmouthshire Farm School Endowment Trust Fund
Annual report for the year ended 31st March 2026

Balance Sheet as at 31 March 2026

	Notes	2026 Unrestricted Funds £	2025 Unrestricted Funds £
Fixed assets			
Investments	7	593,789	551,312
		593,789	551,312
Current assets			
Debtors: amounts falling due within one year	8	2,366	10,255
Cash at bank and in hand		87,521	103,843
		89,885	114,098
Current Liabilities			
Creditors: amounts falling due within one year	9	(2,518)	(2,218)
Net current assets		87,367	111,880
Net assets		681,156	663,192
The Funds of the Charity:			
Unrestricted Funds	10	681,156	663,192
Total Charity funds		681,156	663,192

The draft financial statements were approved for release by the Trustees on 14th July 2026 and signed on their behalf by:

Trustee:

Monmouthshire Farm School Endowment Trust Fund
Annual report for the year ended 31st March 2026

Notes to the financial statements for the year ended 31st March 2026.

1 Principal accounting policies

Basis of accounting

The financial statements have been prepared in accordance with the Statement of Recommended Practice: Accounting and Reporting by Charities preparing their accounts in accordance with the Financial Reporting Standards applicable in the UK and Republic of Ireland (FRS102) issued on 16th July 2014 and the Financial Reporting Standard applicable in the United Kingdom and Republic (FRS 102) and Charities Act 2011.

The trust constitutes a public benefit entity as defined by FRS 102. The Trustees consider that there are no material uncertainties about the Trust's ability to continue as a going concern.

Resources expended

All expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all costs related to the category. Where costs cannot be directly attributed to particular headings they have been allocated to activities on a basis consistent with the use of resources.

Incoming Resources

All income received is accounted for on a receivable basis and has been classified under the appropriate categories. The income from the Roger Edwards Educational Trust is an estimate of the income to be received for the year.

Grants payable

Grants payable are accounted for in full as liabilities of the Charity when approved by the Trustees and accepted by the beneficiaries.

Management and administration

Monmouthshire County Council administer the Trust Fund on behalf of the Trustees. Management and administration costs include expenditure on administration of the Charity and compliance with constitutional and statutory requirements, and an appropriate apportionment of support service recharges and overhead apportionments. The basis of the apportionment is a fixed fee agreed with the Trustees of £200 per year.

Debtors/ Creditors

Where revenue and expenditure have been recognised but cash has not been received or paid, a debtor or creditor for the relevant amount is recorded in the Balance Sheet. Where debts may not be settled, the balance of debtors is written down and a charge made to revenue for the income that might not be collected.

Irrecoverable VAT

Any irrecoverable VAT is charged to the statement of financial activities or capitalised as part of the cost of the related asset, where appropriate.

Recognition of liabilities

Liabilities are recognised when an obligation arises to transfer economic benefits as a result of past transactions or events.

Fund accounting

General funds are available for use at the discretion of the Trustees in furtherance of the general objectives of the Charity. Investment income and gains are allocated to the appropriate fund.

Investments

Investments are included at market value at the balance sheet date. Any realised and unrealised gains and losses on revaluation or disposals are combined in the statement of financial activities.

Monmouthshire Farm School Endowment Trust Fund

Annual report for the year ended 31st March 2026

Assumptions made about the future and other major sources of estimation uncertainty

The Statement of Accounts contains estimated figures that are based on assumptions made by the Trust about the future or that are otherwise uncertain. Estimates have been made taking into account historical experience, current trends and other relevant factors. However, because balances cannot be determined with certainty, actual results could be different from the assumptions and estimates.

The items in the Trust's Balance Sheet at 31st March 2026 for which there is a significant risk of adjustment in the forthcoming financial year are as follows:

The revaluation of investment property and property funds

Changes in the valuation assumptions used, together with significant changes in rental growth could affect (increase or decrease) the fair value of property-based investments. Indicative net asset statements for property funds are subject to uncertainty at the reporting date and the valuation for pooled property funds and investment property is less reliable than usual. As the investments are held on a long-term strategy basis, the fund does not foresee any long-term negative effect in the generation of future income streams.

Cash flow Statement

The Charity has taken exemption from preparing a cash flow under Charities SORP FRS 102 Update Bulletin 1.

2 Income from Investments

	2026	2025
	£	£
Interest on cash balances	11,491	0
Income from Investments	18,413	38,157
	29,904	38,157

3 Expenditure on Charitable Activities

	2026	2025
	£	£
Grants payable	(7,474)	(7,474)
Management & administration	(2,430)	(2,543)
	(9,904)	(10,017)

Grants payable comprise numerous payments to individual students in respect of full-time and part-time courses attended. It is not possible to provide further details due to restrictions of confidentiality.

Monmouthshire Farm School Endowment Trust Fund
Annual report for the year ended 31st March 2026

4 Governance Costs

	2026	2025
	£	£
Net incoming resources is stated after charging:		
Independent Examiner's remuneration	(2,100)	(2,018)
	(2,100)	(2,018)

No indemnity insurance for Trustees liability has been purchased by the Charity. Though no specific indemnity insurance has been purchased by the Charity, the Fund is covered by Monmouthshire County Council's fidelity guarantee insurance. Insurance covers financial losses incurred as a result of fraudulent acts conducted by Authority employees but does not cover the Trustees for any wrong decisions that may have been made. Governance costs have remained broadly the same during the year as a result of the Public Audit Wales Act and in particular the duty placed on Audit Wales to ensure full recovery in its audit fees. The audit fee is included in the management and administration expenditure as per note 3.

5 Investments

	2026	2025
	£	£
M&G Charibond	0	205,232
UBS Multi-Asset Income Fund	144,531	144,530
Royal London	245,345	0
COIF Charities Property Fund	203,913	201,551
Total	593,789	551,312

6 Taxation

The Charity is a registered charity, and as such is entitled to certain tax exemptions on income and profits from investments, and surpluses on any trading activities carried on in furtherance of the Charity's primary objectives, if these profits and surpluses are applied solely for charitable purposes.

The Charity falls with Monmouthshire County Council regulations for VAT, and therefore any liability is accounted for within Monmouthshire County Council.

Monmouthshire Farm School Endowment Trust Fund
Annual report for the year ended 31st March 2026

7 Fixed asset investments

	Total £
Valuation at 1 April 2025	551,312
Purchase	250,000
Disposal	(205,232)
Revaluation loss	(2,293)
Valuation at 31 March 2026	593,789

Fixed asset investments solely consist of the quoted investments. All investments are stated at their market value at 31st March 2026. The historical cost of the investments at 31st March 2026 was £679,000. All of the Charity's investments are quoted in the UK. The details of these are disclosed in the table below, being COIF, Royal London and UBS.

Investments with a market value greater than 5% of the total portfolio market value at 31st March 2026 are as follows:

	£	%
COIF Charities Property Fund	203,913	35%
Royal London	245,345	41%
UBS Multi-Asset Income Fund	144,531	24%

The percentage shown above is the percentage of the total portfolio market value as at 31st March 2026.

8 Debtors

	2026 £	2025 £
Amounts falling due within one year		
Roger Edwards Educational Trust	257	512
Other	2,109	9,743
	2,366	10,255

9 Creditors

	2026 £	2025 £
Amounts falling due within one year		
Accruals and deferred income	(2,518)	(2,218)
	(2,518)	(2,218)

The amounts owed relate to audit fees and payments to Monmouthshire County Council to administer the trust.

Monmouthshire Farm School Endowment Trust Fund
Annual report for the year ended 31st March 2026

10 Unrestricted Funds

	Balance 1 April 2025 £	Incoming resources £	Resources Expended £	Investment loss £	Balance 31 March 2026 £
Unrestricted funds	663,192	30,161	(9,904)	(2,293)	681,156

11 Related party transactions

No remuneration directly or indirectly out of the funds of the Charity was paid or payable for the year to any Trustees. Payments have been made to Monmouthshire County Council respect of management and administration expenses.

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Llanelly Hill Social Welfare Centre Trust Fund**Statement of financial activities for the year ended 31st March 2026**

	2026	2025
	£	£
<i>Incoming resources</i>		
Income Generated by Management Committee	45,612	24,018
Contribution from Monmouthshire County Council		0
Total incoming resources	57,270	24,018
Charitable expenditure:		
Costs of activities in furtherance of the Charity's objects		
Management and Maintenance	57,270	25,268
Total resources expended	57,270	25,268
Net Gain / (Loss) before transfers	0	(1,250)
Net incoming resources before fixed asset revaluations	0	0
Gains/(losses) on the revaluation of fixed assets	0	0
Net movement in funds	0	(1,250)
Fund balances brought forward 1 April	65,222	66,472
Fund balances carried forward 31 March	65,222	65,222

Balance Sheet at 31st March 2026

	2026	2025
	£	£
Fixed assets		
Building and Land	65,000	65,000
	65,000	65,000
Current assets		
Debtors: amounts falling due within one year	154,431	97,159
Creditors: amounts falling due within one year	(154,209)	(96,938)
Net current assets	222	222
Net assets	65,222	65,222
Reserves:		
Endowment capital	65,222	65,222
Total funds	65,222	65,222

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Housing Adaptations

Monmouthshire County Council

July 2026

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Audit snapshot

What we looked at

- 1 Around 15 years ago, Monmouthshire County Council (the Council), like many other Welsh councils, transferred its housing stock to housing associations for them to manage. This means the process of delivering an adaptation to a home is different for people living in housing association properties compared to home-owners and people living in private rented homes.
- 2 We looked at how the Council provides housing adaptations for children, young people and adults living in their own homes and in private rented homes. We reviewed the Council's approach, delivery and monitoring arrangements.

Why this is important

- 3 Housing adaptations are changes to a home that make it easier for people to get around or do everyday tasks. They can help prevent falls or reduce or mitigate the need for formal care and unnecessary admissions to care settings. Examples of housing adaptations might include:
 - installing ramps or grab rails;
 - adding a stairlift or wheelchair lift;
 - fitting a level access shower or shower seat; and
 - widening doorways for wheelchair access.
- 4 The Council assesses people's needs to decide if they are eligible for support. If they are, the Council has a legal duty to arrange or provide services, such as home adaptations or equipment to help vulnerable people stay at home.

- 5 Audit Wales previously reported on Housing Adaptations in 2018. We found an overly complicated system which reinforced, rather than addressed, inequality in provision of adaptations.

What we have found

- 6 The Council delivers an effective preventative housing adaptations service with strong operational arrangements. However, improvements are needed to strengthen corporate oversight and improve the strategic use of data to address workforce risks and support longer-term planning.

What we recommend

- 7 We have made two recommendations. The Council should strengthen corporate oversight of the housing adaptations service by improving reporting to members on the service's performance, value and impact. It should also develop a workforce plan to better understand resilience risks and support the timely delivery of adaptations.

Key facts and figures

The average number of days to complete a Disabled Facilities Grant in Monmouthshire:

- 2023-24: 195 days
- 2024-25: 329 days
- 2025-26: 178 days

The number of Monmouthshire Adaptation Grants completed by the Council was:

- 60 in 2023-24
- 37 in 2024-25
- 55 in 2025-26

The number of Disabled Facilities Grants completed by the Council was:

- 7 in 2023-24
- 4 in 2024-25
- 2 in 2025-26

The combined number of DFGs and MAGs completed by the Council was:

- 67 in 2023-24
- 41 in 2024-25
- 57 in 2025-26

The average cost of delivering a DFG and MAG in Monmouthshire was:

- 2023-24: £ 13,268.52
- 2024-25: £ 7,366.73
- 2025-26: £ 6,069.16

The core budget for housing adaptations has remained at approximately £900,000 for several years.

Responses to the Council's housing adaptations customer satisfaction surveys issued between 2025 and 2026 show that:

- 100% of respondents were either satisfied or very satisfied with the support provided by Council officers;
- 88% of respondents were either satisfied or very satisfied with the length of time it took to provide the adaptation;
- 73% of respondents strongly agreed that their quality of life has improved;
- 69% of respondents strongly agreed that they feel more confident and/or independent.

Our findings

What is working well

Integrated approach to housing adaptations

- 8 The Council has strong arrangements for delivering housing adaptations, supported by the move of the housing adaptations team from Housing into Social Services. This has strengthened links with wider preventative services. Staff and leaders see adaptations as a preventative service that helps people stay independent, live with dignity and return home safely from hospital or care.
- 9 The service makes good use of its Trusted Assessors model.¹ Under this model, Care & Repair assesses and installs minor adaptations costing up to £1,000. These include grab rails, small ramps and handrails. Using Care & Repair in this way reduces pressure on occupational therapists and surveyors and supports timely installation of low-risk adaptations.
- 10 In practice, social care teams work closely together to deliver housing adaptations. Staff are co-located with health teams and, in some areas, based on health sites. This includes Community Occupational Therapists, the Community Resource Team and hospital-based Occupational Therapy staff. All Occupational Therapists can refer service users for minor and major adaptations. These arrangements help people get the right support at the right time.

¹ A Trusted Assessor is someone acting on behalf of and with the permission of multiple organisations to carry out an assessment of health and/or social care needs in a variety of health or social care settings.

Application and assessment process

- 11 The Council uses means testing for larger adaptations through the Disabled Facilities Grant (DFG) process. Cases that are not means tested are processed through the Monmouthshire Adaptations Grant (MAG) programme. This offers a streamlined process for smaller adaptations. The Council supports people with their applications and keeps in regular contact with applicants to explain requirements, monitor progress and ensure they understand the process.
- 12 The Council has a clear approach to assessing applications. The occupational therapy service assesses people's needs and decides which adaptations are eligible. It then refers cases to the sustainable living team. Occupational therapists and the Council's surveyor then assess whether the home is suitable for the recommended adaptation.
- 13 The Council does not hold any council housing stock, but it provides clear information and an accessible application process for private landlords. Its DFG Conditions document explains eligibility for financial support and landlords can apply using a straightforward form, with contact details for further advice.
- 14 These arrangements help make the service easier to access. They also support timely applications and help people move through the process with a clearer understanding of its stages.

Operational performance and monitoring

- 15 The adaptations team collects data on service user profiles and referrals. Timescales, costs and progress of work are also recorded, including customer satisfaction results. Dashboards are used to track and manage this work. Occupational therapists record people's needs and circumstances through their referral and assessment processes. This includes urgency status and other factors to help manage and prioritise cases.

- 16 The housing adaptations service uses a Works in Progress record and an internal Excel dashboard to oversee delivery. It reviews performance at quarterly meetings, supported by monthly reports from Care & Repair. Regular case reviews and tracking help managers spot and respond to delays. However, reporting on outcomes and impact is less consistent and is not widely shared.
- 17 Operational performance has improved significantly since 2024-25, reflecting steps taken to build capacity, track cases better, and increase the pool of contractors. The 'Average time taken to complete Disabled Facilities Grants' has a target of 180 days. Performance against this measure for the last three years is as follows:
- 195 days in 2023–24
 - 329 days in 2024-25
 - 178 days in 2025-26
- 18 Occupational therapists and the housing adaptations team meet regularly to discuss adaptations and share learning. This learning helps identify good practice and informs prioritisation and future delivery. The Council also participates in the South Wales Renewals and Adaptations Group, which supports shared learning with other councils. Together, these arrangements give managers a clear view of performance, support timely action where delays emerge, and help the service improve over time.

Quality

- 19 The Council has arrangements in place to assure the quality of housing adaptations. At the start of each adaptation, it sets out clear specifications in the job schedule. This gives contractors clear instructions about the work they must complete. The Council surveyor carries out sign-off visits and, for works that need formal approval, such as extensions or garage conversions, Building Control staff sign off the required specifications. These arrangements help make sure adaptations are completed safely and to the required standard.

- 20 The Council manages contractors through its Code of Conduct. This sets out expectations around behaviour, quality and consideration for residents. The Code of Conduct requires contractors to consider any occupant vulnerabilities and make reasonable adjustments to their working methods. This can help reduce mess and disruption and demonstrates consideration of residents' needs.
- 21 The Council routinely seeks feedback from service users on contractor performance, including quality of work, tidiness, and timekeeping. This helps support a strong culture of quality and accountability. Contractors who receive poor client feedback may not be used for future work. This helps maintain standards and encourages contractors to deliver a good service.

Service user experience

- 22 The Council uses a customer satisfaction survey when it completes DFG works. The survey includes a range of questions to help understand the service user's overall experience. This person-centred approach provides valuable feedback on how the service made clients feel.
- 23 We looked at responses to customer satisfaction surveys issued between 2025 and 2026. They indicate that service users feel supported, listened to and are treated with dignity and respect. Most respondents also indicated that their adaptation has had a positive impact on their lives. This included improved quality of life, feeling safer at home and feeling more confident or independent. However, the Council does not routinely analyse this information or include it in performance reports or corporate updates. This is a missed opportunity to demonstrate the impact of the service.

What needs to improve

Corporate profile and strategic decision making

- 24 The housing adaptations service has a low corporate profile. The Council does not refer to it clearly in key documents such as the Community and Corporate Plan 2022-28 or Annual Self-Assessment 2024-25. This makes it difficult for the Council to show how the service contributes to its strategic aims.
- 25 Performance reporting focuses more on delivery times than outcomes. The Housing and Communities Service Plan 2025-28 includes one measure: the average time taken to complete Disabled Facilities Grants. The service records outcomes for users, such as whether an adaptation helped someone leave hospital or removed the need for a care package. However, although this information is used to manage day-to-day operations, it is not reported at a corporate level.
- 26 A clearer view of the service's wider impact could help demonstrate value for money, including related cost savings and cost avoidance, and better inform strategic decision-making.

Workforce planning and future demand

- 27 The service does not use its data systematically to plan for future demand. It uses operational data to understand current pressures and has also drawn on this information in reports on funding requirements, such as the March 2025 report to Business Cabinet on the Disabled Adaptations Programme. However, this is not part of a systematic approach to planning for future population needs, likely adaptation types, service outcomes or the service's preventative impact.

- 28 The core housing adaptations budget has remained at around £900,000 for several years, and it is unclear whether this is the right level of funding for future demand. The Council manages short-term pressures through in-year funding requests, capital slippage and late-confirmed external funding. These arrangements make it harder to plan delivery effectively, align workforce capacity with demand and manage the service over the medium to long term.
- 29 The housing adaptations service relies on a limited team of skilled professionals, with only one housing surveyor. Surveying capacity is limited and can create a bottleneck in service delivery. The surveyor also supports other housing service demands so their time is divided. This creates a clear resilience risk. The Council recognises this and plans to recruit an additional part-time surveyor.
- 30 The Council does not have a formal workforce plan for the housing adaptations service. Without one, it cannot clearly assess current and future staffing capacity, identify the skills it needs, or put effective succession arrangements in place. This limits its ability to manage pressure points and plan for future changes in demand.

Understanding partner performance

- 31 The Council is not responsible for delivering housing adaptations for people living in housing association homes – this is the role of the local housing associations. The Council does not monitor how quickly housing associations complete the work or if they inspect completed adaptations. As a result, it does not have a full picture of the timeliness and quality of adaptations across the county.

Recommendations

Taken together, these recommendations are intended to ensure that a high-impact preventative service, delivered effectively at an operational level, is also strategically overseen, sustainably resourced and clearly reflected in corporate decision-making.

Improve corporate oversight of housing adaptations

- R1 The Council should increase corporate oversight and awareness of the housing adaptations service including close working with Social Care to assess outcomes and impact. This includes expanding performance reports and member reporting arrangements to evidence how work achieves value for money and contributes to the Community and Corporate Plan (**paragraphs 25 and 26**).

Develop a workforce plan to support future demand

- R2 The Council should develop a workforce plan for the housing adaptations service to understand and address resilience risks that could affect the timely delivery of adaptations. The plan should include:
- 2.1 a clear understanding and analysis of future demand and service capacity over the medium to long term (**paragraphs 27 and 30**); and
 - 2.2 a clear understanding and analysis of the resource requirements needed to meet future demand over the medium to long term (**paragraphs 28 and 29**).

Appendices

1 About our work

Scope of the audit

The audit considered whether the Council's arrangements for housing adaptations support service users to remain at home. This included reviewing the Council's approach, delivery and monitoring arrangements.

The audit did not include interviews with other stakeholders who are involved in the delivery of housing adaptations such as local health boards, contractors, Extra Care and housing associations. Neither did we contact service users to obtain their feedback on the service they received.

Questions

The audit used the following high-level questions:

- Does the Council have an informed and clear approach to housing adaptations which supports people to remain at home?
- Is the Council delivering its approach to housing adaptations to support people to remain at home?
- Does the Council have arrangements to monitor the progress and impact of housing adaptations to support people to remain at home?

Criteria

We considered Audit Wales's 2018 report on Housing Adaptations to develop the audit criteria. We also had discussions with councils to understand housing adaptations further.

Methods

We reviewed documents relating to housing adaptations process. We interviewed key officers and elected members, and we held a focus group with managers and team leaders involved in the housing adaptations process.

2 Key terms in this report

What we mean by a Monmouthshire Adaptations Grant (MAG)

- 1 A Monmouthshire Adaptations Grant pays for small to medium adaptations that do not require building or planning regulations approval. This includes adaptations such as stairlifts, ramps and level access showers. This grant is not means-tested, so is not dependent on an applicant's financial situation.

What we mean by Disabled Facilities Grant (DFG)

- 2 A Disabled Facilities Grant helps pay for major and important changes to a home so residents can live there more safely. The maximum grant available towards adaptations is £36,000, but the amount received depends on the financial circumstances of the applicant.
- 3 Councils in Wales are legally obliged to provide this grant and it applies to homeowners, tenants, and landlords.

What we mean by value for money

- 4 Value for money means spending money in a way that gets the best possible results for the cost. Value for money is commonly associated with the 'three Es' of economy, efficiency and effectiveness. We have summarised these as:
 - Economy: buying what is needed at the lowest sensible cost to help achieve intended outcomes.
 - Efficiency: using resources well to help achieve intended outcomes.
 - Effectiveness: achieving the intended outcomes for the short and longer term.

- 5 Councils have a legal duty to check whether they are using money and resources economically, efficiently, and effectively.
- 6 Councils must also think about both short-term and long-term needs when making decisions. Sometimes the best value for money is not the cheapest immediate option, but the one that prevents bigger problems and costs later.

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Management response form



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Audited body	Monmouthshire County Council
Audit name	Housing adaptations
Issue date	17.07.2026

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Ref	Recommendation	Commentary on planned actions	Completion date for planned actions	Responsible officer (title)	Audit Wales only
R1	The Council should increase corporate oversight and awareness of the housing adaptations service including close working with Social Care to assess outcomes and impact. This includes expanding performance reports and member reporting arrangements to evidence how work achieves value for money and contributes to the Community	Discussions have taken place with the Scrutiny Manager to ensure Disabled Adaptations are included within People Scrutiny Committee’s annual work plan, with plans to report an overview of the service to the committee annually, with the first report to be presented in December 2026.	Annually (next report December 2026)	Strategic Housing Manager	

Ref	Recommendation	Commentary on planned actions	Completion date for planned actions	Responsible officer (title)	Audit Wales only
	and Corporate Plan (paragraphs 25 and 26).	Discussions are also in place with Social Care colleagues to explore how performance information relevant to both services can be shared to ensure maximum benefit. The use of performance information will also be expanded in the Housing and Communities service business plan, including quarterly updates and performance indicators, to ensure performance is continuously evaluated and actions are informed. Disabled adaptations performance will be formally added to the agenda of quarterly progress meetings with Occupational Therapists. We will also utilise this information in our service newsletter targeting social care.	October 2026 October 2026 Ongoing		

Ref	Recommendation	Commentary on planned actions	Completion date for planned actions	Responsible officer (title)	Audit Wales only
R2	The Council should develop a workforce plan for the housing adaptations service to understand and address resilience risks that could affect the timely delivery of adaptations. The plan should include: 2.1 A clear understanding and analysis of future demand and service capacity over the medium to long term (paragraphs 27 and 30); 2.2 A clear understanding and analysis of the resource requirements needed to meet future demand over the medium to long term (paragraphs 28 and 29).	Workforce planning discussions with team managers are scheduled to commence in Autumn 2026 and will include the Housing HR Lead. This will enable appropriate planning of service management and ensure the team is planning for the future. Consideration will also be given to the option and feasibility of a Housing Trainee/Apprentice. The revised corporate approach to Review & Development Appraisals is also planned to be implemented across the service. Alongside this work, we are working to increase surveyor capacity. As part of reporting to People Scrutiny Committee, an analysis of need, demand and outputs will be undertaken, with findings of any increasing risk to service	Nov 2026 Annually (next report December 2026)	Strategic Housing Manager	

Ref	Recommendation	Commentary on planned actions	Completion date for planned actions	Responsible officer (title)	Audit Wales only
		delivery and changes to resource requirements reported to members.			



Recruitment and retention challenges – the right people at the right time?

Monmouthshire County Council

June 2026

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Audit snapshot

What we looked at

- 1 We looked at the recruitment and retention challenges that Monmouthshire County Council (the Council) is facing, including how well the Council understands its challenges, what it is doing in response, and how it reviews the value for money of its approaches.

Why this is important

- 2 Having the right workforce in place is essential for a Council to deliver the services its communities need and to meet its legal duties. To do this, the Council needs to employ the right number of employees, with the right skills, at the right time.
- 3 The majority of the Council's Day-to-day spending is used to pay for its workforce. However, the Council is facing challenges in recruiting and retaining people to deliver its services.

What we have found

- 4 The Council has a limited understanding of its recruitment and retention challenges and has taken action to address these with some success. The Council does not always assess the value for money of its recruitment and retention approaches.

What we recommend

- 5 We made two recommendations. These focus on strengthening the Council's use of workforce information to better understand current and future recruitment and retention challenges; and developing its approach to assessing the value for money of its recruitment and retention activity.

Our findings

Understanding the challenges

The Council has a limited understanding of its recruitment and retention challenges

- 6 The Council has a limited corporate understanding of its hard to fill posts. Officers know which roles are hard-to-fill and why within their services, but the Council does not collate this information to enable it to have an organisation-wide picture. Without an overall understanding, the Council may focus its actions in the “wrong” areas reducing the value for money of its activities.
- 7 The Council has some information to help it understand its recruitment and retention challenges. For example, it uses discussions with officers and exit interviews to understand its current challenges. But the Council has limited information to help it identify future trends. The Council has recognised within its People Strategy a need to improve its workforce information and is developing a corporate dashboard to improve the frequency and depth of workforce information provided to its senior leaders.
- 8 By not having comprehensive information, the Council is not able to fully understand the challenges it faces or forecast future trends. This increases the risks of not spotting problems early and of designing short-term solutions that do not provide value for money over the longer-term.

- 9 The Council generally understands how its use of a range of workforce management approaches helps it address its recruitment and retention challenges. These include use of agency workers, fixed-term contracts, recruitment freezes and market supplements. For example, it has clear processes in place for employing agency workers and using recruitment freezes. It has a well-established vacancy control process that involves justification for filling roles, consideration of alternatives and senior officer oversight of decisions. It uses fixed-term contracts to cover maternity leave or for managing seasonal demand for some services, but it does not have a formal policy for their use.
- 10 The Council also manages its use of market supplements through a clear policy. It uses them only in exceptional circumstances after a detailed business case is approved by a Chief Officer.
- 11 By understanding the impact of different workforce management approaches, the Council reduces the risk of negatively impacting the culture and morale of the organisation. This can help the Council to retain the talent it needs.

Addressing the challenges

The Council is taking action to address its recruitment and retention challenges, with some success

- 12 The Council uses a range of approaches to address its recruitment and retention challenges. However the Council recognises that challenges remain in some services, such as social care, leisure and cleaning services. The approaches it uses include:
- creating apprenticeship and 'grow your own' opportunities to develop people so they can undertake hard-to-fill posts;
 - attending recruitment fairs targeted at recruiting to 'hard-to-fill posts';
 - improving the appeal and reach of job adverts by using supporting videos and social media; and
 - improving its recruitment website to make it easier for people to look and apply for jobs.
- 13 The Council has a clear commitment to increase diversity and inclusion. For example, it has an inclusive workplace promise and has a guaranteed interview scheme for people with disabilities or who are neurodiverse. By having arrangements to recruit from the full diversity of its community, the Council increases its available pool of talent and increases the likelihood of securing the talent it needs.
- 14 The Council is making use of technology to improve the effectiveness of its recruitment activity. For example it is:
- digitising its job application process;
 - making it easier for job applicants to complete application forms via its website;
 - distributing QR codes to potential applicants at job fairs to make it easier for them to register an interest in future jobs that may become available; and
 - improving the accessibility of vacancies and other information about working for the Council on its website.

- 15 The Council's onboarding arrangements do not always enable new staff to take up their posts quickly. In some cases, these delays have caused the Council to lose preferred candidates to competitors. In response, the Council is developing an online recruitment platform to improve the speed with which it onboards new staff. Its new recruitment platform also has potential to help the Council monitor the timeliness of onboarding in the future. Making sure that new staff start work quickly is important to help the Council continue to deliver services for its communities as well as reducing workload pressure on existing staff.
- 16 The Council has set a specific objective within its People Strategy to establish itself as an employer of choice and is taking positive action to achieve this aim. For example, it offers a range of wellbeing and reward offers including pensions, health benefits and flexible working options. These can improve staff wellbeing, productivity and support retention. In addition, the Council offers a range of learning and development opportunities for staff through its e-learning system. This supports staff to access training for their current roles and can help them to progress into more senior roles in future. Supporting staff development and wellbeing together with reward offers can help improve their motivation and performance whilst improving staff retention.
- 17 The Council works with its staff and their representatives to overcome its recruitment and retention challenges. For example, the Council formed working groups to improve its recruitment arrangements and retention of staff. This is important as involving employees in developing and delivering solutions to tackle recruitment and retention challenges can potentially help the Council identify different ways to address them. Without involving staff the Council may miss opportunities to identify practical solutions and secure staff buy-in to changes.
- 18 The Council works with partners to help overcome its recruitment and retention challenges. For example, it works with another council to provide youth offending services and with other councils and the local health board to provide IT services. By exploring opportunities for collaboration, the Council reduces the risk of missed opportunities to share resources, expertise, and notable practice to support its workforce sustainability.

- 19 Senior leaders have regular oversight of recruitment and retention challenges but gaps in information reduce its effectiveness. For example, councillors receive regular risk management reports updating progress on actions to address the Council's workforce pressures. However, as set out earlier in the report there are gaps in the information the Council collects to understand its recruitment and retention challenges. Making sure that senior leaders have the information they need to have regular oversight of recruitment and retention challenges reduces the risk that they are not identified and addressed in a timely way.

Reviewing value for money

The Council does not always assess the value for money of its approaches to recruitment and retention

- 20 The Council does not always assess or monitor the value for money of its recruitment and retention approaches. It has also not clearly set out who has responsibility for monitoring this. The Council sometimes reviews the costs of initiatives and puts in place cost control measures. For example, in its use of agency staff, recruitment control and external job advertising. However, by not always considering the cost and effectiveness of its approaches it is unable to determine if they provide value for money.
- 21 The Council also does not have arrangements to ensure that it always learns from its different approaches and those of other organisations. For example, the Council does not benchmark its approaches to recruitment and retention with other bodies. Whilst learning is shared internally within the Council through informal discussions, it does not have a mechanism to ensure that learning is always captured and shared.
- 22 By not consistently identifying and sharing lessons learned the Council risks missing opportunities to improve value for money.

Recommendations

R1 The Council should make sure that its senior leaders have the information needed to fully understand its recruitment and retention challenges (**paragraphs 7 and 19**)

R2 The Council should develop arrangements to assess the value for money of its approaches to recruitment and retention and share lessons learned from this (**paragraphs 20,21 and 22**).

Appendices

1 About our work

Scope of the audit

We looked at the challenges the Council faces in recruiting and retaining staff. This included how well the Council understands the challenges, the steps it is taking to respond to these challenges, and the how it reviews the value for money of its approaches.

We did not look at the wider topic of workforce planning.

Audit questions and criteria

Questions

We set out to answer the following questions:

- Does the Council understand its recruitment and retention challenges?
- Is the Council taking action to its address recruitment and retention challenges?
- Does the Council review the value for money of its approaches to address recruitment and retention challenges?

Criteria

We have assessed the Council's arrangements by answering the above audit questions. To help us do that, we have created a set of audit criteria which explains 'what good looks like'. We have used the audit criteria to help us analyse the evidence we collected from our review of documentary evidence and the interviews we conducted.

Our audit criteria were informed by a combination of our knowledge and experience and research into this topic. It was also informed by our conversations with national stakeholders.

Methods

We interviewed senior officers and the cabinet member responsible for developing and delivering the Council's strategic approach to meeting its recruitment and retention challenges.

We also interviewed senior officers from three Council services that have faced recruitment and retention challenges.

We also reviewed a range of documents relevant to the audit questions we were seeking to answer.

About us

The Auditor General for Wales is independent of the Welsh Government and the Senedd. The Auditor General's role is to examine and report on the accounts of the Welsh Government, the NHS in Wales and other related public bodies, together with those of councils and other local government bodies. The Auditor General also reports on these organisations' use of resources and suggests ways they can improve.

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Management response form



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Audited body	Monmouthshire County Council
Audit name	Recruitment and retention challenges – the right people at the right time?
Issue date	

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Ref	Recommendation	Commentary on planned actions	Completion date for planned actions	Responsible officer (title)	Audit Wales only
R1	The Council should make sure that its senior leaders have the information needed to fully understand its recruitment and retention challenges.	Ensure data and analysis of recruitment and retention challenges are shared at Directorate Management Team meetings and included in the annual HR Report to the Strategic Leadership Team.	December 2026	Head of HR	
R2	The Council should develop arrangements to assess the value for money of its approaches to recruitment and	Define and collate appropriate metrics to assess the value for money from recruitment. These <i>could</i> include cost per hire; retention and performance of new	December 2026	Head of HR	

Ref	Recommendation	Commentary on planned actions	Completion date for planned actions	Responsible officer (title)	Audit Wales only
	retention and share lessons learned from this.	recruits; time to hire; feedback from applicants and new recruits. Undertake a benchmarking exercise of these metrics, with comparisons across other public sector organisations.			

Certification of Grant Returns 2023-24 and 2024-25 - Monmouthshire County Council

Audit years: 2023-24 and 2024-25

Date issued: August 2026

This document has been prepared as part of work performed in accordance with statutory functions.

In the event of receiving a request for information to which this document may be relevant, attention is drawn to the Code of Practice issued under section 45 of the Freedom of Information Act 2000. The section 45 code sets out the practice in the handling of requests that is expected of public authorities, including consultation with relevant third parties. In relation to this document, the Auditor General for Wales and Audit Wales are relevant third parties. Any enquiries regarding disclosure or re-use of this document should be sent to Audit Wales at infoofficer@audit.wales.

We welcome correspondence and telephone calls in Welsh and English. Corresponding in Welsh will not lead to delay. Rydym yn croesawu gohebiaeth a galwadau ffôn yn Gymraeg a Saesneg. Ni fydd gohebu yn Gymraeg yn arwain at oedi.

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Audit Findings

Summary of certification work

- 1 Under Paragraph 20 of Schedule 8 to the Government of Wales Act 2006 the Auditor General shall, if required by a local government or other grant-receiving body, make arrangements for certifying grant returns.
- 2 We have completed our certification work upon the Council's grant returns for the 2023-24 and 2024-25 financial years and this report summarises the outcomes of this work.
- 3 This report is being issued later to the Council than would be normally the case and also covers two years of certification work. This is because audit of the Housing Benefit returns for 2023-24 and 2024-25 could not be concluded until recently, and so full and complete details of grant activity for both years could not be presented until now.
- 4 **Exhibit 1** provides a summary of this certification work.

Exhibit 1 – High Level Summary of our grants certification work for 2023-24 and 2024-25

Grants and returns certified	As appointed auditors of the Council, we were required to certify a number of the Council's grant returns for the 2023-24 and 2024-25 financial years: • 2023-24: we certified 5 grant returns with a total value of £51,098,565. • 2024-25: we certified 5 grant returns with a total value of £54,731,966.
------------------------------	---

Certification results	The final outcomes of our certification work were as follows: • 2023-24: 3 returns were issued with a qualified certificate and 2 were unqualified. • 2024-25: 3 returns were issued a qualified certificate and 2 were unqualified.
Audit adjustments	Some adjustments were required to the returns as a result of our certification work: • 2023-24: 3 returns were subject to amendment. • 2024-25: 2 returns were subject to amendment.
Fees	The overall fees charged for the certification work was: • 2023-24: £60,474 • 2024-25: £54,673

- 5 Further detail is provided below on the outcomes of our certification work for both 2023-24 (**Exhibit 2**) and 2024-25 (**Exhibit 4**) for each grant return, highlighting where audit amendments were required and whether the return was qualified.
- 6 A qualification means that issues were identified concerning the Council's compliance with the scheme's requirements, as set by the grant paying body, that could not be resolved through adjusting the return. In these circumstances, it is possible that the relevant grant paying body will require further information from the Council to satisfy itself that the full amounts of grant claimed are appropriate.
- 7 A detailed breakdown of the audit fees for each return certified is provided at **Exhibit 6** at page 14.

Exhibit 2: Summary of certification work outcomes for 2023-24

We were required to certify 5 of the Council's returns for the 2023-24 financial year, of these:

- 3 were qualified
- 3 were amended

Grants and returns	Qualified certificate?	Was the return adjusted?	Adjustment value
National Non-Domestic Rates Return	Yes	No	-
Teachers' Pensions Return	Yes	Yes	£1,894
Housing Benefit Subsidy	Yes	Yes	£2,795
Section 33 Pooled Budget	No	Yes	£1,000
Health Act S28a and 28b Money transfer	No	No	-

Exhibit 3 summarises the key issues relating to the reasons for each of the adjustments or qualifications highlighted above.

Exhibit 3: Detailed summary of the outcome of our certification work on each of the 2023-24 returns

Return	Findings	Amendment (£)
National Non-Domestic Rates	For properties claiming empty property relief we are required to obtain evidence that inspections or spot-checks have been undertaken by the Council. We asked for evidence of the empty property inspection for a sample of properties, of which 4 properties had no evidence of a spot-check or inspection by the Council, and instead the Council had relied on the owners' statements that the properties were empty. Our findings were reported to Welsh Government in a qualification letter but no amendment to the claim was required.	Nil
Teachers' Pensions	We made a number of amendments to the claim form for refunds and contribution tiers and these were detailed in the qualification letter accompanying the revised claim form as follows:	A £1,894 classification adjustment was required between lines on the return –

	• Refunds of £1,001 were mis-classified within the claim form. They were included in the current year contributions lines of claim form instead of the line for refunds made in prior years. • Testing found 2 employees who were included within the wrong 'Tier' in the claim form – although the pension contributions had been calculated correctly. The tiers were amended by £893 to correct the misclassification. The above amendments did not affect the overall contributions or overall balance on the claim form.	no overall impact on net position.
Housing Benefit Subsidy	We identified a number of issues from our testing of the 2023-24 housing benefit subsidy claim: • 5 cases where the Bed & Breakfast rate used to calculate subsidy differed to the invoice from the provider of the accommodation, or other supporting documentation. These were all identified as overpayments and as a result extended testing was undertaken on an additional 40 cases, of which 20 further cases were identified. This resulted in overpayments of benefit ranging from £18 to £2,930, at an aggregate total of £10,014. • 1 case where the incorrect number of bedrooms had been used when determining the Local Housing Allowance rate used to classify expenditure for subsidy purposes. Whilst there was no overclaim of subsidy, as this type of error could lead to an overclaim of subsidy additional testing was carried out. No further issues were identified.	Increase in subsidy of £2,795

	3 cases where an underpayment of benefit occurred as a result of rent not being uplifted appropriately. We were satisfied that this impacted only a small number of cases where there are multiple entries for one address and that this issue will only result in underpayment of benefit.	
Section 33 Pooled Budget Return	A minor amendment of £1,000 was made to correct the budget figure recorded upon the claim form. This had no impact on the total actual expenditure reported.	£1,000
Health Act S28a and 28b Money Transfer return	There were no amendments or qualifications arising from our certification work.	Nil

Exhibit 4: Summary of certification work outcomes for 2024-25

We were required to certify 5 of the Council's returns for the 2024-25 financial year, of these:

- 3 were qualified
- 2 were amended

Grants and returns	Qualified certificate?	Was the return adjusted?	Adjustment value
National Non-Domestic Rates Return	Yes	Yes	£155,399
Teachers' Pensions Return	No	No	-
Housing Benefit Subsidy	Yes	Yes	£1,323
Section 33 Pooled Budget	Yes	No	-
Health Act S28a and 28b Money transfer	No	No	-

Exhibit 5 provides more information relating to the reasons for each of the adjustments or qualifications highlighted above.

Exhibit 5: Detailed summary of the outcome of our certification work on each of the 2024-25 returns

Return	Findings	Amendment (£)
National Non-Domestic Rates	Following the qualification of the 2023-24 return, we were required to follow up upon on the arrangements that the Council had in place to ensure that properties awarded empty property relief were unoccupied. We found that the Council did not have documented arrangements in place during 2024/25 but did provide evidence of inspection and/or photographic evidence provided by the occupier for all but one of the samples tested. We were also provided with a copy of the empty property relief policy that was introduced during the 2025/26 financial year. Our findings were reported to Welsh Government in a qualification letter but no amendment to the claim was required for this issue. In addition, the claim form was amended to correct a misclassification of expenditure of £155,399 between two lines on the claim form. There was no impact on the overall values reported within the return.	Nil overall effect – the only amendment was to correct a misclassification of £155,399 between different areas of the return
Teachers' Pensions	No issues reported or amendments made.	Nil

Housing Benefit Subsidy	We identified a number of issues from our testing of the 2024-25 housing benefit subsidy claim. The most significant findings are as follows: • 10 cases where the Bed & Breakfast rates used to calculate subsidy differed to the invoices from the provider of the accommodation, or other supporting documentation. These resulted in both under and overpayments and additional testing was carried out. • 1 case where the incorrect number of bedrooms had been used when determining the LHA rate. This resulted in an underclaim of subsidy and additional testing was completed. The subsidy form was subject to amendment and a qualification letter communicating these findings, together with some additional issues, was issued to the DWP. The claim form was also subject to a small amendment as a result of our work.	The claim form was amended by £1,323 but there was no change to the overall level of subsidy received by the Council
Section 33 Pooled Budget	The year-end pooled budget position reported an underspend of £48,995 against the agreed budget. Whilst the Council informed us that the final expenditure/ funding position was confirmed by pooled budget partners at a meeting of the 'Integrated Services Partnership Board' meeting, formal minutes evidencing this approval could not be provided to us. Our findings were reported to Welsh Government and Pool partners in a qualification letter but no amendment to the claim was required.	Nil
Health Act S28a and 28b Money Transfer	There were no amendments or qualifications arising from our work.	Nil

Fees

- 8 Our certification work is charged on a per diem basis and so reflects the actual cost of completing the work. **Exhibit 6** below provides a breakdown of the fees charged for each return that we reviewed and certified.

Exhibit 6 – Fee Summary

Claim/Return	2023-24 (£)	2024-25 (£)
Housing Benefit	45,711	43,444
Section 33 NHS (Wales) Act 2006 Pooled Budget	1,910	2,120
Health Act S28a and 28b Money transfer	3,797	3,968
National Non-Domestic Rates Return	4,923	3,577
Teachers' Pension Return	4,133	1,564
Total fee	60,474	54,673

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SUBJECT: Draft Self-Assessment 2025/26
MEETING: Governance and Audit Committee
DATE: 10th September 2026
DIVISION/WARDS AFFECTED: All

1 PURPOSE:

- 1.1 To provide the committee with an opportunity to review the draft Monmouthshire County Council Self-Assessment Report, in line with the requirements of the Local Government and Elections (Wales) Act 2021.

2 RECOMMENDATIONS:

- 2.1 That the committee review the draft self-assessment report 2025/26 and make any recommendations for changes to the conclusions or actions prior to the report being considered by Council.

3. KEY ISSUES:

- 3.1 For the council to be successful, it's important that we are clear about what we want to achieve, making sure that actions are delivered and measuring whether these are having the desired impact. We have clear and established performance management framework in place to achieve this.
- 3.2 The legislative basis for performance management in Welsh local authorities is set out in the Local Government and Elections (Wales) Act 2021. The Act requires each local authority in Wales to keep under review the extent to which it is meeting the 'performance requirements', that is the extent to which: it is exercising its functions effectively; it is using its resources economically, efficiently and effectively and its governance is effective for securing these.
- 3.3 The mechanism for a council to keep its performance under review is self-assessment, with a duty to report the conclusions of the self-assessment once in respect of every financial year. Self-assessment is a way of evaluating, critically and honestly, the current position and to identify areas of development. At the heart of this, is the desire to secure better outcomes for citizens and service users. The self-assessment process has been embedded as part of the council's performance management framework (appendix 1). It is important that the assessment dovetails with, but does not duplicate, the Annual Governance Statement.
- 3.4 The self-assessment report evaluates the council's performance under each of the six Well-being Objectives in the Community and Corporate Plan, along with the programme of work that supports their delivery. The report focusses on the 'what we want to achieve' outcome statements that are each underpinned by specific actions for each objective. To support the delivery of the objectives, the council must make sure that all its areas are working efficiently and effectively. To that end, the report also assesses the effectiveness of the 'enabling functions' that support council services to meet changing demands and ensure their sustainability. These include corporate planning, performance and risk management, financial planning, workforce planning, procurement, asset management, digital and data. The report needs to tick a lot of boxes and as a result is a lengthy document. It is accompanied by a more accessible and concise summary version to increase public awareness of and engagement with the assessment.

- 3.5 Appendix 2 provides the committee with an overview of the process that was followed to complete the draft self-assessment report. This included desk-based evidence gathering to inform an initial evaluation, followed by workshops with each of the directorates and sessions with the Strategic Leadership Team and Cabinet. The assessment has focused on answering three key questions about the effectiveness of the council's arrangements: how well are we doing? how do we know? And, what and how can we do better? These informed the draft report, which is constructed around:
- How well do we understand our local context and place and has this informed our purpose and priorities? (Understanding well-being in the county)
 - How well are we achieving our agreed outcomes? (How well are we achieving the outcomes set in the Community and Corporate Plan)
 - How do we know? (Evidence)
 - How effectively are resources being used to deliver our priorities? (Enabling functions/services)
 - How effectively does the council work with stakeholders and partners on agreed outcomes? (Partnership and collaborative working)
 - What could we do better? (Actions)
- 3.6 The self-assessment is a continuously evolving process which we aim to develop and improve each year. Feedback from Governance and Audit Committee has played a key role in this ongoing development. Feedback from Performance and Overview Scrutiny Committee as well as Cabinet has also informed changes and additions made. Changes include:
- Increased use of feedback from residents and services users including the resident survey, make your mark and service satisfaction surveys.
 - Sought views from residents through our *Let's Talk* forum on the accessibility of the report, providing them with the summary of the report as well as the assessment of the objectives.
 - Used independent evidence from Panel Performance Assessment, regulators and inspectors.
 - Developed the strategic assessment to provide an integrated overview of impact
 - Assessed progress and impact made over the four years of the plan.
 - Identified case studies for each objective and embed these in the full self-assessment.
 - Developed a designed summary of the report to increase accessibility of the document for residents.
- 3.7 The self-assessment report 2025/26 is complimented by a Panel Performance Assessment. The Commissioning an external Panel Performance Assessment is a requirement of the Local Government and Elections (Wales) Act 2021, which requires councils to make arrangements for an independent panel, appointed by the council, to assess the extent to which the council is meeting the performance requirements. The findings of the assessment, along with the council's response to the recommendations, was presented to the committee at their 4th June meeting. Progress in implementing the recommendations provided as part of this assessment will be monitored as part of the self-assessment report.
- 3.8 Governance and Audit Committee has an important role in contributing to the self-assessment report. Committee findings have been used to inform our assessment of performance and formed a key part of our evidence base. Evidence presented to and scrutinised by the committee which informed the assessment includes, but is not limited to, the Annual Governance Statement; the Strategic Risk Register; self-assessment of performance management arrangements; and financial reports. The self-assessment report should be used to inform the committee's role of seeking assurance of the effectiveness of the council's governance and performance management arrangements.
- 3.9 Scrutiny of the council's performance, which is contained in the report, is the remit of the Performance and Overview Scrutiny Committee, who received the assessment of progress in

meeting the Council's objectives at their 30th June meeting. That committee accepted the assessed scores that were presented. The assessed scores for 'a connected place' and 'a learning place' have both been increased from 'level 4 – good' to 'level 5 – very good.'

- 3.10 Governance and Audit Committee are presented with a draft of this report, in accordance with the statutory guidance under the Local Government and Elections (Wales) Act 2021 and can make any recommendations for changes to the conclusions or actions the council intends to take. If the council does not make a change recommended by Governance and Audit Committee, it must set out the recommendation and the reasons why in the final report. Further updates may be made to the report ahead of Council, where information becomes available or feedback received, ahead of the final assessment being presented to Council on the 24th September.

4. RESOURCE IMPLICATIONS:

- 4.1 There are no additional resource implications as a result of this report. However, there may be resource implications in undertaking further actions identified in the self-assessment report. These would be subject to the usual council decision-making processes.

5. BACKGROUND PAPERS:

Local Government and Elections (Wales) Act 2021
Performance and governance of local authorities: statutory guidance
Community and Corporate Plan 2022-28
Self-assessment Report 2024/25

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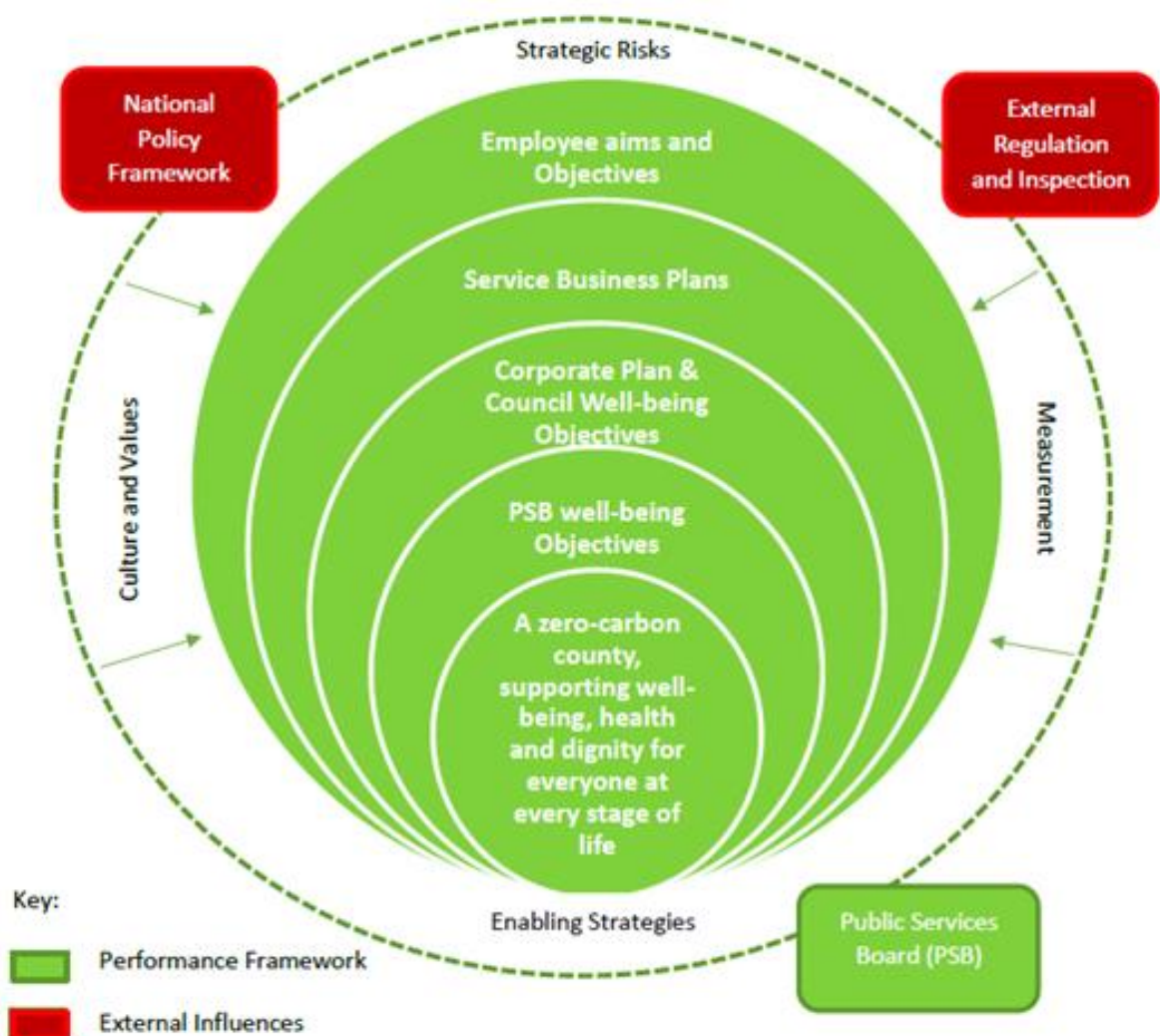
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Appendix 1

Performance Management Framework

Our performance management framework makes sure that everyone is pulling in the same direction to deliver real and tangible outcomes.

Building a zero-carbon county, supporting well-being, health and dignity for everyone at every stage of life is the unifying purpose of the diverse range of services for which we are responsible. We are a partner in the Public Service Board, which is responsible for setting well-being objectives for the county. The council's own well-being objectives are set by Council and form the backbone of our Community and Corporate Plan. Each of our teams has a service business plan that aligns to these objectives. We have a range of performance measures that we use to keep track of our progress. Our risk management policy enables us to manage strategic risks to our delivery. Our employee aims and objectives show the contributions that individual colleagues make to these objectives and delivering our vision in accordance with our values.



Appendix 2 – Self-assessment process

Legislation

The Local Government and Elections (Wales) Act 2021 (“the Act”) provides for a new and reformed legislative framework for local government elections, democracy, governance and performance. The Act replaces the previous improvement duty for councils set out in the Local Government (Wales) Measure 2009. The Act requires each council in Wales to keep under review the extent to which it is meeting the ‘performance requirements’, that is the extent to which it is exercising its functions effectively; it is using its resources economically, efficiently and effectively; its governance is effective for securing these.

The performance and governance provisions in the Act are framed within the context of the well-being duty in the Well-being of Future Generations (Wales) Act 2015, which sets out a legally binding common purpose for public bodies to improve the social, economic, environmental and cultural well-being of Wales.

The mechanism for a council to keep its performance under review is self-assessment, with a duty to publish a report setting out the conclusions of the self-assessment once in respect of every financial year. Self-assessment will be complemented by a panel performance assessment once in an electoral cycle, providing an opportunity to seek external insights (other than from auditors, regulators or inspectors) on how the council is meeting the performance requirements.

Why

Self-assessment is a way of evaluating, critically and honestly, the current position to make decisions on how to secure improvement for the future. It is about the council being self-aware, understanding whether it is delivering the right outcomes, and challenging itself to continuously improve. It needs to be embedded as effective self-assessment helps the council to continually learn and achieve sustainable improvement and better outcomes for citizens, service users and its own workforce.

The WLGA have identified draft principles for self-assessment for councils to ensure that they have arrangements in place that:

- demonstrate self-awareness derived from evidence-based analysis that focuses on outcomes;
- are owned and led at a strategic level and are not an exercise in compliance;
- further develop a culture of challenge to facilitate improvement as part of an ongoing process;
- are integrated as part of the council’s corporate planning, performance and governance processes; and
- enable an organisation-wide assessment rather than an assessment of individual services.

Further developing this culture and embedding an evaluative mindset will be a key development point through the continued production of the self- assessment report.

Process

The council has developed a process to undertake self-assessment under the Act, assessing performance in the 2024/54 financial year. The main component parts of the process and timeline are:

April – May	May – June	June	July - August	September
Desk-based evidence gathering	Directorate self-assessment Workshops	Council self-assessment report drafted and draft assessment of objectives	Refinement of report and consultation with stakeholders through the Let’s Talk Forum	Draft report to Governance and Audit Committee and Self-assessment

		presented to Performance and Overview Scrutiny Committee		agreed in line with council process
--	--	---	--	--

This timeline ensures that the self-assessment can inform and be informed by the policy direction of the council and how it uses its resources efficiently and effectively, particularly the budget setting process.

Evaluative evidence to inform the assessment has been compiled at a directorate level. Most of the evidence has been collated by using intelligence already held corporately in an insightful way; this includes, for example, the Annual Governance Statement, audit and inspection reports, and service level business plans.



The evidence gathered has been explored further, and challenged where necessary, at directorate and enabling function based self-assessment workshops, to determine if the objectives (outcomes) of the council are being achieved.

Self-assessment workshops

Directorate workshops	Enabling functions workshops
Learning, Skills & Economy	People
Social Care & Health	Asset Management
Place	Finance
Infrastructure	Procurement
Customer, Culture & Well-being	Digital & Data

The workshops were facilitated through the following questions:

- How well are we achieving our agreed outcomes? (Community & Corporate Plan objectives)
- How do we know? (Evidence)
- How effectively are resources being used to deliver our priorities? (Enablers)

- How effectively does the council work with stakeholders and partners on agreed outcomes? (Partnership working)
- What could we do better? (Actions - including a review of actions from the previous report)

The full evidence and conclusions from workshops have been collated and will be used by directorates and enabling functions to inform their services business plans.

Following the workshops, the evidence has been reviewed, further challenged, and collated into a corporate level evaluative self-assessment. This has been integrated with the council's requirement to report on the progress it has made in meeting its well-being objectives for the preceding financial year (2024/25) under the Well-being of Future Generations Act. The report is structured under these headings:

- Understanding our local place
- Outcomes (progress against our objectives in the Community and Corporate Plan):
 - How well are we achieving our agreed outcomes?
 - How do we know?
 - Areas for development
- Enabling functions
 - Corporate planning, performance and risk management
 - Financial planning
 - Workforce planning
 - Procurement
 - Assets
 - Digital & Data
 - Democracy & Scrutiny
- Our work with partners
- Our Actions (including progress against previous actions)

The self-assessment report will be scrutinised by the council's Performance and Overview Scrutiny Committee. A draft of the self-assessment report will be made available to Governance and Audit committee, who must review the draft report and make recommendations for changes to the conclusions or action the council intends to take. The self-assessment will be approved in accordance with the council's agreed processes at a meeting of full Council.

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Monmouthshire County Council Self-Assessment 2025-26





Version Control

Title	Monmouthshire County Council Self-Assessment 2025/26
Purpose	To self-assess the council's goals and arrangements as required by the Local Government and Elections (Wales) Act 2021.
Owner	Chief Officer – People, Performance and Partnerships
Approved by	
Date	July 2026
Version Number	0.2
Status	Draft
Review Frequency	Annual
Next review date	2027
Consultation	Cabinet Strategic Leadership Team Performance and Overview Scrutiny Committee Governance and Audit Committee Lets Talk Forum



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Introduction

Our ambition for Monmouthshire County Council and the people it serves is set in our Community and Corporate Plan. We want to be a zero-carbon county, supporting well-being, health and dignity for everyone at every stage of life. We will do this working with, and alongside, our communities. These are ambitious goals and it's vital that we track and evaluate our progress. We are clear about what we want to achieve, and this self-assessment is a critical tool in helping us achieve that. This will make sure we can respond to changing circumstances and opportunities and, most importantly, be held accountable for how well we are doing.

Local councils deliver a wide range of services. Some, such as roads and waste collection are universal, others such as social care are there at times of need. Many of our services act as a safety net when people are at their most vulnerable or are targeted at those experiencing disadvantage. Others, such as schools are there to help young people get the best start in life and make sure we are educating and developing the next generation of Monmouthshire residents. This evaluation cannot cover every single service. We have scrutiny committees and business plans in place to allow our councillors to hold senior officers and Cabinet members to account for those. Instead, it focuses primarily on how well we have delivered the six well-being objectives described in the Community and Corporate Plan.

Our Community and Corporate Plan – at a glance



The report also evaluates some of the key governance aspects that underpin our work such as the effectiveness of our workforce planning, use of assets and our financial management arrangements. It dovetails with the Annual Governance Statement, which is coordinated by our Chief Internal Auditor on behalf of the leadership team. It draws on audit and inspection work carried out by regulators including Audit Wales, Estyn and the Care Inspectorate Wales.

Like many public services we are facing budget pressures as a result of rising costs and increasing demands. We have made tens of millions of pounds in savings over recent years. We have had to take difficult decisions to balance our books but we always do this with the needs of communities in mind. This evaluation helps us understand the impact of the changes we make and allows us to learn from these so we can strive to continually improve what we do.



Our Self-Assessment

The Local Government and Elections (Wales) Act 2021, requires councils to keep their performance under review through self-assessment. We need to publish a report setting out the conclusions of the assessment once every financial year. This report predominantly looks back over the period from April 2025 to March 2026. It also makes reference to the cumulative effect of changes since 2022 when we began to develop our Community and Corporate Plan.

Effective self-assessment helps the council to continually learn and to achieve sustainable improvement and better outcomes for citizens, service users and its own workforce. This is focused on three questions:

- How well are we doing?
- How do we know?
- What and how can we do better?

This is integrated with our annual reporting arrangements on the progress and impact we have made in meeting our well-being objectives, which is a requirement under the Well-being of Future Generations Act. Further details on the process of the self-assessment are shown in Appendix 2. We also produce a short summary of this assessment.

We welcome views from residents on this assessment along with any areas of our work that you think should be considered by the scrutiny committees that hold decision-makers to account. Please get in touch via:

 improvement@monmouthshire.gov.uk

 Matthew Gatehouse, Chief Officer People, Performance and Partnerships, Monmouthshire County Council, County Hall, Usk, NP15 1GA

 @Monmouthshire



Understanding our local place

Monmouthshire is a diverse county. As a council we need to ensure we are meeting the needs of a wide range of groups, from residents to businesses. We strive to better understand the challenges facing our residents.

The context that we operate in is complex. Having a clear and current understanding of the social, economic, environmental, and cultural well-being in Monmouthshire is essential for the council to inform its purpose and priorities.

Local place

How well do we understand our local context and place and has this informed our purpose and priorities?	How do we know?
The council has a good understanding of residents' well-being. We use and analyse a wide range of statistical information, including data on health, income and the local economy. We also carried out a residents' survey, receiving more than 1,000 responses. The findings have helped us understand residents' views about their local area, the council and their interactions with council services. The survey is one way we gather residents' views. It sits alongside feedback collected by individual services, which gives more detailed insight into people's experiences of council services. Services such as social care, libraries, housing adaptations and building control also gather feedback through user surveys. However, given the breadth of our responsibilities, we recognise that we do not yet have a comprehensive understanding of how well all services and policies meet the needs of the people who use them. Audit Wales has also concluded that, like other councils, we need to do more to understand the impact of our services on residents. We supported the Make Your Mark survey in 2025, which had a record 3,509 responses from young people. A youth conference was held in May 2025, bringing together young people from schools across the county to explore three priority areas identified in the survey: the cost of living, mental health, and employment and skills. This enabled young people to develop recommendations for decision-makers, public services and young people themselves to take forward over the coming year.	National Resident Survey Customer Surveys Audit Wales Report - <i>Use of Performance Information: Service User Perspective and Outcomes</i> Make Your Mark survey Informational from the National Statistics Office and other sources Let's Talk Monmouthshire Population Needs Assessment Gwent Well-being Assessment & Plan Community and Corporate Plan Replacement Local Development Plan



Our 46 ward councillors represent their communities and bring forward local insight. This is supported by public open forums at scrutiny meetings and Council, which give residents opportunities to raise issues of concern.



We have launched Let's Talk Monmouthshire as a single platform for consultation and engagement. It gives residents clearer information and one place to take part in online consultations across the organisation, helping to ensure they do not miss opportunities to have their say. Use of the platform has grown, with 1,000 registered contributors, including residents, businesses, visitors and colleagues. We continue to encourage residents to register for regular updates from all directorates.

We have also established a Let's Talk forum for people who are passionate about the county and want to represent their communities. The forum provides valuable feedback on council projects, policies, strategies and consultations. We continue to develop the forum, including working with members to agree topics for future panel sessions.

We also consult directly when planning service changes or considering action in a specific area. For example, we engaged with more than 1,200 people to understand how we could make our communities more age friendly.

The Community and Corporate Plan commits us to working with and alongside communities, empowering people to support one another and develop long-term solutions.

We engaged extensively during the development of the replacement Local Development Plan, which will shape land use across the county. The plan will increase opportunities for younger people to live and work in Monmouthshire, supporting a more balanced population and more socially and economically sustainable communities. We have also worked with residents, businesses and town and community councils to develop Placemaking Plans that reflect the priorities of individual town centres. The placemaking process has strengthened partnership working and created a shared understanding of local challenges and opportunities.

Every five years, we also work with partners across Gwent to carry out a detailed well-being assessment and population needs assessment. The Gwent Public Services Board has engaged widely in developing the area's well-being assessment and plan.

Town centre masterplans

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

- Our objectives contribute to the achievement of the seven well-being goals identified in the Well-being of Future Generations Act
- We are taking all reasonable steps to meet them.
- They remain consistent with the sustainable development principle and the five ways of working. More detail on the how the five ways of working are applied is provided in the progress on each goal later in this report.

We have included the following icons to illustrate each objectives contribution to the Well-being of Future Generations Act goals:



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

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Community & Corporate Plan Objective: A Fair Place to Live

What we want to achieve:

- Improved life chances for people regardless of income or background.
- Residents have better access to council services and support needed to live a healthy life.
- Citizens are able to participate in council and community decision-making and take actions which enable them to shape their own futures.

Our rating:
4 (Good)

Strategic Assessment

Nobody should be left behind in Monmouthshire or feel their voice does not count. Many of our residents are prosperous and very capable of looking after themselves and their loved ones, but this is not the case for all and, in a rural county, inequality can be more hidden than in urban areas. We have therefore focused on improving life chances, reducing the effects of poverty and disadvantage and ensuring residents can access support, improve their health and help shape the future of their communities.

A wide range of council services contribute to making Monmouthshire a fair place to live. These include early years and family support, schools and support for pupils eligible for free school meals, leisure and cultural services, our benefits service, social care and safeguarding services. These services help residents to access opportunities, stay well, feel included and build stronger and more resilient communities.

Our resident survey shows high levels of satisfaction. Ninety percent of respondents would recommend Monmouthshire as a place to live, and 74% were very or fairly satisfied with their local area. The survey also highlights strong community connections, with 79% of residents saying that people in their area get on well and help each other, and 66% saying that people pull together to improve the local area. This shows that residents continue to support one another and contribute positively to their communities.

We know this isn't always the case for everyone and through this objective we have increased the support we provide to residents to improve their life chances and enabled our communities to develop the places they live. We have expanded childcare provision, increased the number of eligible children accessing early education from 82% to 97% since 2022/23, and continued to focus Flying Start where need is greatest. We have gone beyond our statutory duty by providing both a free breakfast and a freshly cooked lunch to all primary pupils who choose to receive them. Uptake of universal free school meals has increased from 64% in 2022/23 to 68.6% in 2025/26, although this still varies between areas and requires further targeted work. We have also continued to provide practical support to those who need it most through targeted initiatives such as Food and Fun, free or subsidised play provision, warm spaces, emergency food aid and practical cost-of-living support in communities across the county.

We have also made good progress in improving access to services and opportunities that support health, participation and inclusion. We have committed to becoming a Marmot region, increased the number of people completing the National Exercise Referral Scheme, developed our Cultural Strategy and opened the Magor and Undy Community Hub. We have strengthened local volunteering and community capacity through the Be Community programme, launched Let's Talk Monmouthshire to improve engagement, achieved Disability Confident Employer Level 2 status and became the first accredited Council of Sanctuary in Wales.

Our evidence shows important strengths, with many milestones completed, increased support for residents, progress in health and community participation, and a range of services adapting to meet need. There are, however, some areas we have identified for improvement. We need to ensure our interventions are clearly communicated, better targeted and more consistently evaluated. We need to increase take-up of support where inequality is greatest and continue to work with communities to develop a shared understanding of community resilience.



A Fair Place to Live		
Fair place 	Evaluation Score:	Level 4 Good – Important strengths with some areas for improvement – the weight of evidence shows that the successes are greater than the areas that have not been achieved. We have increased the support we provide to residents to improve their life chances and enabled our communities to develop the places they live. We have set plans to deliver most of what we to achieve. We have adjusted and expanded our services and delivered a range of projects to support residents who require it. We need to ensure all our interventions to achieve this objective are targeted, clearly communicated and evaluated to assess impact on our objective.
Why we focused on this?		
Nobody should be left behind in Monmouthshire or feel their voice does not count. Many of our residents are prosperous and very capable of looking after themselves and their loved ones. However, this is not the case for all and in a rural county inequality is often more hidden than in urban places. We will increase the intensity of our work to help those who need support to live the lives they want.		
How well are we achieving our agreed outcomes?		How do we know?
What we want to achieve: Improved life chances for people regardless of income or background		
We are supporting working families with our childcare offer in Monmouthshire. We have increased the number of childcare settings from 94 to 97 during the year. We have established a new childcare setting at Trellech Primary School and submitted a full Business Justification Case to Welsh Government regarding a new setting at Archbishop Rowan Williams Primary School. We have also increased the number of eligible children accessing Early Education from 82% to 97% since 22/23. We have remained committed to ensuring Flying Start provision is available for parents in areas of the county that need it most. We develop our Flying Start offer based on demand. Some settings currently having no eligible children and choosing not to offer the service. This has contributed to an overall, slight reduction in the number of Flying Start settings, from 45 to 43. Our expansion of the childcare offer is supporting families in Monmouthshire to access childcare and parents to return to work. We are committed to providing Welsh-medium childcare. The number of children accessing Welsh-medium early education has grown by 25% during 25/26, from 74 to 93. We have faced challenges in developing additional Cylch Meithrin settings due to limited site space and uncertainty around the permanent location for the Welsh school in Monmouth. This has meant that families in Monmouth and Chepstow cannot yet access Welsh-medium childcare, including Flying Start. We have approved the existing Cylch Meithrin to offer Flying Start places to support families in the interim while a longer-term approach is developed. We aim to ensure that we are able to meet the growing demands of Welsh medium early education in the future. We have gone above our statutory duty to provide universal free school meals to all primary school pupils by providing a free breakfast and a freshly cooked meal at lunchtime to all who choose to receive them. Presently, 68.6% of pupils are receiving meals, up from 64% in 22/23. This is supporting pupils to receive healthy, free meals at school. This also helps to reduce food insecurity and improve equity in health and education outcomes. We continue to promote the uptake of Universal Free School Meals, however have seen variances in uptake between areas. This means that not all children who may benefit from free school meals are receiving them. We have gathered a targeted list of schools using data on deprivation, eligibility for free school meals and additional learning needs to try to increase take-up where it will make the biggest difference.		Number of childcare and Flying Start places Free school meals uptake Community Development Team action plan Carbon and monetary saving from Bentyg library of things

We know that nutritious food benefits children and young people by improving their physical and mental health, which enhances their ability to learn and grow. We know that some families may also require support with meals during school holidays. We have continued to deliver our Food and Fun programme to support families during this time. We've worked with schools to identify children who may benefit the most from this provision, ensuring our offer is targeted. The programme provides two healthy meals and activities for children during the summer holidays, aiming to reduce the financial burden on families and promote the health and well-being of children through physical activity. We achieved 6,377 attendances and served 12,849 meals during the summer of 25/26. We are ensuring children have access to activities and play, no matter their background. We have continued to deliver our programme of free or subsidised play provision through MonLife. This year, 2,217 children benefitted from this service. We have undertaken refurbishments at our outdoor play areas and parks to ensure play and activity are available to every child at no cost. We understand that the cost of living is still too high for many people. We have focused our efforts on delivering practical support that residents can access directly in their towns and communities. We have held 46 public-facing engagement events across the county, which were attended by 1,213 people. These events helped people to find local support, get advice, and connect into activities that improve well-being and reduce isolation. During the year we have supported the Warm Spaces programme which delivered 32 warm spaces, hosting 868 sessions for 1,238 attendees, and provided 10,315 meals/refreshments alongside advice and enrichment activity in venues. We also supported food provision through Emergency Food Aid. We backed 14 organisations for summer provision and 21 for winter provision, including £2,400 for emergency supermarket food vouchers via Monmouthshire Citizens Advice. We have continued to support circular economy projects. We have supported Benthylg libraries of things across the county which mean residents can borrow or buy things that they only use occasionally, supporting the environment and reducing costs. Our initiatives have saved residents approximately £100k since opening in April 2022, as well as resulting in a carbon saving of 45,841kg. We are continuing our commitment to wider circular economy initiatives which help people on lower incomes to reduce expenditure. These include our repair cafes, swap shops, and bike repair workshops.	
What we want to achieve: Residents have better access to council services and support needed to live a healthy life	
We are working with our partners in other public services to take action to reduce unfair and unjust inequalities in health. We have committed to becoming a Marmot region and recognise that the conditions in which people are born, grow, live, work and age play a major factor in their health. We have continued to help residents to improve their health and fitness levels through the National Exercise Referral Scheme. This is a national scheme designed to improve health and well-being for adults with chronic conditions or those at risk. We have supported 522 people to complete the scheme this year an increase from 456 in 24/25. Those completing the scheme reported improvements in balance, fitness levels and independence, and importantly their mental health. Overall, 75% of people reported that their general well-being had improved and that they felt happier after completing the scheme. The positive experience of those taking part has resulted in an increase in Exercise Referral Memberships at our leisure centres over the last decade from 300 in 2015 to 1,134 in 2025. We are ensuring our leisure services are accessible for all residents no matter their income through our Passport to Leisure scheme which offers discount for residents in receipt of benefits. We have worked with the creative sector in Monmouthshire to develop our Cultural Strategy. We facilitated workshops with local and national organisations and the creative and economic sector, and held a consultation on the draft strategy. Monmouthshire's Cultural Strategy 2025-2035	School Holiday Play provision Food and Fun scheme National Exercise Referral Scheme completion Cultural Strategy

outlines a visionary plan for the next decade. This strategy emphasises that culture is not an isolated endeavour, but a key driver of well-being, economic growth, community resilience, and collective identity.

CASE STUDY – NATIONAL EXERCISE REFERRAL SCHEME

The National Exercise Referral Scheme (NERS) is a national scheme funded by the Welsh Government. It aims to improve the lives of adults at risk of developing or currently managing chronic conditions through a structured 16-week physical activity regimen. Patients are referred to the scheme by their GP.

Philip was referred to NERS following a heart attack which left him feeling shaken. Following his heart attack, Philip struggled to walk and was becoming out of breath quickly. Through his NERS class, Philip has been able to progress his recovery and regain his stamina. He described the programme as “the best thing for me” and said it has “given me back my life”, allowing him to regain his strength and confidence. When asked if he would recommend the programme to others, Philip said he would “seriously recommend” the programme to others in his position to allow them to get back to doing the things they could before.

Philip’s fitness goals for the future include continuing to attend his NERS and Fit4Life classes twice a week to keep his fitness up and continue his recovery.

We developed and opened the new £2.9 million Magor and Undy Community Hub in partnership with MUCH group. The development was based on extensive involvement of the community and is designed based on residents’ feedback. The site provides spaces for community use and commercial events, as well as potential for small business growth. The MUCH group now occupies and manages the community hub for the direct promotion of social, cultural, leisure, sporting and other community activities.

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

We are lucky to have high levels of social capital in Monmouthshire. We want to ensure we are engaging with our excellent community of volunteers. We are strengthening local volunteering and community capacity through the Be Community programme, which aims to equip individuals with the skills and knowledge needed to make a meaningful difference. We supported 122 organisations and delivered 48 training opportunities throughout the year to help build community capacity. Nearly all participants in our programme reported improved skills and confidence. We are focused on working with our communities to grow community resilience further. Our residents survey showed 66% of felt that people in their local area pull together to improve the local area. This shows that residents continue to support their local place in Monmouthshire.

We recently underwent an inspection from an external panel of peers to assess how we function as a Council. This panel recommended that we work closely with communities and volunteers to develop a shared understanding of community resilience. To address this, we have developed a set of actions which include co-producing a practical definition of community resilience with our stakeholders and moving from broad engagement to targeted work and action with community groups.

'Lets Talk Monmouthshire'

Disability Confident Employer status

County of Sanctuary status

Number of staff completing a Welsh language course

We have launched 'Lets Talk Monmouthshire' as a platform for consultations and engagement. This is enabling greater clarity of information for residents and providing a single place to visit for online consultations right across the organisation, to ensure residents do not miss the opportunity to engage. So far, over 930 residents have signed up to receive regular updates. Our resident survey showed 39% of respondents felt the council keeps residents well informed about the services and benefits it provides, while 55% feel did not feel well informed. We need to grow our engagement and encourage more residents to register for regular updates on Let's Talk so they receive updates directly. We are committed to tackling inequality. We have achieved the accredited Disability Confident Employer (Level 2) status. We committed to encourage local firms to become accredited disability confident employers. The number of Disability Confident Committed firms has fallen from 39 to 27. Some of these businesses have ceased trading during this period. The number of Disability Employers has also decreased slightly, from 7 to 6. We are working with the Department for Work and Pensions on an authority-wide engagement programme with small and medium enterprises that have premises in Monmouthshire. This work will promote the Disability Confident pledge and inclusive work practices, aiming to increase opportunities in the workplace for disabled residents. Council passed a motion in September 2023 committing us to formally becoming a County of Sanctuary. This was secured at the end during 2025-26 with Monmouthshire becoming the first accredited Council of Sanctuary in Wales recognising our commitment to building safe, compassionate, and resilient communities. Supporting and promoting the use of the Welsh language is vital to ensuring its growth. We are providing opportunities for our staff to improve their Welsh language skills; 42 staff members were completing a Welsh language course during 25/26. We currently have 382 members of staff with some level of Welsh language skills that can be used to provide a service in Welsh to residents. There has been a decrease in the percentage of the Monmouthshire population who can speak Welsh, from 21.3% to 19.7%. We are continuing to work with partners to promote the use of the Welsh language in our county.	Number of staff that have a level of Welsh speaking ability
Further areas for development identified through our 2025/26 self-assessment	
Work with communities and stakeholders to develop a shared understanding of community resilience.	

Well-being of Future Generations Act impact

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



Well-being Objective: A Fair Place to Live

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

Measures of progress

Milestone	Target for completion	Progress
A new poverty and inequality action plan is approved by Cabinet	December 2024	It has been agreed that a new strategy or formal tackling poverty and inequality action plan is not the preferred option. Instead, we have ensured a focus on addressing poverty and inequality is mainstreamed by embedded it throughout our strategies and plans.
All four library of things are fully operational	March 2025	All sites are currently operational.
Establish two additional Cylch Meithrin	First established September 2025, second established January 2027	These have not been established as planned due to a lack of suitable accommodation.
Establish childcare settings on the sites of Archbishop Rowan Williams Primary school and Trellech Primary schools	To establish the site at Trellech by March 2025 and Archbishop Rowan Williams by January 2027	The setting at Trellech Primary School has now been completed. A business case for the site at Archbishop Rowan Williams Primary School has been submitted to Welsh Government.
Opening of the Magor and Undy Community Hub	August 2023	This has now been completed.
A new inclusive Cultural Strategy is approved by Cabinet	March 2025	This has now been completed.

Disability Confident Employer (Level 2) Status attained	June 2024			This has now been completed.	
County of Sanctuary Status attained	December 2024			This has now been completed.	
Measure	Previous ¹	Latest ²	Target for 2025/26	Quick View	Comment
Percentage of pupils choosing to receive universal free school meals	75	68.6	77	↓	This is the figure at the end of March 2026
i) The financial saving to communities (£) ii) Carbon saving (Kg Co2) from items borrowed through Benthgy Library of Things	i) 28,028 ii) 12,402	i) 41,986 ii) 18,199	i) 20,000 ii) 10,000	↑	These figures refer to annual savings
Percentage of people participating in sporting activities three or more times a week	42	43	45		Previous figure is for the year 2021/22, latest is 2022/23. This is based on national data. The Quick View column is blank as we do not have recent data available to assess.
Number of children benefitting from MonLife-run free or subsidised play provisions	2,463	2,217	3,708	↓	Changes to the funding and parameters of some schemes included in this data set has resulted in a reduction in the number of children accessing schemes. As a result, targets will be reviewed to ensure they are appropriate.
Number of local employers who make the disability confident employer pledge	46	33	70	↓	Some businesses who had made the disability confident pledge have now ceased trading. We are working with the DWP to increase the number of businesses taking up the pledge.
Percentage of people who volunteer	32	39	40		Previous is 2019/20, latest is 2022/23. This is based on national data. The Quick View column is blank as we do not have recent data available to assess.
Percentage of the population who can speak Welsh	21.3	19.7	18	↓	This is measured by a national survey. The previous is figure is for March 2025, latest is December 2025. There is an overall improvement since the beginning of the plan when 18.4% of people said they could speak Welsh.

Quick View of Trend: ↑ Improving performance; ↓ Declining Performance; ↔ Unchanged Performance
Quick View of Target: Green – Target achieved; amber – just missed the target; red – fell some way short

¹ Previous data is 2024/25 unless otherwise stated.

² Latest data is 2025/26 unless otherwise stated.



Community & Corporate Plan Objective: A Green Place to Live

What we want to achieve:

- Council operations are net zero by 2030 and local communities are supported to reduce their own carbon footprint
- Nature recovery, improved environmental and river health
- Sustainable local agriculture and farming practices with public services and residents consuming more local and seasonal produce

Our rating:
4 (Good)

Strategic Assessment

Monmouthshire's natural environment is central to our quality of life, local identity and visitor economy. We need to protect and conserve the county's outstanding landscapes, improve biodiversity and river health, reduce carbon emissions and strengthen resilience to climate change. These are complex, long-term challenges and the full impact of our actions will take time, but it is vital that we continue to act now to safeguard the environment for current and future generations.

A wide range of council services contribute to making Monmouthshire a green place to live. These include waste and recycling services, estate and building management, transport and fleet services, planning and community development. These services help to reduce emissions, protect and enhance the environment and enable residents and communities to play their part in creating a greener Monmouthshire.

Generally, residents views of Monmouthshire as a green place to live are positive. Fifty-nine percent of residents said their local area has a clean environment, 65% said local air quality is good and 75% said there are enough green spaces in their area.

We have refreshed our Climate and Nature Emergency Strategy and translated it into clearer action plans. We have completed costed decarbonisation surveys across our estate and reduced estate emissions by 17.8% from the 2019/20 baseline. We have continued to invest in low carbon technologies, renewable energy and ultra-low emission vehicles. We have also maintained strong recycling performance, with 71.3% of municipal waste sent for recycling, reuse or composting, exceeding the statutory target, and independent assessment shows our work on waste reduction and food to be particularly strong.

Our evidence shows that the scale of the challenge to meet our decarbonisation ambitions remains significant. This is a similar picture across the UK. Overall emissions increased between 2022/23 and 2024/25, largely due to procurement and construction activity, and our current rate of reduction is not sufficient to reach net zero by 2030 without substantial further investment. We have made

important progress and are building the evidence, plans and partnerships needed for the next stage, but the path to net zero remains extremely challenging.

We have made good progress in supporting nature recovery, improving environmental resilience and strengthening local food systems. We have enhanced 47 hectares of public land for biodiversity, delivered 13 green infrastructure projects, supported 25 nature recovery projects and continued to work through catchment and nature partnerships to improve habitats and river health. We have developed action plans for biodiversity, nature recovery, rivers and flood risk, and have continued to support communities through nature-based projects and local green space activity.

We have developed a Local Food Strategy and made practical progress on sustainable food. We have improved or revived over 220 allotment plots and more than 200,000 portions of Welsh organic vegetables have been supplied to pupils through the Welsh Veg in Schools scheme.

Our evidence shows important strengths that outweigh the areas not yet completed. We recognise river health remains a major concern and some resident perceptions of the local environment are lower. We also recognise the scale of the challenge to reduce our carbon emissions and resources required to deliver the pace of change required.



A Green Place to Live		
Green place 	Evaluation Score:	Level 4 Good – Important strengths with some areas for improvement – the weight of evidence shows that the successes are greater than the areas that have not been achieved. We are continuing to implement projects that are contributing to achieving our objective. The range of work that we are undertaking is helping us to understand the scale of the challenge and the path we need to take to reach our net zero goals. We have supported nature recovery and improved river health. We are also enabling the use of more local and seasonal produce. We remain ambitious in our aim of becoming net zero by 2030. However, unless there is significant public investment, the evidence that we are gathering suggests that reaching our target will be extremely challenging.
	Why we focused on this?	Climate change, nature loss and declining biodiversity are among the most significant challenges facing our communities, economy and future wellbeing. Monmouthshire's natural environment is one of its greatest strengths, shaping the places people value, supporting health and wellbeing, sustaining local food and farming, and underpinning our tourism and visitor economy. More frequent extreme weather, increased flood risk, rising temperatures and pressure on habitats are already affecting people, places and services. At the same time, the loss of nature and biodiversity weakens the ecosystems we rely on for clean air, water, food, carbon storage and resilience to climate impacts. We recognise the need to protect and restore the natural environment, reduce carbon emissions, support nature recovery and adapt to unavoidable climate impacts. Which will ensure that future generations can continue to enjoy and benefit from Monmouthshire's outstanding landscapes and rich natural heritage.
How well are we achieving our agreed outcomes?		How do we know?
What we want to achieve: Council operations are net zero by 2030 and local communities are supported to reduce their own carbon footprint		
We are taking local action to reduce our carbon emissions and play our part in tackling climate change. Like many other public bodies, we are facing systemic challenges to reach our ambition of achieving net zero by 2030. However, we are making good progress with the resources available. We have completed costed decarbonisation surveys across our estate. We are using them to develop an estate decarbonisation plan, carbon heat strategy and wider Decarbonisation Strategy to meet our Net Zero ambition. We are also improving our use and availability of internal energy management data. We are using this to identify high-emitting sites and develop a corporate energy policy to support lower consumption and better carbon management. We have invested in low carbon technologies such as the use of renewable energy to decrease emissions from our estate. We have decreased our estate emissions by 17.8% from our 2019/20 baseline. We have established an informal stakeholder working group to co-ordinate further opportunities to use alternative delivery models and capabilities to reduce our emissions. We are developing Refit Phase 2, which focuses on further energy efficiency and renewable projects for our buildings. We have noted the Local Area Energy Plan that has been produced in conjunction with the Cardiff Capital Region (CCR). This outlines actions for key aspects of our energy transition locally, as well as joining up actions regionally and nationally. We have invested in the transition of our fleet to ultra-low emission vehicles (ULEV). We have increased the percentage of our fleet which is ultra-low emission from 8% in 22/23 to 17.2% in 25/26. We have not seen tangible changes to the emissions from travel since 22/23 and since the baseline year of 2019/20. We are developing a fleet transition plan to accelerate the transition. We have also implemented a new pool car scheme to increase access to shared vehicles, lower business mileage and support behavioural change.		Climate and Nature Emergency Strategy Carbon emission reporting data Recycling and waste data Local Area Energy Plan Climate Emergency UK Assessment

Overall carbon emissions increased between 2022/23 and 2024/25. This was largely due to rises in emissions from procurement and our supply chains. This included the development of Severn View Park care home and the carbon-neutral Abergavenny 3-19 school. We have ensured that, while these construction activities have temporarily raised emissions, both buildings have been designed to ensure minimal environmental impact and reduce carbon emissions in the long-term. We recognise that our current rate of reduction is not sufficient to reach net zero by 2030 due to the complexity of the challenge and the high costs involved in decarbonising our fleet and estate. Substantial further investment would be required to transition at the desired pace. We have identified that 87% of our emissions are linked to emissions coming from procurement, staff commuting and similar activities. This mirrors the picture across Wales where these emissions make up 83% of total local authority emissions. Achieving net zero will therefore be dependent on reducing our supply-based emissions, along with direct energy use in council buildings and fleet.

We have updated and expanded our Electric Vehicle Charging Infrastructure (EVCI) at multiple sites across the county. We have commissioned a technical report to forecast demand to ensure we are targeting suitable locations. We are using the findings of this report to develop an EVCI strategy for the county which will increase the availability and accessibility for all residents. This will support the transition to electric vehicles within communities, helping to reduce emissions.



We have continued to support low-income households to access grant funding to improve the energy efficiency of their homes. We are promoting the Eco4 scheme which provides funding for low-income households and those living with medical conditions worsened by damp or cold to access energy efficiency improvements.

We have maintained a high rate of recycling. At the end of 25/26, 71.3% of municipal waste was sent for recycling, reuse or composting. This exceeded the statutory target of 70%. We have achieved this through the continued participation of residents in household recycling schemes. Our resident survey showed, 68% of residents were satisfied with waste management services. We have achieved the highest UK score for Waste Reduction & Food in the independently run Climate Emergency UK assessment, at 93%. We have identified that the amount of residual household waste produced per person per year has risen from 198kg in 2022/23 to 202kg in 2024/25 and remains above the Wales average.

What we want to achieve: Nature recovery, improved environmental and river health

The natural world in all its guises is the backdrop to life in Monmouthshire. We need to do all we can to ensure its protection and conservation. We have reviewed and updated our Climate and Nature Emergency Strategy to include a biodiversity and ecosystems resilience action plan. This is ensuring biodiversity and nature recovery sits at the heart of what we do to address climate change. We have developed a Local Nature Recovery Action Plan to provide a roadmap for local conservation efforts. This plan will support everyone, from individuals and communities to businesses and conservationists. Our efforts have resulted in 47 hectares of public land being enhanced for biodiversity this year. Alongside this work, we have also developed a Green Infrastructure Strategy. Through this we aim to create a network of green spaces to improve both our

Biodiversity and ecosystems resilience action plan
Nature Recovery Action Plan

local environment but also support residents' health and access to green space. During the year, we delivered 13 Green Infrastructure nature-based projects across the county. These delivered a variety of benefits including ecosystem resilience and climate change mitigation.

We continue to actively participate in partnerships, including coordinating of the Monmouthshire Local Nature Partnership and roles in the Usk catchment partnership. We have supported the delivery of 25 nature recovery projects, including improvements to green spaces, purchase of machinery to facilitate meadow management, and the continued delivery of our Nature Isn't Neat work which promotes conscious grassland management to enhance nature. We have empowered local nature champions to carry out their existing vision for local green spaces and the wider community to enhance biodiversity. We have fostered conversations with local community groups about protecting local nature and biodiversity planting and provided opportunities for primary schools and gardening volunteers to help with enhancement of green spaces outside their normal sites. Our resident survey show resident are fairly satisfied with the environment in their areas. 59% of people felt their local area has a clean environment, 65% said local air quality is good, and 75% felt there are enough green spaces in their area.

CASE STUDY – NATURE ISN'T NEAT

Nature Isn't Neat is an approach that encourages us all to alter the way we manage grassland on our verges, open spaces and parks to benefit nature. By letting areas of grassland grow we're encouraging more wildflowers to flower for longer, providing food and habitat for wildlife and pollinating insects like bees and butterflies. Not only does it benefit nature, by allowing plants to grow bigger roots they store more carbon in the soil and help mitigate climate change. Bigger roots also create more air in the soil and help reduce the impact of flooding.

We work in partnership with the Gwent Green Grid to deliver this work, and during 2025/26, we managed or enhanced 47 hectares of public land for biodiversity. This is the maximum area of publicly owned land we can deliver. Our efforts are helping to restore nature in our county and improve the resilience of our local environment.

The health of our rivers has suffered in recent years. Phosphate targets for the Usk were being failed at a rate of 88% and the Wye at 68%. We have continued to lobby for change, and Dŵr Cymru Welsh Water is now installing phosphate stripping plants to improve the health of our rivers. Improvements are already visible, with the Lower Wye no longer being classed as failing for phosphorus levels. We have developed an action plan showing how we will work in partnership to improve the health of our rivers and oceans. The Climate and Nature Emergency Steering Group is monitoring its progress. We are working with partners and the community to improve river health and water quality through practical action including invasive species removal, litter clearance and community activities that build understanding of river ecology. We continue to support joined-up action through partnerships, including Gwent Green Grid Partnership (GGGP) and wider Gwent collaboration with Natural Resources Wales (NRW) through programmes such as Rivers for Life activity delivered through the Resilient Ecological Networks (REN) programmes, as well as active involvement with the Usk and Wye Catchment Partnerships. We also support and deliver action through the Wye Valley National Landscape, the Living Levels Partnership, the Severn Estuary Partnership and ASERA (Association of Severn Estuary Relevant Authorities). Collectively, these arrangements provide coordination, shared evidence and governance, and help to secure external funding and deliver capacity to support statutory duties and the council's priorities and targets.

We have developed and consulted on a Local Flood Risk Management Strategy and action plan, which assesses flood risk on a catchment-based approach and will identify Strategic Flood Risk Areas and support community resilience. We have secured external funding to work with partners to assess the feasibility of natural flood management approaches. This nature-based approach looks at upstream land management to reduce

Green Infrastructure
Strategy

downstream flooding risk. We continue to work with partners to advocate for flood defences and wider environmental resilience for our main rivers. We also operate as the Sustainable Drainage Systems (SuDS) approving body to ensure that all new developments in the county have a sustainable drainage system in place, reducing the risk of flooding whilst also providing water quality and biodiversity benefits. With extreme weather events becoming more frequent we understand more than ever the importance of supporting communities at risk of flooding. We have developed updated emergency flood response plans for sites across the county and regularly engage with our communities through one-to-one sessions and community meetings. Storm Claudia had a significant impact on our communities, particularly in Monmouth, Skenfrith, and Abergavenny. We recognise the impact this has on residents and business in the County. We have worked with partners, including Welsh Government, to provide financial support to those affected in their recovery. We are also reviewing flood protection measures in each community and collaborate with the Welsh Government, Natural Resources Wales, and other stakeholders to develop improved protections, given the increasing frequency of severe weather events.	
What we want to Achieve: Sustainable local agriculture and farming practices with public services and residents consuming more local and seasonal produce	
We have created a Local Food Strategy to facilitate access to council land for growing food and have allocated land for community use. We have supported the Welsh Government's Allotment Support Grant. This has improved, created or revived over 220 allotment plots across six sites in Monmouthshire. This investment increases access to locally grown produce, encourages sustainable food practices at a household level and supports wider health and well-being outcomes. A Green Flag Award application was submitted in January 2026 for Incredible Edible Usk, recognising community-led food growing, sharing and education initiatives that encourage residents to grow, consume and value local, seasonal produce. We have successfully secured external funding through the Marches Food Partnership to expand the delivery of our strategy. We are working towards a more sustainable local food system, increasing the use of local and seasonal produce used across our services while strengthening local supply chains and supporting sustainable farming. Currently 23% of our food spend is on Welsh produce. We are working with partners to increase this. Targeted initiatives are beginning to shift the system further, particularly the Welsh Veg in Schools programme, which is now operating in 10 schools, reaching approximately 2,100 pupils and supplying 180kg of locally grown produce. This is directly supporting local growers and embedding fresh, seasonal food into school settings, while demonstrating how public procurement can drive demand for local produce. This has also enabled us to supply pupils in ten schools with nutritious, local food regardless of socio-economic background. We have also supported the development of new safety standards and logistics, enabling growers to expand and new farmers to diversify into organic horticulture as part of this scheme. We are supporting the development of more sustainable farming practices. Targeted programmes have worked with farms covering over 1,400 acres, delivering improvements in soil health, reduced chemical inputs and increased diversification. This is being complemented by wider engagement, with 377 members in the local regenerative farming network and further expansion planned through regional programmes expected to work with around 120 farmers. Our initiatives are supporting a growing momentum towards more sustainable land management and food production across the county.	Local Food Strategy Welsh Government Allotment Support Grant

Well-being of Future Generations Act impact

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

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

Well-being Objective: A Green Place to Live



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

Measures of progress

Milestone	Target for completion	Progress
New climate and nature emergency strategy approved by Cabinet	May 2024	This has now been completed.
Food strategy developed and approved	May 2024	This has now been completed.
Increased use of seasonal and/or local produce in schools, care homes and domiciliary care	May 2026	Work with partners is ongoing to increase the use of seasonal, local produce in schools and play activities across the county.

Measure	Previous	Latest	Target for 2025/26	Quick View	Comment
Carbon emissions (kgCO ₂ e) from the council's assets and operations ⁱ	54,859	56,911	36,000	↓	Latest figure is for 2024/25, previous is for 2023/24. 2025/26 data will be included when available. This increase is largely due to significant construction

					projects such as the Net Zero school in Abergavenny which emit carbon during construction but which will result in significant carbon over time.
Percentage of our local authority fleet which is ultra-low emission	16.5	17.2	18	↑	
Capacity (MW) of renewable energy equipment installed on the council's estate	6.722	6.815	6.75	↑	This is a cumulative figure. Latest figure is for 2024/25, previous is for 2023/24. 2025/26 data will be included when available.
Amount (kwh) of renewable energy generated from council installations	5.3m	5.5m	4.89m	↑	This is an annual figure. Latest figure is for 2024/25, previous is for 2023/24. 2025/26 data will be included when available.
Percentage of municipal waste sent for recycling, reuse or composting	72.2	71.3	72	↓	This is provisional data which may be subject to change. This figure is above the national target of 70%.

Quick View of Trend: ↑ Improving performance; ↓ Declining Performance; ↔ Unchanged Performance

Quick View of Target: Green – Target achieved; amber – just missed the target; red – fell some way short



Community & Corporate Plan Objective: A Thriving and Ambitious Place



What we want to achieve:

- Vibrant town centres which bring people together and attract investment
- People of all ages and backgrounds have the skills to do well in work or start their own business
- Sustainable Transport and Infrastructure

Our rating:
4 (Good)

Strategic Assessment

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Monmouthshire should be a place where people, businesses and communities can thrive, where town centres remain active and welcoming, where residents of all ages can develop the skills they need to succeed, and where good transport and infrastructure connect people to opportunity. This matters because a thriving and ambitious county supports prosperity, helps retain young people, strengthens community resilience and makes it easier for residents to access work, services and cultural opportunities. Monmouthshire starts from a comparatively strong economic position, with high employment and qualification levels, however this is not experienced equally by everyone or in every place. We need to build on these strengths in a way that is inclusive, sustainable and rooted in the needs of our towns and communities.

We are seeing positive signs of progress, such as an improvement in our economic position as measured by the UK Competitiveness Index. Evidence shows that Monmouthshire has a highly qualified and economically active population, with 57% of residents qualified to level 4 and above and 79% of people economically active, both above Wales averages.

A wide range of services contribute to making Monmouthshire a thriving and ambitious place. These include planning and regeneration, culture and heritage, tourism, property and asset management, highways and transport, digital and infrastructure services, education and lifelong learning, and business and employment support. Together, these help create the conditions for investment, improve the attractiveness and function of our towns, support enterprise and employability, and enable residents to access opportunity and participate in the county's economic and civic life.

We have made good progress putting in place the strategies, partnerships and investment needed to deliver this objective. We have worked with residents, businesses and town and community councils to develop placemaking plans for our towns, creating a clearer

shared understanding of local priorities and a basis for targeted regeneration. We have strengthened the strategic framework for promoting the county through our Destination Management Plan and linked this with wider work such as the Cultural Strategy. We have also continued to use Welsh and UK Government and UK funding to improve town-centre buildings, public-facing assets and the visitor offer. This is helping to increase footfall, support local trade and make our towns more attractive places to live, work and visit.

We are building on Monmouthshire's strong skills and employment base while responding to areas where more targeted action is needed. We have continued to support residents to move into work, gain qualifications and develop businesses. During the year, council-supported programmes helped 120 people into employment, while 90 pre-start and existing businesses were supported and 10 new businesses were created. We have also made strong progress supporting young people at risk of becoming disengaged from education, employment or training, with 44 NEET young people supported into employment. The proportion of school leavers who are NEET remains above where we want it to be. We know that retaining young people in the county remains a challenge because of housing costs, limited higher education presence and the need for stronger local pathways into work and training. We have ensured our Deposit Replacement Local Development Plan is focussed on addressing these challenges. We have secured funding to develop a new Monmouthshire Skills Centre which will also help support post-16 pathways for learning.



Transport and infrastructure remain critical enablers of this objective. In a largely rural county, limited public transport can restrict access to employment, learning and services and can reduce the benefits of growth for some communities. We have adopted a new Local Transport Strategy, strengthened regional transport planning, established an infrastructure project team and secured significant external funding for transport and active travel schemes. Since 2022, we have secured £35 million to implement transport projects. We have also secured more than £24 million for active travel, with more than 100 active travel routes now in place and usage of routes increasing by 4.1%. We have also improved the frequency of buses in some areas and continue to support major regional rail and road proposals that would improve connectivity.

We continue to face significant challenges in maintaining our highways network. We saw further deterioration in the condition of roads last winter and the maintenance backlog remaining beyond available resources. We have taken a planned approach to prioritising investment, responding to urgent need and reviewing how pothole repairs are delivered and communicated. The funding gap remains substantial and continues to limit the pace at which overall road condition can improve.

A Thriving and Ambitious Place		
Thriving and ambitious place 	Evaluation score:	Level 4 – Good – Important strengths with some areas for improvement – the weight of evidence shows that the successes are greater than the areas that have not been achieved. We have developed our strategies to deliver the objective; our focus is now on delivering these. We have provided support for residents and businesses to gain new skills, develop and grow. We have delivered projects to enhance connectivity in the County. We are building from a strong economic and skills base. Our assessment shows we need to grow this base and provide targeted support and projects for people, business and places that need them most.
	Why we focused on this?	Our starting point is a comparatively strong one. Monmouthshire has a strong local economy and is well placed for growth in Welsh terms. There is strength in a number of key sectors which are highlighted and supported at a national level. Employment rates are high, as are qualification levels. But more can be done. Monmouthshire can be more vibrant. The conditions exist to achieve this. We will work with national, regional and local partners to increase investment, improve connectivity and continue the development of an economy which is thriving, ambitious and enterprising.
How well are we achieving our agreed outcomes?		How do we know?
Page 2 of 11	What we want to achieve: Vibrant town centres which bring people together and attract investment	
	Attracting residents and visitors to our town centres is vital for the local economy. We are committed to ensuring that town centres remain vibrant and welcoming places that meet the needs of the local communities, businesses and visitors. We are working to create an environment that allows town centres, tourism and businesses to thrive. We have worked with residents, businesses and town and community councils to develop Placemaking Plans for all six towns that reflect the priorities of individual town centres. Plans for Monmouth, Abergavenny and Magor with Undy have been recently agreed, and work is progressing on a plan for Caldicot. The placemaking process has strengthened partnership working and created a shared understanding of local challenges and opportunities. The local placemaking partnership groups, which include both town and county councillors, have developed recommendations for how the available funding should be deployed locally in 2026/27 to support town-specific priorities. Delivery is supported by Welsh Government Transforming Towns funding and the UK Government Pride in Place Impact Fund, providing a strong basis for locally prioritised regeneration activity across Monmouthshire's town centres. We have continued to invest in projects that strengthen town centres, increase footfall and support local businesses. We have used Shared Prosperity Fund support to deliver improvements to visitor and public-facing assets. We have utilised grants for tourism and event activity that help bring more people into our town centres and support local trade. Our efforts have seen an increase in the number of visitors to our heritage sites from 189,000 in 24/25 to almost 245,000 in 25/26. We have developed a Destination Management Plan that sets a clear strategic framework for managing and promoting Monmouthshire as a destination. We have completed a Destination Policy Impact Assessment, consulting with 30 businesses, to ensure our approach continues to be informed by local insight and business needs. There has been a continued gradual increase in visitor spend and stays in the county. We are ensuring our strategies, including also our Cultural Strategy, are closely linked and work together to foster the right environment for our county's towns.	
		Placemaking plans Destination management plan

We are also making investments in key town-centre assets. Since 2022, we have secured £2.4 million from the Welsh Government Transforming Towns Placemaking Grant and used this investment to improve or bring back into use almost 30 town-centre buildings and make shop front and public realm improvements. This is directly strengthening the appearance, use and economic resilience of our town centres. We have also secured a further £2.2 million from UK and Welsh Government sources for projects in 2026/27, maintaining momentum for future regeneration and investment.

CASE STUDY – SHIRE HALL

We are investing in our historic buildings in the county, ensuring they are fit for purpose and sustainable for future generations. Supported by a £2.8 million investment, including £1.5 million from the National Heritage Lottery Fund, we are undertaking a refurbishment of a Monmouthshire landmark, Shire Hall. This project will see Shire Hall revitalised as an inspiring community museum and dynamic learning hub.

Changes include: innovative displays telling Monmouth's story, flexible learning spaces, visible object storage, and improved conditions for our internationally significant collections; Upgrades to the heating system and energy efficiency will enhance environmental sustainability, reducing the carbon footprint of this Grade I listed building; Redesigned retail spaces and a renewed visitor welcome will improve the experience for all, supporting Monmouth's regeneration and the Destination Management Plan; removal of physical, financial, and social barriers to access, ensuring Shire Hall is a welcoming space for everyone.

Extensive consultation with a wide range of communities, including ethnic minority groups and individuals living with dementia, has shaped the project. Initiatives such as the Dynamic Collections and Anti-Racist Wales projects have already resulted in co-curated exhibitions and more inclusive museum experiences. A Citizens Panel will continue to guide future exhibitions and events, ensuring ongoing community representation.

What we want to achieve: People of all ages and backgrounds have the skills to do well in work or start their own business

Monmouthshire values all of its citizens and the people who work for our businesses. In 2023 we developed an Economy, Employment and Skills Strategy. We are committed to helping people of all ages and backgrounds develop the skills needed by new and established businesses helping them to grow and thrive.

We have continued to support residents who want to start or grow their own business through Business Monmouthshire. We supported 90 pre-start and existing businesses during the year. The service has provided advice, clinics, networking and tailored support to pre-start and existing businesses, helping more residents become business-ready, progress towards self-employment and launch new businesses. Ten new businesses were created this year as a result of our support. We have ensured a focus on developing our relationships with business across the county, hosting networking events to connect our vast variety of businesses. In 2025/26, 60% of Monmouthshire start-ups are active after three years, compared to 53% for Wales and 50% for Great Britain. We will continue to support our thriving business community to grow.

We have continued to provide targeted employment and skills support to help people move into work, progress in employment and gain new qualifications. During the year, council-supported programmes helped 120 people into employment, above our target of 82. We have continued to support areas with skills shortages such as construction by supporting residents through our Construction Skills Certification Scheme (CSCS) drop-in

Entrepreneur and business assistance

Employment support

NEET young people support

club. We have enabled 209 qualifications to be achieved by people we support and supported 254 people to improve their skills. We are developing plans for a Monmouthshire Skill Centre to provide a centralised location for residents of all ages to develop skills. This includes provision for our young school leavers looking to gain vocational qualifications and older residents who may be looking to upskill or change career.

CATE STUDY – STEM PROGRAMME

In July 2025, we launched our STEM – Science, Technology, Engineering, Mathematics – programme. The programme, supported by the Welsh Government, aims to attract new businesses to Monmouthshire and establish strong links between businesses and schools, promoting inspirational STEM learning and expanding pathways at Post-16. The programme also explores the feasibility of establishing an apprenticeship centre in Monmouthshire.

Through engagement with Welsh Government, Cabinet Members, EAS, Coleg Gwent, local businesses and headteachers (primary and secondary), a comprehensive programme of resources, training and support is being developed. Resources for each school will include a range of coding, robotics, engineering and 3D printing equipment, and will be complemented by a programme of school-to-school networks, class workshops and business engagement to help fully embed STEM in the school Curriculum.

Across the UK, the level of young people not in education, employment or training (NEET) is increasing. This is an issue we are also facing in Monmouthshire. We are supporting our young people to access training and employment through our NEET strategy. We are working with young people through our Inspire programme to help them remain in education where possible or to support a transition to a suitable alternative. During the year, we supported 285 young people to achieve an additional qualification and / or achieve a life skill. We have supported a 12-week Future Focus employability pilot for 18-24-year-olds in partnership with the Jobcentre in response to rising youth unemployment and confidence barriers, with early cohorts already securing employment. We continue to face challenges in ensuring suitable training provision for school leavers. We are continuing to work with sixth forms to develop pathways to employment. The development of a Monmouthshire Skills Centre will support our ability to ensure suitable post-16 pathways are available. Through our efforts, we have supported a total of 44 NEET young people into employment, an increase on 10 during 24/25. Overall, the percentage of Year 11 leavers were NEET, decreased from 3.1% to 2.5% in the last year, this remains higher than the 1.8% in 2023.

The latest data shows that 57% of Monmouthshire residents are qualified to level 4 of the national framework (the highest level), compared to 45% for Wales and 48% for Great Britain. The ratio of jobs to population in Monmouthshire is also higher than the figures for Wales, however slightly lower than the UK as a whole. We want to ensure there is opportunity for our resident to work and grow within the county. We have developed a deposit replacement Local Development Plan. This highlights new possible employment sites and aims to address the shortage of sites seen in recent years. We are seeing positive signs of progress in the Monmouthshire economy, such as an improvement in our economic position as measured by the UK Competitiveness Index, and sustained levels of people economically active: 79% of people in Monmouthshire are economically active which is above the rate for Wales (76%).



What we want to achieve: Sustainable Transport and Infrastructure

Good transport and infrastructure are vital to our communities and economy, enabling access to a wide range of services and opportunities for all residents.

We adopted a new Local Transport Strategy in May 2024. This sets out a clear ambition for transport infrastructure in Monmouthshire over the next five years. It has also enabled us to contribute to the development of a regional transport plan which now guides how transport funding is allocated in the region. We have established an infrastructure project team to ensure all transport and highways programmes of work are aligned to maximise additional benefits and ensure all funding is used effectively. Since 2022, we have secured £35m to implement transport projects to enhance access, safety and infrastructure. Work includes road resilience projects to adapt to the effects of climate change and increased bus service frequency.

The UK Government has allocated £445m of resources to enable rail infrastructure improvements across Wales, this includes the delivery of the recommendations made by the Southeast Wales Transport Commission. The upgrades to the South Wales Mainline will increase train service frequency and the provision of five new railway stations – including Magor Walkway. We will continue to work with the Welsh Government and our neighbouring authorities to deliver the other recommendations of the Commission which includes the provision of a new link road between the M48 and the B4245 to enhance park and ride facility at Severn Tunnel Junction Railway station.



Monmouthshire is not alone in facing challenges maintaining its highways. We have a significant backlog in roads maintenance, similar to areas across the UK, and there was a further deterioration in the condition of roads through the last winter. We simply cannot afford to fund all the necessary improvements from our capital budget. We commission independent assessments of key highways infrastructure, and these have enabled us to prioritise maintenance expenditure in line with our maintenance strategy. We are also undertaking surveys of road and pavements to gain a further detailed understanding of their condition. We are using Welsh Government's Local Government Borrowing Initiative to allow us to borrow money to fund an increased number of improvements projects, though this will still not meet

the identified funding gap required. We have also completed a number of repairs and maintenance to our highway network in response to emergency or urgent need. We are reviewing our approach to pothole repairs and will set out the findings in September 2026. This includes testing different approaches to repairs, reviewing prioritisation and allocation of schemes and increasing availability of information to residents.

We have continued to use funding successfully awarded from Welsh Government to expand Active Travel infrastructure. Over the past four years, we have secured more than £24 million in funding for our Active Travel projects. We now have over 100 active travel routes across the county, these include routes which connect residential areas with town centres and links to key transport hubs and services. We have another 23 routes being developed, including the Abergavenny-Llanfoist bridge. We have established baseline monitoring data for active travel across key towns over several years; this shows that usage of these routes has increased by 4.1%, helping more people to use their cars less, and build more physical activity into daily life.

Local Transport Strategy

Highway planned programme maintenance

Well-being of Future Generations Act impact

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

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



Well-being Objective: A Thriving and Ambitious Place

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

Measures of progress

Milestone	Target for completion	Progress
Placemaking Plans for Abergavenny, Magor with Undy and Monmouth	March 2025	This has now been completed.
Develop Economy, Employment and Skills Strategy	February 2024	This has now been completed.
Develop and approve NEET strategy	November 2024	This has now been completed.
Local Transport Plan supporting modal shift is produced	May 2024	This has now been completed.

Measure	Previous	Latest	Target for 2025/26	Quick View	Comment
Number of NEET young people supported into employment during the year	10	44	25	↑	This is an annual figure. Support reflects the capacity for delivery of projects.

Number of pre-starts and existing businesses assisted during the year by the local authority and its partners	71	90	100	↓	Support reflects the funding available each year and the size and scale of projects delivered.
Number of working age people supported into employment during the year through action by the local authority	82	120	82	↑	Support reflects the funding available each year and the size and scale of projects delivered.
Percentage of school leavers not in education, employment or training	3.1	2.5	1.5	↑	Latest is 2025, previous is 2024. This percentage equates to 20 young people.
Percentage of care experienced young people who have completed at least three months in education, training or employment	65	57	60	↓	
Number of visitors to our heritage & culture sites during the year	189,541	244,915	200,000	↑	
Number of schools who reported that MonLife Heritage Learning has had a positive impact on teaching and learning in their school	11	10	12	↓	
Number of active travel routes created or enhanced	19	9	18	↓	These figures show number of projects in each year. We now have over a hundred active travel routes.

Quick View of Trend: ↑ Improving performance; ↓ Declining Performance; ↔ Unchanged Performance

Quick View of Target: Green – Target achieved; amber – just missed the target; red – fell some way short

Community & Corporate Plan Objective: A Safe Place to Live



What we want to achieve:

- Increased supply of good quality affordable housing
- Reduce the number of people who become homeless
- A more energy efficient housing stock with a lower carbon footprint
- Communities in which everyone feels safe and respects each other

Our rating:
4 (Good)

Strategic Assessment

Monmouthshire should be a place where everyone has access to a safe, secure and affordable home and feels part of a community where they are respected and protected. This matters because having a stable home is fundamental to health, well-being and life chances, while safe and cohesive communities help people to feel connected, supported and able to thrive. In a county with high house prices, limited rental supply and growing pressures on housing affordability, access to suitable housing remains a significant challenge for many residents and continues to shape wider inequalities in the county.

Generally, residents feel Monmouthshire is a safe place to live. Eighty-nine percent of residents taking part in our annual resident's survey told us that they feel safe in their local area during the day, and 65% felt safe after dark.

A wide range of council services contribute to making Monmouthshire a safe place to live in addition to specific commitments we made in our Community and Corporate Plan. These include, trading standards, environmental health, licensing, community safety partnerships, youth services, public protection, safeguarding and regulatory services. Together, these services help protect residents from harm, support vulnerable households and strengthen safe, stable and resilient communities.

We have made progress in increasing the supply of affordable homes and putting in place the longer-term framework needed to improve the supply and affordability of housing. Our Replacement Local Development Plan has been developed with affordability and net zero housing standards at its core and includes a strong policy ambition. During the year, 102 additional affordable homes were delivered, and the number of affordable homes granted planning permission increased to 66. This shows positive progress, however we recognise the gap between current delivery and the level of need in the county which the development plan aims to address.

We have made strong progress in reducing the use of temporary accommodation and improving homelessness prevention. By applying a Rapid Rehousing approach, increasing prevention capacity and remodelling our housing support services, we have increased the proportion of homelessness applications successfully prevented from becoming homeless to 69.7%. We have worked with social landlords, private landlords and through property acquisition and repurposing to expand the availability of temporary accommodation. This has contributed to a 93.5% reduction in the use of bed and breakfast accommodation since 2022/23 and no families or 16- and 17-year-olds currently placed in bed and breakfast. However, homelessness demand remains high, the number of households in temporary accommodation remains significant, and the average time people spend waiting for settled accommodation has increased substantially, showing that permanent housing supply remains a critical pressure.

We have continued to support a more energy efficient housing stock and safer communities. Through schemes such as Eco4, Solar Together and Nest, we are helping residents, particularly lower-income households and those affected by cold and damp homes, to improve energy efficiency and reduce costs. We have also worked with partners to respond to community safety concerns, including work with young people on knife crime and anti-social behaviour. Most residents continue to feel safe in their local area, although concerns about anti-social behaviour remain and resident confidence after dark is lower. We will maintain a strong focus on prevention, partnership working and targeted reassurance in communities where concern is greatest.



Objective: A Safe Place to Live		
Safe place 	Evaluation Score:	Level 4 – Important strengths with some areas for improvement – the weight of evidence shows that the successes are greater than the areas that have not been achieved. We have drafted our ambition for development in the county and implemented projects and support to deliver our objective. Our assessment shows that the delay in progressing our plans has limited the impact we have made to deliver our objective in the short term.
Why we focused on this? For most people, Monmouthshire is a really good place to live, but not for everyone. This needs to change. We will work with partners to create a safe place that people are proud to call home, increase the availability of good quality affordable housing, reduce homelessness and promote approaches to help homeowners to improve energy efficiency and reduce carbon emissions.		
How well are we achieving our agreed outcomes?		How do we know?
What we want to achieve: Increased supply of good quality affordable housing		
Having a safe, secure and warm place to call home is one of the most important contributors to well-being. High property prices and a limited supply of affordable housing in the County mean this is currently out of reach for too many local people. We have developed a deposit Replacement Local Development Plan (RLDP) to address these key issues. The plan allocates 50% affordable housing on each new development and will introduce enabling policies which will allow for further affordable housing developments to come forward. This includes facilitating more single person accommodation in the county which is currently extremely limited and is a factor contributing to homelessness. We will also ensure this plan supports our efforts to tackle climate change and reduce bills for residents by ensuring new developments are of the highest energy efficiency standards. The deposit plan was approved by Council in October and is currently with Welsh Government for public examination. We have increased the number of affordable homes available in the County. The improved the health of our rivers is enabling appropriate development to be permitted within areas where it was previously restricted. This is contributing to the increase in the number of affordable homes granted planning permission. The number granted planning permission each year across the county has increased from 50 in 22/23 to 66 in 25/26, although this is below our target of 75. The number of affordable homes delivered per year has also increased from 48 in 22/23 to 102 in 25/26, this is above our target of 80. We recognise that more affordable homes are needed to meet demand in the county. Our deposit Replacement Local Development Plan aims to increase delivery.		Draft RLDP Number of affordable homes granted planning permission Number of affordable homes delivered

CASE STUDY – REPLACEMENT LOCAL DEVELOPMENT PLAN

A Local Development Plan (LDP) provides the framework the council uses to decide what development, including the building of new houses, retail and infrastructure, takes place. These plans are developed by the council and examined by external inspectors, such as Welsh Government. Monmouthshire's most recent LDP ran until 2021 – we have developed a new plan, a Replacement Local Development Plan (RLDP) to replace this and create the environment for key and sustainable development for the county.

Monmouthshire's RLDP will aim to address key issues in the county, including:

- making provision for approximately 5,400-6,210 new homes over the plan period (2018-33), including approximately 2,000 affordable homes.
- making provision for the use of employment land to support job growth of up to 6,240 additional jobs, and include policies to facilitate growth in foundational sectors such as retail, leisure, tourism and agriculture.
- focusing growth in the county's most sustainable settlements of Abergavenny, Chepstow, Monmouth and Caldicot, including Severnside, as well as some growth in our most sustainable rural settlements to deliver much needed affordable homes and to address rural inequality and rural isolation in these areas.

What we want to achieve: Reduce the number of people who become homeless

We have seen increased demand for homelessness services in recent years. Alongside this, limited temporary accommodation has meant we have been dependent on costly and unsuitable bed and breakfast accommodation to fulfil our responsibilities to citizens.

We have applied a Rapid Rehousing approach and increased the resources for homeless prevention. This includes increased staffing, procedural changes and closer partnership working to support more people at risk. We are also providing grants from the Homeless Prevention Fund to help tackle arrears/debt and enable households to remain in their current accommodation or to access alternatives. We remodelled our Housing Support service to include dedicated substance misuse support, temporary accommodation support and re-settlement support. This also includes dedicated support for young people with higher need. This has contributed to us increasing the prevention of homelessness. The percentage of applicants successfully prevented from becoming homeless has increased from 50% in 22/23 to 69.7% in 25/26. We have reviewed our Housing Support Grant programme and are increasing capacity in to ensure effective delivery. We will also increase alignment with work on youth homelessness to support young people at risk.

We understand the importance of ensuring suitable and secure temporary accommodation for our residents. We are engaging with local landlords, including registered social landlords, to ensure the availability of temporary accommodation within our communities. We have increased our number of property acquisitions to provide accommodation. This includes including the re-purposing of the previous residential home, Severn View to provide includes 17 units of accommodation, providing suitable temporary accommodation for a range of individuals, including those with complex needs While we have evolved our approach to meet needs, the demand for temporary accommodation in the county has remained high in recent years. The number of homeless households in temporary accommodation has increased form 117 in 22/23 to 136 in 25/26.

Homelessness data

We have significantly reduced the use of Bed and Breakfast accommodation. Our work to increase the availability of temporary accommodation, combined with a slight reduction in demand, has resulted in a 93.5% reduction in the use of bed and breakfast accommodation since 22/23, from 92 to 6. We have also ensured there are no families or 16-17 year-olds in bed and breakfast accommodation. This means that families and individuals in need are accessing more suitable accommodation, which is also resulting in cost savings for the authority. We know that temporary accommodation should be a temporary, not permanent, solution to demand. Securing settled accommodation remains a challenge. The average time that homeless households spend in Band 1 with a homeless duty before moving on to settled/permanent accommodation has almost doubled in recent years, from 10.2 months in 22/23 to 20.1 months in 25/26. This is mainly driven by those waiting for one bedroom and four bedroom properties, of which waiting times were 20.5 months and 24 months, respectively. To address these challenges, we are working to increase the number of suitable permanent affordable homes across the county. We have successfully secured grant funding and are using this to increase the number of affordable homes available within communities and new housing developments. Our Replacement Local Development Plan has a clear focus on ensuring increased affordable housing. This will help us to address some of this need, particularly the demand for single person accommodation, of which there is a limited supply. We are also working to increase the number of properties available through Leasing Scheme Wales, which provides long-term, affordable private accommodation for families and individuals.	
What we want to achieve: A more energy efficient housing stock with a lower carbon footprint	
We are committed to tackling the climate emergency and reducing emissions. Domestic properties are one of the biggest contributors to carbon emissions in Monmouthshire. We have ensured our Replacement Local Development Plan (RLDP) has lowering carbon emissions at its core by requiring new homes in the county to be net zero carbon. This will contribute to reducing our carbon footprint as a county and reduce energy costs for residents in new homes, including affordable homes. We are supporting the energy schemes, Solar Together, which is a group-buying scheme for residents wanting to install solar panels and Nest Scheme which provides advice and support for energy efficiency improvements. We have continued to support low-income households to access grant funding to improve the energy efficiency of their homes. We are promoting the Eco4 scheme which provides funding for low-income households and those living with medical conditions worsened by damp or cold to access energy efficiency improvements. We supported the approval of 328 applications during this year and are working with the NHS to identify residents with respiratory or immune suppression illnesses who may benefit from the scheme. We will undertake a targeted campaign to try and increase take-up from those who can benefit from the scheme.	Number of people supported to access Eco4
What we want to achieve: Communities in which everyone feels safe and respects each other	
Everyone should have the right to feel safe and have a sense of belonging in their local community. In general, most people in Monmouthshire feel safe - 89% of residents taking part in our annual resident's survey told us that they feel safe in their local area during the day, and 65% felt safe after dark. We have worked closely with young people across the county to tackle knife crime and anti-social behaviour. We have secured funding from the Police and Crime Commissioner's Office to support this work. We have partnered with the charity Fearless to deliver workshops on critical topics such as county lines and knife crime at our youth centres, supporting young people to deal with these challenges. We have targeted young people involved in anti-social behaviour in Caldicot and other town centres and have seen a reduction in the number of ASB incidents. We are	Resident's survey results Feedback from young people at youth centres Annual safeguarding evaluation report

strengthening the relationship between young people and local police by regularly inviting officers to our youth centres to engage directly and listen to their concerns. We have undertaken an annual evaluation of our safeguarding arrangements. This evaluates the cornerstones of safeguarding in Monmouthshire and provides assurance that effective safeguarding arrangements are in place across the county. This evaluation also forms an integral part in the improvement of safeguarding practice across the Council. We have worked with partners to develop a Gwent Serious Violence Prevention Strategy. This has helped to identify the serious violence priorities across Monmouthshire. We are now working with key partners and agencies to deliver a range of targeted interventions to address these. We have contributed to the development of the Gwent regional violence against women and domestic sexual violence (VAWDASV) strategy. The strategy is now being implemented through partnership arrangements and will ensure that more people feel safe, and free from abuse and violence.	Gwent Serious Violence Prevention Strategy VAWDASV strategy
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Well-being of Future Generations Act impact

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

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

Well-being Objective: A Safe Place to Live



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

Measures of progress

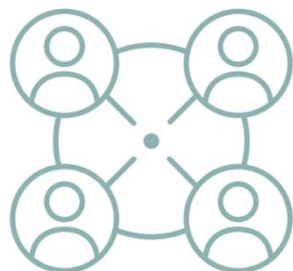
Milestone	Target for completion	Progress
Replacement Local Development Plan approved by Council	July 2025	The RLDP was approved by Council for consultation in October 2025. This is now with Welsh Government for examination.
The use of B&B accommodation is eliminated for households with children and young people	March 2027	There are currently no families in B&B accommodation. Ensuring increases in both temporary and permanent accommodation will be key to achieving this milestone.

Rapid Rehousing Approach introduced	April 2023		This has now been completed. The Rapid Rehousing Approach was implemented in April 2023 and has contributed to increased focus on homeless prevention.		
Measure	Previous	Latest	Target for 2025/26	Quick View	Comment
Number of affordable homes granted planning permission in the year	108	66	75	↓	
Number of additional affordable homes delivered in the year	71	102	80	↑	
Percentage of homeless applications who are successfully prevented from becoming homeless	71	69.7	70	↓	This is an annual figure for 2025/26.
Number of 16 and 17 year olds in bed and breakfast accommodation	0	0	0	↔	Latest figure is the position at the end of March 2026.
Number of families in bed and breakfast accommodation	0	0	0	↔	Latest figure is the position at the end of March 2026.
Number of homeless households in bed and breakfast accommodation	20	6	25	↑	Latest figure is the position at the end of March 2026. This represents a significant decline since 2022.
Number of homeless households in temporary accommodation	140	136	150	↑	Latest figure is the position at the end of March 2026.

Quick View of Trend: ↑ Improving performance; ↓ Declining Performance; ↔ Unchanged Performance

Quick View of Target: Green – Target achieved; amber – just missed the target; red – fell some way short

Our rating:
5 (Very Good)



- High quality social care which enables people to live their lives on their terms
- A healthy and active Monmouthshire where loneliness and isolation are reduced, well-being is promoted, and people are safeguarded
- A professional and passionate social care workforce

Monmouthshire should be a place where people's contributions are valued, they feel part of a community and they can access care and support that helps them live well on their own terms. This matters because strong health, social care and well-being services protect the most vulnerable residents, support independence and dignity, reduce loneliness and isolation and help people remain connected to their families and communities. Demand for these services is increasing, particularly as our population ages and needs become more complex. In this context, the quality, availability and resilience of care and support are critical to peoples' well-being now and in the future.

Making Monmouthshire a connected place where people care depends on partnership working across the council, public services and communities. A wide range of services contribute to this objective, including adult and children's social care, housing adaptations, leisure and youth services, community development, safeguarding, public health, carers support, education inclusion and wider partnership work with health and voluntary sector organisations. Together with support from residents and communities, these services help residents stay independent for longer, strengthen community connections, improve well-being and ensure people receive the right support at the right time.

We are delivering care and support while also building the preventative and community-based approaches needed for the future. Demand for social care services continues to increase and needs are becoming more complex, particularly as more residents require support later in life and with higher levels of need. This creates an ongoing risk to our ability to meet people's needs as quickly and consistently as we would want and brings significant financial pressures. We have continued to respond to this through innovation, partnership working and the development of more preventative models of support, including reablement, assistive technology, early help, community-based well-being support and stronger pathways that help people remain independent for longer. Although these pressures remain significant, we have made progress across children's services, adult care, well-being and workforce development to deliver our objective.

In children's services, we have strengthened early help and family support, and we have achieved greater stability in the number of children looked after. We have also made good progress in developing more in-county placements for children and young people, improving the ability to keep them close to their communities and support networks. We have strengthened the foster carer offer and contributed to a more cohesive fostering community. Recruiting and retaining foster carers remains challenging, reflecting similar pressures seen across Wales and the wider UK.

We have also made progress in developing and adapting services and increasing provision in response to rising demand for adult social care. We have also increased the focus and capacity of preventative services. We have increased reablement activity with over half of packages mitigating the need for further support. We have strengthened commissioned domiciliary care and reduced unmet care hours substantially, from 804 hours a month in March 2023 to around 271 hours a month over the last year, meaning we are now able to fulfil more domiciliary care need. Feedback from adult social care service users shows slightly lower satisfaction with care and support than previous years, with 83% of adults reporting they were happy. We have also opened Severn View Park, a new specialist care home that increases local capacity for people living with dementia and provides both long-term, reablement and respite care.



We are also strengthening wider well-being and community support. We have developed strategic approaches such as the Living Well Strategy and our work to become a Marmot Region, helping to focus action on prevention, resilience and the wider determinants of health. We have expanded assistive technology, which is helping more residents live safely and independently at home, and we have increased the delivery of housing adaptations that improve quality of life and confidence. We have supported young people's mental health through youth service programmes, with all participants in the Emotional Logic programme reporting improved emotional well-being, and we have significantly expanded participation in nature-based health and well-being projects.

We continue to recognise and support carers, with stronger information, signposting and practical support. We are aiming to reduce waiting times for carers assessments. We have developed our social care workforce through recruitment, retention and new models such as micro-care, which has grown from eight carers in 2022 to 59 carers, between them delivering over 900 hours of support each week.

A Connected Place Where People Care		
Connected place 	Evaluation Score:	Level 5 – Very Good – Major strengths – a significant majority of actions and measures are on track. No more than one or two falling short. We have increased access to care and support in the county and provided services to support health and well-being of residents. Our evidence shows we are supporting higher levels and greater complexity of demand. We are developing preventive approaches to help people live well. The resources required to meet existing demand and develop further preventative approaches remains a challenge to ongoing delivery.
Why we focused on this? Monmouthshire will be a place where people's contributions are valued, they feel part of a community and are connected to others. The health and social care system is facing significant challenges, and statutory services across the UK are struggling to cope with the volume and complexity of demand. Monmouthshire has a track record of delivering innovative approaches and rich partnership working. We recognise that well-being is about far more than treating people when they get sick. There are many factors that can affect our health including the environment, housing, what we do for work, how much we earn, our lifestyles, transport and community cohesion. These wider determinants of health, sometimes called the social determinants, can affect physical and mental health in either a positive or negative way.		
How well are we achieving our agreed outcomes?		How do we know?
What we want to achieve: High quality social care which enables people to live their lives on their terms		
We are delivering a long-term strategy to prevent and safely reduce the need for children to come into care. We have established a coordinated approach to early intervention and prevention in Children's Social Services. This allows families to receive support at the right level of intensity to enable parents to provide their children with the safety, nurture and care that they need. We have developed our practice at the front door of children's services, particularly through mechanisms such as the Early Help Assessment Team (EHAT) and the SPACE well-being panel. The SPACE Well-being and Family Support Panel supports effective partnership working and continues to be a hub for early intervention and coordinated support for children, young people and their families. Evaluation and feedback of family support services indicate clear and positive outcomes for families. 100% of families continue to report a positive outcome following a Building Stronger Families team intervention. We have developed a range of services that focus on practice development and working with families to support strengths, manage risks and achieve good outcomes, reducing the need for children to be looked after. We have services in place to support the rehabilitation of children following periods of being looked after through Families Re-connect. We provide medium-term, holistic support to families making sustainable change through the Achieving Change Together Team. We provide a therapeutic response to parents and carers in supporting children with trauma presentations through My Support Team (MyST), for example. We have reduced the number of children with lower support needs entering statutory services and reduced escalation of need within services. Overall, this work creates more stable outcomes, reduces pressure on statutory services, and helps families get the right support at the right time. If families do require help from children's services we are focused on preventative family support throughout our processes in children's social care,		Early help service evaluations Placement Development Strategy Children Social care performance data Hospital discharge monitoring information Reablement service performance information

from first referral to complex cases. We have achieved stability in the number of children looked after, with a gradual reduction from 208 in March 2022 to 192 in March 2026.

We have invested in foster care recruitment, developed support arrangements, and increased foster carer fees to retain and attract foster carers to provide support for children who require it. This has strengthened the foster carer offer and contributed to a more cohesive fostering community. This has supported an increased willingness among carers to accept placements. We continue to face challenges recruiting and retaining foster carers, a challenge seen across Wales and the rest of the UK. The number of Local Authority foster carers is not increasing at a rate sufficient to meet our needs. We have increased the use of kinship care and Special Guardianship Orders (SGOs), which align with earlier and more effective family-based interventions. This is resulting in more children who need care being placed with our own foster carers or kinship carers rather than with independent fostering agencies (IFA). In September 2025 for all children in foster placements, 36% were placed with IFAs and 64% placed to in-house foster cares or kinship carers.

We are delivering our placement development strategy to develop children's residential and 16+ supported accommodation placements within the county. This is addressing a shortage of suitable placements for children requiring support particularly locally, and especially those who need additional support or who cannot be placed with foster carers. We have completed four projects of the six identified. We have provided aged 16+ supported accommodation for five placements, a four-bed residential children's home and two therapeutic residential children's home with potential for two placements each. Progress in developing residential provision is affected by a range of external factors and ensuring compliance with legal and regulatory requirements. We are developing a further two projects: one children's residential home and a further aged 16+ supported accommodation. We have not yet identified, and continue to explore the market, for a suitable and appropriate property to develop a further 16+ supported accommodation service.

The delivery of the placements strategy is improving the availability of support and helping to ensure children and young people can remain close to their communities. The proportion of children looked after who were supported to remain in Monmouthshire has varied over the last few years. Currently, In March 2026, 55.7% were supported to remain in Monmouthshire; this has increased from 50.5% in March 2024 but remains lower than 59.2% in March 2023. We continue to review the demand of placements and try to forecast demand by identifying children who may need, at some point, to be accommodated. Predicting demand, however, remains a challenging and dynamic process with evolving need and changes in the type and intensity of provision required. This is also complicated by uncertainty within the care market nationwide.

We continue to experience demand pressure across the social care and health system, with an ageing population in Monmouthshire, particularly, meaning an increase in the amount of support required and complexity of people's support needs. These demand pressures are seen across Wales and the rest of the UK. We have developed and adjusted our delivery of adult social care to meet the increasing and more complex needs of our older residents. We have developed preventative approaches such as increasing capacity in reablement, and use of assistive technology, which is helping to mitigate ongoing care needs, particularly for people with lower care needs, and helping to reduce the need for domiciliary care. We are continuing to manage an increase in need for residential care, driven by the ageing demographic and increasing complexity of need. In some situations, delayed requests for support, reduce the ability to provide preventative and community-based support which otherwise could allow people to remain in their own homes for longer.

We are continuing to focus on the consistency of support provided at the front door of adult's social care to make sure that people receive the most appropriate information, advice and assistance they need. We are also continuing to ensure we have capacity and support available to review and assess care requirements to provide support that meets needs with the right services, allowing choice and consistency including the provision of reablement to try to reduce further needs.

Adults Social care
performance
information

Strategy for
commissioned
domiciliary care

We are implementing a long-term strategy for commissioned domiciliary care. We have increased capacity across home care and significantly and reduced the number of unmet care hours from 804 hours a month in March 2023 to an average of around 271 hours a month over the last year. We are now able to provide an average of 96.4% domiciliary care hours in the last year. This is due to a combination of our activities and external factors resulting in the market for home care stabilising. This is improving access to vital support to enable people to remain living in their own home. We have seen a gradual reduction in the number of adults in receipt of home care, from 636 in March 2023 to 452 in March 2026. This is due to a combination of adjustment in the assessment of care and support, including an increase in reablement services, along with a range of other factors that influence care needs. Feedback from Adults' social care services users shows lower levels of satisfaction with care and support. In the last year 83% of adults were happy with their care and support which is marginally lower than the 83.5% in 2022/2023. We have seen an increase in the number of adults in receipt of residential care over the same period, rising from 317 in March 2023 to 369 currently in 2026. This increase is contributed to by an increasing complexity of support needs from residents. We are developing new provision and the way we provide care and support to meet this demand. We opened Severn View Park, a specialist care home for people living with dementia, in March 2024. The home provides 32 bedrooms for both long-term support and short-term support in the form of respite based on a relationship-centred care model. The new care home aims to maintain connections with the surrounding community. We continue to work with partners in both primary and secondary health to prevent unnecessary admissions to hospital and to support timely discharges. Ensuring well-coordinated and timely discharges and managing the pressure within the hospital system remains challenging. We convene weekly multi-disciplinary meetings to identify and unblock delays when they arise. We continue to develop and embed our practice, working in an integrated way with multi-disciplinary teams to support hospital discharge from acute and community hospitals. The number of patients awaiting discharge for social care varies during the year, having risen in the last couple of years, delays have stabilised this year. We continue to face challenges in responding to all people's care and support needs in as timely a manner as we would want. We have decreased waits for adult social care assessments over the last year supporting residents to have their needs assessed sooner. The ageing demographic and complexity of people's needs has also increased costs needing to be met from our Adults' Social Care budget. We continue to actively plan for current and future demand in our service provision and budget setting. We continue to deliver early intervention and preventative community-based support to help support residents to remain independent for as long as possible. We recognise that this will not remove the need for more specific care and support and continue to plan for this as part of our domiciliary care strategy and working with care providers in the county.	
What we want to achieve: A healthy and active Monmouthshire where loneliness and isolation are reduced, well-being is promoted, and people are safeguarded	
We know that generally residents feel connected to their place in Monmouthshire, with 69% of respondents to our resident survey felt part of their local area. This is not the case for everyone. We also recognise the vital role that residents play in their local community and 57% of residents who responded to the survey expressed interest in taking part in local community activities or events. We have developed a Living Well Strategy to promote a whole authority approach to wellness and well-being and address inequality by promoting healthier lifestyles and building resilience, particularly among deprived communities. This will coordinate our own council activity and work with partners to facilitate healthier lifestyles and build individual and community resilience so that residents, especially our more deprived residents, are enabled to live healthier and independently for longer. This aims to support residents' well-being as well as delaying or reducing their call on statutory services.	Youth Service provision Carers and Young Carers service Living Well Strategy

We are also committed to work with others across Gwent and the Institute of Health Equity to tackle health inequalities as part of being a Marmot Region. This is focusing on the determinants of health, sometimes called the social determinants, such as the environment, housing, income and lifestyles, transport that can impact in either a positive or negative way on physical and mental health.

We have developed our services to support adults to live independently for longer. We are delivering a transformation plan to expand the use of assistive technology in Monmouthshire. Assistive technology contributes to enhancing and enriching living at home, supporting people to remain living safely and independently in their own homes for as long as possible. The Assistive Tech service has grown from supporting 850 clients in its first year in 2022/23 to 1070 in 2025/26. The service has completed around 300 installations a year. This has provided a range of technology that helps support someone to live independently at home for longer. We continue to aim to increase the use of assistive technology equipment within care and support planning in social care to support a more preventative approach. We also continue to engage with suppliers to identify new equipment opportunities.

CASE STUDY – ASSISSTIVE TECHNOLOGY

Mary has lived in Abergavenny all of her life and has many fond memories of the town.

The assistivetech equipment helps both her and her family to feel safer and independent knowing that help is at hand should she need it.

Mary had falls previously with the most recent fall leading to hospital admission with a fractured pelvis. Due to the increased risk of falls, Mary has since been provided with a falls detector. A falls detector not only allows Mary to call for help at the press of a button, it is dual purpose and will automatically call the operator by the lifeline should a complete fall be detected. The alert informs the operator if the alarm raised is a pendant press or a falls which enables them to follow the set protocol for the type of emergency alerted.

Having lived at her flat for many years, Mary wants to remain living there. The provision of a Lifeline Alarm with the falls detector goes some way to providing the security and peace of mind Mary needs to remain living in her own home.

We provide housing adaptations which help people stay independent, live with dignity and return home safely from hospital or care. In the last year we have delivered 57 adaptations. Following an adaption, 73% of people felt that their quality of life has improved and 69% of respondents felt more confident and /or independent.

We have increased the capacity and number of people accessing reablement. Reablement provides support to people to relearn how to do daily activities and is helping to reduce people's need for further support and reduce the demand on longer term care services. We have increased the number of packages of reablement we deliver from 184 a year in 2022/23 to 445 in 2025/26. In the last year 53.3% of reablement packages delivered mitigated the person's need for further support.

We are enabling healthier, more active lives by increasing outdoor access. We supported 574 schools, volunteers, and partners to participate in nature-based well-being projects county wide. We have supported young peoples' mental health and well-being across the county through the youth service Shift project. We have expanded the offer with a focused grant funded programme called Emotional Logic. Every young person engaged in the project reported an improvement in their mental health/emotional well-being.

We recognise the vital role that carers undertake in supporting people in the county. We have commissioned carers services, provided information and advice and offered a range of free events and activities to support carers and young carers' needs. We have focused on re-shaping the information we provide to carers, informed by feedback from the young carers and carers strategy group. This feedback is informing the redevelopment of our website, a revised carers handbook and improved signposting to other organisations with specific expertise and knowledge. We are strengthening links with information, advice and assistance services in social care to improve early identification of carers. The number of adults carers known to us has grown by over 100 in the last year. We provide the 1,166 adult carers on our database with advice and assistance through our biannual carer newsletter and discounted leisure offer. The number of young carers registered with the Young Carers Service has reduced from 136 to 103 this year. This reflects improved identification processes and regular reviews of known young carers. Those who have not engaged with the service in the past year are contacted three times (by email, telephone and letter) to check whether they require a review. If there is no response, their details are archived, with the option to re-engage should their circumstances change. We undertake carers needs assessments to ensure that carers needs are understood in their own right. There continues to be increasing demand for carers support. The number of carers awaiting a needs assessment has continued to increase from 8 in 2023/24 to 27 in the same period in 2025/26. Increased demand and reduced capacity due to a staff vacancy in the carers team has resulted in longer waiting lists for assessment. This has also reduced our ability to prioritise preventative support, as capacity is focused on undertaking needed assessment. We are continuing to develop clearer information about a carer needs assessment to ensure that all age unpaid carers are correctly supported by the appropriate agencies at the right time. We are also re-focusing and increasing capacity in the carers in team to support the increase in support requirements from carers.	
What we want to achieve: A professional and passionate social care workforce	
We have developed our workforce planning arrangements in social care. We have focused our social care workforce development on addressing areas where there is high demand and recruiting to essential posts to meet the care needs of our residents. Recruitment is focused on demonstrating the opportunities, career progression, work life balance and job satisfaction that people experience who work within the sector. We are also developing opportunities for work experience and apprenticeship pathway opportunities for roles in social care. Generally, the workforce in social care remains stable. Our social services workforce continues to experience pressures in responding to increasing complexity and intensity of demand with limited resources. We have recently experienced increasing challenges in both recruiting and retaining staff, particularly in Children's Social care, a significant driver of which is increased work demand and pressures. We also continue to experience recruitment challenges for certain roles across social care. We have fewer vacancies across social care overall over the year, with 19 vacancies in March 2026 compared to 26 vacancies in March 2025. We have enhanced the development and well-being offer for our existing social care staff. We have undertaken a training needs analysis and used this to develop training plans that focus on professional development and practice, as well as coaching, mentoring and personal development reviews. We have delivered a range of activities and support working with care providers and our partners. We have developed a micro-care project to increase the availability of care in the county. The project supports self-employed carers to develop their businesses as well as providing the opportunity for greater oversight and governance of self-employed care workers operating within Monmouthshire. The number of micro-carers is steadily increasing. The scheme started as a pilot in 2022 where there were 8 micro-carers registered. The number of carers has grown to 59, who are now delivering over 900 hours of care and support each week, supporting Monmouthshire residents in their local community. We have allocated additional funding to pay fees for care providers to increase the placements available for people who require care. We have provided additional funding from the recent budgets for care provider fees across Children's and Adults' social care. This includes allocating an	Social care workforce recruitment and retention data Micro-care project Fees for care providers

additional £290k this year to support the payment of the increase in National Minimum Wage and Real Living Wage. This ensures that providers can continue to pay the real living wage to attract and retain key staff to meet increasing demand. We also continue to aim to ensure that our fee rate remains a viable and attractive option for care providers so that residents can choose the best support for them.

Well-being of Future Generations Act impact

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

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



Well-being Objective: A Connected Place Where People Care

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

Measures of progress

Milestone	Target for completion	Progress
Development of a young persons' Placement Development Strategy	April 2024	This has now been completed.
Approval of a commissioning strategy to support a sustainable domiciliary care sector	May 2024	This has now been completed.

Measure	Previous Period	Latest Period	Target for 2025/26	Quick View	Comment
Percentage of packages of reablement completed during the year that mitigated the need for support / positive outcome from reablement	55.7	53.3	60	↓	The overall number of packages of reablement being delivered and completed have increased.

Percentage of adult service users who are happy with the care and support they have had	84.7	83	85	↓	
Percentage of hours of long-term domiciliary care fulfilled	97.5	96.4	96	↓	This is the average provided over the year April 25 – March 26
Percentage of families reporting a positive outcome following a building stronger families team intervention	100	100	90	↔	
Percentage of adult service users who have had the right information or advice when they needed it	78.0	71.2	80	↓	We are increasing our resources through additional staff to ensure more people have access to the correct information when they need it.
Percentage of placements of children who are looked after by the local authority made with in-house foster carers	35.8	40.6	43	↑	This measure shows the percentage of children looked after by the local authority who are placed with in house foster carers.
Percentage of young people engaged in the youth service Shift project who perceive an improvement in their mental health / emotional well-being	90	100	85	↑	
Number of schools, volunteers, local interest groups and partners involved in nature-based health and well-being projects and initiatives across the county	41	574	30	↑	This increase is a result of two significant grant funded projects in the year.

Quick View of Trend: ↑ Improving performance; ↓ Declining Performance; ↔ Unchanged Performance
Quick View of Target: Green – Target achieved; amber – just missed the target; red – fell some way short



Community & Corporate Plan Objective: A Learning Place



What we want to achieve:

- Improved school attendance and reduced levels of exclusion which remove barriers to learning for vulnerable pupils
- The benefits of the new curriculum in Wales are maximised through excellent teaching and learning
- A truly inclusive educational system that recognises learners' starting points, strengths and educational needs
- Continue our programme of school modernisation

Our rating:
5 (Very Good)

Strategic Assessment

Monmouthshire should be a place where every child, young person and adult can learn, develop skills and achieve their potential. Education is one of the strongest foundations for well-being, employment and health. A strong start in life helps children and young people build confidence, resilience and ambition, while lifelong learning enables residents to adapt, retrain and contribute throughout adulthood. The pandemic caused significant disruption to learning, attendance, emotional well-being and social development, and its effects are still being felt. At the same time, education continues to change through the Curriculum for Wales and the Additional Learning Needs Act. This means we must ensure all learners, particularly those who are vulnerable or disadvantaged, receive the right support at the right time.

A wide range of council services help make Monmouthshire a place where people can learn and develop the skills they need to reach their potential. These include early years and childcare, school transport, youth services, safeguarding, education inclusion, additional learning needs, adult and community learning, education welfare, school estate management, libraries, leisure, culture and partnership work with health, social care and the voluntary sector. Together, these services support access to education, remove barriers to learning, help learners and families stay engaged, improve well-being and create inclusive environments for lifelong learning.

We have strengthened the systems, strategies and provision needed to meet increasing learner needs. We have updated key policies and guidance and strengthened multi-agency support for vulnerable pupils. Primary attendance is close to pre-pandemic levels and above the Wales average. Secondary attendance has also improved and remains above the Wales average, although it is still below pre-

pandemic levels. Attendance of pupils eligible for free school meals remains a challenge, especially in secondary schools. The causes are often complex and linked to wider disadvantage, well-being, family circumstances and additional learning needs.

We have responded to increasing complexity and behaviours that challenge by reshaping inclusion services, improving data, establishing an inclusion panel and working with schools to use managed moves, additional learning provision and other support to avoid escalation. Fixed-term exclusions remain high and continue to place pressure on schools and specialist provision. However, all permanent exclusions issued during the last year were rescinded through stronger multi-agency work and alternative support arrangements.

Teaching, learning and curriculum development remain strong overall. Learners in secondary schools continue to achieve higher results than the Wales average, with a capped 9 score of 375.9. Estyn inspections demonstrate that many schools are developing broad, balanced and purposeful curricula that reflect their context and meet pupils' needs. Variation remains, particularly for lower-attaining pupils and disadvantaged learners, so our support and challenge will continue to focus on where improvement is most needed.

We have strengthened inclusive education helping to create a more consistent and equitable approach for learners with additional learning needs and other barriers to learning. We are reducing reliance on out-of-county provision by expanding local specialist provision, including a Social, Emotional and Mental Health Specialist Resource Base, and by developing additional provision within schools. Demand for additional learning needs support is increasing, and schools face ongoing financial and capacity pressures.

We have also widened opportunities for learners and residents. The Inspire programme supported 285 young people to gain an additional qualification or life skill during the year. Estyn recognised the Youth Service for supporting young people's confidence, resilience and life skills, and young people were able to express their views through the Make Your Mark ballot and youth conference. Adult and community learning has become more accessible through subsidised courses and partnership work with Coleg Gwent, with 963 enrolments during the year.

We have made progress in school modernisation and Welsh-medium education. The new King Henry VIII all-through school in Abergavenny, provides modern, inclusive net zero learning facilities for pupils aged 3 to 19, including specialist accommodation for pupils with complex neurodevelopmental and learning needs. We have also improved and remodelled pupil referral service accommodation in south Monmouthshire, completed the new Trellech nursery building, opened Ysgol Gymraeg Trefynwy and secured a new site for Ysgol Gymraeg y Fenni.



A Learning Place		
Learning place 	Evaluation Score: Level 5 – Very Good – Major strengths – a significant majority of actions and measures are on track. No more than one or two falling short.	We have developed our approaches and increased our support to schools and pupils to respond to an increased demand and complexity of support children and young people require, particularly vulnerable learners. Our assessment identifies the progress made in attendance, attainment and support for vulnerable learners. We continue to adjust, develop and target our support to meet further support and need.
Why we focused on this? Monmouthshire will be a place where everybody experiences the best possible start in life and has the opportunity to learn, developing the skills and knowledge they will need to reach their potential. The pandemic has had a substantial effect on schools and pupils. The two years of uncertainty and significant disruption to learning have inevitably left a legacy. Before the pandemic we knew that our disadvantaged learners did not achieve the outcomes we would wish. The pandemic has worsened the learning experiences of many vulnerable students such as those eligible for free school meals. The emotional and mental well-being of pupils was often affected, with many experiencing increased uncertainty, anxiety and loneliness. In line with our guiding principles, it is vital that we develop more opportunities to listen and learn from our pupils and students. Since schools have reopened the education system in Wales has continued to evolve with reforms and developments including the new curriculum for Wales and the introduction of a new Additional Learning Needs Act.		
How well are we achieving our agreed outcomes?		How do we know?
What we want to achieve: Improved school attendance and reduced levels of exclusion which remove barriers to learning for vulnerable pupils		
Lower attendance in schools has been a challenge across Wales since the pandemic. We know that being in school supports children's well-being and development. We are working with schools to improve pupil attendance, which has increased in both primary and secondary schools, although progress remains gradual. We have updated our attendance and engagement policy. This is providing a graduated approach for schools to support improvements in attendance. We have a dedicated Education Welfare Service (EWS) that provides targeted support for vulnerable pupils. Family Liaison Officers are also ensuring support for pupils and their families. We are also working closely with partners such as Inclusion, Social Services, Health Services and the Police to ensure a cohesive approach. Of the 80 primary pupils supported by the Education Support Team across 24/25, 79% showed increased attendance. We are broadening our understanding of the drivers of low attendance. We have, as part of our updated attendance and engagement policy, developed additional emotionally based school avoidance (EBSA) guidance. We have also undertaken extensive multi-agency work to enhance the understanding of, and support offered, around EBSA by professionals including school staff. We are focused on providing early identification and preventative support which is helping to promote positive outcomes and prevent persistent absenteeism. We have developed a Children Missing Education (CME) Policy which sets out the action we will take to support and engage with CME and those at risk of non-attendance. We are engaging in developmental work with Welsh Government to strengthen processes for Children Missing Education (CME). This is ensuring that we are well informed to monitor and support this group of vulnerable pupils effectively. We have robust policy processes in place to ensure the notification of CMEs are followed up and investigated by the EWS in a timely manner. We are supporting these children to return to school as soon as possible, where possible.		Education Welfare Service School Attendance School Exclusions Whole school approach to emotional and mental well-being Trauma Informed Schools Training Estyn Inspection of Monmouthshire's Education Services

An Estyn inspection of education services completed in November 2025 identified the Authority’s trauma-informed, relationship-centred approach to improving attendance as a strength, with clear improvements in primary school attendance and early signs of progress for some vulnerable groups. Estyn is also clear that attendance for secondary-age pupils and pupils with ALN requires further improvement. They also noted that evaluation of attendance strategies is not yet sufficiently rigorous to determine which interventions are having the greatest impact.

Attendance in primary schools is returning to pre-pandemic levels at a quicker pace, from 92.9% in 22/23 to 93.9% in 24/25. Despite being lower than pre-pandemic levels, this is 1.1 percentage points above the Wales average. Secondary school attendance has proven more challenging to increase due to the complex range of factors driving lower attendance. Secondary school attendance has increased from 88.1% in 22/23 to 89.5% in 24/25. This is more than 5 percentage points lower than pre-pandemic levels, however is above the Wales average. We recognise that more needs to be done to address ongoing challenges in attendance, particularly in secondary schools. Ensuring high levels of attendance amongst pupils eligible for free school meals (eFSM) is a more complex challenge. We are committed to increasing attendance of pupils eFSM. Attendance of eFSM pupils in primary schools was 89.1% in 24/25, almost 4 percentage points lower than non-eFSM pupils, however is 0.9 percentage points above the Wales average. In secondary schools, attendance of eFSM pupils was 79.8%, almost 10pp lower than non-eFSM pupils and slightly below the Wales average.

We are seeing increases in challenging behaviours in schools. This is a challenge seen across the UK since the pandemic. As a result, the number of fixed term exclusions (FTEs) in our schools have more than doubled between 22/23 and 24/25, with 2,198 issued in the last academic year. We are improving how we capture and analyse exclusions data. This is enhancing our knowledge of reasons for exclusions and is facilitating challenge and support to schools. We have identified priority areas for support including increasing the ability of schools to support learners presenting behaviours of concern who may require additional learning provision (ALP). Schools continue to face financial pressure, and some struggle to provide learners with the additional support they require.

We have implemented an Inclusion Panel to manage permanent exclusions (PEx). This allows for multi-agency decision making on next steps and monitoring. We are ensuring, through this panel, that the interests of the learner are held central to this decision. We are working with schools to utilise managed moves to an appropriate setting, including Cysgod y Coed (formerly the Monmouthshire Pupil Referral Service). We are also working with schools to increase support available or adjust ALP where possible to avoid escalation. These improvements in the process have resulted in all permanent exclusions issued during 24/25 being rescinded. This is enabling pupils who were at risk of permanent exclusion remaining supported in an appropriate setting, improving life chances for these pupils. We are providing additional funding to schools to enable every school to have on-site additional provision. This will allow more young people with additional needs to remain in their school setting and aligns with our values of promoting an inclusive and understanding school environment.

What we want to achieve: The benefits of the new curriculum in Wales are maximised through excellent teaching and learning

We need to support all learners to secure the necessary skills and knowledge that we would expect them to have at the relevant point in their education. We are ensuring that schools in Monmouthshire are embracing the new curriculum. Through our regular monitoring and Estyn inspections we know that, overall, many schools are making good progress in developing a broad, balanced and purposeful curriculum that reflects the context of the school and meets pupils’ needs well. Nearly all schools have aligned their curriculum with the principles of the Curriculum for Wales and most have a clear vision for the curriculum. They have carefully designed their curriculum to promote pupils’ moral, social and cultural development effectively.

The results of learners in our secondary schools continue to be higher than elsewhere in Wales. On average, the capped 9 points score was 375.9 in Monmouthshire in 2025, compared to 354.3 across Wales. Most of our pupils performed in line with their expectations. Overall, two schools in

Estyn Inspection reports

Attainment data

Welsh in Education Strategic Plan

Monmouthshire were above Welsh Government modelled capped 9 outcomes, and two below in some categories. Breaking groups of learners in each individual school into 'thirds' compared with modelled outcomes shows that all schools are above expectation for the highest achieving thirds. We are seeing more variation from the modelled outcome in the middle and lowest thirds, particularly in the lowest third. This suggests a need for targeted intervention to support lower-attaining learners.

When schools evaluate their own performance, they assess this against similar schools. This is a more informative and detailed assessment of attainment and wider progress, given the varying make up and individual plans of schools, than comparing against Wales averages. These groups of similar schools are called 'families'. When comparing our comprehensive schools with those in their 'family', two schools outperform schools in every category (including capped 9, literacy, numeracy, science, Welsh Baccalaureate, 5+ A*-A, no qualifications). One of our schools underperforms in all categories and one in a majority of categories compared to similar schools.

We continue to support our schools to raise attainment levels beyond expected levels to levels where they and we want attainment to be. We have a clearly articulated school improvement strategy. This has supported us to establish robust systems of support and challenge. An Estyn inspection of education services completed in November 2025 found "well-defined roles, strong accountability and consistent information-gathering enable leaders and School Improvement Partners (SIPs) to develop an accurate understanding of schools." Our work is ensuring that barriers to improvement are addressed promptly.

We have seen improvements in the quality of teaching and learning in our schools. Since February 2022, Estyn has inspected 20 primary schools, 11 non-maintained settings, 3 secondary schools and Cysgod y Coed in Monmouthshire. Two secondary schools and the Cysgod y Coed were judged to require significant improvement. Since this time, one secondary school in significant improvement has closed. Of the remaining schools, no follow-up was required, with many having spotlights of good practice or case studies identified.

We have an agreed Welsh in Education Strategic Plan which sets our strategic direction for the planning, delivery, and growth of Welsh medium education in Monmouthshire over the next ten years. We are mainly on track with our delivery targets of the plan. We opened a new Welsh-medium primary school to serve both Monmouth and the surrounding towns and villages, Ysgol Gymraeg Trefynwy, in September 2024. Uptake of places has been positive, with 33 learners currently enrolled. We are expanding provision at Ysgol Gymraeg y Fenni. This expansion, combined with the opening of Ysgol Gymraeg Trefynwy, will mean there are 120 school places available for each cohort. This exceeds the Welsh Government target of 115 places, and meets the aspirations and targets of our WESP.

We are increasing the number of Welsh language learners through our immersion provision. This allows for pupils to join our Welsh medium schools later on. Immersion classes have supported growth in pupil numbers in reception classes as it allows parents to choose a Welsh-medium education for all their children, not just those starting school. Since opening our first immersion class at Ysgol Gymraeg y Ffin, 32 pupils have benefitted from this provision. We have now expanded our provision to Ysgol Gymraeg y Fenni, and plan to open provision at Ysgol Gymraeg Trefynwy from September 2026. We are working with all three schools to co-construct a sustainable, county wide model for immersion. Although this work is at an early stage of development, the alignment of provision across the two established immersion classes will support any future changes.

What we want to achieve: A truly inclusive educational system that recognises learners' starting points, strengths and educational needs

In recent years, schools have seen a consistent increase in the number of children eligible for free school meals. These students may face challenges that not all students will face. We need to ensure that we are supporting our learners eligible for free school meals (eFSM) to achieve their potential.

Attainment data

We continue to address the gap in attainment between eFSM and non-eFSM learners. This is a complex issue that is influenced by many factors, including lower attendance among the eFSM cohort and pupils who are eFSM being more likely to have additional needs or require additional learning provision. During 2025 the gap in attainment of eFSM and non-eFSM learners has increased in Monmouthshire, sitting now at around 1.8 GCSE grades. Schools continue to undertake a detailed assessment of attainment and wider progress based on the varying make up and individual plans of each school to ensure that each pupil has an equal opportunity to succeed no matter their socio-economic background. We are also working with schools to ensure pathways and opportunities are available which interest all learners. We are exploring options with Coleg Gwent on developing Junior Apprenticeships in the county, and have continued work to further opportunities to complete childcare qualifications.

We have developed a new Inclusion Strategy and an updated Additional Learning Needs (ALN) Policy to shape our work with children and young people in schools and settings in Monmouthshire. The Inclusion Strategy sets out our priorities to improve outcomes for children and young people in vulnerable groups and their families. The Additional Learning Needs Policy outlines our approach to supporting children and young people with barriers to learning and additional learning needs, ensuring they receive the necessary support, resources, and opportunities to thrive academically, socially, and emotionally. These policies and strategies are enabling the delivery of an inclusive and understanding school environment.

We are ensuring nearly all learners with ALN in Monmouthshire can have their needs met by their local mainstream school through our Special Resource Bases. This is enabling more children to remain in their local school, and is reducing the need for out-of-county placements. We have established an Additional Learning Provision (ALP) Review and associated quality assurance cycle to ensure that there is a consistent and equitable approach to meeting the needs of Monmouthshire children and young people with ALN. The assessment demonstrates many strengths in provision across Monmouthshire, as well as identifying some recommendations for development on the consistency of ALN provision across the county. We are seeing rising demand for ALN provision across the county, which we may be unable to meet within existing provision. We are expanding our local specialist provision through the establishment of a Social, Emotional and Mental Health Specialist Resource Base at the former Ysgol Y Fenni. This will ensure more children are able to access the support needed and reduce reliance on out of county placements.

We are continuing to operate the Inspire programme across the county. This programme supports young people who may be facing barriers to learning such as attendance, attainment, behaviour and wellbeing. We work with young people to overcome challenges, return them to a school setting where possible or identify appropriate alternative pathways. During the year we supported 285 young people to achieve an additional qualification and / or achieve a life skill.

The council’s Youth Service provides and a range of inclusive services to support young people’s confidence, resilience and life skills. The positive difference the Youth Service makes for children and young people across the county was recognised in an Estyn inspection of the service in November 2025. The Youth service also ran the “Make Your Mark” ballot, where almost three-quarters of 11–18 year olds took part in 2025 and Youth Conference. Young people stated that the top three priorities were the cost of living, mental health matters, and employment and skills. This enabled young people to express their views clearly and democratically and their views to inform the development of policy.

We are reducing financial barriers to our adult education courses to make them more accessible to our residents. We have reviewed our course funding model that now means that all our community education courses are directly subsidised. We have also continued our partnership with Coleg Gwent to offer low-cost foundation-level learning. We recognise the importance of removing any barriers to involvement in adult education and the effect it can have on adults gaining new skills and knowledge. In 25/26, the total number of enrolments on community education courses was 963.

- Additional Learning Needs Policy
- Inclusion Strategy
- Additional Learning Provision (ALP) Review
- Inspire programme
- Adult education courses participation

What we want to achieve: Continue our programme of school modernisation

The environment in which children and young people learn is important to their development and well-being.

We have invested £1.2 in improving and remodelling our south Monmouthshire pupil referral service. This is providing the service with a permanent and dedicated high-quality environment that is conducive to the needs and increasing demands of the vulnerable population of pupils it serves.

We are expanding our provision of Welsh medium education. We have secured a new site for Ysgol Y Fenni which will increase the capacity of the school from 210 to 420 pupils. Delays in construction have meant the opening of this site has been delayed. We opened Ysgol Gymraeg Trefynwy on the site of Overmonnow Primary school in September 2024, with 24 pupils attending, which has now increased to 33 pupils. To continue the expansion of our Welsh medium provision we need to focus on promoting Welsh medium education and securing appropriate staff to ensure a high-quality education for our young people.

King Henry VIII all-through school

Welsh in Education Strategic Plan

Pupil Referral Service

CASE STUDY – KING HENRY VIII SCHOOL

In July 2025, we celebrated the official opening of the new King Henry VIII all-through school in Abergavenny. The facility provides a hub for learning in Abergavenny, providing the tools for young people to thrive as well as well wider community facilities. The building is the first operationally net zero carbon all-through school in Wales, in line with our commitment to decarbonise our operations. The school has the capacity for 1,200 secondary school age pupils, 420 primary age pupils and 200 places for post-16 education. There will also be suitable accommodation for 71 pupils with complex neurodevelopmental and learning needs within the school. This will help to reduce the number of pupils attending an out-of-county secondary school.

Well-being of Future Generations Act impact

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



Well-being Objective: A Learning Place

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

Measures of progress			
Milestone	Target for completion	Progress	
Attendance and Engagement Strategy updated to strengthen systems and processes to improve and sustain high levels of attendance in line with new Welsh Government Guidance	September 2024		This has now been completed.
Inclusion Strategy approved by Cabinet	November 2024		This has now been completed.
Quality Assurance of Additional Learning Provision across the county via school's finance forms and provision pyramids is completed. Additional Learning Provision (ALP) meets the needs of vulnerable learners in the county and is of good quality	Regular Assessment		An Additional Learning Provision (ALP) Review associated quality assurance cycle has been established. An update on the outcomes and recommendations from the quality assurance was presented to Performance & Overview Scrutiny Committee in June 2025.
Additional Learning Need Coordinators and Specialist Resource Base Leads are engaged in quality assurance processes around the consistency and impact of Additional Learning Need provision through Additional Learning Provision forum and cluster / Specialist Provision and Outreach Team	Regular Assessment		Individual Development Plans moderation has taken place at both a cluster and Local Authority level. Secondary supported self-evaluation for ALN / ALP outcomes have been shared with ALN coordinators and Headteachers; where relevant action plans have been developed with schools or existing plans added to.
A new carbon neutral, 3-19 school is opened in Abergavenny	Phase 1 April 2025, Phase 2 April 2026		Phase 1 was completed in April 2025 with completion of the new school building. Phase 2 is not yet complete.
A strategic review of school catchments is completed, and recommendations are made to Cabinet	Annual review of policy		The School Admissions Policy 2025/26, including a review of school catchment areas, was approved by Cabinet in April 2024, in which it was agreed to accommodate the villages of Tredunnock, Llanhennock and Llandegveth into the catchment area for Usk Church in Wales Primary School. These changes were implemented for the academic year 2025/26.
Deliver a new non-maintained nursery in Trellech, invest S106 funding to improve the infrastructure at Castle Park and Archbishop Rowan Williams schools and improve and develop the buildings used to accommodate the Pupil Referral Service	Trellech March 2025, Archbishop Rowan Williams January 2027		Trellech Nursery building was completed and opened in February 2025. We are investing S106 funding to improve the infrastructure at Castle Park and Archbishop Rowan Williams schools and expect to complete this by January 2027.
A new Welsh-medium seedling provision is opened in Monmouth	September 2025		This has now been completed.
A newly refurbished Welsh-medium primary school is opened	Opened and refurbished September 2025		We have secured a new site for Ysgol Y Fenni which will increase the capacity of the school from 210 to 420 pupils. Delays in

			construction have meant the opening of this school has been delayed to 2026.		
Measure	Previous	Latest	Target for 2025/26	Quick View	Comment
Percentage pupil attendance (brackets show eFSM figures) i) Primary ii) Secondary	i) 93.6 (89.0) ii) 88.2 (75.8)	i) 93.9 (89.1) ii) 90.1 (79.8)	i) 94 (92) ii) 94 (92)	↑	Data measured in academic years. The Previous column shows 2023/24 academic year data. Latest shows the 2024/25 academic year.
Percentage of schools engaged in professional learning related to Emotionally Based School Avoidance (EBSA); Trauma Informed Approaches; and Autism	79	94	100	↑	
Number of Reception learners in Welsh medium schools	56	57	85	↑	Previous figure is for the academic year 2023/24, latest is for academic year 2024/25.
Number of children transitioning from a Welsh language primary school to a Welsh language secondary school	27	22	46	↓	Previous is academic year 2023/24, latest is academic year 2024/25.
Number of young people supported by Inspire (in school support/outreach support/post 16 support) to achieve an additional qualification and / or achieve a life skill	186	285	133	↑	This is an annual figure for 2025/26.
Number of enrolments by adult learners on community education courses including Coleg Gwent franchise courses	909	963	950	↑	

Quick View of Trend: ↑ Improving performance; ↓ Declining Performance; ↔ Unchanged Performance
Quick View of Target: Green – Target achieved; amber – just missed the target; red – fell some way short



Using Our Resources

The council needs to remain relevant and viable for the next generation, while continuing to meet the needs of residents, visitors and businesses in the here-and-now. To support the delivery of our goals, we must make sure that all aspects of the council are working efficiently, effectively and in line with the sustainable development principle set out in the Well-being of Future Generations Act.

The Act specifies core areas in an organisation that need to adapt to meet the changing demands on our services and ensure their longevity and sustainability. We have evaluated our arrangements for these areas and included digital and data as another important enabler of how we deliver the council's services. The areas we have assessed are:

- Corporate planning, performance and risk management
- Financial planning
- Workforce planning (people)
- Procurement
- Assets
- Digital & Data
- Democracy & Scrutiny

Annual Governance Statement

The council has a governance framework, our Code of Corporate Governance, for the year end March 2026. The framework comprises the systems and processes, and culture and values, by which the Authority is directed and controlled and its activities through which it accounts to, engages with and leads the community. It enables the Authority to monitor the achievement of its strategic objectives and to consider whether those objectives have led to the delivery of appropriate, cost-effective services.

We have produced a draft Annual Governance Statement for the year 2025/26 that demonstrates that we have appropriate governance arrangements in place to meet the governance principles and that a review has been undertaken to assess the effectiveness of those arrangements. This self-assessment of our resources integrates with the findings from the Annual Governance Statement and will also contain further actions and recommendations related to these arrangements.

Corporate Planning, Performance and Risk Management – Evaluation Score: Level 4 - Good

How effective is corporate planning?	How do we know?
We have developed and agreed a Community and Corporate Plan 2022-28. This sets a clear direction for the council. An Audit Wales review of our objective setting in the Community and Corporate Plan found ‘the council has set its well-being objectives in accordance with the sustainable development principle and is aligning its key strategies and business plans to support their delivery, but it could further strengthen its approach by increasing the diversity of citizen involvement in future’. We have developed an accompanying performance measurement framework. We have reviewed the measurement framework to increase the focus on outcomes, where possible. We have set targets against these measures that demonstrate the ambition of the council to residents. This is allowing us to be held to account for performance and measure our performance on areas that can be directly affected by the council and the progress of wider outcomes that are not directly in the council’s control. In line with the findings from our Panel Performance Assessment, we need to continue developing a more consistent evaluative culture so that reporting increases its focus on outcome and impact. Supporting and enabling strategies have been developed to ensure they are fit for purpose and support the new policy aims and objectives set out in the Community and Corporate Plan. These will enable the delivery of the ambitions of the plan. We have developed arrangements to monitor the impact of these strategies and regularly evaluate performance against outcomes, through an annual performance assessment.	Community and Corporate Plan 2022-28 and measurement framework Panel Performance Assessment Enabling strategies Annual performance assessment of enabling strategies
How effective is performance management?	How do we know?
The approval of the Community and Corporate Plan has ensured that there is a clear direction for the council. This has been embedded in our performance management framework. Regular reporting ensures accountability at all levels and demonstrates progress to residents. We have embedded the self-assessment process in the council’s performance management framework. The self-assessment process has facilitated the completion of a robust evaluation of performance. These performance management arrangements have helped to clearly identify areas of progress and areas for development. An Audit Wales review of our performance management arrangements found ‘the council has a maturing performance management system that supports delivery of its corporate objectives’. The Panel Performance Assessment recognised some progress had been made in demonstrating outcomes and impact as part of our performance management framework. The Panel reinforced the need to communicate progress more clearly to councillors, residents, partners and businesses. We need to continue moving from describing what we have done to explaining what has changed, who has benefited, what has not worked as intended and what we will do differently as a result. Service business planning principles, supporting templates and guidance are in place and regularly reviewed. Service business plans are facilitating services to plan for the next three years, assess what went well, learn from what did not and measure the impact their service has made on people and places of Monmouthshire. Overall, service business plan completion rates and quality have developed, however these remain varied and require improvement. Quality assurance on service business plans has shown areas of planning still require development to ensure the principles are consistently applied. We are developing an updated suite of performance management training to ensure officers completing plans are equipped with the information and guidance needed.	Community and Corporate Plan progress report Draft Self-assessment report Service business plans & quality assurance Panel Performance Assessment

How effective is risk management?	How do we know?
We have developed an updated strategic risk management policy and guidance. This defines the approach, process and responsibility for managing strategic risk in the council. This also defines risk tolerance and a risk appetite for the council. The policy is now embedded in the council and requirements have been integrated as part of the council's performance management framework. There remains some part of the new policy that need to be strengthened in their application through the organisation. The strategic risk register is updated regularly and available to all members and officers to view at any time. There are arrangements to formally review the whole strategic risk register and report it six monthly to scrutiny, Governance and Audit Committee and Cabinet. This facilitates and demonstrates that risk management is embedded in the council and strategic risks facing the council are being robustly identified and managed. The risk assessment in service business plans is not always completed robustly. This limits the ability of services to use their service business plans to robustly manage and mitigate risks and may impact the escalation of risks onto the strategic risk register. We are developing an updated performance management training suite, including risk management. This should support the improvement of risk identification and management at a service level.	Strategic risk management policy, appetite statement and guidance Strategic risk register

Financial Planning – Evaluation Score: Level 4 – Good

How effective is financial monitoring?	How do we know?
The Council continues to maintain robust core financial governance arrangements, including regular budget monitoring, annual budget setting, treasury and capital reporting, statutory accounts production and oversight through Cabinet, scrutiny and Governance and Audit Committee. The Annual Governance Statement concluded that the Council's governance arrangements remain effective and provide a sound framework for delivering services, and financial management arrangements conform to the governance requirements of the CIPFA Statement on the Role of the Chief Financial Officer in Local Government. There has also been external assurance on the Council's financial sustainability arrangements. The Audit Wales financial sustainability review acknowledged the Medium Term Financial Strategy positively and confirmed the robustness of arrangements more widely in place. The Council has also committed to progressing the delivery plan associated with the Medium Term Financial Strategy, including self-assessment against the CIPFA Financial Management Code and an independent financial resilience review. The 2025/26 draft accounts were prepared and published, and the budget and outturn reports demonstrate continued compliance with statutory and professional financial management requirements. The 2026/27 budget also included the Responsible Financial Officer's assessment of robustness and reserves, and the Council Fund was maintained at the Medium Term Financial strategy minimum of 5% of net revenue budget. We still need to formalise a structured self-assessment framework, update financial regulations and standing orders where required. We also need to ensure learning from external review, internal audit, budget monitoring and the Annual Governance Statement is brought together into one coherent improvement plan. This will help ensure the Council continues to meet changing regulatory expectations and strengthens resilience in a more complex financial environment.	Financial monitoring reports Annual Governance Statement Audit Wales review

How effective is financial planning?	How do we know?
We have made progress in strengthening the financial and organisational foundations needed to deliver change over the medium term. The Medium Term Financial Strategy is now embedded as the framework for budget planning, with six-monthly updates to the Medium Term Financial Plan used to refresh assumptions, assess risks and support early engagement with Cabinet, scrutiny and services. This has helped move the Council towards a more disciplined and forward-looking approach to financial planning. The 2026/27 budget was set on a balanced basis, without reliance on the Council Fund reserve, and included a package of service efficiencies, reform and income measures alongside targeted investment in priority services. The budget process continued to be supported by scrutiny, public consultation and impact assessment, helping ensure that difficult choices were considered in the context of the Community and Corporate Plan, equality, climate and the needs of residents. Our capital planning is based on an established prioritisation process informed by evidence and assessment of risk to develop a programme within the financial constraints on the council. We have reviewed and agreed a current and forward capital programme for 2026/27. The core capital programme is being sustained and sets planned investment in the council's infrastructure. There remains a considerable number of backlog pressures that sit outside the core capital programme. These have varying levels of risk associated with them. Our financial planning arrangements identify current and future budget pressures which pose a risk to the deliverability of our objectives in the Community and Corporate Plan. A programme of change reserve has been strengthened through the 2025/26 outturn, with additional resources set aside to support transformation activity and invest-to-save work. This gives the Council greater capacity to progress change in a planned way. However, the scale of the medium-term financial challenge remains significant. The indicative 2027/28 revenue gap is currently estimated at £9.9m and further work is needed to translate change activity into fully costed, deliverable and recurrent savings options. Capital pressures, particularly highways and infrastructure, also have revenue consequences through borrowing costs, so future change plans will need to be selective, affordable and clearly linked to service priorities.	Budget setting reports 2026/27 Medium -Term Financial Strategy

Workforce Planning – Evaluation Score: Level 4 - Good

How effective is workforce management?	How do we know?
We have a loyal, dedicated and talented workforce that continue to deliver our services and objectives for residents. We have an established set of policies and procedures that guide our Human Resources function. These support standards and behaviours we expect employees to deliver. They also allow flexibility and opportunity for our workforce to develop their careers in Monmouthshire. If employees do not meet these standards, we have arrangements to manage and resolve these issues. We have re-instigated the staff conference and a more impactful People Leaders' Workshop programme. Alongside this we have held Q&A sessions with colleagues, the leader and chief executive have also visited many teams. The percentage of respondents to the staff survey saying they feel up to date has improved at team, directorate and whole authority level. The percentage of colleagues who say they feel valued and listened to and increased from 65% to 71%. Our workforce radar is beginning to give management teams data to form a clearer view of people-related risks. This should enable better targeted action to improve sickness, turnover, and workforce planning. Progress is positive, however work is still needed to embed the appraisal approach consistently and make communications about starters, leavers and internal moves more systematic. We have improved how colleagues understand and access our wellbeing and benefits offer by promoting it through the jobs website, colleague conferences and filmed material for wider access. We have also developed better early-warning mechanisms through the workforce radar, team Q&A sessions and colleague survey, giving us stronger insight into cultural issues before they become more serious.	People Strategy Workforce management data Staff survey
How effective is workforce planning?	How do we know?
We have a flexible approach to workforce planning to attract and retain people to roles in the council. This includes long-standing agile working arrangements, for jobs that do not require employees to travel to their base every day and targeted recruitment campaign for certain jobs. We have strengthened our position as an employer of choice by improving our recruitment platform, refreshing the jobs section of the website, promoting development opportunities and laying the foundations for stronger workforce planning. Turnover is at 8.1% which is healthy but marginally higher than the optimal position. We are not making full use of exit interview data to understand the reasons people are leaving the organisation alongside other data sources. However, our survey shows us that 89% of colleagues would recommend MCC as an employer to friends and family, an increase of five percentage points on the previous year. This was reinforced by the Peer Panel Assessment conducted in February 2026 which highlighted that staff were seen as loyal, committed, and integral to the council's culture and delivery model. We are experiencing recruitment challenges in specific sectors, most of which match wider national recruitment issues. We have launched our e-recruitment system and improved the applicant experience, although there have been some challenges and	People Strategy Workforce management data learning management system

automation benefits have not yet been fully realised. We have also developed a work experience policy, an apprentice-first approach and internal work experience options to widen routes into careers with MCC.

We are in the early stages of developing our workforce planning arrangements. We have become a member of workforce planning networks, to learn from others in the development of our practice. We do not yet have all the arrangements in place to facilitate the organisation to plan the workforce it needs to meet current and future demands. This is a commitment made in the People Strategy and also highlighted in the Peer Panel Assessment report.

The development and retention of existing staff is an essential component of workforce planning. We have significantly improved access to learning by launching Thinqi authority-wide and using it to deliver essential learning alongside broader development opportunities. 84% of colleagues said they have access to the training they need, up from 81%. However, response rates for the survey tend to be lower for those who do not have access to a laptop and the next stage is to improve access to training for colleagues who do not regularly use a laptop or PC.

Procurement – Evaluation Score: Level 3 - Adequate

How effective is strategic procurement?	How do we know?
We have a Socially Responsible Procurement Strategy 2023-28 which sets an enabling platform for the development of progressive policies that will achieve greater and more targeted social, economic, environmental and cultural gains through working with our supply chains. In line with this, we have developed a Socially Responsible Procurement Policy in collaboration with Ardal to ensure that Ardal Councils maximise the social, economic, environmental and cultural wellbeing that it delivers through its procurement activity. We have developed training and guidance to ensure officers are supported to deliver the requirements of the strategy and ensure increased compliance. We have delivered training sessions across the council and are developing a procurement intranet site to provide a repository for all necessary procurement routes, forms and guidance. We have also commissioned the development of a 'procurement bot' to assist officers in accessing data and required documentation. Feedback has shown that officers do not always feel supported during the procurement process. Our initiatives aim to reduce strain on officers and increase confidence in their ability to meet the requirements of the strategy. Through the development of the strategy, we have continued our focus on contributing to reducing the carbon emissions produced by the council. We have developed a dashboard to enable teams to identify services with high carbon usage and explore carbon reduction opportunities. We have also developed carbon reduction guidance to support officers in considering carbon emissions as part of their procurement processes. More targeted communications are being developed to increase supplier knowledge, and a communication strategy is being developed to highlight the Local Authority's low-carbon requirements. We are working to increase opportunities for local businesses to bid for work. We have held a 'Meet the Buyer' networking event to increase awareness of procurement opportunities for local suppliers. An additional event will take place in partnership with the Economy, Employment and Skills team through their established Business Forums to promote tender opportunities above the £75k threshold. Whilst a Contract Forward Plan exists, it is recognised that further work needs to be undertaken to ensure it captures future activity more accurately to allow greater dedicated time for suppliers to plan and consult on opportunities. Targeted activities	Socially Responsible Procurement Strategy 2023-27 Socially Responsible Procurement Policy Updated guidance and training Tools developed 'Meet the Buyer' events held

will be undertaken with directorates to raise awareness of the need to ensure that the Contract Forward Plan is kept up to date to ensure adequate support for officers can be put in place, in advance of procurement activities being undertaken.



We have committed to increasing the community benefits and social value delivered by suppliers. A cross-directorate Social Value Delivery Group has been established which meets regularly and includes officers from a range of service areas. It is intended that the Group will raise awareness of the need to include opportunities for the under employed or apprentices within local authority contracts, to increase the community well-being value and benefits of Council procurements to the wider local community. Tailored support will also be provided to contractors and contract managers to assist them to deliver their 'Themes, Outcomes and Measures' commitments to ensure maximum value from local procurement spend.

Ensuring value for money, legal compliance and transparency is key to our work. Ardal Councils Contract Forward Plans have been developed. These will be used to identify opportunities to collaborate to create better economies of scale given the potential aggregate spend across the Ardal Partnerships. The Forward Plans will also be used to identify potential officer support required from the Ardal Category Management teams when significant procurement spend is scheduled. Ardal Category Management Teams will also use the Contract Forward Plan to initiate discussions with directorates to identify efficiencies and opportunities to innovate and review compliance of Contracted Spend vs Non-Contracted Spend. As part of the new legislation a Contract Register must also be published to ensure transparency. Whilst a Contract Register exists it is not as extensive as needed therefore the Strategic Procurement Lead will be working with directorates to increase entries and subsequently visibility of procurement activities.

Further areas for development identified through our 2025/26 self-assessment

Strengthen arrangements that support officers undertaking procurement to meet the ambitions of the Socially Responsible Procurement Strategy

Assets – Evaluation Score: Level 5 - Very Good

How effective is strategic Asset Management?	How do we know?
We have developed an Asset Management Strategy that informs the way decisions and day-to-day management of council land and property is undertaken. It sets five clear objectives for land and property to deliver the council's objectives. It also establishes the supporting policy framework from which the strategy is implemented. The strategy is supported by an Asset Management Plan which identifies the actions to deliver the strategy. Landlord services continue to play a crucial role in supporting services across the organisation to meet their objectives. Work has continued throughout this year to acquire properties to create supported accommodation, particularly for care experienced young people. These developments are enabling us to meet the needs of more vulnerable people in our county and ensure all have access to a safe place to live. We have also undertaken and progressed a range of projects across our school estate, ensuring buildings are safe and fit for purpose. This includes the refurbishment of the former Deri View Primary School which will enable the relocation of Ysgol Gymraeg y Fenni to the site, increasing pupil numbers. Low carbon design principles continue to shape our capital maintenance programme, with a particular focus on the net zero initiative. Decarbonised heating options have been installed in new developments, including the new 3-19 King Henry School and in temporary accommodation developments. Alongside these improvements, Electric Vehicle (EV) charging facilities have been installed at various council locations, including County Hall and Severn View Parc Care Home. These installations have supported the expansion of the public EV network throughout the county.	Asset Management Strategy and Asset Management Plan
How effective is operational Asset Management?	How do we know?
We are undertaking feasibility studies, technical assessments and surveys on property, infrastructure, and assets. These are informing our capital budget planning and maintenance schedules in line with established processes. Decision making on managing our assets needs to be strengthened in line with our Asset Management Strategy. We have a considerable number of maintenance pressures for, including property and highways infrastructure and public rights of way, that sit outside any potential to fund them within the capital medium term financial plan. These carry significant risk. We continued to work across the Council to understand and plan for future accommodation needs, supporting services and ensuring the estate evolves in line with organisational priorities. To underpin stronger, more efficient decision-making, we have procured a new Asset Management System, which will improve the strategic review of property options, identify opportunities to rationalise and optimise space, and strengthen our ability to track life-cycle costs, repairs, and investment needs over time. Whilst good progress has been made to strengthen the enablement role and governance arrangements around Landlord Services and use of council assets, further work will be done to develop individual Service Asset Plans so that more proactive planning on the potential for assets and developing service requirements can be forecast. Service Asset Working Groups will be established for each directorate to inform the development of the capital maintenance budget. We will continue to work with directorates to determine whether the spaces they occupy remain fit for purpose, in the right places, accessible and best meet current and future service needs.	Asset Management Strategy and Asset Management Plan Asset Management System

Digital & Data – Evaluation Score: Level 3 - Adequate

How effective is the development of digital?	How do we know?
We have developed a revised Digital and Data Strategy that sets the direction for the organisation over the next three years We have strong partnership arrangements in place for digital with the Shared Resource Service (SRS). To accelerate our use of digital as means to transform the way we work and deliver our ambitions in the strategy. We have implemented a shared service model for digital and data in collaboration with Torfaen County Borough Council and Blaenau Gwent County Borough Council through an expanded role for the Shared Resource Service. The transfer of our digital team into SRS has been completed. This gives us access to broader digital expertise. As part of this collaboration, we are progressing a partnership-wide approach to AI. We have agreed an AI proposal that will create a secure, shared and well-governed approach to using AI across SRS partners. The initial phase will reduce duplication, strengthen consistency and give staff access to approved tools for tasks such as summarisation, translation, redaction and handling common enquiries. As the use of AI develops, this should help deliver more efficient services, better value for money and improved outcomes for residents. To support this, we are developing an AI Policy to strengthen governance of the use of AI. We also need to ensure there is enough capacity to support implementation. We are strengthening how we priorities digital and data projects based on the outcomes they can achieve and how we subsequently evaluate impact of digital and data, including efficiency and effectiveness. We have established routes for services to advocate, champion and shape the use of digital and data in their areas. These are supporting the council's digital and data activity to become more closely aligned with the Council's priorities, including the For Purpose On Purpose change programme transformation and service improvement priorities. We are developing a benefits and value framework to improve how digital and data projects are identified, prioritised, resourced and evaluated We have established information security and technology arrangements ensuring that information held by the council to ensure that information remains confidential, maintains its integrity and is available to those who need to access it as part of our work. We actively support, advise, and train our workforce. Mandatory training is provided for GDPR and cyber security, alongside comprehensive guidance, and policies for all aspects of data management. We have developed a range of training for officers to improve digital literacy across the organisation. These includes foundational digital skills programme on our corporate training platform. We know that continuous development in digital skills is essential to achieve our ambition. We need to continue to develop digital training resources to allow staff to continue to improve their digital skills.	Digital Service Business Plan Digital and Data Strategy Information security and governance arrangements. Digital, data and technology collaboration Data & AI investment case

How effective is the development of data?	
We have been implementing projects in line with our digital and data strategy that are focused on providing insight using our data to inform our service delivery and policy development. For example, we have improved our Local Info website providing residents with more and easier to access tailored information specific to their property. We have developed the use of geo-spatial data, including automating updates from internal systems and external sources through our Geographical Information Systems (GIS) to inform service delivery. We have run the national resident survey and analysed responses to provide insights into resident views of their local place and council. We have analysed the Welsh Index of Multiple Deprivation 2025 and population projections, helping services and senior leaders better understand changing demographics and deprivation to inform decision making. We have not been able to fulfil all our data ambitions in the year. We need to further harness and connect data as council-wide asset. We have made investments in our data capability and capacity through the SRS collaboration. We have agreed a further business case to generate more advanced insights by developing a modern data platform working with Gwent-wide partners. This will enable previously separate data sets to be ingested, cleansed, matched and visualised. This has the potential to support stronger insight, self-service analytics and, over time, predictive analytics. We also need to improve our data maturity across the organisation. We have begun to develop our training for officers to improve data skills. These include training on the use of business intelligence tools and developed data standards for the organisation. We need to continue to develop training resources to allow staff to continue to improve their data skills.	Performance & Data Insight Service Business Plan Digital and Data Strategy Data & AI investment case

Democracy & Scrutiny – Evaluation Score: Level 4 - Good

How effectively are resources being used?	How do we know?
The use of remote attendance at Council, Cabinet and committee meetings is fully embedded. This brings positive benefits for those with work or family commitments who are able to participate in meetings they would otherwise not be able to attend. Attendance at meetings has remained high. Revisions to the changes of scrutiny committees have reduced duplication, for example budget and performance reports are now presented to Performance and Overview Scrutiny Committee rather than having the same report presented to four separate meetings. There is robust challenge from scrutiny members. The outcomes of scrutiny meetings are clearly captured and shared with cabinet and officers to consider. A forward work planner is used to identify decision making reports due to be considered by Council, Cabinet and Individual Cabinet Member decision. This is also used to inform the work programme of scrutiny committees. The Panel Performance Assessment report notes that the “timeliness of the Cabinet forward plan can hinder scrutiny’s effectiveness”. Work is needed to improve the use of the planner and ensure decision making reports are included on it at the earliest opportunity to support improved democratic work planning. The report also found that “there is a lack of clarity around how members can deploy “deep dive” approaches within task and finish methodologies, suggesting further support and clearer frameworks are needed.”	Attendance Figures Forward work planner
Further areas for development identified through our 2025/26 self-assessment	
Strengthen democratic planning to ensure effective scrutiny and decision making	

Panel Performance Assessment

In February 2026, Monmouthshire County Council underwent its first Panel Performance Assessment under the Local Government and Elections (Wales) Act 2021. The assessment provided an independent peer view of the Council.

The assessment focussed on how well the Council is meeting its performance requirements: exercising its functions effectively, using its resources economically, efficiently and effectively, and maintaining effective governance arrangements. The Panel also considered three locally agreed areas of focus linked to alignment to across directorates to deliver priorities, prevention and person-centred working, and the Council's ability to demonstrate and communicate outcomes from the Community and Corporate Plan.

The Panel's overall conclusion was positive. It described Monmouthshire as:

“An ambitious, well-run Council with communities at its heart and a reach that transcends boundaries.”

This assessment provides valuable external assurance that the Council has important strengths in leadership, partnership working, governance and its commitment to community well-being. It also reinforces the need for continued focus, prioritisation and disciplined delivery if the Council is to turn its ambition into measurable, sustainable outcomes for residents.

We recognise from the Panel's findings that the Council has a strong foundation to build from. Our purpose, set through the Community and Corporate Plan, is well understood and provides a clear framework for improving well-being, reducing inequality and supporting a zero-carbon county. The Panel recognised the Council's ambition, its constructive relationships with partners, and the commitment shown by members, officers, communities and stakeholders.

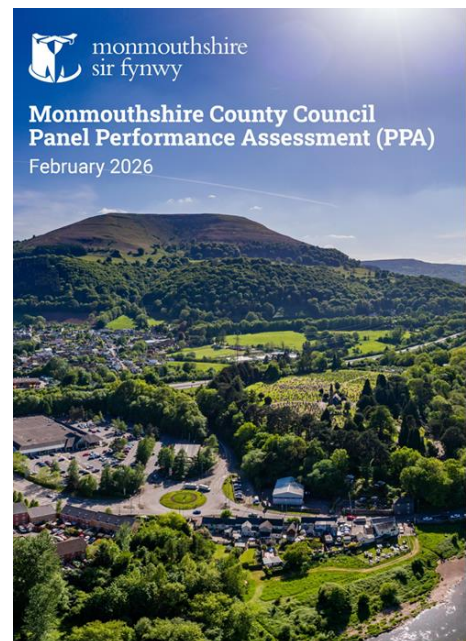
The assessment challenges us to be sharper about how we prioritise, sequence and evidence our work. The Council operates in a demanding financial and service environment, with increasing demand, complex community needs and limited organisational capacity. The Panel's findings therefore reinforce the importance of being more explicit about the major changes that will deliver better outcomes at lower cost, and about how these will be governed, resourced and evaluated.

The Panel made three recommendations:

1. Prioritise major opportunities to deliver better outcomes for residents at lower cost.
2. Strengthen community resilience and shared understanding.
3. Workforce and succession planning

We accepted these recommendations and developed a response to address them. This includes using the Council's change programme For Purpose, on Purpose as the mechanism to prioritise major change opportunities, defining and strengthening an approach to Resilient communities and embedding workforce planning as part of our commitments in the People Strategy.

The full report can be found at: [Monmouthshire-PPA-Report-2026-Final.pdf](https://www.monmouthshire.gov.uk/monmouthshire-ppa-report-2026-final.pdf).



Our work with others

To deliver the outcomes required for the county we need to work together with a range of partners, stakeholders and our communities. The council will not have all the answers to solve the challenges facing the county and we will not be able to deliver the outcomes required on our own. Working collaboratively with others increases the likelihood of us developing effective and sustainable solutions.

Stakeholders and partnership working

How effectively does the council work with stakeholders and partners on agreed outcomes?	How do we know?
Working in partnership is one of the ways we can achieve our objectives while delivering value for money. We enter into collaborative arrangements thoughtfully and with a clear articulation of how they can help us achieve our objectives. Regionally we work with many large organisations in partnership including Welsh Government, Cardiff Capital Region, Regional Partnership Board and the Gwent Public Services Board to fulfil our commitments on, for example, decarbonisation, transport, health and social care, housing and regeneration. An Internal Audit review identified a reasonable level of assurance was in place for the authority's governance arrangements based on a sample of partnerships. The audit identified we need to strengthen our guidance on the arrangements that partnerships need to have in place and assure ourselves these are subsequently adhered to. We have created a partnership toolkit to support lead council officers to develop and capture the arrangements for their partnership. We need to complete its implementation for those partnerships we have identified on our partnership register. Including, applying it to evaluate if the expected outcomes of the partnerships are being realised. The South East Wales Corporate Joint Committee (CJC) has responsibility for preparing Regional Strategic Development Plans, Regional Transport Plans and enhancing or promote the economic well-being of the area. The committee is made up of the leaders of the ten local authorities in South East Wales. All governance papers are published on the Cardiff Capital Region website. The arrangements are overseen by a joint committee comprising representatives from the ten local authorities with additional regulatory activity undertaken by Audit Wales. We extend our reach beyond borders through our work with the Marches Forward Partnership. This brings us together with councils covering Herefordshire, Powys County and Shropshire to reshape the economic landscape of the Marches region by fostering collaboration and innovation. Work is overseen by the Marches Forward Partnerships Board which consists of leaders and chief executives from councils involved. Our recent Panel Performance Assessment recognised Monmouthshire's strong social capital and outward-facing partnership culture. It found that communities, partners, town and community councils and stakeholders are ready and willing to work with the council. The assessment encourages us to channel these strengths more deliberately into co-production and preventative work. It recommended we strengthened shared understanding of community resilience in the Monmouthshire context. The panel found the council works effectively with neighbouring authorities and plays leading roles in key partnerships and is seen as a partner others want to work with. The panel highlighted the that now is the time to build on this investment and begin realising tangible returns, supported by sensitive and valued leadership. Partnerships and collaborations of all scales are important to deliver improved outcomes in the county. We are committed to strengthening our collaboration with community and town councils and lean into the expertise and enthusiasm of the many volunteers and community groups that make this county so special.	Internal Audit review of Partnerships and collaborations Corporate Joint Committee Marches Forward Partnership Panel Performance Assessment

Our Actions

Through the self-assessment, we have identified how well we are doing and what we can do better. Identifying these is not the end of the self-assessment process. We will look to build on and learn from the areas that are going well and address areas that we can do better.

The action plan focuses specifically on what, and how, we can do better for the significant conclusions of the assessment. All of the findings will inform the development of the council's well-being objectives and delivery plans. They will inform how internal processes and procedures should change to support more effective planning, delivery and decision-making to drive better outcomes, and ways to deliver the council's functions. These also integrate with further actions identified in the council's Annual Governance Statement 2025/26 and actions in response to the recommendations in the Panel Performance Assessment completed in 2026.

The actions will be monitored through the year as part of the council's performance management arrangements. The next self-assessment report will also include an assessment of the progress made on these actions.

Progress with 2024/25 Actions

We have provided an update on progress against the actions we identified in the 2024/25 self-assessment report. A more detailed assessment of these arrangements is provided in the relevant section of the report.

Section	What can we do better	How	Progress
Outcomes	Develop more childcare places, including Flying Start and Welsh-medium childcare provision	Implement the action plan as part of Childcare Sufficiency Assessment	We have increased the number of childcare settings. We develop our Flying Start offer based on demand. We aim to ensure that we are able to meet the growing demands of Welsh medium early education in the future.
Outcomes	Understand the reasons for the rise in young people Not in Employment, Education or Training	Implement the NEET Prevention Strategy and targeted support with partners	We continue supporting our young people to access training and employment through delivering our NEET strategy.
Outcomes	Develop the support offer for disadvantaged learners to achieve their potential	Develop a whole authority approach on supporting disadvantaged learners, including working with the EAS	We continue to work with schools and the EAS to support disadvantaged learners.
Enablers	A programme of service change which identifies sustainable ways to deliver services whilst addressing the forecast funding gap.	Develop a programme of change to enable delivery of required savings over the medium term.	We have developed a Whole Authority programme for change - 'For Purpose, On Purpose – F-POP'. Next steps include the development of a pipeline of future change projects, which will include projects informing the Council's medium term financial plan.
Enablers	Strengthen arrangements that support officers undertaking	Develop consistent guidance, training, and support for officers	We have developed and delivered guidance and training to officers across the council, in partnership with Ardal. We are

	procurement to meet the ambitions of the Socially Responsible Procurement Strategy	undertaking procurement	investing in a procurement hub and AI bot to simplify the process for officers. Further work is needed to ensure officers feel supported and confident in the procurement process.
Enablers	Strengthen the capacity and capability to deliver the ambition in the digital and data strategy.	Develop and deliver the action plan in the Digital and Data Strategy	We have continued to deliver the action plan in the digital and data strategy and produced an annual assessment of its progress. We have made further investments in collaborative digital and data capability to deliver our ambitions.
Stakeholder and Partnership	Evaluate if the expected outcomes of partnerships are being realised and impact on delivering the council's objectives.	Implement the partnership toolkit to facilitate lead council officers for identified partnerships to evaluate if the expected outcomes of the partnerships are being realised.	A partnership toolkit has been developed. This provides support for Council lead council officers for identified partnerships to use as part of overseeing arrangements for their partnerships.

New Areas for Development 2025/26: What and how can we do better?

Section	What can we do better	How	Who	When
Outcomes	Work with communities and stakeholders to develop a shared understanding of community resilience.	Actions are identified in response to the Strengthening Community Resilience and Shared Understanding recommendation in the Panel Performance Assessment	Head of Customer, Communication and Engagement	December 2027
Enablers	Strengthen democratic planning to ensure effective scrutiny and decision making	Ensure earlier inclusion of reports in committee, cabinet and council forward planners and improve the coordination between decision making and work programmes.	Chief Officer Law & Governance	March 2027

Actions from Panel Performance Assessment

The Panel Performance Assessment made three recommendations for the Council to address. The actions we have committed to in response are set out below, and we will report on progress in our next self-assessment.

Recommendation	Action	Timescale & Responsibility
Prioritising major opportunities to deliver better outcomes for residents at lower costs.	Establish and maintain a single, live change portfolio within For Purpose, On Purpose (including major opportunities), with clear entry criteria, stage- gates and decision papers routed via the Programme Assurance Board.	Short Term: now – September 2026 Chief Executive – All actions
	Apply the FPOP Benefits and Value Framework to assess investment required, organisational capacity, expected returns (financial and non financial) and delivery confidence; use this to prioritise opportunities and sequence delivery.	Short Term: now – September 2026
	Strengthen programme management discipline through the FPOP Programme Management Office, including consistent templates, reporting, risk management and a portfolio dashboard to support early intervention where delivery is off-track.	Medium Term: October 2026 – March 2027
	Ensure opportunities that require member decisions progress through existing approval routes (Cabinet/Council) with clear business cases and benefits realisation expectations.	Long Term: April 2027 – December 2027
Strengthening Community Resilience and Shared Understanding.	Co-produce a clear, practical definition of Resilient Communities with communities, partners, Town and Community Councils and frontline officers, with equity embedded throughout the process.	Short Term: now – September 2026 Head of Customer, Communication and Engagement – All actions
	Undertake proportionate mapping of existing community assets, networks and activity, focusing on strengths and gaps that matter for prevention. This will include a digital community asset map, supported by local points of contact for residents who are less digitally enabled	Medium Term: October 2026 – March 2027
	Move from broad engagement to targeted action by identifying a small number of priority places and/or themes where strengthening Resilient Communities can deliver the greatest preventative and equity benefit.	Medium Term: October 2026 – March 2027
	Establish a Resilient Communities Network to support alignment, shared learning and reduced duplication across the Council, partners, health, the voluntary sector and Town & Community Councils.	Long Term: April 2027 – December 2027
	Use a proportionate mix of lived experience, qualitative insight and proxy measures to demonstrate progress, reflecting the PPA's expectations for meaningful short and medium term evidence.	Long Term: April 2027 – December 2027
Workforce and Succession Planning	Run a development session for managers on succession planning with the LGA	Short Term: now – September 2026 Chief Officer, People,

Upskill HR Business Partners in strategic workforce planning	Medium Term: October 2026 – March 2027
Produce a workforce development plan to sit underneath the People Strategy to provide clarity on the steps that need to be taken to ensure a future focused workforce	Medium Term: October 2026 – March 2027
Implement the workforce of the future through expanding talent entry points, including work experience, apprenticeships, traineeships and graduate opportunities	Medium Term: October 2026 – March 2027
Develop a training pathway for all job roles to ensure existing staff are developed to maximise their capability	Medium Term: October 2026 – March 2027
Undertake research to understand the future skill requirements across the authority and develop or commission training to future proof our workforce	Medium Term: October 2026 – March 2027



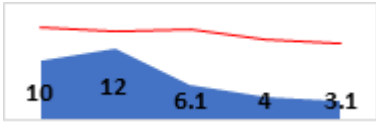
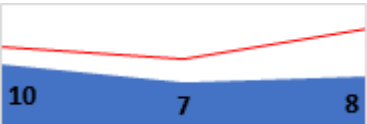
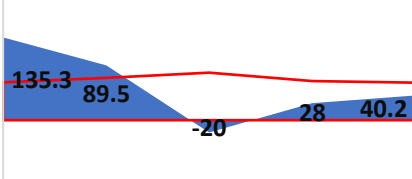
Performance Measures

The use of performance measures is one of the important mechanisms we use to assess our performance. Each of our objectives has specific performance measures set to monitor progress. Some further relevant performance indicators we use to assess our services' performance are set out in this section.

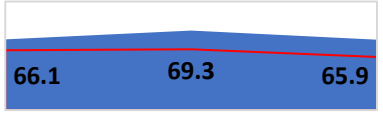
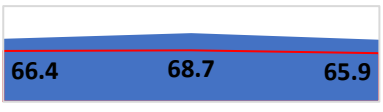
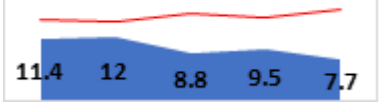
National indicators have been set as part of the Future Generations Act for the purpose of measuring progress towards the achievement of the well-being goals in Wales as a whole. While the national indicators will not measure the performance of individual public bodies or public services boards, it is important that they are considered to track the progress being made to improve well-being in Monmouthshire. Some of the national indicators that are relevant to the objectives we have set, where an update is available at a county level, are included in the table below.

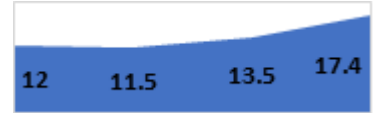
Longer term measures in the Community & Corporate Plan 2022-28

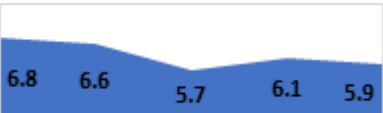
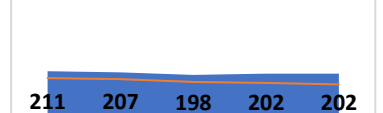
Alongside the specific measures included under each objective the Community and Corporate Plan also includes measures for each objective that we want to track because they will inform our work. We want to see positive movement in these measures, but they are things where our input is only part of a much bigger picture. The latest update of the measures can be seen below. The red comparator line in some graphs seen below displays the Wales average data, where available.

Longer term measures	Trend (Wales trend in red where available)	Latest	Longer term measures	Trend (Wales trend in red where available)	Latest
A Fair Place to Live					
Percentage of people satisfied with their ability to get to/ access the facilities and services they need		86	Gap in healthy life expectancy between most and least deprived areas – male (years)		3.1
Percentage of people living in households in material deprivation		8	Difference in average pay between men and women working in the county (£)		40.2



Longer term measures	Trend (Wales trend in red where available)	Latest
Healthy life expectancy - female (years)		65.9
Healthy life expectancy – male (years)		65.9
Gap in healthy life expectancy between most and least deprived areas - female (years)		7.7

Longer term measures	Trend (Wales trend in red where available)	Latest
Percentage of children living in relative low-income families		17.4
Percentage of residents who feel 'People in my local area get on well and help each other'		79.1
Percentage of residents who feel 'People in my local area pull together to improve the local area'		65.5

A Green Place to Live					
Average carbon emissions per capita in Monmouthshire (tonnes)		5.9	Average annual residual household waste produced per person (kilograms)		202
Number of rail passenger journeys		194,306	Percentage of the Special Area of Conservation river catchment waterbodies that fail the phosphorus targets	Trend data not available	88 for Usk 67 for Wye

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Longer term measures	Trend (Wales trend in red where available)	Latest
Average level of nitrogen dioxide pollution in the air ($\mu\text{g}/\text{m}^3$), measured at Air Quality Management Areas in Monmouthshire		6

Longer term measures	Trend (Wales trend in red where available)	Latest
Percentage of people who agree that their local area has a clean environment		59.5

A Thriving and Ambitious Place					
Percentage of people satisfied with their local area as a place to live		95	Gross disposable household income per head (£)		24,081
Average hourly town centre footfall		288	Percentage unemployed i) females ii) males	Data not available	Data not available
Percentage of vacant town centre premises		10.9	Percentage employed – female		75.3
Annual economic impact of tourism (£)		329.8	Percentage employed – male		83.6
Number of tourists visiting the county (million)		2.29	Percentage of council expenditure spent in local supply chain through public sector contracts	Data not yet available	Data not yet available

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Longer term measures	Trend (Wales trend in red where available)	Latest
Percentage of people who attend or participate in arts, culture or heritage activities three or more times a year	85 76 79	79
Percentage of adults with qualifications at different levels of the national qualification framework	Update in learning place below	

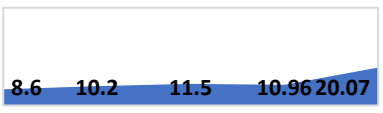
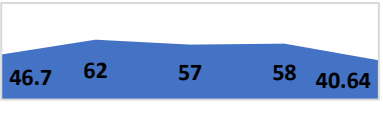
Longer term measures	Trend (Wales trend in red where available)	Latest
Percentage increase in active travel route usage	New measure – trend data not yet available	4.1

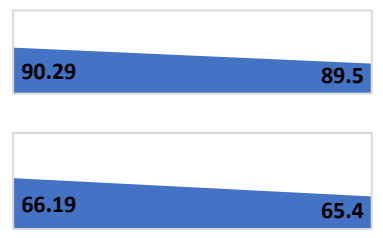
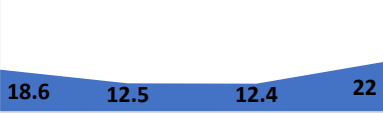
A Safe Place to Live					
Median house prices compared to median workplace-based earnings	10.26 9.96 9.41 8.57 7.98	7.98	Number of recorded crimes - sexual offences	205 200 236	236
Percentage of all homes in the county with an energy efficiency rating of 'C' or above	43.4 49.2 50.45	50.45	Number of recorded crimes - public order offences	972 722 768	768
Average weekly rent for social housing in Monmouthshire	94.8 98.53 101.74 109.38 116.87	116.87	Rate of anti-social behaviour incidents per 1,000 population	13.89 10.56 13.1 13.04 13	13

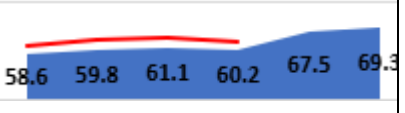
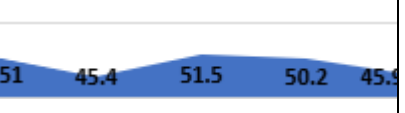
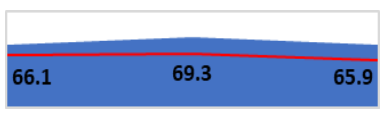
Monmouthshire County Council Self-Assessment 2025-26



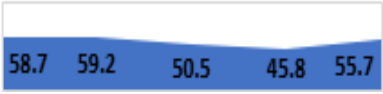
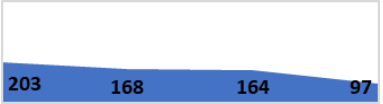
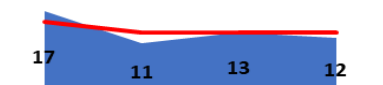
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Longer term measures	Trend (Wales trend in red where available)	Latest
Average time (months) homeless households spend in Band 1 with a homeless duty before moving on to settled/permanent accommodation		20.07
Percentage of social housing allocated to homeless households		40.64
Number of overall crimes recorded		6152

Longer term measures	Trend (Wales trend in red where available)	Latest
Percentage of residents who feel safe when outside in their local area during the i) day ii) night		i) 89.5 ii) 65.4
Percentage of those referred to the youth offending service who subsequently re-offend		22
Number of recorded crimes - sexual offences		236

A Connected Place					
Percentage of children supported to remain living with their family (not including children looked after)		69.3	Percentage of adults with two or more healthy lifestyle behaviours	Trend data not available	93
Percentage of adult service users who feel part of their community		45.9	Healthy life expectancy at birth (women)		65.9



Longer term measures	Trend (Wales trend in red where available)	Latest												
Percentage of children looked after supported to remain in Monmouthshire	 <table border="1"><thead><tr><th>Year</th><th>Value</th></tr></thead><tbody><tr><td>2017</td><td>58.7</td></tr><tr><td>2018</td><td>59.2</td></tr><tr><td>2019</td><td>50.5</td></tr><tr><td>2020</td><td>45.8</td></tr><tr><td>2021</td><td>55.7</td></tr></tbody></table>	Year	Value	2017	58.7	2018	59.2	2019	50.5	2020	45.8	2021	55.7	55.7
Year	Value													
2017	58.7													
2018	59.2													
2019	50.5													
2020	45.8													
2021	55.7													
Number of carers and young carers supported by the carers team	 <table border="1"><thead><tr><th>Year</th><th>Value</th></tr></thead><tbody><tr><td>2017</td><td>203</td></tr><tr><td>2018</td><td>168</td></tr><tr><td>2019</td><td>164</td></tr><tr><td>2020</td><td>97</td></tr></tbody></table>	Year	Value	2017	203	2018	168	2019	164	2020	97	97		
Year	Value													
2017	203													
2018	168													
2019	164													
2020	97													
Percentage of people who are lonely	 <table border="1"><thead><tr><th>Year</th><th>Value</th></tr></thead><tbody><tr><td>2017</td><td>17</td></tr><tr><td>2018</td><td>11</td></tr><tr><td>2019</td><td>13</td></tr><tr><td>2020</td><td>12</td></tr></tbody></table>	Year	Value	2017	17	2018	11	2019	13	2020	12	12		
Year	Value													
2017	17													
2018	11													
2019	13													
2020	12													

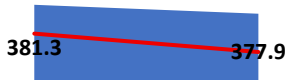
Longer term measures	Trend (Wales trend in red where available)	Latest								
Healthy life expectancy at birth (men)	<table><tr><th>Measure</th><th>Value</th></tr><tr><td>Healthy life expectancy at birth (men)</td><td>65.9</td></tr><tr><td>Wales trend</td><td>68.7</td></tr><tr><td>Previous value</td><td>66.4</td></tr></table>	Measure	Value	Healthy life expectancy at birth (men)	65.9	Wales trend	68.7	Previous value	66.4	65.9
Measure	Value									
Healthy life expectancy at birth (men)	65.9									
Wales trend	68.7									
Previous value	66.4									
Percentage of people who agree 'People in my local area get on well and help each other'	<table><tr><th>Measure</th><th>Value</th></tr><tr><td>Percentage of people who agree 'People in my local area get on well and help each other'</td><td>79.1</td></tr><tr><td>Wales trend</td><td>78.05</td></tr></table>	Measure	Value	Percentage of people who agree 'People in my local area get on well and help each other'	79.1	Wales trend	78.05	79.1		
Measure	Value									
Percentage of people who agree 'People in my local area get on well and help each other'	79.1									
Wales trend	78.05									

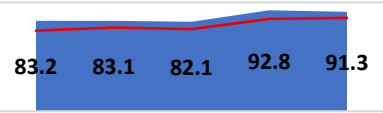
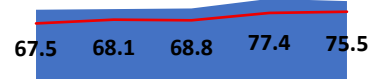
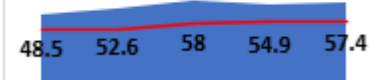
A Learning Place																									
Number of upheld permanent exclusions across primary and secondary schools	(this decline is a result of the introduction of an inclusion panel to manage and mitigate exclusions and identify appropriate alternatives) <table><tr><th>Year</th><th>Value</th></tr><tr><td>2017</td><td>10</td></tr><tr><td>2018</td><td>22</td></tr><tr><td>2019</td><td>0</td></tr></table>	Year	Value	2017	10	2018	22	2019	0	0	Capped 9 Point Score - eFSM	<table><tr><th>Year</th><th>Value</th></tr><tr><td>2017</td><td>304.7</td></tr><tr><td>2020</td><td>304.7</td></tr></table>	Year	Value	2017	304.7	2020	304.7	304.7						
Year	Value																								
2017	10																								
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Year	Value																								
2017	304.7																								
2020	304.7																								
Rate of permanent exclusions across primary and secondary schools	(this decline is a result of the introduction of an inclusion panel to manage and mitigate exclusions and identify appropriate alternatives) <table><tr><th>Year</th><th>Value</th></tr><tr><td>2017</td><td>1.07</td></tr><tr><td>2018</td><td>2.34</td></tr><tr><td>2019</td><td>0</td></tr></table>	Year	Value	2017	1.07	2018	2.34	2019	0	0	Percentage of adults with qualifications at different levels of the national qualification framework i) no qualifications	<table><tr><th>Year</th><th>Value</th></tr><tr><td>2017</td><td>3.9</td></tr><tr><td>2018</td><td>3.1</td></tr><tr><td>2019</td><td>3.9</td></tr><tr><td>2020</td><td>4.6</td></tr><tr><td>2021</td><td>4.1</td></tr></table>	Year	Value	2017	3.9	2018	3.1	2019	3.9	2020	4.6	2021	4.1	4.1
Year	Value																								
2017	1.07																								
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2020	4.6																								
2021	4.1																								

Monmouthshire County Council Self-Assessment 2025-26



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Longer term measures	Trend (Wales trend in red where available)	Latest
Rate of fixed term exclusions 5 days or less: i) primary ii) secondary More than 5 days: iii) primary iv) secondary	Trend data not yet available	i)29.1 ii)394.0 iii)1.1 iv)9.0
Capped 9 Point Score – All pupils		369.8
Capped 9 Point Score - Females		377.9
Capped 9 Point Score - Males		362.2

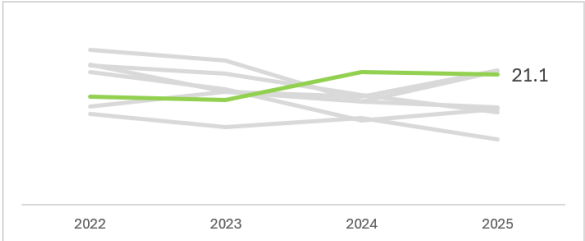
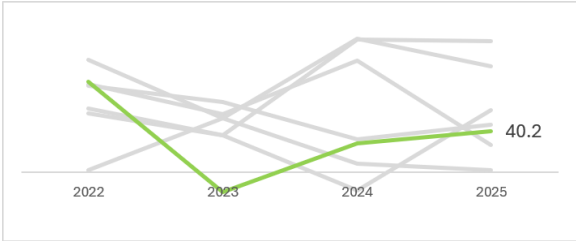
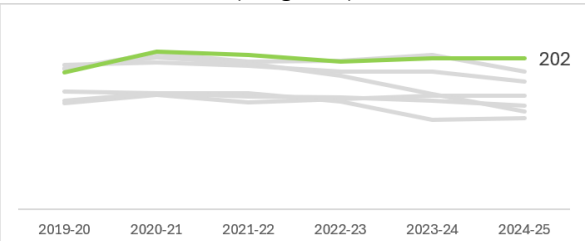
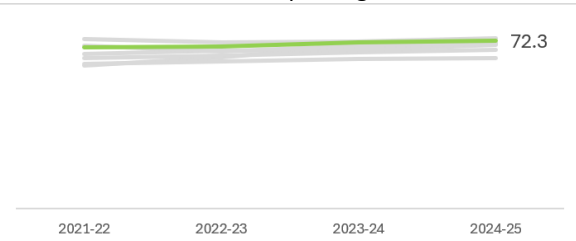
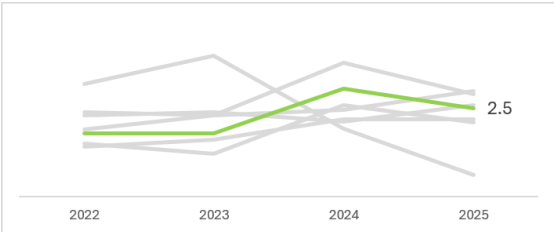
Longer term measures	Trend (Wales trend in red where available)	Latest
Percentage of adults with qualifications at different levels of the national qualification framework ii) qualified to level 2 or above		91.3
Percentage of adults with qualifications at different levels of the national qualification framework iii) qualified to level 3 or above		75.5
Percentage of adults with qualifications at different levels of the national qualification framework iv) qualified to level 4 or above		57.4
Percentage of learners studying for an assessed qualification in Welsh as a subject	Trend data not yet available	93.3%



Performance comparable with other areas

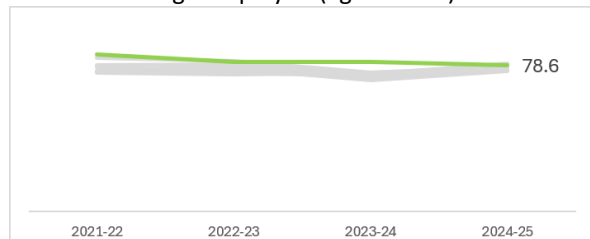
When assessing performance, it is essential to ensure wider context and relative performance is considered to offer a well-rounded evaluation.

Through our self-assessment we have assessed our progress using both local and national metrics. Some of these national metrics are comparable with other local authorities across Wales. The table below provides an overview of how we are performing against some of our ‘nearest neighbours’. These ‘neighbours’ are those authorities with which we share a wide range of similar characteristics, for example rurality, population demographics, and local economic factors. These may not always correlate with nearest geographic neighbours. The selection of nearest neighbours is based on ONS analysis which assesses a range of data and evidence to ensure a meaningful comparison.

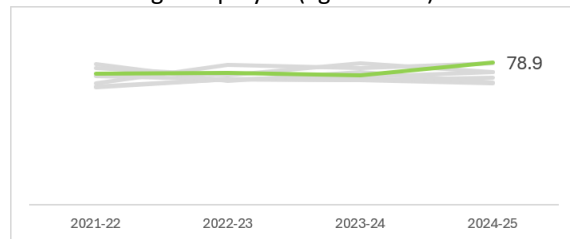
Objective: A Fair Place to Live	
Percentage of people who say they can speak Welsh	Difference in average pay between men and women working in the county (£)
	
Objective: A Green Place to Live	
Annual residual household waste produced per person (kilograms)	Percentage of municipal waste sent for recycling, reuse or composting
	
Objective: A Thriving and Ambitious Place	
Percentage of school leavers known not to be in Education, Employment or Training (NEET)	
	



Percentage employed (aged 16-64) - Male

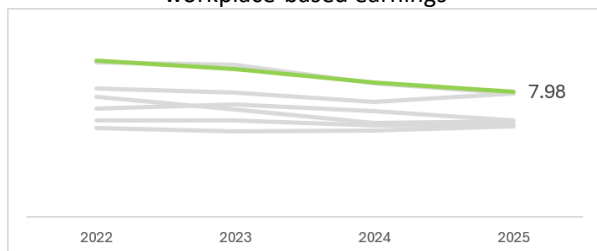


Percentage employed (aged 16-64) - Female

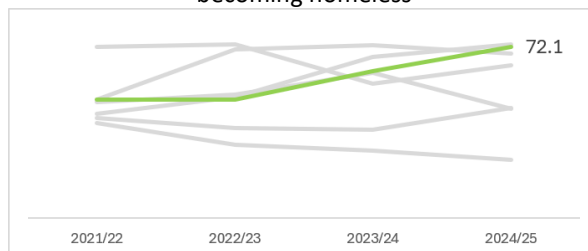


Objective: A Safe Place to Live

Ratio of median house prices compared to median workplace-based earnings

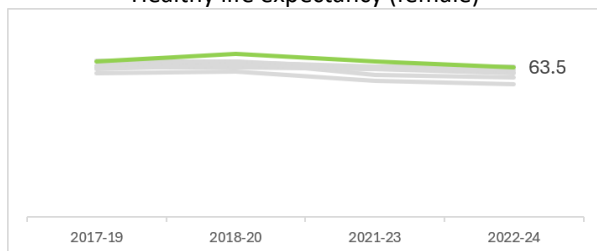


Percentage of households successfully prevented from becoming homeless

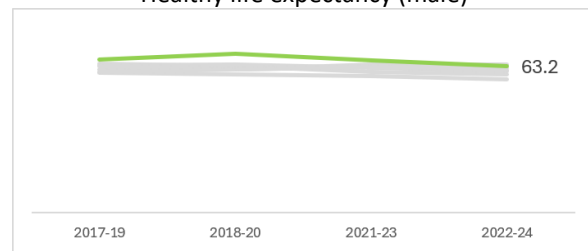


A Connected Place Where People Care

Healthy life expectancy (female)

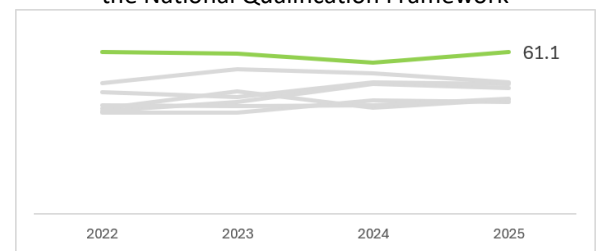


Healthy life expectancy (male)



A Learning Place

Percentage of adults qualified to level 4 or above of the National Qualification Framework

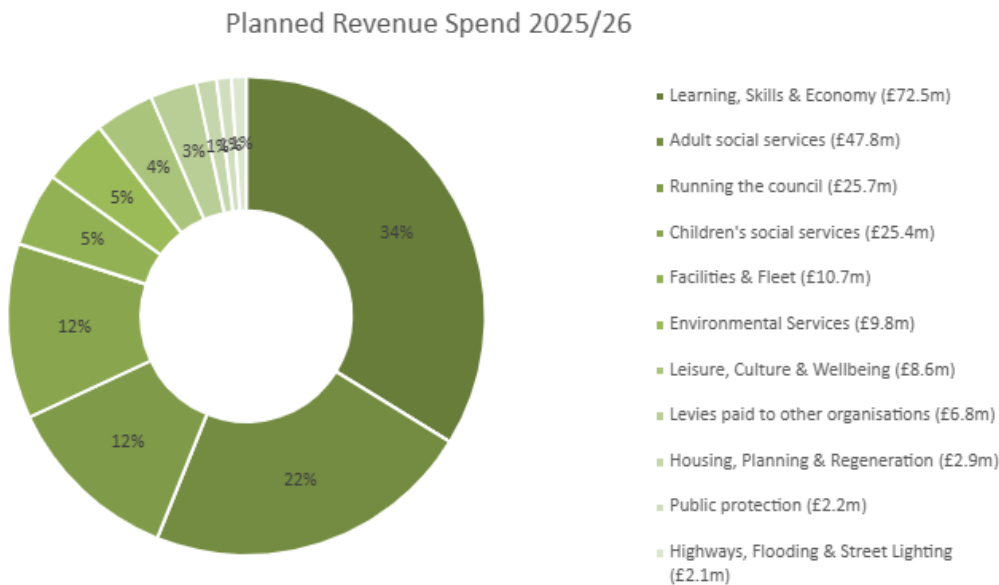




What we spent in 2025/26

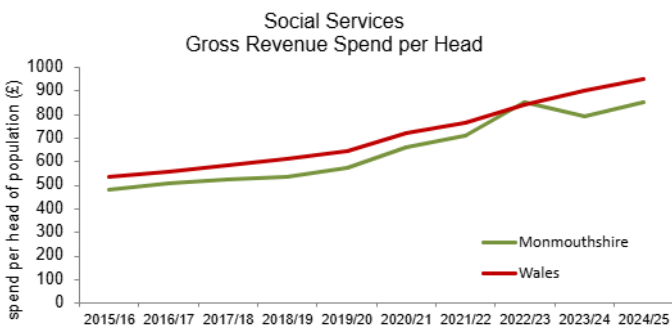
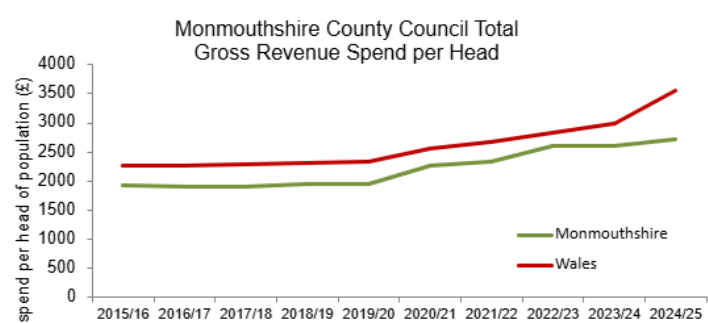
In 2025/26, the council’s planned spend was £214.5 million to provide services for Monmouthshire residents.

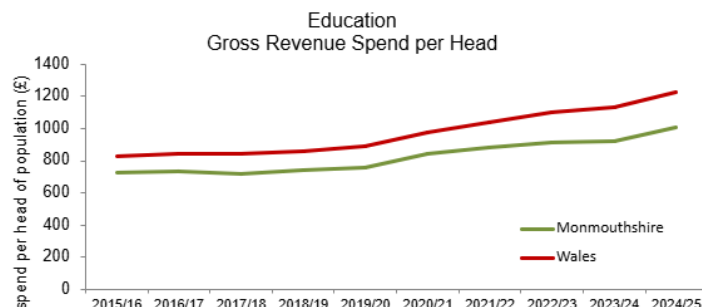
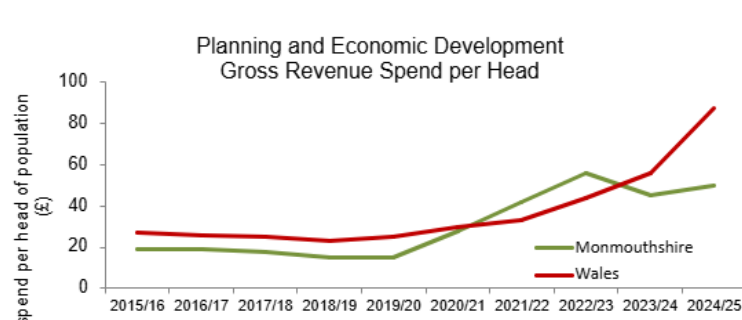
The proportion of our spending on different services in 2025/26 is shown in the diagram. These services are paid for by a combination of central government grants, council tax and non-domestic rates. Council tax is also used to fund the services of the Police and crime commissioner for Gwent and Community Councils.



How our revenue spend compares with other areas

The graphs below show how much we spend per head of population in some of our priority areas. In 2024/25, the latest year comparative data is available, we had the lowest gross revenue spend per head of all councils in Wales. We spend less than the Wales average on education services, social services and planning and economic development. We have continued to work hard to make sure this money goes where it matters. For 2024/25 we received an increase in core funding; however, our budget settlement from the Welsh Government was the lowest per head of population of councils in Wales.





What citizens said

Involvement and working together with residents and communities in Monmouthshire is essential to develop and deliver solutions to achieve outcomes and ensure residents are involved in the decisions that affect them.

Through our self-assessment we have used the views of service users and residents to inform our assessment. Some of the specific engagement exercises we have undertaken to involve citizens this year include:

Budget engagement: Monmouthshire County Council launched its draft budget proposals for 2026-2027 in January 2026. Communities were invited to share their views on these possible changes in an open consultation process. A range of information on the proposals and their potential impacts was shared. Face-to-face budget consultation events took place, as well as online budget sessions. For those unable to join the livestream, the session was uploaded to the website to watch after the event. As part of the consultation process, residents were also asked to share their thoughts via a feedback survey on the budget proposals, which were shared across our social media platforms. The feedback received informed the development of our final budget proposals.



Cultural Strategy: We have worked in partnership with our creative sector to develop a Cultural Strategy for the county. This strategy sets out how we will work with creative groups, communities and individuals across the county to celebrate and champion our culture. Through the strategy we will work to create more opportunities and link with the economic sector to ensure the creative sector can thrive. We held a consultation of our draft strategy between October and December 2025 to ensure residents views were captured and considered in the development of the final strategy.

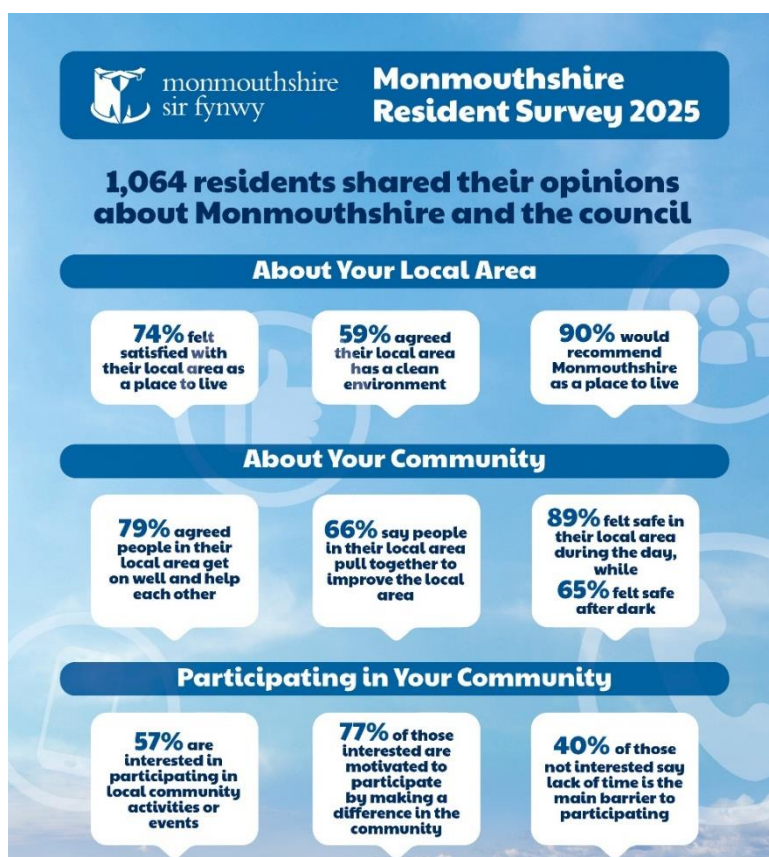
Customer Complaints and Compliments: We monitor and learn from feedback received from customers. These are reported to the Governance and Audit Committee. Issues included the length of time we can take to respond to people. Not only is it important to deal with complaints effectively, investigating and



putting things right for the complainant where necessary, it is also vital to learn from them to minimise the chances of the same problem occurring twice. Nineteen complaints about Monmouthshire County Council were received by Public Service Ombudsman for Wales in 2024-25, the last year for which data is available, a decrease from twenty-nine during 2023-24. Monmouthshire is below the average levels of complaints reported to the Ombudsman at 0.30 per 1,000 residents. This ranges from 0.22 to 1.08 with an average of 0.45.

National Residents Survey: During the Autumn of 2025, we conducted a resident survey on everyday life in Monmouthshire. Hosted by Data Cymru, the survey was part of their National Residents Survey, designed to support local councils in increasing their understanding of performance and perception. Residents were asked about their experiences in the local area, their views on the council's services, and how we, as a council, can improve things. Thanks to the engagement from residents, we received 1,064 responses. We have analysed the survey results to understand what respondents said about their local area, the council and their interactions with the council. The evidence from the survey provides us with a fuller picture of how people feel in the county and the valuable feedback will help inform our services. The full results are available on <https://www.letstalkmonmouthshire.co.uk/resident-survey-2025>. The survey is one mechanism to help us understand residents' views, alongside a range of feedback collected across services, which will provide a more detailed understanding of the council's services.

Respondents were asked questions about their local area, some of the key results are shown in the graphic below:



The responses show that residents continue to be satisfied with their local area as a place to live, assist each other in their communities and support their local place in Monmouthshire. We know this isn't always the case for everyone, and we remain focused on our objective in the council's Community and Corporate Plan to make Monmouthshire a Fair Place to live where the effects of inequality and poverty have been reduced.

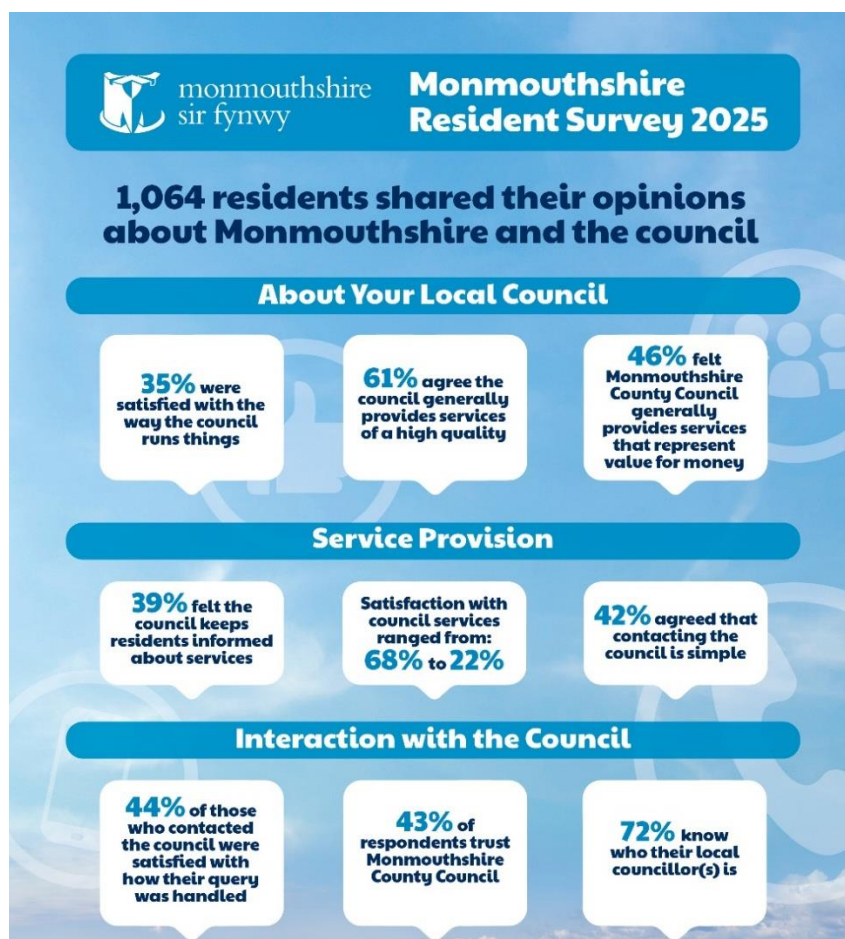


Overall, a significant majority of respondents felt safe in the day, with most feeling safe at night, although fewer than in the day. Feelings of safety continued to vary by age and place. We are focused on delivering our objective for Monmouthshire to be a safe place to live where people have a home and community where they feel secure.

Younger respondents to the survey reported lower levels of satisfaction with Monmouthshire as a place to live. The council's Replacement Local Development Plan (RLDP) identifies this as one of its key issues, ensuring our communities are socially and economically sustainable by providing accessible places to live and work and a choice and range of homes to retain and attract younger people and rebalance our ageing demography. We have made progress with agreeing the plan, the RLDP was approved by council in October 2025 and will be sent to Welsh Government for public examination. The response rate to the survey was also lower in the younger age groups. We continue to focus on strengthening our engagement with young people.

Respondents also expressed an interest in participating in their local community. We recognise the vital role that residents play in their local community. We are committed to working with and alongside our communities, so citizens are able to participate in council and community decision-making and take actions which enable them to shape their own futures.

We asked questions about the council to understand people's views on local service delivery, interaction with the council and democratic representation. Key results about the council are shown below:



Overall, fewer than half of the respondents were satisfied with how the council operates, its communication methods, their access to information and the level of trust they felt toward the council.



The council's core values are Teamwork, Openness, Fairness, Flexibility, and Kindness. We are dedicated to upholding these values in the delivery of our services, and the survey responses highlight the importance of consistently reflecting these principles in all the council's activities.

We have launched 'Let's Talk Monmouthshire' as a platform for consultations and engagement. This aims to provide greater clarity of information for residents and a single place to visit for online consultations right across the council to ensure residents do not miss the opportunity to engage. Let's Talk Monmouthshire has also been created to ensure that in-person events are easily identified as opportunities for people to discuss and share opinions on council consultations and surveys.

More than half of respondents felt the council provides high-quality services overall. Satisfaction varied by services, from higher levels in waste management to lower levels in other service areas. Respondents reported generally higher satisfaction levels with their experience of specific council processes, such as making payments and requests.

The council's Community and Corporate Plan sets the objectives we are trying to achieve to deliver our outcomes for the county and improve services. We have a framework to review the performance of all our services. We continue to strengthen how we use residents and services users' views when assessing our performance. Service areas will use the responses from this survey to inform their planning and evaluate their performance against the objectives we have set in the plan.

Staff engagement

As part of our process to collate the self-assessment, we held directorate and enabling-service workshops to provide an opportunity for staff to directly feed into the self-assessment via identification of their own strengths and areas for development. Workshop attendees were presented with evidence packs, collated from existing information sources such as scrutiny reports, external regulator feedback, and service business plans, and were facilitated to self-assess their performance. A range of evidence was gathered from the workshops, both in terms of successes and areas for development associated with our strategic goals and our enabling functions, but also on how to strengthen the self-assessment process.

We have also used evidence gathered from a range of staff events and groups. These include the relaunched People Leaders Workshops and team Q&A sessions which are held face-to-face in peoples' workplaces. We also completed a new staff survey to enable us to understand how connected people feel to the organisation. The use of these sessions, networks, digital communication, surveys and feedback loops to senior managers, has extended the reach of contact with the workforce.

Businesses

We have continued to engage with businesses through our new customer relationship management system which acts as a database of Monmouthshire businesses and a tool to promote the advice and guidance services that we can provide to pre-starts and existing businesses. Our Economy, Employment and Skills team continue to improve our links with businesses and have helped to improve feedback loops with businesses to ensure we are capitalising on the conversations that are taking place and can improve our service as a result. We have re-established our Business Forum which is enabling us to expand our networks and strengthen relationships and feedback loops with local businesses. This feedback will continue to inform our self-assessment.

Trade Unions

We engage well with Trade Unions to achieve our outcomes. We have briefed them on the process we undertake to complete our self-assessment and shared our initial findings with them as part of our self-assessment process. We have developed a Social Partnership Duty Report 2025, setting out how we will build on existing practice, and work collaboratively with trade unions, in line with the requirements of the Social Partnership and Public Procurement (Wales) Act 2023.



What Regulators and Inspectors Said

We work closely with our regulators and inspectors to quality-assure our activities as this is vital to ensuring improvement. Their feedback is valued, and we use their assessments to help us focus on the things we need to improve across the council.

Each year, Audit Wales publishes an Audit Plan setting out the work they plan to undertake at the council. As part of the plan, they have undertaken a range of audits during the year. These included:

- Counter-fraud Arrangements: The report found that the council fosters an anti-fraud culture and is actively strengthening its approach to training, however recognises there are further steps that it can take. The council does not currently maximise its use of data analytics and could strengthen its intelligence sharing arrangements.
- Arrangements for commissioning services: The report found that the Council does not have consistent arrangements in place across the organisation to secure value for money. Though individual services exhibit positive action, a whole authority approach is needed to ensure consistency.
- Implementing Audit Wales recommendations to improve the council's digital approach: The report found that the Council has made good progress in addressing the digital strategy recommendations and its longstanding arrangements support oversight of external audit recommendations. Audit Wales provided no recommendations for improvement.
- Assurance and Risk Assessment work in the council during 2025/26. This reviewed the arrangements the council has put in place to secure value for money in the use of its resources in line with the Auditor General's duties. The assessment is also used to inform our work planning for future years.

We have developed responses to the recommendations in these reports and the progress in delivering these is regularly reported to the council's Governance & Audit Committee. Reports produced by Audit Wales are available to download on their website (www.audit.wales/publications). This includes local government national reports.

We underwent an Estyn Inspection into Local Government Education Services in November 2025. The inspection highlighted a coherent and strategically led approach to improving outcomes for children and young people. The inspection recognised improvements made in the authority's approach to meeting additional learning needs and fostering an inclusive environment, paired with strong partnership working which allows barriers to improvement to be addressed promptly. It also identified areas requiring further development, including ensuring consistency in evaluation processes to evaluate the impact of local authority work more effectively and improving attendance in schools, particularly for secondary-age pupils. Progress in addressing the three recommendations will be monitored within the Children, Learning, Skills and Economy's Strategic Director Report. The full Estyn report, and other Estyn reports related to Monmouthshire and schools in the county, can be found on www.estyn.gov.wales.

Care Inspectorate Wales carried out an improvement check of Monmouthshire County Council's adult services in April 2025, following up on their Performance Evaluation Inspection (PEI) conducted in July 2022. The inspection assessed the progress made in addressing previously identified areas for improvement. The review found key strengths in our establishment of a place-based approach and implementation of the commissioning strategy, the improved availability of domiciliary care and development of reablement approaches reducing or mitigating the need for ongoing support. Areas requiring further development identified include the need for improvement in risk identification, staff engagement and communication and support for carers. We have developed a response to address the areas for improvement identified.

The full inspection report, and other inspection reports about Monmouthshire social services by Care Inspectorate Wales (CIW), can be found on www.careinspectorate.wales.



Equality and Diversity

The council has a long-standing commitment to equality and diversity. Our fourth Strategic Equality Plan, produced under the Equality Act 2010 sets the council's objectives to ensure we deliver better outcomes for people with protected characteristics. This is clearly aligned with the evidence provided by the Well-being Assessment, and evidence provided by the Equality and Human Rights Commission's report "Is Wales Fairer 2023".

As well as this, it is important to us as it is the right thing to do. We produce annual monitoring reports that provide updates on progress on the action plan in the Strategic Equality Plan and evidence good practice being carried out across the council departments. These can be found [here](#).

The Welsh Language

The Welsh language is central to the goals introduced as part of the Well-being of Future Generations Act, particularly for our contribution to a Wales of vibrant culture and thriving Welsh language. It also makes an important contribution to the Welsh Government goal of having a million Welsh speakers by 2050.

The Welsh Language (Wales) Measure 2011, and accompanying Welsh Language standards, place a legal duty on councils to treat Welsh and English equally, to promote the Welsh Language and provide services to the public through the medium of Welsh. There are 176 standards that apply to the council. This is a significant challenge, but systems have been put in place to comply with these. We have a Welsh Language Strategy for 2022-2027, which identifies a vision of how the language will look in Monmouthshire in five years and is accompanied by targets to help achieve it. We produce annual monitoring reports that assesses our progress against our Welsh language commitments under the Welsh Language (Wales) Measure 2011 and the Welsh Language Standards. These can be found [here](#).

Armed Forces

We have taken the [Armed Forces Community Covenant pledge](#) to encourage support for the Armed Forces community working and residing in Monmouthshire and to recognise and remember the sacrifices made by members of this Armed Forces community, particularly those who have given the most. This includes in-Service and ex-Service personnel, their families and widow(er)s throughout Monmouthshire. We are committed to working with charities, local businesses, communities and individuals to ensure service personnel and their families, as well as reservists and veterans, are supported.

We have established a Monmouthshire Armed Forces Group to ensure the needs of the Armed Forces Community are built into relevant policies, strategies and day-to-day service delivery in a consistent and practical way.



Appendix 1 – Self-assessment process

Legislation

The Local Government and Elections (Wales) Act 2021 provides the legislative framework for local government elections, democracy, governance and performance. The Act requires each council in Wales to keep under review the extent to which it is meeting the ‘performance requirements’, that is the extent to which it is exercising its functions effectively; it is using its resources economically, efficiently and effectively; its governance is effective for securing these.

The performance and governance provisions in the Act are framed within the context of the well-being duty in the Well-being of Future Generations (Wales) Act 2015, which sets out a legally binding common purpose for public bodies to improve the social, economic, environmental and cultural well-being of Wales.

Each year councils must publish a report setting out the conclusions of the self-assessment once every financial year. Self-assessment is complemented by a panel performance assessment once in an electoral cycle, providing an opportunity to seek external insights (other than from auditors, regulators or inspectors) on how the council is meeting the performance requirements.

Why?

Self-assessment is a way of evaluating, critically and honestly, the current position to make decisions on how to secure improvement for the future. It is about the council being self-aware, understanding whether it is delivering the right outcomes, and challenging itself to continuously improve. It needs to be embedded as effective self-assessment helps the council to continually learn and achieve sustainable improvement and better outcomes for citizens, service users and its own workforce.

The WLGA have identified draft principles for self-assessment for councils to ensure that they have arrangements in place that:

- demonstrate self-awareness derived from evidence-based analysis that focuses on outcomes;
- are owned and led at a strategic level and are not an exercise in compliance;
- further develop a culture of challenge to facilitate improvement as part of an ongoing process;
- are integrated as part of the council’s corporate planning, performance and governance processes; and
- enable an organisation-wide assessment rather than an assessment of individual services.

Further developing this culture and embedding an evaluative mindset will be a key development point through the continued production of the self- assessment report.

Process

The council has developed a process to undertake its self-assessment under the Act, assessing performance in the 2025/26 financial year. The main component parts of the process and timeline are:

April - May	May - June	June	July – August	September
Desk-based evidence gathering	Directorate self-assessment Workshops	Draft self-assessment report produced and objectives presented to Performance and Overview Scrutiny Committee	Refinement of report and consultation with stakeholders through the Let’s Talk Forum	Draft report to Governance and Audit Committee and Self-assessment agreed in line with council process



This timeline ensures that the self-assessment can inform and be informed by the policy direction of the council and how it uses its resources efficiently and effectively, particularly the budget setting process.

Evaluative evidence to inform the assessment has been compiled at a directorate level. Most of the evidence has been collated by using intelligence already held corporately in an insightful way; this includes, for example, the Annual Governance Statement, audit and inspection reports, and service level business plans.



The evidence gathered has been explored further, and challenged where necessary, at directorate and enabling function based self-assessment workshops, to determine if the objectives (outcomes) of the council are being achieved.

Self-assessment workshops

Directorate workshops	Enabling functions workshops
Learning, Skills & Economy	People
Social Care & Health	Asset Management
Place	Finance
Infrastructure	Procurement
Customer, Culture & Well-being	Digital & Data

The workshops were facilitated through the following questions:

- How well are we achieving our agreed outcomes? (Community & Corporate Plan objectives)
- How do we know? (Evidence)
- How effectively are resources being used to deliver our priorities? (Enablers)
- How effectively does the council work with stakeholders and partners on agreed outcomes? (Partnership working)
- What could we do better? (Actions – including a review of actions from the previous report)

The full evidence and conclusions from workshops have been collated and will be used by directorates and enabling functions to inform their services business plans.



Following the workshops, the evidence has been reviewed, further challenged, and collated into a corporate level evaluative self-assessment. This has been integrated with the council's requirement to report on the progress it has made in meeting its well-being objectives for the preceding financial year (2025/26) under the Well-being of Future Generations Act.

The report is structured under these headings:

- Understanding our local place
- Outcomes (progress against our objectives):
 - How well are we achieving our agreed outcomes?
 - How do we know?
 - Areas for development
- Enabling functions
 - Corporate planning, performance and risk management
 - Financial planning
 - Workforce planning
 - Procurement
 - Assets
 - Digital & Data
 - Democracy & Scrutiny
- Our work with partners
- Our Actions (including progress against previous actions)

The self-assessment report will be scrutinised by the council's Performance and Overview Scrutiny Committee. A draft of the self-assessment report will be made available to Governance and Audit Committee to review the draft report in line with the requirements of the legislation. The self-assessment will be presented for approval at a meeting of full Council.



Objective template explained

Appendix 2

Evaluation Score: This provides our assessment of performance against the objective using the evaluation scoring mechanism	
Why we focused on this?	
Why we are focussing on this objective to improve well-being in Monmouthshire.	
How well are we achieving our agreed outcomes?	How do we know?
Row 1 - This sets 'What we want to achieve' from the Community & Corporate Plan 2022-28	
Column 1 - This provides the self-assessment of our performance during 2025/26 based on 'what we want to achieve'	Column 2 - The evidence sources we have used to inform our assessment.
Further areas for development identified through our 2025/26 self-assessment	
These are specific conclusions from the self-assessment that inform our action plan.	

Well-being of Future Generations Act impact				
This provides an explanation of how our activity contributes to the Well-being of Future Generations Act well-being goals and ways of working. It also identifies the council's well-being objective(s) that were set as part of the Community and Corporate Plan in April 2023.				
Measures of progress				
Measure	Previous	Latest	Target for 2025/26	Comment
This provides an update using the measurement framework of the Community and Corporate Plan.	Previous data is 24/25 unless otherwise stated	Latest data is 25/26 unless otherwise stated	This is the target we set for 25/26	Any further explanation on the performance measure

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Monmouthshire County Council Self-Assessment Summary 2025-26

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monmouthshire
sir fynwy



Summary

We want to be a zero-carbon county, supporting well-being, health and dignity for everyone at every stage of life. We are committed to working with, and alongside, our communities to achieve this. This is the clear purpose established by our Community and Corporate Plan. The annual self-assessment is one of the ways we report on progress and identify where we need to make further improvements. Importantly it allows us to be held to account by elected councillors and local people.

Local authorities deliver a wide range of services. This evaluation cannot cover every one of them. Instead, we have focused on the six objectives in our plan. Beyond the detail you see here, we have scrutiny committees, business plans and performance measures in place. These allow us to be held accountable for all aspects of our work. We also rely on the work of our internal audit team, peer assessment process and external regulators such as Audit Wales, Estyn and the Care Inspectorate Wales to provide an independent lens.

During the year we underwent a Panel Performance Assessment process. The assessment provided an independent peer view of the Council. The Panel's overall conclusion described Monmouthshire

as: An ambitious, well-run Council with communities at its heart and a reach that reach that transcends boundaries. The process provided areas of assurance and recommendations for areas of development that we are responding to.

This is a summary of a fuller self-assessment which is available on our website. The assessment also evaluates the effectiveness of the things that are not always visible to residents. These include financial management, use of assets, procurement and HR. Looking at these helps us identify areas for development for the years ahead. You can find these towards the end of this summary.

Our objectives



How well do we understand our local context and place?

Monmouthshire is a great place to live, work and visit. We have made a clear commitment to work with and alongside communities, empowering people to support each other and come up with long-term solutions. We have launched the Let's Talk Monmouthshire website and have over 1,000 residents and organisations signed up to make it easier for people to have conversations about the policies and changes that affect them. We have also established a Let's Talk forum for people who are passionate about the county and want to represent their communities in more in-depth conversations. In Autumn 2025, over 1,000 people completed our

residents survey for the second year. This further helped increase our understanding of peoples' perceptions of their local council and the place they live

We have also engaged residents, businesses and town and community councils in the production of partnership placemaking plans to improve Monmouthshire's town centres. The placemaking process has strengthened partnership working and created a shared understanding of local challenges and opportunities.



How well are we achieving our agreed outcomes?

We have assessed progress against our objectives using a six-point scale. This scores each objective from 1 (unsatisfactory) through to 6 (excellent). After the local elections in May 2022, we took time to understand what matters to people and put the foundations in place for improvement. This included new strategies for the climate, the economy and food. We have been delivering these strategies, and our assessment evaluates the impact they have made so far over the last three years.

Many of the things we are committed to, such as improving the health of the Wye and Usk rivers, achieving net zero and tackling inequality are complex challenges that will not be solved quickly. This assessment shows a positive trajectory of improvement. The arrows next to each of the objectives below indicate the change in assessment over the last year while the colours correlate with the scores.

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↔ A fair place to live

Our rating:
4 (Good)

We have focused on improving life chances, reducing the effects of poverty and disadvantage and ensuring residents can access support, improve their health and help shape the future of their communities.

We have expanded childcare provision, increased the number of eligible children accessing early education from 82% to 97% since 2022/23, and continued to focus Flying Start where need is greatest.

We have gone beyond our statutory duty by providing both a free breakfast and a freshly cooked lunch to all primary pupils who choose to receive them. Uptake of universal free school meals has increased from 64% in 2022/23 to 68.6% in 2025/26, although this still varies between areas and requires further targeted work.

We have also continued to provide practical support to those who need it most through targeted initiatives such as Food and Fun, free or subsidised play provision, warm spaces, emergency food aid and practical cost-of-living support in communities across the county.

We have made good progress in improving access to services and opportunities that support health, participation and inclusion. We have committed to becoming a Marmot region, increased the number of people completing the National Exercise Referral Scheme, developed our Cultural Strategy and opened the Magor and Undy Community Hub.

We have strengthened local volunteering and community capacity through the Be Community programme, launched Let's Talk Monmouthshire to improve engagement, achieved Disability Confident Employer Level 2 status and became the first accredited Council of Sanctuary in Wales.

There are some areas we have identified for improvement. We need to ensure our interventions are clearly communicated, better targeted and more consistently evaluated. We need to increase take-up of support where inequality is greatest and continue to work with communities to develop a shared understanding of community resilience.





Green place

To live and work, with reduced carbon emissions, and making a positive contribution to addressing the climate and nature emergency

↔ A green place to live

Our rating:
4 (Good)

Monmouthshire's natural environment is central to our quality of life, local identity and visitor economy. We need to protect and conserve the county's outstanding landscapes, improve biodiversity and river health, reduce carbon emissions and strengthen resilience to climate change. These are complex, long-term challenges and the full impact of our actions will take time, but it is vital that we continue to act now to safeguard the environment for current and future generations.

Generally, residents views of Monmouthshire as a green place to live are positive. Fifty-nine percent of residents said their local area has a clean environment, 65% said local air quality is good and 75% said there are enough green spaces in their area.

We have refreshed our Climate and Nature Emergency Strategy and translated it into clearer action plans. We have completed costed decarbonisation surveys across our estate and reduced estate emissions by 17.8% from the 2019/20 baseline. We have continued to invest in low carbon technologies, renewable energy and ultra-low emission vehicles. We have also maintained strong recycling performance, with 71.3% of municipal waste sent for recycling, reuse or composting, exceeding the statutory target, and independent assessment shows our work on waste reduction and food to be particularly strong.

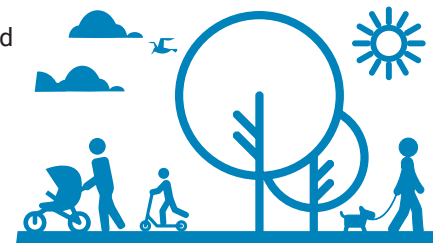
Our evidence shows that the scale of the challenge to meet our decarbonisation ambitions remains significant. This is a similar picture across the UK. Overall emissions

increased between 2022/23 and 2024/25, largely due to procurement and construction activity, and our current rate of reduction is not sufficient to reach net zero by 2030 without substantial further investment. We have made important progress and are building the evidence, plans and partnerships needed for the next stage, but the path to net zero remains extremely challenging.

We have made good progress in supporting nature recovery, improving environmental resilience and strengthening local food systems. We have enhanced 47 hectares of public land for biodiversity, delivered 13 green infrastructure projects, supported 25 nature recovery projects and continued to work through catchment and nature partnerships to improve habitats and river health. We have developed action plans for biodiversity, nature recovery, rivers and flood risk, and have continued to support communities through nature-based projects and local green space activity.

We have developed a Local Food Strategy and made practical progress on sustainable food. We have improved or revived over 220 allotment plots and more than 200,000 portions of Welsh organic vegetables have been supplied to pupils through the Welsh Veg in Schools scheme.

We recognise river health remains a major concern and some resident perceptions of the local environment are lower. We also recognise the scale of the challenge to reduce our carbon emissions and resources required to deliver the pace of change required.



Thriving & ambitious place



Where there are vibrant town centres, where businesses can grow and develop

A thriving and ambitious place

Our rating:
4 (Good)

Monmouthshire should be a place where people, businesses and communities can thrive. Monmouthshire starts from a comparatively strong economic position, with high employment and qualification levels, however this is not experienced equally by everyone or in every place. We therefore need to build on these strengths in a way that is inclusive, sustainable and rooted in the needs of our towns and communities.

We have made good progress putting in place the strategies, partnerships and investment needed to deliver this objective. We have worked with residents, businesses and town and community councils to develop placemaking plans for our towns, creating a clearer shared understanding of local priorities and a basis for targeted regeneration activity. We have strengthened the strategic framework for promoting the county through our Destination Management Plan and linked this with wider work such as the Cultural Strategy.

We have also continued to use Welsh Government and UK Government funding to improve town-centre buildings, public-facing assets and the visitor offer. This is helping to increase footfall, support local trade and make our towns more attractive places to live, work and visit.

We are building on Monmouthshire's strong skills and employment base while responding to areas where more targeted action is needed. We have continued to support residents to move into work, gain qualifications and develop businesses. During the year, council-supported programmes helped 120 people into employment, while 90 pre-start and existing businesses were supported and 10 new businesses were created.

We have also made strong progress supporting young people at risk of becoming disengaged from education, employment or training, with 44 NEET young people supported into employment. The proportion of school leavers who are NEET remains above where we want it to be. We know that retaining young people in the county remains a challenge. We have ensured our Deposit Replacement Local Development Plan is focussed on

addressing these challenges. We have secured funding to develop a new Monmouthshire Skills Centre which will also help support post-16 pathways for learning.

Transport and infrastructure remain critical enablers of this objective. We have adopted a new Local Transport Strategy, strengthened regional transport planning, established an infrastructure project team and secured significant external funding for transport and active travel schemes. Since 2022, we have secured £35 million to implement transport projects. We have also secured more than £24 million for active travel, with more than 100 active travel routes now in place and usage of routes increasing by 4.1%. We have also improved the frequency of buses in some areas and continue to support major regional rail and road proposals that would improve connectivity.

We continue to face significant challenges in maintaining our highways network, with further deterioration in the condition of roads last winter and the maintenance backlog remaining beyond available resources. We have taken a planned approach to prioritising investment, responding to urgent need and reviewing how pothole repairs are delivered and communicated. The funding gap remains substantial and continues to limit the pace at which overall road condition can improve





Safe place



To live where people have a home and community where they feel secure



A safe place to live

Our rating:
4 (Good)

Monmouthshire should be a place where everyone has access to a safe, secure and affordable home and feels part of a community where they are respected and protected. This matters because having a stable home is fundamental to health, well-being and life chances, while safe and cohesive communities help people to feel connected, supported and able to thrive.

We have made progress in increasing the supply of affordable homes and putting in place the longer-term framework needed to improve the supply and affordability of housing. Our Replacement Local Development Plan has been developed with affordability and net zero housing standards at its core and includes a strong policy ambition. During the year, 102 additional affordable homes were delivered, and the number of affordable homes granted planning permission increased to 66. This shows positive progress, however we recognise the gap between current delivery and the level of need in the county which the development plan aims to address.

We have made strong progress in reducing the use of temporary accommodation and improving homelessness prevention. By applying a Rapid Rehousing approach, increasing prevention capacity and remodelling our housing support services, we have increased the proportion of homelessness applications successfully prevented from becoming homeless to 69.7%

We have worked with social landlords, private landlords and through property acquisition and repurposing to

expand the availability of temporary accommodation. This has contributed to a 93.5% reduction in the use of bed and breakfast accommodation since 2022/23 and no families or 16- and 17-year-olds currently placed in bed and breakfast. However, homelessness demand remains high, the number of households in temporary accommodation remains significant, and the average time people spend waiting for settled accommodation has increased substantially, showing that permanent housing supply remains a critical pressure.

We have continued to support a more energy efficient housing stock and safer communities. Through schemes such as Eco4, Solar Together and Nest, we are helping residents, particularly lower-income households and those affected by cold and damp homes, to improve energy efficiency and reduce costs. We have also worked with partners to respond to community safety concerns, including work with young people on knife crime and anti-social behaviour.

Most residents continue to feel safe in their local area, Eighty-nine percent of residents taking part in our annual resident's survey told us that they feel safe during the day. Although concerns about anti-social behaviour remain and resident confidence after dark is lower, at 65%. We will maintain a strong focus on prevention, partnership working and targeted reassurance in communities where concern is greatest.



Connected place



Where people feel
part of a community
and are valued

↑ A connected place where people care

Our rating:
5 (Very Good)

Monmouthshire should be a place where people's contributions are valued, they feel part of a community, and they can access care and support that helps them live well on their own terms. The quality, availability and resilience of care and support are critical to peoples' well-being now and in the future.

We are delivering care and support while also building the preventative and community-based approaches needed for the future. Demand for social care services continues to increase and needs are becoming more complex, particularly as more residents require support later in life and with higher levels of need. This creates an ongoing risk to our ability to meet people's needs as quickly and consistently as we would want and brings significant financial pressures.

We have continued to respond to this through innovation, partnership working and the development of more preventative models of support, including reablement, assistive technology, early help, community-based well-being support and stronger pathways that help people remain independent for longer. Although pressures remain significant, we have made progress across children's services, adult care, well-being and workforce development to deliver our objective.

In children's services, we have strengthened early help and family support, and we have achieved greater stability in the number of children looked after. We have also made good progress in developing more in-county placements for children and young people, improving the ability to keep them close to their communities and support networks. We have strengthened the foster carer offer and contributed to a more cohesive fostering community. Recruiting and retaining foster carers remains challenging, reflecting similar pressures seen across Wales and the wider UK.

We have made progress in developing and adapting services and increasing provision in response to rising demand for adult social care. We have also increased the focus and capacity of preventative services. We have increased reablement activity with over half of packages mitigating the need for further support.

We have strengthened commissioned domiciliary care and reduced unmet care hours substantially, from 804 hours a month in March 2023 to around 271 hours a month over the last year, meaning we are now able to fulfil more domiciliary care need. Feedback from adult social care service users shows slightly lower satisfaction with care and support than previous years, with 83% of adults reporting they were happy. We have also opened Severn View Park, a new specialist care home that increases local capacity for people living with dementia and provides both long-term, reablement and respite care.

We are also strengthening wider well-being and community support. We have developed strategic approaches such as the Living Well Strategy and our work to become a Marmot Region, helping to focus action on prevention, resilience and the wider determinants of health. We have expanded assistive technology, which is helping more residents live safely and independently at home, and we have increased the delivery of housing adaptations that improve quality of life and confidence.

We have supported young people's mental health through youth service programmes, with all participants in the Emotional Logic programme reporting improved emotional well-being, and we have significantly expanded participation in nature-based health and well-being projects.

We continue to recognise and support carers, with stronger information, signposting and practical support. We are aiming to reduce waiting times for carers assessments. We have developed our social care workforce through recruitment, retention and new models such as micro-care, which has grown from eight carers in 2022 to 59 carers, between them delivering over 900 hours of support each week.





↑ A learning place

Our rating:
5 (Very Good)

Monmouthshire should be a place where every child, young person and adult can learn, develop skills and achieve their potential. A strong start in life helps children and young people build confidence, resilience and ambition, while lifelong learning enables residents to adapt, retrain and contribute throughout adulthood. This means we must ensure all learners, particularly those who are vulnerable or disadvantaged, receive the right support at the right time.

We have strengthened the systems, strategies and provision needed to meet increasing learner needs. We have updated key policies and guidance and strengthened multi-agency support for vulnerable pupils. Primary attendance is close to pre-pandemic levels, at 93.9%. Secondary attendance has also improved, at 89.5%, although it is still below pre-pandemic levels. Attendance of pupils eligible for free school meals remains a challenge, especially in secondary schools.

We have responded to increasing complexity and behaviours that challenge by reshaping inclusion services, improving data, establishing an inclusion panel and working with schools to use managed moves, additional learning provision and other support to avoid escalation. Fixed-term exclusions remain high and continue to place pressure on schools and specialist provision. However, all permanent exclusions issued during the last year were rescinded through stronger multi-agency work and alternative support arrangements.

Teaching, learning and curriculum development remain strong overall. Learners in secondary schools continue to achieve their expected results. Estyn inspections demonstrate that many schools are developing broad, balanced and purposeful curricula that reflect their context and meet pupils' needs. Variation remains, particularly for lower-attaining pupils and disadvantaged learners, so our support and challenge will continue to focus on where improvement is most needed.

We have strengthened inclusive education helping to create a more consistent and equitable approach for learners with additional learning needs and other barriers to learning. We are reducing reliance on out-of-county provision by

expanding local specialist provision, including a Social, Emotional and Mental Health Specialist Resource Base, and by developing additional provision within schools. Demand for additional learning needs support is increasing, and schools face ongoing financial and capacity pressures.

We have also increased opportunities for learners and residents. The Inspire programme supported 285 young people to gain an additional qualification or life skill during the year. Estyn recognised the Youth Service for supporting young people's confidence, resilience and life skills, and young people were able to express their views through the Make Your Mark ballot and youth conference. Adult and community learning has become more accessible through subsidised courses and partnership work with Coleg Gwent, with 963 enrolments during the year.

We have made progress in school modernisation and Welsh-medium education. The new King Henry VIII all-through school in Abergavenny, provides modern, inclusive net zero learning facilities for pupils aged 3 to 19, including specialist accommodation for pupils with complex neurodevelopmental and learning needs. We have also improved and remodelled pupil referral service accommodation in south Monmouthshire, completed the new Trellech nursery building, opened Ysgol Gymraeg Trefynwy and secured a new site for Ysgol Gymraeg y Fenni.



How effectively are resources being used to deliver our priorities?

Over the past year we have developed enabling strategies to ensure we align all of our resources to deliver the priorities set out in the Community and Corporate Plan. We have evaluated these and concluded that we have sound arrangements in place to enable and support service delivery.

The Well-being of Future Generations Act defines the core set of activities that are common to the corporate governance of public bodies. We have assessed each of these using our evaluation framework:

Corporate planning, performance and risk management.
We assessed this as **level 4 (Good)**. Unchanged from last year



Financial planning. We assessed this as **level 4 (Good)**.
Unchanged from last year



Workforce planning (people). We assessed this as **level 4 (Good)**.
Unchanged from last year



Procurement. We assessed this as **level 3 (Adequate)**.
Unchanged from last year



Assets. We assessed this as **level 5 (Very Good)**.
Unchanged from last year



Digital and data. We assessed this as **level 3 (Adequate)**.
Unchanged from last year



Democracy and scrutiny. We assessed this as **level 4 (Good)**.
Unchanged from last year



Further detail on these is available as part of the full evaluation available at: www.monmouthshire.gov.uk/improvement.

What do you think?

We have used some of the feedback we have received from other organisations to shape this report and would be delighted to hear your views to help us inform future assessments. Please get in touch: improvement@monmouthshire.gov.uk

How effectively does the council work with stakeholders and partners on agreed outcomes?

Working in partnership is one of the ways we can achieve our objectives while delivering value for money. Key partners include Welsh Government, the Cardiff Capital Region and the Gwent Public Services Board. Our recent peer Panel Performance Assessment recognised Monmouthshire's strong social capital and outward-facing partnership culture. The assessment encouraged us to channel these strengths and recommended we develop a shared understanding of community resilience in the Monmouthshire context.

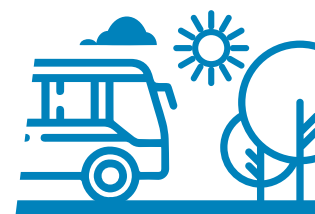
Areas for Development

As a result of the self-assessment, we have identified a number of areas for development. These include:

- Work with communities and stakeholders to develop a shared understanding of community resilience.
- Consolidate existing and prioritise future projects to deliver better outcomes through our change programme For Purpose on Purpose
- Strengthen workforce and succession planning

Measuring Progress

We use a wide range of performance measures to evaluate our progress against our priorities. These are found throughout the assessment. We also track progress against a range of outcome measures at population level. Key measures are presented regularly to Cabinet and the Performance and Overview Scrutiny Committee so that we can actively manage performance and adjust delivery where we are falling short of our expectations.



29TH SEPTEMBER 2026 (Additional meeting)

Report Title	Report Author	Terms of reference category				
		Financial Affairs	Risk, Internal Control, Performance & Corporate Governance	Complaints	Internal Audit	External Audit
Call in of the Headteacher & Chair of Governors in response to the Internal Audit review of King Henry VIII 3-19 School.	Jan Furtek					
WAO Audit of Accounts Report	Steve Wyndham/Charlotte Owen					
Governance & Audit Committee Annual report 2025/26	Chair – Andrew Blackmore		✓			

15TH OCTOBER 2026

Report Title	Report Author	Terms of reference category				
		Financial Affairs	Risk, Internal Control, Performance & Corporate Governance	Complaints	Internal Audit	External Audit
Revenue & Capital MTFP update and process	Jon Davies	✓				
2025/26 MCC Statement of Accounts Final	Jon Davies	✓				
Health and Safety Annual Report	Kate Thompson		✓			
Anti Fraud, Bribery and Corruption Risk Assessment	Jan Furtek				✓	
Audit Wales Report: National Fraud Initiative 2025/26 - Update for Monmouthshire County Council	Steve Wyndham		✓			✓
Internal Audit quarterly progress report (Q2)	Jan Furtek				✓	
Whole Authority Commissioning Framework & Approach	Cath Fallon/Peter Davies		✓			

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Public Document Pack Agenda Item 14

MONMOUTHSHIRE COUNTY COUNCIL

Minutes of the meeting of Governance and Audit Committee held
at Council Chamber, County Hall, The Rhadyr, Usk, NP15 1GA on Thursday, 23rd July,
2026 at 2.00 pm

PRESENT: Andrew Blackmore (Chair)
County Councillor Tony Easson (Vice Chair)

County Councillors: , Sara Burch, David Jones, Phil Murphy,
Peter Strong, Rachel Garrick and Tony Kear

Lay Members: Colin Prosser, Rhodri Guest

OFFICERS IN ATTENDANCE:

Adam Fall	Democratic Services Officer
Jan Furtek	Chief Internal Auditor
Richard Jones	Performance and Data Insight Manager
Nicola Perry	Senior Democracy Officer
Jonathan Davies	Head of Finance/Section 151
Steve Wyndham	Audit Wales Officer

APOLOGIES:

County Councillors Ann Webb

1. Declarations of Interest

No declarations of interest were made.

2. Public Open Forum

No submissions were received.

3. To note the Action List from the previous meeting.

Recording: [View Item 3 \(2:59\)](#)

The Committee noted the Action List. One outstanding action remains in progress and is due for completion in October 2026.

The action list was noted.

4. SRS Annual Internal Audit Report – Torfaen CBC IA Team

Recording: [View Item 4 \(3:20\)](#)

The Committee received the Annual Internal Audit Report for the Shared Resource Service. Members considered the satisfactory audit opinion, cyber security arrangements and delivery of the audit programme.

MONMOUTHSHIRE COUNTY COUNCIL

Minutes of the meeting of Governance and Audit Committee held at Council Chamber, County Hall, The Rhadyr, Usk, NP15 1GA on Thursday, 23rd July, 2026 at 2.00 pm

Action: Arrange a future update from SRS officers regarding cyber security and emerging risks.

Resolved: To note the report and audit opinion.

5. Monmouthshire County Council Draft Statement of Accounts 2025/26

Recording: [View Item 5 \(17:16\)](#)

The Head of Finance presented the Draft Statement of Accounts for 2025/26. Members considered the pension fund position, school budget deficits, borrowing levels, reserves and related disclosures. Audit Wales confirmed that audit work was progressing in line with the agreed timetable.

Actions:

- Review Gateway Credit Union disclosure wording.
- Review the Gwent County History Association related party disclosure.

Resolved: To review and note the Draft Statement of Accounts 2025/26.

6. Draft Annual Governance Statement 2025/26

Recording: [View Item 6 \(57:02\)](#)

The Committee received the Draft Annual Governance Statement and noted that governance arrangements were assessed as effective and fit for purpose. Members discussed information governance, organisational change and the Well-being of Future Generations (Wales) Act.

Action: Officers to report back regarding the Committee's role in reviewing implementation of the Well-being of Future Generations Act.

Resolved: To note the Draft Annual Governance Statement.

7. Audit Wales Work Programme: Council Progress Update

Recording: [View Item 7 \(01:13:13\)](#)

The Committee received an update on progress against Audit Wales recommendations and discussed performance information, value for money arrangements and data maturity.

Actions:

- Share information relating to the data maturity assessment.
- Consider including indicative completion dates for ongoing actions.

Resolved: To note the report.

8. Governance and Audit Committee Forward Work Plan

Recording: [View Item 8 \(01:23:01\)](#)

The Committee considered and noted the Forward Work Plan.

MONMOUTHSHIRE COUNTY COUNCIL

**Minutes of the meeting of Governance and Audit Committee held
at Council Chamber, County Hall, The Rhadyr, Usk, NP15 1GA on Thursday, 23rd July,
2026 at 2.00 pm**

9. To approve the minutes of the previous meeting

Recording: [View Item 9 \(01:23:03\)](#)

The minutes of the previous meeting were approved as an accurate record.

10. Date of Next Meeting: 10th September 2026

Noted.

Meeting ended at 3.24pm

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Is my report exempt?

In some instances it may be necessary to submit a report to a committee but withhold the whole report, or part of that report, due to the sensitive nature of information contained within it.

There are specific circumstances in which a report may be considered exempt which are set in legislation. When writing your report bear in mind the following circumstances to consider whether your report should be exempt;

Local Government Act, Schedule 12A, Part 4;

12. Information relating to a particular individual
13. Information which is likely to reveal the identity of an individual
14. Information relating to the financial or business affairs of any particular person (including the authority holding that information)
15. Information relating to any consultation or negotiations, or contemplated consultations or negotiations, in connection with any labour relations matter arising between the authority or a Minister of the Crown and employees of, or office holders under, the authority.
16. Information in respect of which a claim to legal professional privilege could be maintained in legal proceedings
17. Information which reveals that the authority proposes –
 - a. To give under any enactment a notice under or by virtue of which requirements are imposed on a person; or
 - b. To make an order or direction under any enactment
18. Information relating to any action taken or to be taken in connection with the prevention, investigation or prosecution of crime.

If you are unsure if the report should be exempt or not you should contact Democratic Services or the Monitoring Officer for further advice and guidance. The principal to bear in mind however is that the public interest in maintaining the exemption outweighs the public interest in disclosing the information.

If your report is to be exempt you should let Democratic Services know as soon as possible if you have not already done so when adding the item to the forward plan of the relevant committee.

When submitting your report to Democratic Services for publication with the agenda you must also include an exemption certificate which give details as to why the report is exempt and not for publication. This certificate will be publicly available with the agenda in place of the report so the reasoning for the exemption should be made clear on this form. The exemption certificate is available overleaf.

Further information on definitions and exemptions is available within the Local Government Act at the following link; <http://www.legislation.gov.uk/ukpga/1972/70/schedule/12A>



SCHEDULE 12A LOCAL GOVERNMENT ACT 1972 EXEMPTION FROM DISCLOSURE OF DOCUMENTS

Meeting and Date of Meeting: 10th September 2026

Report: Annual Cyber Security Report

Author: Sian Hayward

I have considered grounds for exemption of information contained in the background paper for the report referred to above and make the following recommendation to the Proper Officer:-

Exemptions applying to the report:

This report can be exempted under schedule 12A of the Local Government Act as well as S31A (Law Enforcement and Prevention of Crime) of the Freedom of Information Act . This is due to the extremely sensitive nature of the councils cyber security arrangements.

Factors in favour of disclosure:

Openness & transparency in matters concerned with the public

Prejudice which would result if the information were disclosed:

Details of the councils cyber security arrangements would be in the public domain and enable cyber criminals to enter our council communications networks and commit cyber fraud.

My view on the public interest test is as follows:

Factors in favour of disclosure are outweighed by those against.

Recommended decision on exemption from disclosure:

Maintain exemption from publication in relation to report

Date: 12/08/26

Signed

Post: Head of Information Security and Technology

I accept/I do not accept the recommendation made above

Signed:

A handwritten signature in black ink, appearing to be 'PD' followed by a long horizontal stroke.

Peter Davies - Chief Officer Resources and Deputy Chief Executive

Date: 12/08/26

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By virtue of paragraph(s) 14 of Part 1 of Schedule 12A
of the Local Government Act 1972.

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