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County Hall
Rhadyr
Usk
NP15 1GA

Monday, 5 October 2026

Notice of meeting

Special Meeting Performance and Overview Scrutiny Committee

**Tuesday, 13th October, 2026 at 10.00 am,
The Council Chamber, County Hall, The Rhadyr, Usk, NP15 1GA**

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

AGENDA

Item No	Item	Pages
1.	Apologies for Absence.	
2.	Declarations of Interest.	
3.	2027/28 Revenue & Capital Medium Term Financial Plan (MTFP) update and process - To scrutinise the latest six-monthly update of the Council's Medium Term Financial Plan (MTFP), reflecting updated assumptions, risks, and strategic context.	1 - 26
4.	Planning Annual Performance Report (APR) - To scrutinise the annual performance report prior to submission to Welsh Government.	27 - 86
5.	ADDITIONAL BUSINESS: Health & Safety Annual report - To note any questions for officers / the Cabinet Member, to be answered outside the meeting (report to follow).	
6.	Next Meeting: 24th November 2026 at 10.00am.	

Paul Matthews

Chief Executive

MONMOUTHSHIRE COUNTY COUNCIL CYNGOR SIR FYNWY

THE CONSTITUTION OF THE COMMITTEE IS AS FOLLOWS:

County Councillor Rachel Buckler, Devauden;, Welsh Conservative Party
County Councillor John Crook, Magor East with Undy;, Welsh Labour/Llafur Cymru
County Councillor Steven Garratt, Overmonnow;, Welsh Labour/Llafur Cymru
County Councillor Meirion Howells, Llanbadoc & Usk;, Independent
County Councillor Su McConnel, Croesonen;, Welsh Labour/Llafur Cymru
County Councillor Alistair Neill, Gobion Fawr;, Welsh Conservative Party
County Councillor Martin Newell, Town;, Welsh Conservative Party
County Councillor Paul Pavia, Mount Pleasant;, Welsh Conservative Party
County Councillor Peter Strong, Rogiet;, Welsh Labour/Llafur Cymru
Clare Werrett

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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 adequate notice to accommodate your needs.

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If you would like to speak under the Public Open Forum at an upcoming meeting you will need to give three working days' notice in advance of the meeting by contacting

Scrutiny@monmouthshire.gov.uk

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

Alternatively, if you would like to submit a written, audio or video representation, please contact the team via the same email address to arrange this. The deadline for submitting representations to the Council is 5pm three clear working days in advance of the meeting. If combined representations received exceed 30 minutes, a selection of these based on theme will be shared at the meeting. All representations received will be made available to councillors prior to the meeting.

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

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

Questions for the Meeting

Scrutinising Performance

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

Scrutinising Policy

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

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

Empowering Communities

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

Service Demands

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

Financial Planning

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

Making savings and generating income

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

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

Questions to ask within a year of the decision:

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

Questions for the Committee to conclude...

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

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

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



SUBJECT:	MEDIUM TERM FINANCIAL PLAN UPDATE – OCTOBER 2026
MEETING:	PERFORMANCE AND OVERVIEW SCRUTINY COMMITTEE
DATE:	13 October 2026
DIVISION/WARDS AFFECTED:	WHOLE AUTHORITY

1. PURPOSE:

- 1.1. To present the refreshed Medium Term Financial Plan (MTFP) update at Appendix 1 and to provide the covering context for Scrutiny and Cabinet consideration. The report sets out the planning framework for the 2027/28 budget, the current scenario-based budget range, the principal financial resilience issues, and the governance route through which detailed budget proposals will be developed.

RECOMMENDATIONS TO PERFORMANCE AND OVERVIEW SCRUTINY COMMITTEE

- i. That the Performance and Overview Scrutiny Committee scrutinise the latest six-monthly update of the Council's Medium Term Financial Plan (MTFP), reflecting updated assumptions, risks, and strategic context.

2. RECOMMENDATIONS (to Cabinet):

- 2.1. That Cabinet notes the refreshed MTFP update at Appendix 1, including the current scenario-based planning range for 2027/28 of £3.0m favourable, £4.5m mid-case and £6.5m adverse, and the four-year cumulative planning range of £19.3m to £31.4m.
- 2.2. That Cabinet notes that the MTFP update is a planning framework rather than the statutory budget decision, and that assumptions will be refreshed as the UK Autumn Budget, Welsh Government budget, provisional settlement and directorate budget packages become clearer.
- 2.3. That Cabinet notes the key areas requiring continued scrutiny through the budget process, particularly schools' financial recovery, reserves and financial resilience, demand-led pressures, savings deliverability, capital affordability and the development of a recurring route to a balanced budget.

3. KEY ISSUES:

- 3.1. The Council reviews its budgetary position annually and maintains a rolling Medium Term Financial Plan. The MTFP links the Council's policy objectives, service priorities and

financial capacity, and provides the framework within which the annual budget is developed.

- 3.2. The refreshed MTFP update moves the budget process towards scenario-based planning rather than a single fixed estimate. For 2027/28 the current range is £3.0m favourable, £4.5m mid-case and £6.5m adverse. The same approach is being extended across the four-year MTFP period, showing a cumulative planning range of £19.3m to £31.4m.
- 3.3. The purpose of this approach is to support earlier, more transparent choices. It allows assumptions on pay, price inflation, funding, income, borrowing and reserves to be tested as new information becomes available, while avoiding a false impression that the budget gap can be known with precision at this stage.
- 3.4. The central message is that the Council is not facing a one-year balancing exercise. Even where the 2027/28 gap is considered manageable, pressures accumulate over the medium term. The budget response therefore needs to focus on recurring proposals that reduce the underlying gap, supported by clear evidence on deliverability, risk and service impact.
- 3.5. The latest in-year monitoring position provides a more stable platform for planning than in some previous years, but the position remains finely balanced. School balances, capital affordability, service demand and the limited flexibility within usable reserves remain material issues for the budget process.
- 3.6. The Appendix sets out the evidence base in detail. The main issues for Scrutiny and Cabinet consideration are whether the planning assumptions are reasonable, whether the main risks are clearly understood, and whether the proposed budget process provides sufficient challenge before draft proposals are finalised.
- 3.7. The planning range will be updated as national funding information, directorate budget packages and capital programme choices become clearer.
- 3.8. Schools' budgets remain a significant financial resilience issue. Cumulative schools deficits are forecast to increase to £9.337m by the end of 2026/27, which will require continued focus on the credibility and delivery of recovery plans, including staffing assumptions, pupil numbers, ALN pressures and reliance on grants.
- 3.9. Reserves continue to provide important protection against volatility, but they are finite and cannot be used as a substitute for recurring budget solutions. The Appendix therefore distinguishes between headline reserves and those balances that are genuinely available to manage future risk after allowing for commitments, school balances and planned use.
- 3.10. The capital programme will need to be considered alongside the revenue scenarios. Additional borrowing, capital receipts risk and infrastructure pressures all have potential revenue consequences, and any additional capital investment will need to be assessed through the approved capital priority matrix and the wider affordability framework.
- 3.11. The budget process will therefore develop rounded directorate packages that bring together pressures, mitigations, savings, income, demand management, service choices and capital consequences. This will enable Cabinet to consider the net contribution of each package to the budget gap, rather than considering separate lists of growth and savings in isolation.

Budget timetable

- 3.12. The indicative timetable in Appendix 1 is structured around establishing the planning range, developing directorate packages, refreshing assumptions following national budget announcements and the provisional settlement, officer and SLT challenge, political consideration of emerging options, scrutiny and consultation, and final approval of the revenue budget, capital programme and Council Tax requirement.

Phase	Main activity	Indicative timing
Establish planning range and evidence base	Refresh assumptions, confirm the scenario range, test the approach with SLT and Cabinet.	Sep-26
Member framing and engagement	Present the MTFP update, explain the scenario approach, and brief Cabinet, political groups and members before detailed proposals are settled.	Oct-26
Directorate budget package development	Develop rounded directorate packages covering pressures, savings, income, service change, demand management and capital implications.	October to early November 2026
Settlement and scenario refresh	Review the UK Autumn Budget, Welsh Government draft budget and provisional settlement, then refresh the favourable, mid-case and adverse scenarios.	Late October to early December 2026
Challenge, prioritisation and draft budget	Undertake officer and SLT challenge, integrate revenue and capital choices, and refine a coherent draft budget package.	November to January 2027
Draft budget, scrutiny and consultation	Cabinet considers draft proposals, followed by scrutiny and consultation with residents, businesses, partners, staff and trade unions.	20 January to 18 February 2027
Final settlement and budget decision	Update for final settlement, consultation and scrutiny feedback, then take final budget proposals to Cabinet and Council.	Late February to 4 March 2027

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

- 4.1. This is a contextual planning report and therefore carries no direct impacts. Equality, Future Generations, safeguarding, social justice and corporate parenting implications will be considered as specific budget proposals are developed for consultation and decision.

5. OPTIONS APPRAISAL

- 5.1. This report provides an update on the Council's financial planning framework and does not itself approve individual budget proposals. Options appraisal will be undertaken for substantive savings, pressures, income proposals and service changes as part of the draft budget process.

6. EVALUATION CRITERIA

- 6.1. The budget process will be evaluated through officer and SLT challenge, member engagement, scrutiny, consultation feedback and the final budget decision-making process.
- 6.2. The six-monthly MTFP update also provides a mechanism for reporting progress against the MTFS delivery plan, which is included at Appendix A to Appendix 1.

7. REASONS:

- 7.1. To provide Scrutiny and Cabinet with an updated planning framework for the 2027/28 budget and the wider medium-term financial outlook. This includes the current scenario range, the principal financial risks, the resilience issues requiring attention, and the governance process for bringing forward detailed budget proposals.

8. RESOURCE IMPLICATIONS:

- 8.1. There are no resource implications arising directly from noting this report. The resource implications of the 2027/28 budget, capital programme and Council Tax requirement will be considered through the draft and final budget reports.

9. CONSULTEES:

Strategic Leadership Team
All Cabinet Members
Performance and Overview Scrutiny committee

10. APPENDICES:

Appendix 1 - Medium Term Financial Plan update - October 2026

11. AUTHORS:

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12. CONTACT DETAILS:

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Medium Term Financial Plan – October 2026 Update

Scenario-based planning range for the 2027/28 budget and four-year medium-term financial outlook

Report at a glance	
Purpose	To update Cabinet on the Council's medium-term financial outlook, including the planning framework for the 2027/28 budget and the extension of scenario-based planning across the four-year MTFP period.
Planning approach	Scenario-based planning is used rather than a single fixed-point estimate and will be extended across the four-year medium-term planning period.
Current 2027/28 range	£3.0m favourable, £4.5m mid-case and £6.5m adverse.
Main focus	Funding uncertainty, financial resilience, schools, service demand, capital affordability and the route to a balanced budget.
Decision framework	Supports early choices before draft budget proposals are finalised.

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Section 1	Introduction
Section 2	Strategic financial context and outlook
Section 3	External context
Section 4	Funding context
Section 5	Reserves and financial resilience
Section 6	Schools' budgets and reserve balances
Section 7	Budget assumptions and scenario-based planning range
Section 8	Uncertainty, sensitivity analysis and budgetary risk
Section 9	Bridging the gap between expenditure and available resources
Section 10	Medium-term approach to change and sustainability
Section 11	Capital programme
Section 12	Budget process, governance and timetable
Appendix A	Progress against the MTFS delivery plan

1. Introduction

- 1.1. The Council's Medium term financial strategy (MTFS) and plan (MTPF) are the link between its long-term policy objectives and its financial capacity. It seeks to ensure that the Council's strategic objectives can be achieved within the confines of the financial resources available.
- 1.2. The MTFS, as approved, committed to a six-monthly update of the MTPF, including an update of progress against the performance framework and delivery plan embedded within the MTFS. This report represents the first six-monthly update of the MTPF during 2026/27, with the final budget report of Cabinet in March 2027 representing the second iteration.
- 1.3. The purpose of the MTPF update is to provide a rolling financial planning framework that links the Council's strategic objectives, service priorities, financial resilience and statutory duty to set a balanced budget. It is not itself the statutory budget decision, but it establishes the planning assumptions, risk context, timetable and governance framework within which detailed budget proposals will be developed.
- 1.4. The approach reflects the CIPFA Financial Management Code principles most relevant to an MTPF update: clear financial leadership, reliable assumptions, transparent scenario planning, risk-aware decision making, and alignment between service planning, capital investment and financial capacity. The document does not replace the MTFS; it applies those principles to the current planning period and the route to the 2027/28 budget.

2. Strategic Financial Context and Outlook

- 2.1. The Council's financial planning continues to be shaped by constrained public finances, service demand and the need to protect financial resilience. This update uses scenario-based planning to support informed choices, rather than presenting a single fixed estimate of the 2027/28 budget gap.
- 2.2. Recent financial performance provides a more stable platform for budget planning than in some previous years, but the position remains finely balanced. The latest in-year monitoring position shows a broadly manageable non-school position, while school balances remain a material financial resilience risk.
- 2.3. The budget process is designed to refine assumptions at key points: the UK Autumn Budget, the Welsh Government draft budget, the provisional local government settlement and the development of directorate budget packages. This allows the Council to maintain momentum while recognising that the final position will not be known until later in the process.
- 2.4. Assumptions will be managed through a clear refresh and challenge cycle. Finance will maintain the working model, directors will own the service evidence underpinning pressures and mitigations, SLT will provide corporate challenge, and Cabinet will consider the financial and policy choices that emerge as the range narrows.

3. External context

- 3.1. The main external factors affecting the MTPF are Welsh Government funding, pay and price inflation, interest rates, labour market conditions and demand for services. These factors are reflected in the scenario range and will be refreshed as national information becomes clearer.

Factor	Planning Implications
Inflation	• Pay, contract and non-pay assumptions remain key drivers of the scenario range • Inflation should be treated through sensitivity analysis rather than a single fixed assumption • Demand-led inflationary impacts need to be evidenced separately where they exceed the core planning assumptions
Labour market	• Recruitment, retention and workforce capacity continue to affect service delivery and transformation • Pay assumptions remain a significant part of the 2027/28 planning range • Commissioned services and agency costs may create additional pressures if labour market conditions remain tight
Utilities prices	• Energy and fuel costs remain important but should be assessed against current contracts and market forecasts • Transport, fleet, schools, leisure and property budgets remain exposed to price movements • Any above-assumption movement should be reflected through scenario updates or evidenced service pressures
Interest Rates	• Borrowing rates influence the affordability of both the existing capital programme and any additional investment • Revenue consequences of unsupported borrowing need to be considered alongside revenue budget scenarios • Treasury management assumptions should continue to be reviewed as market conditions change
Economic & political landscape	• UK public expenditure choices shape the funding envelope available to Welsh Government • Welsh Government budget decisions and the local government settlement remain central to the Council's planning range • Scenario planning allows the Council to plan before final funding information is available while remaining transparent about uncertainty

4. Funding context

- 4.1. The Council's main funding sources are the Welsh Government settlement, Council Tax, fees and charges, grants and other specific income. The key planning issue is how these sources interact with service demand, inflation and the residual gap that must be closed through the budget process.

Welsh Government settlement

- 4.2. The Welsh Government settlement remains the single largest source of Council funding and is therefore a significant driver of the MTFP. The latest planning range assumes a 1.90% increase in Welsh Government funding for 2027/28 in the mid-case scenario, with the assumption to be refreshed as national budget information and the provisional local government settlement become available. The favourable and adverse scenarios currently test increases of 2.10% and 1.50% respectively.

- 4.3. The main funding issues for the 2027/28 budget process are the level of the local government settlement, the treatment of specific grants, whether national funding is recurrent or one-off, and the balance between Welsh Government funding, Council Tax, income, reserves and savings in closing the budget gap.
- 4.4. In addition, the Council receives significant specific grant funding that is subject to defined terms and conditions. These grants support important service activity but can create financial planning challenges where they are annually allocated, uncertain, ring-fenced or not fully indexed for inflation. For planning purposes, specific grants should be assumed to continue at existing levels unless there is robust evidence of change, but any known or likely grant change should be assessed separately from the core scenario range until the scale and service impact are clear.

Council Tax

- 4.5. Council Tax is currently modelled at 3.95% for 2027/28 as a planning assumption only. Cabinet has not yet considered the level to be proposed, and any recommendation will need to take account of affordability, consultation feedback, settlement funding and the full budget package.

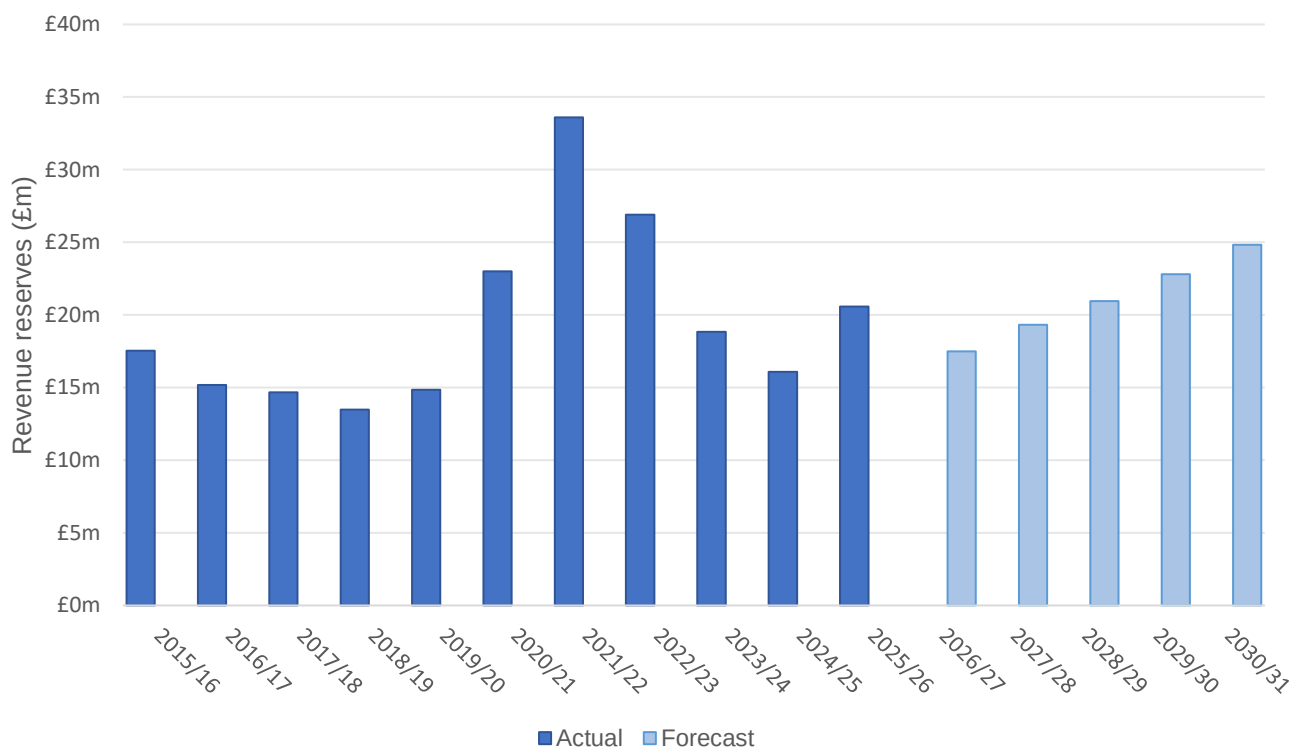
Fees & Charges for services

- 4.6. Fees and charges make an important contribution to the Council's funding base and support the delivery of discretionary and chargeable services. For 2027/28 the mid-case planning assumption is a 2.90% increase, with favourable and adverse scenarios of 2.50% and 3.50% respectively to reflect the potential impact of price, demand and collection performance.
- 4.7. The annual planning assumption remains that fees and charges should normally increase by at least the relevant rate of inflation unless there is a clear policy, legal, market or service reason to depart from that position. Any material deviation from the planning assumption will need to be considered as part of the wider budget package given the impact on the residual budget gap.

5. Reserves and financial resilience

- 5.1. Reserves remain a key part of the Council's financial resilience framework. They provide capacity to manage volatility, support planned change and respond to unforeseen pressures, but they are a finite resource and are not a sustainable substitute for a recurring balanced budget. Consistent with the CIPFA Financial Management Code, the test is therefore not simply the level of reserves held, but whether their purpose, adequacy, planned use and replenishment are clearly understood within medium-term financial planning.
- 5.2. The following charts should therefore be read as an evidence base for the resilience judgement, rather than as standalone financial information. They illustrate the composition and direction of usable reserves, the distinction between general and earmarked balances, and the extent to which some reserves are already linked to specific commitments, risks or planned use.
- 5.3. This context is particularly important because the Council's financial resilience will depend on the funds that are genuinely available to manage risk and support transition after allowing for existing commitments and planned use.

Revenue reserve balances (£m) Actual to 2025/26 | Forecast from 2026/27

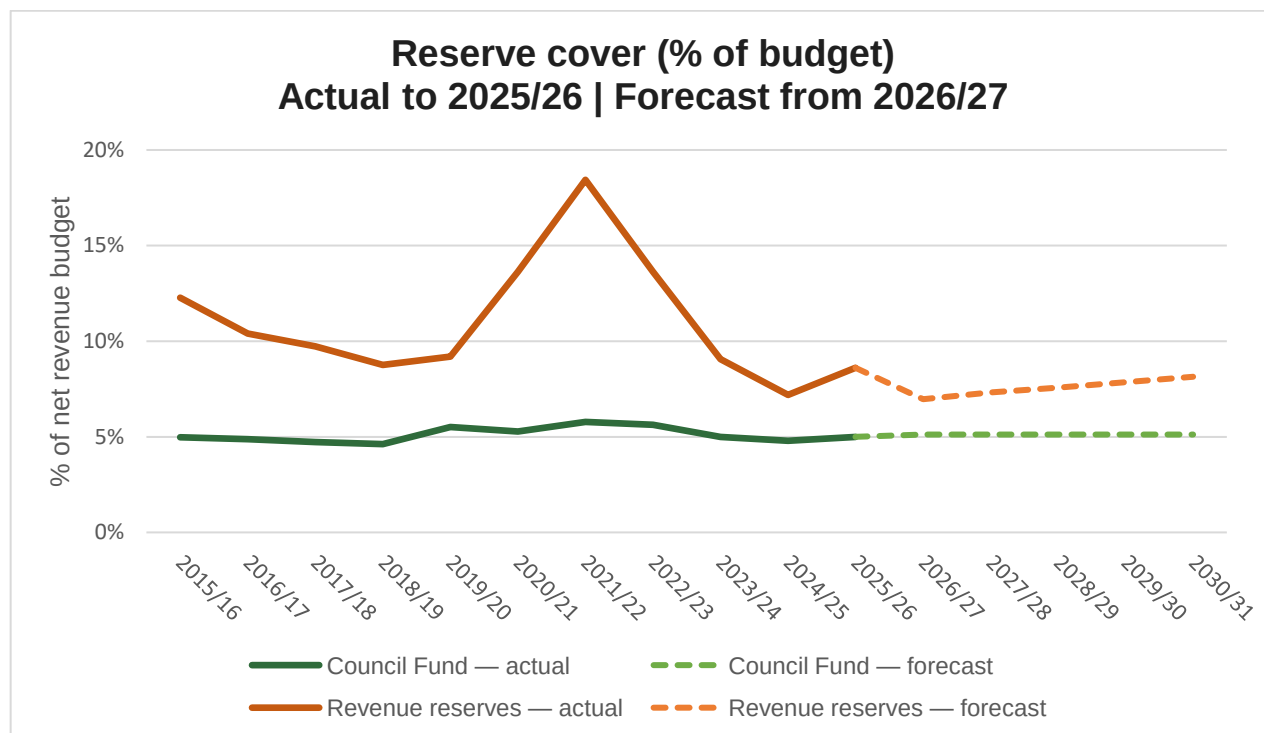


- 5.4. The above position should be considered alongside the underlying reserve composition at 1 April 2026 shown below. Total usable revenue reserves stood at £20.6m; however, this includes a maintained Council Fund balance of £12.0m, a £6.9m deficit in school balances, £8.7m of strategic earmarked reserves and £6.7m of service and partnership reserves. The net general fund balance, after recognising school balances, was therefore £5.1m. This reinforces the central resilience message: while the Council continues to hold usable reserves, the element that is genuinely flexible for future budget management is more limited than the headline total implies.

Revenue reserve component at 1 April 2026	£m
Council Fund	12.0
School balances	(6.9)
Net general fund balance	5.1
Strategic earmarked reserves	8.7
Service and partnership reserves	6.7
Total usable revenue reserves	20.6

- 5.5. The Council Fund continues to be maintained at 5% of the net revenue budget, in line with the Council's approved reserves policy. This remains an important safeguard and provides

assurance against general risk, but it should be considered alongside the wider earmarked reserve position, the forecast direction of school balances, capital commitments and the scale of the medium-term budget gap shown elsewhere in this update.



- 5.6. Taken together, the charts help explain why the Council's reserves position needs to be considered in terms of quality, availability and purpose, not just the headline total. They show that the Council Fund provides a core level of general protection, while a significant part of the wider reserves position is earmarked, committed or constrained. This distinction is important for the MTFP because reserves may provide time-limited support for transformation, risk management or exceptional volatility, but they do not create recurring budget capacity.
- 5.7. For the 2027/28 budget framework, the Council should protect the Council Fund, review earmarked reserves for purpose and availability, and maintain a clear distinction between one-off support, risk management and recurring budget solutions. This reflects CIPFA FM Code principles that financial decisions should be transparent, evidence-based and sustainable over the short, medium and long term.
- 5.8. Any planned use of reserves should meet a clear assurance test: it should be affordable, transparent, time-limited, linked to a defined purpose and supported by an exit route. Where reserves are used to manage transition, timing or exceptional volatility, the underlying recurring solution should be identified and the impact on future financial resilience should be explicit.
- 5.9. The reserve position will therefore be kept under review through the budget process alongside the scenario range, school deficit recovery, capital affordability and delivery risk. This will allow Cabinet to consider whether the emerging budget package protects the Council's underlying financial resilience, rather than relying on reserves to defer difficult recurring choices.

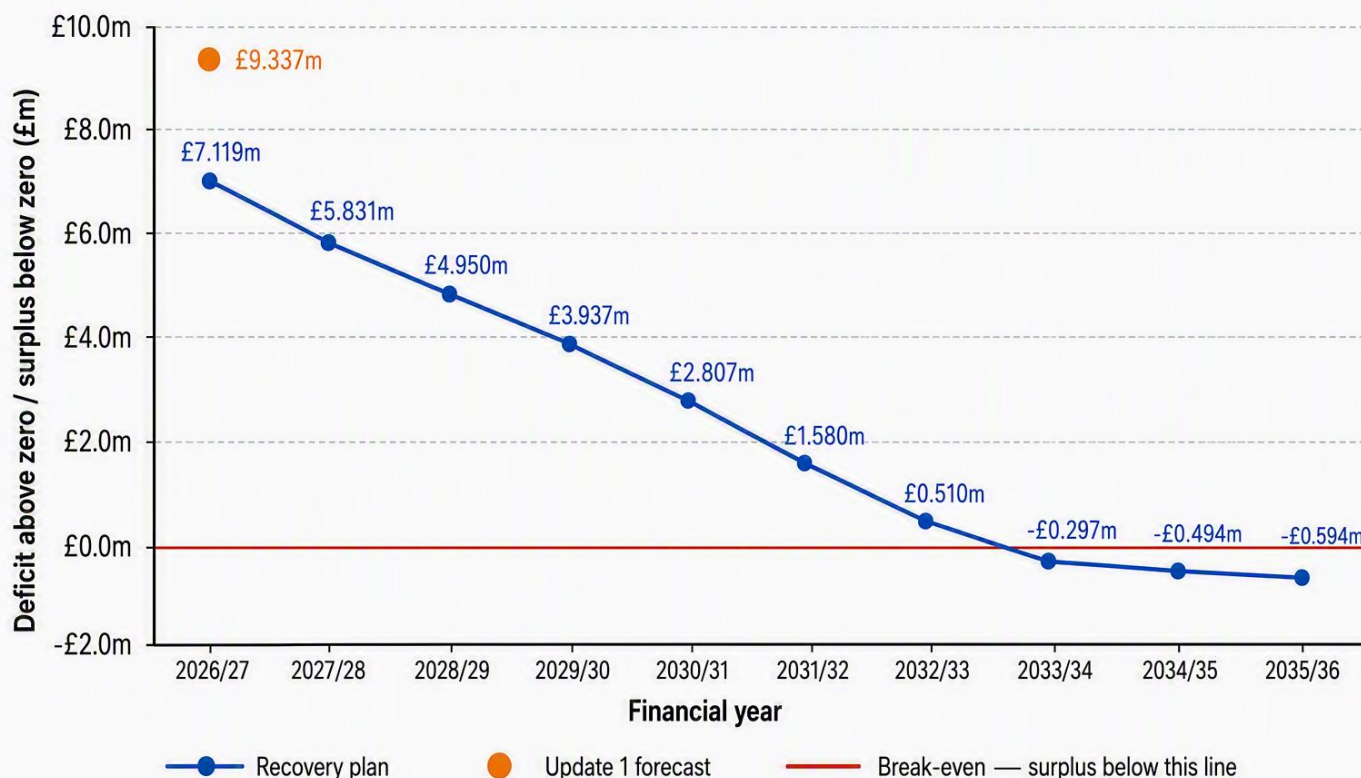
6. Schools' budgets and reserve balances

- 6.1. Schools' budgets are a central part of the Council's financial resilience because cumulative school deficits are carried on the Council's balance sheet. The focus for the MTFP is therefore the future risk, recovery trajectory and implications for 2027/28 budget planning.
- 6.2. The latest forecast indicates that the cumulative schools deficit is expected to increase to £9.337m by the end of 2026/27. This creates a weaker starting point for the 2027/28 budget process and reinforces the need to test whether recovery plans remain credible and deliverable.

Year	Net level of School Balances (Surplus) / Deficit in £000's
2015/16	(1,156)
2016/17	(269)
2017/18	(175)
2018/19	232
2019/20	435
2020/21	(3,418)
2021/22	(6,956)
2022/23	(4,257)
2023/24	904
2024/25	4,092
2025/26	6,880
2026/27 Forecast	9,337

- 6.3. The recovery plan chart below illustrates the forward risk. It shows that the latest forecast is materially above the agreed recovery trajectory, meaning the Council now needs to assess not only whether recovery plans exist, but whether they remain deliverable from this weaker starting point.

School balance projection based on recovery plans agreed



- 6.4. The strategic implication is that school financial recovery will need to be treated as a medium-term resilience programme. The Council will need to maintain pressure on recovery plan delivery, understand where plans are not realistic, and distinguish clearly between temporary support, targeted intervention and any recurring funding decisions that may need to be considered through the 2027/28 budget process.
- 6.5. The immediate priority is to identify where recovery plans remain credible, where assumptions need to be reset, and where additional support, challenge or escalation is required. This should include staffing structures, pupil number assumptions, ALN pressures, grant reliance, planned management actions and the timescale for reducing accumulated deficits.
- 6.6. The proposed next step is to use the high-risk school review to inform the 2027/28 budget process, the reserves and financial resilience assessment, and any future reports to Cabinet on school financial recovery. This will ensure that schools' financial recovery is considered as part of the Council's wider medium-term risk management framework, rather than as a standalone monitoring issue.

7. Budget assumptions and scenario-based planning range

- 7.1. The medium-term budget model is being used to present a planning range rather than a single estimate. For 2027/28 the current range is £3.0m favourable, £4.5m mid-case and £6.5m adverse.

- 7.2. This range should be considered as a planning framework. The mid-case reflects the current working assumptions, while the favourable and adverse scenarios show how movements in funding, pay, inflation, income and borrowing could affect the level of action required.
- 7.3. For 2027/28, the opening scenario range does not include a general allowance for service demand-led pressures over and above the price inflation assumption. This approach is deliberate. Its purpose is to require directorates to bring forward rounded budget packages that identify the underlying drivers of any pressure, the management action already being taken, the scope for demand management or service redesign, and any residual funding requirement that remains after mitigation.
- 7.4. This does not mean that demand-led pressures are being discounted. Rather, they will need to be evidenced through the budget process and considered alongside compensating proposals, service choices and corporate affordability. This avoids building untested growth into the base before directorates have demonstrated the net position.
- 7.5. For the later three years of the MTFP, a moderate allowance for demand-led pressures above inflation is included. This reflects historic experience that isolated demand-led pressures tend to emerge over time, particularly in high-cost statutory services. Including a measured allowance in the later years helps keep the medium-term outlook realistic, while retaining discipline in the immediate 2027/28 budget process.

Planning assumption	Favourable	Mid-case	Adverse
Pay inflation – non-teaching	3.00% / £1.3m	3.30% / £1.6m	3.50% / £1.8m
Pay inflation – teaching	3.25% / £1.4m	3.50% / £1.5m	3.75% / £1.6m
Price inflation	2.50% / £3.4m	2.90% / £4.0m	3.50% / £4.8m
Borrowing	£0.4m	£0.5m	£0.7m
Reserves	£0.0m	£0.2m	£0.5m
Levies and insurances	£0.4m	£0.4m	£0.4m
Reduce capitalisation support	£1.0m	£1.0m	£1.0m
Fees and charges	2.50% / (£0.6m)	2.90% / (£0.7m)	3.50% / (£0.8m)
Welsh Government funding	2.10% / (£3.0m)	1.90% / (£2.7m)	1.50% / (£2.2m)
Council Tax	3.95% / (£3.3m)	3.95% / (£3.3m)	3.95% / (£3.3m)
Estimated budget gap 2027/28	£3.0m	£4.5m	£6.5m

- 7.6. While the immediate focus of the budget process is the 2027/28 budget gap, the same scenario-based approach will be extended across the four-year MTFP period. This is important because relatively modest annual changes in pay, inflation, funding, demand or capital financing assumptions can compound materially over the medium term. The four-year range will therefore provide Cabinet with a clearer view of both the first-year budget requirement and the cumulative level of risk or opportunity that may need to be managed through future budget rounds.

Scenario	2027/28	2028/29	2029/30	2030/31	Four-year cumulative range
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Favourable	£3.0m	£6.1m	£5.5m	£4.7m	£19.3m
Mid-case	£4.5m	£7.2m	£6.9m	£6.2m	£24.8m
Adverse	£6.5m	£9.0m	£8.3m	£7.6m	£31.4m

- 7.7. The key message from the scenario range is that the Council is not facing a one-year balancing exercise. Even where the 2027/28 gap is considered manageable, pressures accumulate over the medium term. The budget process therefore needs to identify recurring proposals that reduce the underlying gap, rather than relying mainly on one-off measures or deferring choices into later years.

8. Uncertainty, sensitivity analysis and budgetary risk

- 8.1. The scenario range provides the main sensitivity analysis for 2027/28. The remaining budget risks are those that could materially change the range or affect the deliverability of the eventual budget package.
- 8.2. The principal risks currently influencing the Council's financial planning are summarised below. They will be monitored through the budget process and reflected in the scenario range where they become sufficiently evidenced.
- 8.3. The risk response will be proportionate to the nature of each risk. Some risks will be reflected directly in the scenario range, some will require mitigation through directorate packages, some will be escalated through corporate risk and performance arrangements, and some will remain as issues for consultation or political choice where there is no purely technical solution.
- 8.4. The following table is intended to show which risks could change the size of the budget gap, why they matter and what management response is proposed.

Risk area	Direction of risk	Why it matters	Management response
Welsh Government settlement and specific grants	Funding may be above or below the mid-case assumption.	Settlement and grant movements have a direct impact on the residual budget gap and may affect core service activity.	Refresh scenarios following national budget announcements, provisional settlement and final settlement; assess specific grant changes separately where required.
Pay, inflation and commissioned services	Costs may exceed current planning assumptions.	Pay, contracts, care, transport, utilities and construction costs can create significant recurrent pressure.	Update assumptions as national and market information changes; challenge contract uplifts; reflect material movements in the scenario range.
Demand-led services	Activity, complexity or placement costs may rise.	Social care, homelessness, ALN and transport can move quickly. No general 2027/28 allowance is included	Require evidence-led directorate proposals; test activity and unit costs; consider prevention, demand management and service redesign.

		above price inflation, but later-year assumptions include a moderate demand allowance to reflect historic experience.	
Schools' financial recovery	School deficits may worsen or recover more slowly.	The forecast cumulative schools deficit is a material financial resilience risk for the Council.	Maintain recovery plans, review high-risk schools, test staffing and pupil assumptions, and consider proportionate intervention where required.
Savings and budget package deliverability	Savings may be delayed, reduced or non-recurrent.	Non-delivery increases the residual gap and risks carrying unresolved pressure into future years.	Apply rolling officer and SLT challenge; test deliverability, dependencies, timing and recurrent benefit.
Income, debt recovery and fees and charges	Income may underperform against assumptions.	Demand, affordability, collection rates and market conditions can affect Council Tax, fees, charges and other income.	Set prudent assumptions, monitor collection and debt recovery, and review fee decisions alongside the wider budget package.
Capital programme and revenue consequences	Additional capital investment may create revenue cost.	Unsupported borrowing, maintenance and operating costs can increase the revenue budget gap.	Prioritise capital pressures, quantify revenue consequences and consider capital choices alongside the revenue scenarios.
Reserves and financial resilience	Reserve flexibility may remain constrained.	Reserves protect against volatility but cannot fund recurring pressures sustainably.	Maintain the Council Fund, review earmarked reserves, avoid recurring reliance on reserves and replenish where possible.
Future Waste policy and funding	Funding and service costs may not align.	Changes to waste policy could affect the net cost of service delivery.	Monitor national announcements, model service impacts and reflect confirmed implications through the relevant directorate package.

9. Bridging the gap between expenditure and available resources

- 9.1. Best practice in medium-term financial planning is to treat the budget gap as a managed programme of choices rather than a balancing exercise at the end of the process. The Council's approach will therefore be to develop a rounded package of recurring savings, service reform, demand management, income, Council Tax, use of reserves where appropriate, and capital financing choices, supported by clear evidence on deliverability, risk and recurrent impact.

- 9.2. This approach is consistent with recognised good financial management practice, which emphasises medium-term planning, whole-system choices, scenario testing, clear links between resources and priorities, and the protection of financial resilience. It also reflects the principle that uncertainty is a reason to plan earlier and more systematically, rather than to defer choices until all funding information is known.
- 9.3. The budget response should be developed across five connected levers: controlling and evidencing expenditure pressures; reducing or redesigning demand; increasing income where appropriate and deliverable; delivering recurring savings and productivity improvements; and using reserves or one-off resources only where they support transition, risk management or genuine one-off pressures.
- 9.4. In simple terms, the budget will need to be built from a rounded package of evidenced pressures, realistic savings, income choices, demand management, Council Tax decisions and limited one-off support where appropriate.

Budget lever	What the package should show	Key tests before inclusion
Service pressures	The underlying driver, evidence base, statutory or policy context, current mitigations and residual funding requirement.	Is the pressure unavoidable, recurrent, evidenced and net of management action?
Demand management and prevention	How demand, complexity, placement cost, activity or avoidable escalation can be managed differently.	Is the impact realistic, measurable and aligned with service outcomes?
Savings and productivity	Proposals for service reform, staffing, procurement, digital, assets, process improvement or reduced activity.	Are the savings recurring, deliverable, timed correctly and supported by clear accountability?
Income, fees and charges	Inflationary uplifts, policy choices, market opportunities, collection assumptions and affordability considerations.	Is the income prudent, collectible, lawful, equitable and consistent with demand assumptions?
Reserves and one-off resources	Any proposed use of reserves, capital receipts, capitalisation support or time-limited funding.	Is use genuinely one-off, affordable, transparent and linked to transition or risk management?

- Directorate packages should therefore be prepared on a net contribution basis. They should bring together pressures, mitigations, savings, income and service choices in one place, showing the net effect on the budget gap under the favourable, mid-case and adverse scenarios. This is particularly important because the 2027/28 opening scenario range does not include a generic demand-led growth allowance above inflation; any such pressures must therefore be evidenced, mitigated and presented as part of a rounded directorate package.
- Each proposal should distinguish clearly between recurring, one-off and time-limited impacts. Recurring pressures should normally be met through recurring funding or recurring mitigation. One-off resources may have a role in managing timing, implementation, redundancy,

transformation or exceptional volatility, but they should not be used to obscure an unresolved recurring budget gap.

- The challenge process should test whether proposals are financially material, deliverable within the budget year, lawful, consistent with the Council's priorities, supported by equality and future generations considerations, and capable of being monitored. Where delivery risk is high, the budget should either include a realistic phasing assumption or identify a contingency, alternative mitigation or escalation route.
- In practical terms, the next stage of the budget process should produce: a refreshed scenario range; directorate packages showing net contribution to the gap; a list of proposals suitable for consultation; an assessment of cumulative risk and deliverability; and a clear view of any residual gap remaining to be addressed through political choices on Council Tax, service levels, income, reserves or further savings.

10. Medium-term approach to change and sustainability

- 10.1. The Council's medium-term approach to change and sustainability needs to sit at the heart of the MTFP. The CIPFA Financial Management Code emphasises that strong financial management should support short, medium and long-term sustainability, embed financial management within organisational culture, use quality data and risk management, and maintain transparency, accountability and assurance in decision-making. The Council's ongoing programme of change, For Purpose On Purpose (F-POP), provides the framework through which those principles can be translated into practical service and financial change.
- 10.2. F-POP should therefore be treated as a delivery and assurance mechanism for medium-term financial sustainability, not simply as a separate transformation programme. Its role is to help services redesign activity, manage demand, improve productivity, make better use of data and assets, and strengthen budget ownership. Financial benefits should only be included in the MTFP where there is clear evidence on timing, deliverability, investment requirement, dependencies, risks and recurrent impact.
- 10.3. The programme should also help distinguish between three different types of benefit: direct recurrent savings that can safely be built into the budget; cost avoidance or demand mitigation that reduces future pressure but may be harder to cash out immediately; and enabling benefits, such as improved data, workforce capacity or service resilience, that support better financial management but should not be counted as savings until they are evidenced.

F-POP / change theme	Contribution to sustainability	Financial planning test	Assurance / governance
Demand, prevention and early intervention	Reduces avoidable escalation, placements, crisis response and repeat demand where service evidence supports intervention.	Is the expected impact measurable, attributable and likely to reduce recurrent cost or future growth?	Tracked through service performance, finance monitoring and directorate budget packages.

Productivity, process and digital change	Improves capacity, reduces manual processing, removes duplication and supports more consistent service delivery.	Can benefits be converted into cashable savings, avoided cost, improved control or service resilience?	Benefits register, implementation plans and post-delivery review.
Workforce, capacity and culture	Strengthens budget ownership, financial awareness, leadership accountability and capacity to deliver change.	Are roles, savings ownership, training needs and change capacity sufficiently clear?	Officer challenge, SLT oversight and budget holder accountability.
Data, insight and performance	Improves understanding of cost, demand, activity, productivity and outcomes, enabling better choices.	Is the evidence strong enough to support budget assumptions and service redesign choices?	Consistent reporting, risk tracking and scrutiny of key assumptions.
Assets, procurement and commissioning	Supports better use of estate, contracts, commissioning models, external funding and whole-life cost decisions.	Are savings, receipts, contract benefits or cost avoidance realistic, timed and risk-assessed?	Capital, procurement and revenue implications considered together.

- The governance of F-POP should therefore be linked directly to the budget cycle. Proposals emerging from the programme should be tested through the same challenge route as other budget proposals, with clear ownership, delivery milestones, enabling investment, risk assessment, equality and future generations considerations, and a benefits profile showing when and how the financial impact will be realised.
- For 2027/28, the prudent position is not to include a general, unallocated financial benefit from F-POP within the opening scenario range. Instead, specific proposals should be added only where they have been sufficiently developed and tested. Over the medium term, the programme should become an increasingly important source of recurring savings, cost avoidance and improved resilience, but this must be supported by a robust benefits framework and regular reporting to SLT and Cabinet.

11. Capital programme

- 11.1. Capital investment remains central to maintaining essential infrastructure, supporting service delivery, meeting statutory responsibilities and delivering longer-term policy objectives. For MTFP purposes, the key issue is affordability: capital plans must be considered within sustainable limits and alongside the revenue consequences of borrowing, maintenance, operating costs and future service commitments.
- 11.2. The capital programme should therefore be assessed alongside the revenue scenarios set out in this update. New or changed capital commitments should identify their revenue impact, funding source, deliverability, risk and whole-life cost before they are built into future MTFP assumptions.

- 11.3. Rising construction, material and contract costs remain an important affordability risk. Where external grant funding does not keep pace with cost increases, schemes may require additional Council contribution, reduced scope, deferral or alternative delivery options.
- 11.4. While ongoing condition surveys, asset data and service monitoring help identify and manage risk, the Council's ageing asset base will continue to require investment to maintain, refurbish or replace infrastructure to acceptable standards. This includes schools, highways, bridges, structures, operational property, ICT, vehicles, drainage, rights of way and other assets that support service delivery and community resilience.
- 11.5. Annual capital allocations for asset maintenance and refurbishment are targeted at the highest-priority backlog issues, with focus on statutory compliance, health and safety, assets in the poorest condition, network resilience and risks to service continuity. Estate optimisation, asset disposals, transfers and strategic capital projects will also be used to reduce risk and release value where appropriate, although these measures will not fully address the total backlog.
- 11.6. The current draft capital MTFP is outlined below. This table will be refreshed as part of the 2027/28 capital programme review and should be considered as a current working position until updated figures are finalised.

Capital budget	Indicative Budget 2027/28
Expenditure	£000's
Asset Management Schemes	2,230
School Development Schemes	0
Infrastructure & Transport Schemes	7,372
Regeneration Schemes	730
Inclusion Schemes	1,200
ICT Schemes	413
Vehicles Leasing	1,500
Capitalisation Directive	1,708
Other Schemes	50
Total Expenditure	15,202
Funding	£000's
Supported Borrowing	(2,406)
Unsupported Borrowing	(5,564)
Grants & Contributions	(3,872)
Reserve Funded	(103)
Capital Receipts	(1,758)
Vehicle Lease Financing	(1,500)
Total Funding	(15,202)
(Surplus) / Deficit	0

- 11.7. The Capital Strategy provides the formal framework for capital investment decisions, including affordability, prudence, sustainability, risk and deliverability. The MTFP update should inform that strategy by identifying the revenue consequences and resilience implications of current capital assumptions before final budget proposals are brought forward.
- 11.8. While the core capital programme remains in place and supports essential infrastructure investment, significant backlog and emerging infrastructure pressures remain outside the programme because of affordability constraints. Some of these pressures are expected to reach a critical intervention point during the four-year MTFP period. The budget process will therefore need to distinguish between pressures that can continue to be managed through routine maintenance, those that require planned preventative investment, and those where deferral would materially increase the risk of asset failure, service disruption or higher whole-life cost.
- 11.9. All schemes and unfunded pressures will be reviewed through the budget process using the approved capital priority matrix. This will give greatest weight to health and safety, legal and statutory obligations, revenue budget impact, corporate priorities, external funding leverage, asset condition, network resilience, whole-life cost and deliverability. For schemes already approved but delayed, the review should confirm whether the original business case, cost estimate, funding package, delivery timetable and revenue implications remain valid.
- 11.10. The Capital Programme for 2027-2031 will therefore be refreshed alongside the revenue budget so that capital choices, borrowing assumptions and revenue consequences are considered together. This review will consider existing commitments, capital contingency, emerging infrastructure pressures, external funding opportunities, capital receipts, reserves, unsupported borrowing and the impact of any additional borrowing on the revenue scenario range.
- 11.11. The capital receipts summary below sets out the expected opening balances, planned use of receipts, forecast new receipts and closing balances across the MTFP period. It will be updated as the capital programme is refreshed.

Capital receipt balances	2026/27	2027/28	2028/29	2029/30	2030/31
	£000's	£000's	£000's	£000's	£000's
Balance as at 1st April	5,091	3,843	2,888	2,233	2,286
Capital receipts used for financing	(595)	(50)	(50)	(50)	(50)
Capital receipts used to support capitalisation direction	(2,931)	(1,708)	(708)	0	0
Capital receipts Forecast	2,278	803	103	103	103
Forecast Balance as at 31st March	3,843	2,888	2,233	2,286	2,339

- 11.12. The reducing balances shown in the table mean that capital receipts should be treated as a financing risk, not guaranteed capacity, until disposals are sufficiently certain. Where expected receipts are delayed, reduced or not achieved, the Council may need to reconsider scheme timing, scope, alternative funding sources or the level of borrowing required.
- 11.13. This reinforces the need for the capital programme review to consider capital priorities, available financing and revenue consequences together. Given the limited headroom in the capital programme, any additional capital investment requiring unsupported borrowing should

be considered explicitly alongside the revenue budget, the Council's overall financial resilience and the medium-term route to a recurring balanced position.

- 11.14. The following table provides an indicative sensitivity showing the annual revenue impact of additional unsupported borrowing in £10m tranches. It is intended to illustrate the scale of revenue consequences that would need to be accommodated within the MTFP, rather than to pre-judge any individual capital decision. The figures are based on the current 50-year PWLB maturity rate of 6.49%, with a simple straight-line MRP assumption over 50 years. Actual costs will depend on the borrowing rate at the point of advance, repayment profile, MRP policy, asset life and timing of spend.

Additional unsupported borrowing	Annual revenue budget impact (MRP + Interest)
£10m	£0.85m
£20m	£1.70m
£30m	£2.55m
£40m	£3.40m
£50m	£4.25m

12. Budget Process and Timetable

- 12.1. Setting a balanced budget for 2027/28 will require a disciplined, staged and evidence-led process. The role of this MTFP update is to set the planning framework, identify the current range, describe the main risks and clarify how assumptions, directorate proposals, engagement and settlement information will be brought together before final decisions are made.
- 12.2. The process will need to support transparent accountability. Finance will maintain the overall model and assurance framework; directorates will evidence pressures, mitigations and proposals; SLT will test deliverability and corporate fit; Cabinet will shape the policy choices; and scrutiny, consultation and member engagement will provide challenge before final recommendations are made.
- 12.3. The budget process will be structured around a number of phases: establishing the planning range and key assumptions; developing directorate packages; officer and SLT challenge; political consideration of emerging options; formal draft budget proposals; consultation and scrutiny; and final approval of the revenue budget, capital programme and Council Tax requirement.
- 12.4. Directorate budget packages will be expected to show pressures, mitigations, income, savings, service change, demand management and capital consequences in a single net position. This will allow Cabinet to consider rounded choices under the favourable, mid-case and adverse scenarios rather than reviewing separate lists of growth and savings.
- 12.5. The milestone dates in developing the budgetary process for 2027/28 are as follows:

Phase	Main activity	Indicative timing
1. Establish planning range and evidence base	Refresh assumptions, confirm the scenario range, test the approach with SLT, and brief the Leader and Cabinet Member for Finance.	Sep-26
2. Member framing and engagement	Present the MTFP update, explain the scenario approach, and brief Cabinet, political groups and members before detailed proposals are settled.	Oct-26
3. Directorate budget package development	Develop rounded directorate packages covering pressures, savings, income, service change, demand management and capital implications.	October to early November 2026
4. Settlement and scenario refresh	Review the UK Autumn Budget, Welsh Government draft budget and provisional settlement, then refresh the favourable, mid-case and adverse scenarios.	Late October to early December 2026
5. Challenge, prioritisation and draft budget	Undertake officer and SLT challenge, integrate revenue and capital choices, and refine a coherent draft budget package.	November to January 2027
6. Draft budget, scrutiny and consultation	Cabinet considers draft proposals, followed by scrutiny and consultation with residents, businesses, partners, staff and trade unions.	20 January to 18 February 2027
7. Final settlement and budget decision	Update for final settlement, consultation and scrutiny feedback, then take final budget proposals to Cabinet and Council.	Late February to 4 March 2027

12.6. The timetable is intended to give Cabinet a clear view of the main decision and assurance points. It will also provide a framework for monitoring how assumptions change, how proposals are developed and challenged, and how engagement feedback is reflected before the final budget is recommended.

Appendices

Appendix A - Progress against the MTFS Delivery plan

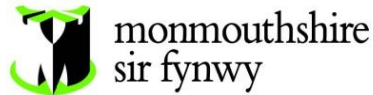
The medium term financial strategy (MTFS) approved by Council in July 2024 outlined the delivery plan that will convert the MTFS into practice. The plan contains the actions proposed in accordance with the strategy document. These align to the strategy's key aims and objectives.

There was a commitment made to provide a six-monthly update on progress against the delivery plan to monitor progress of the plan against the core objectives. The latest update of progress is outlined below:

Action No.	Action/Description	Outcome/Output	Timescale for completion	Responsible Officer/Body	Progress update September 2026
1	Develop a Change and Improvement plan to enable delivery of required savings over the medium term	Programme of work developed with overarching governance to enable delivery to be co-ordinated	By Autumn 2026, to inform the 2027/28 budget cycle	Cabinet/SLT	Programme of change reserve strengthened through the 2025/26 outturn, but further work is needed to translate change activity into fully costed, deliverable and recurrent savings options with clear ownership, milestones, benefits tracking and links to service business planning.
2	Delivery of budget holder training	Refresh and rollout of training to all budget holders	Initial rollout by December 2026, then ongoing	Head of Finance	Progress has been slower than originally intended and the training offer is not yet fully embedded. The next stage is to finalise and deploy a refreshed training offer covering forecasting, monitoring, savings delivery, reserves, income, debt management, procurement links and financial systems, with an evaluation mechanism.
3	Self-assessment of compliance with CIPFA Financial Management Code	Self-assessment to identify further actions to improve the Council's financial management	March 2027	Deputy Chief Executive	Core financial governance arrangements remain robust, with the Annual Governance Statement concluding that governance arrangements are effective. The Deputy Chief Executive has completed an initial self-evaluation against the CIPFA Financial Management Code, which provides assurance that the Council's core financial management arrangements are in place while identifying areas for continued operational improvement. The focus now is on using that evaluation, alongside learning from external review, internal audit, budget monitoring and

Action No.	Action/Description	Outcome/Output	Timescale for completion	Responsible Officer/Body	Progress update September 2026
					wider governance processes, to inform ongoing improvements in financial management practice, including links to the Code of Corporate Governance, options appraisal and medium-term financial planning.
4	Independent financial resilience review to be undertaken	Independent review to highlight and further areas for improvement	March 2027	Deputy Chief Executive	Audit Wales has provided positive external assurance on the MTFS and wider financial sustainability arrangements. The next step is to the scope and value of commissioning an independent financial resilience review to provide external assurance on medium-term planning, reserves, savings delivery and financial governance.
5	Enhance approach to modelling future growth, demand, demographic and inflationary pressures in the MTFP		Ongoing through six-monthly MTFP updates and the 2027/28 budget cycle	Head of Finance	MTFS and six-monthly MTFP updates have strengthened modelling of pay, inflation, service pressures, funding assumptions and capital affordability. Further work will develop scenario planning for 2027/28 and later years, including downside funding scenarios, capital pressures and the revenue consequences of unsupported borrowing.
6	Revenue reserves (including school balances) and useable capital receipt review to be undertaken in line with the revised reserves policy	Rationalisation of revenue reserves	Ongoing through six-monthly MTFP updates and outturn review	Deputy Chief Executive; Head of Finance	2025/26 outturn strengthened resilience, with £1.068m transferred to the Council Fund and £3.020m used to replenish earmarked reserves, including £2.5m to the Risk Mitigation Reserve. School deficits remain a significant risk, increasing to £6.88m with nineteen schools in deficit.
7	Financial risk register to be maintained and regularly updated	To ensure that suitable mitigations are in place against key financial risks	Ongoing through six-monthly MTFP update and 2027/28 budget cycle	Head of Finance	The Council has a sound and improving understanding of financial risks and cost drivers through the MTFS, MTFP updates, outturn and monitoring. Key risks include school deficits, service pressures, early 2026/27 risks, capital affordability and infrastructure pressures with revenue consequences.

Action No.	Action/Description	Outcome/Output	Timescale for completion	Responsible Officer/Body	Progress update September 2026
8	Annual review of fees and charges	To benchmark and assess fees and charges to ascertain scope for further income potential	Annually as part of the budget cycle	Head of Finance	Fees and charges remain a key part of the 2027/28 budget framework. Future reviews should continue to test income assumptions, collection performance, affordability and service-specific risks, alongside the wider budget package.



SUBJECT:	MONMOUTHSHIRE PLANNING SERVICE ANNUAL PERFORMANCE REPORT (APR)
MEETING:	PERFORMANCE & OVERVIEW SELECT COMMITTEE
DATE:	13 October 2026
DIVISION/WARDS AFFECTED:	ALL

1.0 PURPOSE

- 1.1 To provide the committee with a report on the performance of the Council's Planning Service for the financial year period **2025/26**.

2.0 RECOMMENDATION:

- 2.1 To scrutinise the contents of the Planning Service's Annual Performance Report 2025/26 prior to its endorsement by the Cabinet Member for Planning & Economic Development on 31 October 2026 for submission to the Welsh Government.

3.0 BACKGROUND

- 3.1 The Welsh Government (WG) requires all Local Planning Authorities in Wales to prepare and submit an Annual Performance Report (APR) and Capacity and Capability Survey by the end of October each year. The requirement forms part of the Planning Performance Framework and supports Welsh Government's objective of creating a positive, responsive and enabling planning service. The APR provides an opportunity to review performance, identify areas of good practice, understand service pressures and challenges, and establish actions for continued improvement. The 2025/26 reporting period is also the first since 2018/19 for which all-Wales comparator performance data has been available, enabling more meaningful benchmarking against other Welsh planning authorities.
- 3.2 This is the twelfth Annual Performance Report (APR). The report to a scrutiny committee provides the opportunity to review and discuss performance and was welcomed by previous Committees, which requested that it become an annual item.
- 3.3 The APR looks at the performance of the Planning Service against nationally set performance indicators, Welsh Government (WG) targets, the Wales average performance, and Monmouthshire's performance over the previous year. The results are considered in the context of the challenges, opportunities, priorities and resources (staffing and financial) available. The objective of the APR is to reflect on and celebrate good performance, identify areas for improvement, and look across Wales to identify potential areas of best practice that Monmouthshire could learn from or share with others.

3.4 The APR is divided into sections, with the format and appearance being consistent throughout Wales, and all LPAs reporting on the same performance indicators. The report looks at where the Planning Service sits corporately, local pressures, customer feedback and performance. Performance is analysed across the five key aspects of planning service delivery as set out in the Planning Performance Framework:

- Plan making (omitted from the APR in recent years as no performance data was provided by WG and given the work now being concentrated on replacing the current LDP);
- Efficiency;
- Quality;
- Engagement; and
- Enforcement.

This Framework was established by the Welsh Government in partnership with local planning authority representatives. Performance is ranked as 'good', 'fair' or 'needs improvement'.

3.5 The Annual Performance Report and the related Performance Framework is provided at Appendix 1.

4.0 KEY ISSUES

4.1 The purpose of the Planning Service is 'To plan for, advise on, give permission for and ensure the best possible development', that links directly to all six of the Council's Corporate objectives. The service is an enabling tool to help address some of the challenges and issues identified corporately.

4.2 Key areas of work for the Planning Service include:

- Carrying out a replacement of the Monmouthshire LDP.
- Preparing and co-ordinating thematic supplementary planning guidance to help to foster the interpretation and implementation of LDP policy.
- Implementing the Council's LDP through engaging and working with communities, and partnership working with both internal and external partners.
- Monitoring and evaluating development plan policies, including preparing the statutory LDP Annual Monitoring Report (AMR).
- Maintaining the LDP evidence base and ensuring fitness for purpose for future LDP revision.
- Providing pre-application advice to customers;
- Determining planning applications in accordance with adopted policy and material planning considerations, taking into account stakeholder comments and corporate objectives;
- Securing financial contributions from developers to offset the infrastructure demands of new development;

- Safeguarding the County's 2400 Listed Buildings and 31 Conservation Areas, areas of archaeological sensitivity, the Wye Valley National Landscape and the Bannau Brycheiniog National Park;
- Providing a heritage service for our neighbouring colleagues in Blaenau County Borough that works in a manner that is consistent and as well-resourced as the one provided for Monmouthshire.
- Taking robust enforcement action against unauthorised development that is unacceptable in the public interest.

5.0 MAJOR PROJECTS FROM 2024/25

5.1 During the reporting period these included:

- A significant proportion of the Planning Service's workload during 2025/26 related to the progression of the Replacement Local Development Plan (RLDP). The RLDP was submitted to the Welsh Government in November 2025 for Examination during the reporting period, representing a major milestone in the plan-making process. Following submission, the Examination was temporarily suspended in December 2025 to allow additional work to be undertaken in relation to phosphorus and nutrient neutrality matters, reflecting the significance of water quality considerations within the River Wye and River Usk catchments.
- The Council worked collaboratively with Welsh Government, Natural Resources Wales, Dŵr Cymru Welsh Water (DCWW) and other stakeholders during the suspension period to progress the evidence base and identify appropriate solutions. This enabled the Examination to recommence, with hearing sessions taking place throughout September and October 2026. The Examination remains one of the most resource-intensive workstreams undertaken by the Planning Service and has required significant officer input across both Planning Policy and Development Management functions.
- A restructuring of the Development Management service was implemented during the reporting period and is now beginning to take shape. The revised structure provides clearer career pathways, improved progression opportunities and enhanced professional development prospects for officers at all stages of their careers. In addition to supporting recruitment and retention, the new structure is intended to strengthen the overall resilience of the service by improving capacity, creating additional succession planning opportunities and reducing reliance on a small number of experienced officers.
- During 2025/26, the Council determined four major planning applications, comprising two residential developments, a strategic employment proposal and a significant renewable energy scheme. Collectively, these applications will support the delivery of new homes, economic growth and renewable energy generation across Monmouthshire, whilst securing associated infrastructure and community benefits through the planning process. Notwithstanding the scale and complexity of these developments, 100% of major applications were determined within agreed timescales.

6.0 CONCLUSIONS AND RECOMMENDATIONS OF OUR 2025/26 APR

6.1 Based on the performance information in Section 6 and Appendix A of the APR, we can be pleased with the service we deliver. During this period:

- The proportion of major applications determined within 8 weeks or agreed timescales improved from 89% to 100% (7 out of 7 applications). This maintains our performance well above the 'Good' target of 60%
- The end-to-end period for determining major planning applications continued its trend, falling from, 436 days in 2023/24 to 267 days in 2024/25 to 163.7 days;
- The proportion of all applications determined within 8 weeks or agreed timescales remained high at 93% (increasing from 92% in 2024/25), and remaining above the Welsh average of 91.6%
- The proportion of applications we approved remained high at 97% (up from 95% in 2024/25)
- In seven out of nine appeals (73%) against our decisions to refuse planning permission, MCC's decision was confirmed, well above the 'Good' standard of 66% or more;
- We dealt with a large number of applications for listed building consent (54 applications) and 70%. This dipped slightly from 78% due to changes in staff and periods of vacant posts between new officers starting.
- Enforcement performance remained strong for the measure relating to the percentage of enforcement cases investigated in 84 days, 81% which is rated 'Good'. It is acknowledged that the time taken to take positive enforcement action increased to 191 days, rated 'Fair', this was still well below the Welsh average in 2025/26 of 275 days. This was primarily because we closed a small number of long-standing, complex cases which inflated the average figure. The number of enforcement cases received increased in 2025/26 and we served 6 notices. With regards to appeals against enforcement notices issues, the Council were successful in 100% of appeals being upheld (5 out of 5).
- S106 monies (£244,450) were received towards important community infrastructure schemes. Whilst this figure has reduced from 2024/25 (approximately £1m) this reflects the lifetime of the current Local Development Plan.
- During 2025/26, the Council continued to use Section 106 planning obligations to support the delivery of infrastructure and community benefits arising from development. Examples included investment in the Caldicot Greenway/Multi-User Route, local play and recreation facilities, community infrastructure and affordable housing projects across Monmouthshire. These projects demonstrate the practical role of planning obligations in mitigating development impacts and securing benefits for local communities.

6.2 A summary table of our performance can be found in Appendix A of the APR. Of the 20 ranked indicators, 8 are ranked 'Good', while 4 are 'Fair' and 3 'need improvement'.

- The three indicators recorded as requiring improvement relate to plan-making measures that were introduced as part of the revised Planning Performance Framework and were therefore not assessed as part of previous Annual Performance

Reports. These indicators should also be considered within the wider Welsh context, where many authorities are engaged in the review or replacement of their development plans. At the end of the reporting period, fewer than half of Welsh planning authorities had a development plan that remained within its plan period. During 2025/26, Monmouthshire's principal planning policy priority was the progression of the Replacement Local Development Plan through submission and Examination. Given the scale and significance of that work programme, resources were appropriately focused on supporting the Examination process, responding to Inspector-led matters and progressing the Plan towards adoption.

	Number of indicators*
Welsh Government target has been set and our performance is 'good'	8
Welsh Government target has been set and our performance is 'fair'	4
Welsh Government target has been set and our performance 'needs improvement'	3

*Performance standards are not set for 5 of the ranked indicators.

6.3 Four actions are identified going forwards:

Action 1 – Continue the digitisation of historic planning records and Tree Preservation Order information to improve data quality, public access to information and opportunities for customer self-service.

Action 2 – Continue implementation of the Buildings at Risk (BAR) Strategy into other settlements, prioritising interventions that secure the long-term conservation, sustainable reuse and enhancement of Monmouthshire's heritage assets.

Action 3 – Explore and embed the responsible use of Artificial Intelligence (AI) across the Planning Service to support productivity, improve customer service, reduce administrative workloads and enable officers to focus more time on professional planning, place-making and decision-making activities.

Action 4 – a) To adopt a Planning Enforcement Plan to provide a clear process and procedures to how the planning enforcement service operates within the county.
b) – Elected Member & Community/Town Council Training on planning enforcement and overview of the Planning Enforcement Plan.

7.0 RESOURCE IMPLICATIONS:

7.1 Officer time and costs associated with the preparation of this APR are met from the Development Management budget and work is carried out by existing staff.

8.0 SUSTAINABLE DEVELOPMENT AND EQUALITY IMPLICATIONS:

8.1 Sustainability, equality and well-being considerations are central to the planning service's activities. This report is a review of the previous year's performance against targets and benchmarking information, however the proposed four actions for future improvements seek to improve service delivery to the benefit of our customers and communities.

8.2 An Equality and Future Generations Evaluation is attached as an appendix.

9.0 OPTIONS CONSIDERED

9.1 There is a requirement for Local Planning Authorities to prepare and submit an Annual Performance Report (APR) and Capacity and Capability Survey to the Welsh Government each autumn. The 2025/26 reporting cycle is particularly significant as it is the first since 2018/19 for which comprehensive all-Wales comparator data has been made available, enabling meaningful benchmarking of Monmouthshire's planning performance against other Welsh authorities. The APR provides an opportunity to review service performance, identify strengths and areas for improvement, understand current pressures and challenges, and establish actions to support the continued delivery of a high-quality planning service.

In considering the APR, the following options were identified:

Recommend the APR for submission to the Welsh Government without amendment.
Recommend the APR for submission to the Welsh Government, subject to amendments to the proposed actions for the forthcoming year.

9.2 The APR provides a useful reflection on last year's performance against targets and benchmarking information. The proposed actions seek to continue that journey of improvement, given the resources available to us. Consequently, option 1 is the preferred option.

10.0 HOW WILL SUCCESS BE MEASURED?

10.1 The Planning Service is measured against a number of clear and consistent (across Wales, and over time) performance indicators allowing aspects of a successful service to be measured. These indicators need to be viewed in the context of other factors, including customer and stakeholder feedback, outcomes (which are not always captured by performance indicators), and whole Council priorities.

10.2 We strive to deliver the best service possible, and our mission is to plan for, advise on, give permission for, and ensure the best development possible.

11.0 CONSULTEES

- Planning Committee and the Performance & Overview Scrutiny Committee
- Cabinet Member for Sustainable Economy

- SLT
- Communities and Place DMT

12.0 BACKGROUND PAPERS:

None

13.0 AUTHOR & CONTACT DETAILS:

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Appendices

1. Annual Performance Report including appendix (Performance Framework)
2. Equality and Future Generations Evaluation

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MONMOUTHSHIRE COUNTY COUNCIL

Planning Services Annual Performance Report 2025-2026

*Monitoring the performance of the planning service in
Monmouthshire.
Reviewing progress, outcomes and key challenges during
2025/26.*

Cyngor Sir Fynwy / Monmouthshire County Council



MONMOUTHSHIRE COUNTY COUNCIL
PLANNING ANNUAL PERFORMANCE REPORT
1st April 2025 - 31st March 2026

PREFACE

I am very pleased to introduce the twelfth Annual Performance Report for Monmouthshire County Council's Planning Service.

This report demonstrates that the Planning Service continues to perform strongly across a range of key measures. I am particularly pleased that, for the first time since 2018/19, Welsh Government has reinstated all-Wales performance data, allowing meaningful benchmarking against other planning authorities. The results show that Monmouthshire continues to perform strongly in a number of areas, including the determination of major planning applications, overall application performance, planning appeals and enforcement investigations.

During the year, the Planning Service successfully balanced the demands of progressing the Replacement Local Development Plan (RLDP) through Examination whilst continuing to deliver its statutory functions.

The implementation of the revised Development Management structure during the reporting period has also strengthened the resilience of the service, creating clearer career progression opportunities and a stronger platform for future recruitment, retention and succession planning.

Good planning remains central to the Council's purpose of becoming a zero-carbon county whilst supporting well-being, health and dignity for everyone at every stage of life. Planning has a vital role in addressing climate change, delivering homes and employment opportunities, supporting sustainable economic growth and protecting the heritage and landscapes that make Monmouthshire such a special place. I would like to thank Members, officers and all those involved in the planning process for their continued commitment and contribution during another successful year.

Councillor Paul Griffiths, Cabinet Member Planning & Economic Development

CONTEXT

1.0 This section sets out the planning context within which the Local Planning Authority operates, both corporately and in terms of Monmouthshire as a county, for the 2025/2026 period.

1.1 We contribute to delivering the Council's high-level objectives, set out in the Council's Community and Corporate (CC) Plan 2022-28. The objectives we contribute to are:

MCC Purpose

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

CC Objectives

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

Local Context

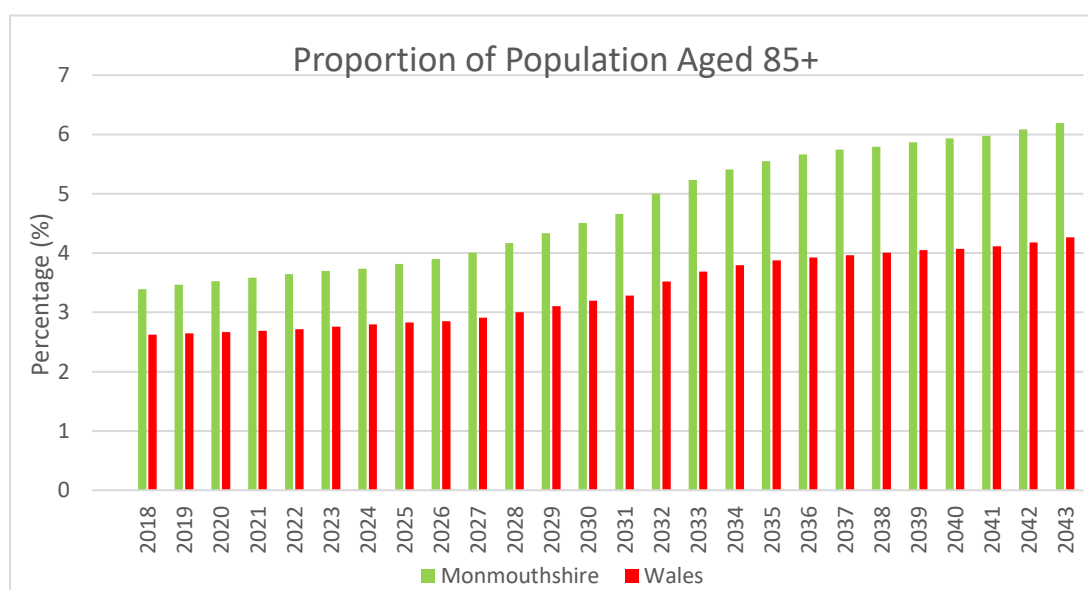
1.2 Located in South-East Wales, Monmouthshire occupies a strategic position between the major centres in South Wales, the South-West of England and the Midlands. The County shares a border with the neighbouring Local Planning Authorities of Newport, Torfaen and Brecon Beacons National Park (BBNP) in Wales and Gloucestershire, the Forest of Dean and Herefordshire in England, with Severn crossing links to South Gloucestershire. The County forms the gateway to South Wales and is part of the Cardiff Capital City Region. This location gives the County a distinctive identity.

Our People

1.3 Monmouthshire covers an area of approximately 88,000 hectares with a population of 93,000 in 2021. Almost 8% of residents reside within the BBNP area of the County. The County has a low population density of 1.1 persons per hectare – significantly lower than the South-East Wales average of 5.3 persons per hectare – reflecting the area's rural nature. Only 53% of the population lived in wards defined as being urban areas (i.e. with a population of more than 10,000).

1.4 Our population increased steadily, up 7.6% between 2001 and 2011 compared with the Wales average of 5.5%. The increase from 2011 to 2021 represents a lower increase at 1.8%, however, this is marginally higher than the growth for Wales over the same period of 1.4%. This increase is wholly attributable to inward migration, with natural change showing negative growth. The County has a relatively high and increasing proportion of older age groups, and a lower and decreasing proportion of younger adults compared with the UK and Wales averages. The graph below illustrates the proportion of those aged 85+ in Monmouthshire in comparison to Wales, based upon the 2018-based local authority population projections for Wales, 2018 to 2043. It shows that the trend in the ageing demographic is likely to continue. The 2021 Census suggests the proportion of those aged 85+ is 3.4% in Monmouthshire compared to 2.7% in Wales.

1.5 The diagram below encapsulates the issues that the Council are seeking to address during the development of the Replacement Local Development Plan (RLDP) over the next few years:



Demographic change has significant implications for economic activity and demand for services to enable our citizens to continue to live independent lives.

Housing & Quality of Life

1.6 The County has three broad categories of settlement:

- The historic market towns of Abergavenny, Chepstow and Monmouth have developed over many years to have a wide range of opportunities for employment, shopping, community facilities and public transport;
- The newer settlements in Severnside of Caldicot/Portskewett, Magor/Undy, Rogiet and Sudbrook where recent high levels of residential growth have taken place without the local jobs and community facilities to match. The area

benefits, however, from a strategic location at the 'Gateway' to Wales with good access to the employment markets of Newport, Cardiff and Bristol;

- The rural area, containing the small town of Usk, the larger villages of Raglan and Penperlleni, and a large number of smaller villages, widely dispersed around the County.

1.7 Over the last decade, housing completions in the Monmouthshire LPA area have averaged over 300 dwellings per annum, although there have been significant annual variations with 205 completions in 2014/15 and 443 in 2018/19.

1.8 The average house price in Monmouthshire was £335,000 in July 2026 (provisional), up 2.8% from July 2025. This was slightly higher than the rise in Wales (2.6%) over the same period (source Office for National Statistics).

1.9 Monmouthshire is generally a prosperous County offering a high quality of life for its residents. However, poor access to community facilities and declining local service provision is an issue for rural and ageing communities. The health of Monmouthshire's population is generally better than the Wales average, with greater life expectancies and a higher proportion of residents classing themselves as being in good health (2021 Census). Fewer residents in the County suffer with a limiting long-term illness compared with Wales as a whole. The rate of reported crime in Monmouthshire tends to be lower than for Wales as a whole.

Our Economy

1.10 The ONS Annual Population Survey indicates that Monmouthshire continues to have one of the highest employment rates in Wales. In the year ending March 2026, 78.0% of the County's working age population (aged 16-64) were in employment, compared with the Wales average of 72.1%. Monmouthshire recorded the highest employment rate in South East Wales and was among the highest performing local authorities in Wales, demonstrating the County's continued economic resilience and attractiveness as a place to live and work.

1.11 The latest Business Register and Employment Survey (BRES) indicates that employment in Monmouthshire continues to be concentrated in the public administration, education and health sector, which accounts for the largest proportion of jobs in the County. Distribution, transport, accommodation and food services also represent a significant component of the local economy. Tourism remains an important contributor to economic activity, supporting employment, local businesses and services across the County. According to the latest UK Business Counts data, Monmouthshire had 4,445 active enterprises in 2024. Professional, scientific and technical services, agriculture, forestry and fishing, and construction accounted for the largest share of businesses. The business base is characterised by a strong small business sector, with 98.7% of enterprises employing fewer than 50 people.

1.12 Tourism is vital to Monmouthshire's economy and generates income to support a wide range of businesses and services. The latest STEAM (Scarborough Tourism Economic Activity Monitor) data demonstrates the continued strength of Monmouthshire's visitor economy. In 2025, an estimated 2.28 million visitors generated 3.65 million visitor days within the county, contributing £395.7 million to the local economy and supporting 3,475 full-time equivalent jobs. Compared to 2024, the total economic impact of tourism increased by 8.4%, visitor days increased by 3.3%, employment supported by tourism increased by 1.5%, and the economic impact per visitor day rose by 8.7% to £108.41. Visitor numbers remained stable, decreasing by just 0.1% compared with the previous year. These figures indicate that tourism continues to make a significant contribution to Monmouthshire's economy, supporting local businesses, services and employment opportunities across the county.

1.13 Management of the destination for visitors and residents is guided by Monmouthshire's Destination Management Plan 2025-2030. Following a comprehensive review of the previous Plan, extensive research and engagement were undertaken with local, regional and national stakeholders to develop a new long-term framework for the visitor economy. The Plan was adopted in November 2025 and sets out a clear vision, strategic priorities and delivery framework to support the sustainable growth and management of tourism across the county to 2030.

1.14 While commissioned by Monmouthshire County Council, the Plan provides a shared strategic direction for public, private and third-sector organisations with an interest in supporting the visitor economy and maximising benefits for local communities. The Plan supports the Council's wider vision of creating socially and economically sustainable communities by attracting and retaining younger people and helping to rebalance the county's ageing demographic. It therefore places a strong emphasis on revitalising towns and landscapes, enhancing the quality and diversity of visitor experiences, and continuing to evolve Monmouthshire's destination brand to strengthen its position as an attractive place to visit, invest, work and live.

1.15 The 2021 Welsh Government Commuting Statistics indicate that 61.2% of the County's working residents work in the area. This is an increase on previous years and suggests that there has been some progress in meeting the aspiration to increase the proportion of resident workforce working within Monmouthshire over the Plan period. However, the same data source suggests that Monmouthshire has a net outflow of 2,800 commuters – with 14,300 commuting into the Authority to work and 17,100 commuting out. There was significant in-commuting from Newport (3,000), Torfaen (1,900) and Blaenau Gwent (1,400), and from England (2,900). The

main areas for out-commuting were Newport (2,600), Torfaen (2,400), Cardiff (1,600) with a further 4,600 going to Bristol. A relatively high proportion of Monmouthshire's residents travel long distances to work, with a high usage of the private car. Heavy reliance on the private car and limited opportunities for public transport is a particular issue in rural areas.

1.16 the adoption of the Destination Management Plan 2025-2030 during the reporting period provides a clear strategic framework for managing tourism growth and supporting investment in the visitor economy over the coming years.

Our Built Heritage

1.17 The Monmouthshire LPA area has a rich built heritage and historic environment which includes:

- Approximately 2,400 Listed Buildings, of which 2% are Grade I, 10% are Grade II* and 88% are Grade II. Of note, around 176 Listed Buildings have been identified as being at risk.
- 31 Conservation Areas – designated for their special historic or architectural interest, covering some 1,648 hectares in total;
- 45 Historic Parks and Gardens – identified as having a Special Historic Interest, covering 1,910 hectares;
- 3 Landscapes of Outstanding Historic Interest identified by Cadw (parts of Blaenavon, the Gwent Levels and the Lower Wye Valley);
- 164 Scheduled Ancient Monuments.

THE PLANNING SERVICE

2.0 The Planning Service's purpose, 'To plan for, advise on, give permission for and ensure the best possible development', links directly to all six of these objectives. The Planning Service sits within Place & Community Well Being Directorate.

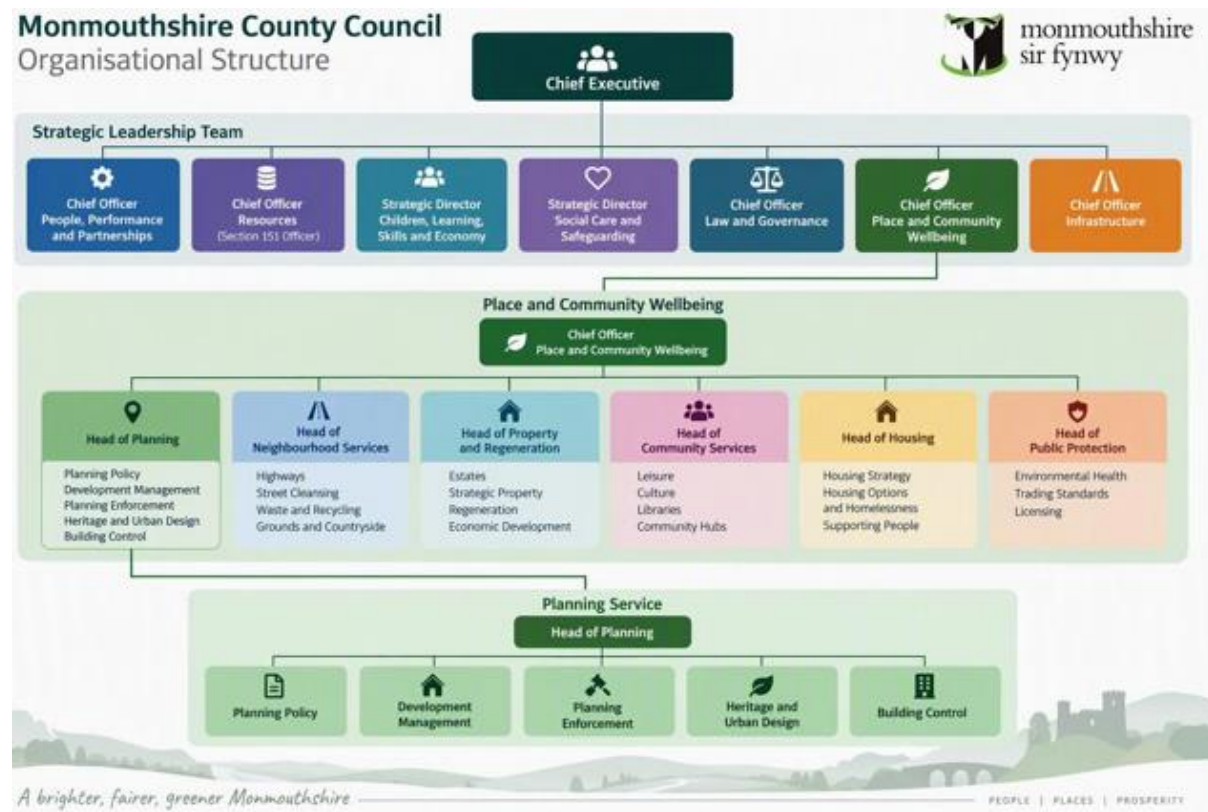
2.1 The Planning Service is made up of i) the Planning Policy and ii) the Development Management (DM) teams. The primary purpose of the Planning Policy team is to prepare and monitor the statutory Local Development Plan (LDP) and assist in its effective implementation through the Development Management (planning application) process. This ensures that the land use and sustainable development objectives of the Council are met ensuring the provision of an adequate supply of land in sustainable locations for housing, retail, education, recreation, tourism, transport, business, waste and other needs, whilst protecting the county's valued environmental, heritage and cultural assets. This work aligns directly with achieving the Council's objectives.

2.2 Key areas of work for the Service include:

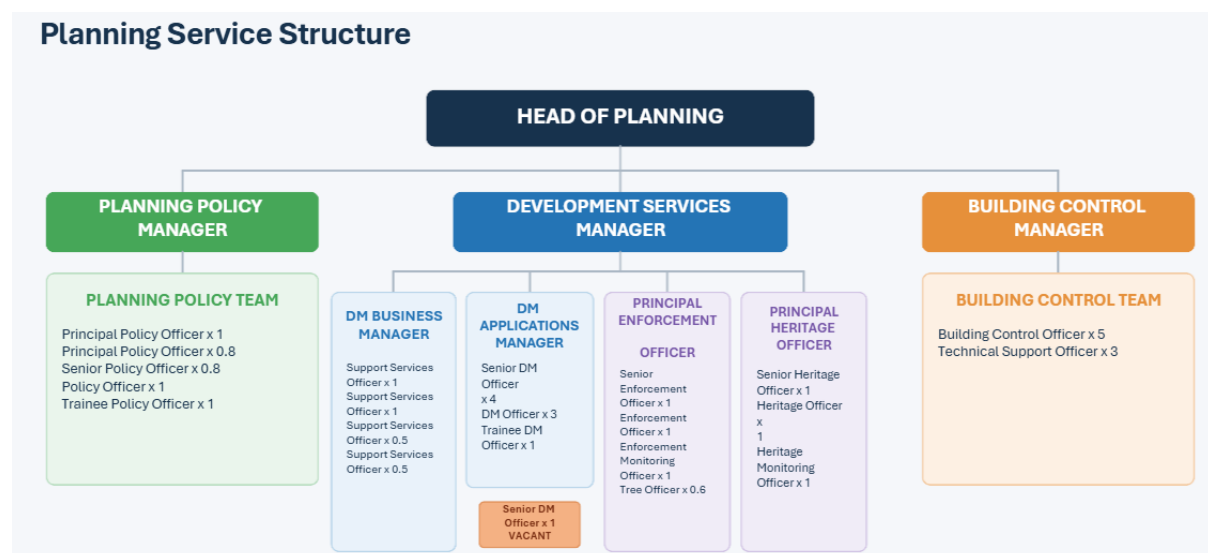
- Carrying out a replacement of the Monmouthshire LDP.
- Preparing and co-ordinating thematic supplementary planning guidance to help to foster the interpretation and implementation of LDP policy.
- Implementing the Council's LDP through engaging and working with communities, and partnership working with both internal and external partners.
- Monitoring and evaluating development plan policies, including preparing the statutory LDP Annual Monitoring Report (AMR).
- Maintaining the LDP evidence base and ensuring fitness for purpose for future LDP revision.
- Providing pre-application advice to customers;
- Determining planning applications in accordance with adopted policy and material planning considerations, taking into account stakeholder comments and corporate objectives;
- Securing financial contributions from developers to offset the infrastructure demands of new development;
- Safeguarding the County's 2400 Listed Buildings and 31 Conservation Areas, areas of archaeological sensitivity, the Wye Valley National Landscape and the Bannau Brycheiniog National Park;
- Providing a heritage service for our neighbouring colleagues in Blaenau County Borough that works in a manner that is consistent and as well-resourced as the one provided for Monmouthshire.
- Taking robust enforcement action against unauthorised development that is unacceptable and expedient to do so in the public interest.

Service Structure and Reporting Lines

3.0 Wider Corporate Structure:



3.1 Planning Structure 2025/26:



Budgets and Financial

4.0 Planning application fee income (see Figure 1 below) remains an important source of funding for the Development Management service. During 2025/26, the service received £499,000 in planning application fees against a budget target of £717,000. While planning fees contribute significantly towards the cost of operating the service, they do not currently achieve full cost recovery and the service continues to rely on funding from the Council's wider budget to support statutory planning functions.

4.1 The Welsh Government's planning application fee policy seeks to move local planning authorities towards greater cost recovery and a more sustainable funding model. Revised planning fees were originally expected to be introduced from 1st April 2025 but were not implemented until much later in the reporting period, December 2025. As a result, the majority of applications determined during 2025/26 were either submitted before the revised fee regime was introduced or had only been subject to the new fee structure for a limited period. Consequently, it is too early to draw meaningful conclusions regarding the impact of the revised fees on income generation or progress towards full cost recovery.

4.2 Fee income is also heavily influenced by development activity and the number and type of applications submitted in any given year. Monmouthshire is currently in the latter stages of the adopted Local Development Plan and progressing the Replacement Local Development Plan through Examination. As is often the case at this stage of the plan cycle, a significant proportion of strategic housing and employment allocations within the adopted plan have either already been implemented or have planning permission. This can reduce the volume of major planning applications coming forward and limit opportunities for generating significant fee income. While application numbers remain healthy overall, the limited availability of large development sites can have a notable impact on income levels and the ability of planning fees to contribute towards full cost recovery.

4.3 Looking forward, adoption of the Replacement Local Development Plan will provide a new portfolio of development opportunities across the County. Over time this is expected to support future development activity and may contribute to increased planning fee income. However, planning income will continue to be influenced by wider economic conditions, development viability and market confidence and therefore remains inherently difficult to predict with certainty.

4.4 No dedicated training budget was available to the Planning Service during 2025/26. This continues to present challenges given the increasingly complex legislative, policy and technical environment within which planning services operate. Recent changes to planning legislation, ongoing implementation of net zero and biodiversity requirements, infrastructure reforms and the progression of the Planning (Wales) Bill place growing demands on officers to maintain and develop specialist knowledge and skills.

4.5 Despite the absence of a formal training budget, officers have continued to access professional development opportunities where available through online learning, professional networks, regional working groups, Welsh Government events and Royal Town Planning Institute (RTPI) Cymru continuing professional development activities.

4.6 Training and development opportunities for colleagues were primarily events organised by the Council itself or occasionally by the RTPI, including the Wales Planning Conference. There was also a law update by FTB Chambers and the annual Welsh Enforcement Conference. In-house opportunities were provided via quarterly Development Management and Planning Policy Liaison Meetings. There is also an opportunity for DM officers to discuss individual cases with colleagues at casework management meetings held twice a week.

4.7 The issue of workforce capacity, skills retention and professional development is recognised nationally. RTPI Cymru and Welsh Government are currently supporting a range of initiatives aimed at strengthening the planning profession in Wales, including workforce planning research, planning bursaries, apprenticeships and measures to improve recruitment and retention across local planning authorities. These initiatives are intended to help build a more resilient and sustainable planning profession capable of responding to increasing demands and legislative change.

Figure 1

	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26
Budgeted fee income	£668k	£684k	£681k	£693k	£589k	£480k	£480k	£567k	£620k	£717
Actual income	£560k	£430k	£653k	£666k	£494k	£651k	£554k	£475k	£508k	£499k

Workforce and Succession Planning

4.8 The Planning Service comprises a multidisciplinary team responsible for development management, planning policy, enforcement, conservation and administrative support functions. During 2025/26, the service maintained a healthy balance of experienced officers and younger planners at earlier stages of their professional careers. This broad range of experience and age profile provides a strong foundation for knowledge sharing, mentoring and skills development, helping to support service resilience and succession planning.

4.9 Like many planning authorities across Wales, the service continues to operate within a challenging recruitment environment, with competition for qualified planning professionals remaining high. During the reporting period there were three vacant posts within the Development Management section. While these vacancies have created short-term capacity pressures, the service has continued to perform strongly against a number of key performance indicators and has maintained delivery of its statutory functions.

4.10 A restructuring of the Development Management service was implemented during the reporting period and is now beginning to take shape. The revised structure provides clearer career pathways, improved progression opportunities and enhanced professional development prospects for officers at all stages of their careers. In addition to supporting recruitment and retention, the new structure is intended to strengthen the overall resilience of the service by improving capacity, creating additional succession planning opportunities and reducing reliance on a small number of experienced officers.

4.11 It is anticipated that the outstanding vacancies within the Development Management service will be filled during the current reporting period. This will place the service in a stronger position to respond to future development pressures and support implementation of the Replacement Local Development Plan following its anticipated adoption.

4.12 We recognise that workforce planning and succession management remain critical issues for the planning profession nationally. The service will therefore continue to focus on recruitment, retention, professional development and creating opportunities for staff progression to ensure that it is well placed to respond to future legislative changes, service demands and the delivery of the Council's strategic planning objectives.

Skills and Capacity

4.13 The Planning Service benefits from a strong and experienced team across development management, planning policy, enforcement and conservation functions. In particular, the Council retains an in-house Heritage Team, providing specialist conservation expertise that is increasingly uncommon amongst Welsh local planning authorities. Capacity within the team was temporarily affected during the reporting period while a new Heritage Officer was recruited and inducted into post.

4.14 The Council's long-established shared Minerals Planning Service arrangement with Carmarthenshire County Council continues to work effectively and provides a proportionate and sustainable approach given the relatively low volume of minerals planning work arising in Monmouthshire.

4.15 Officers continue to actively engage in professional networks including Planning Officers Society Wales (POSW), the Development Management Wales Managers Group and RTPI Cymru events, including the Enforcement Conference. These arrangements help officers maintain up-to-date knowledge, share best practice and develop professional networks. Looking ahead, the planned Development Management and Planning Policy conferences in 2027 will provide further opportunities to strengthen collaboration and professional development across the service.

Recruitment and Retention

4.16 Recruitment and retention remain a challenge across the Welsh planning profession, particularly in relation to senior and management-level Development Management posts. This is a well-recognised issue nationally and continues to be a key priority for the Planning Officers Society Wales (POSW). While Monmouthshire has experienced some difficulties in recruiting to management positions during the reporting period, the recent Development Management restructure has created clearer career pathways and progression opportunities which are expected to strengthen recruitment, retention and succession planning in the future. We remain committed to developing talent from within the service and maintaining a resilient and sustainable workforce capable of responding to future service demands.

OUR LOCAL STORY

Workload

5.0 A significant proportion of the Planning Service's workload during 2025/26 related to the progression of the Replacement Local Development Plan (RLDP). The RLDP was submitted to the Welsh Government for Examination during the reporting period, representing a major milestone in the plan-making process. Following submission, the Examination was temporarily suspended in December 2025 to allow additional work to be undertaken in relation to phosphorus and nutrient neutrality matters, reflecting the significance of water quality considerations within the River Wye and River Usk catchments.

5.1 The Council worked closely with Welsh Government, Natural Resources Wales, Dŵr Cymru Welsh Water (DCWW) and other stakeholders during the suspension period to progress the evidence base and identify appropriate solutions. This enabled the Examination to recommence, with hearing sessions taking place throughout September and October 2026. The Examination remains one of the most resource-intensive workstreams undertaken by the Planning Service and has required significant officer input across both Planning Policy and Development Management functions.

5.2 Alongside progression of the Examination, significant work was undertaken to support the delivery of the RLDP's strategic allocations through a programme of master planning and placemaking activity. This included continued engagement with

the Design Commission for Wales, which provided independent design review and expert advice to help shape high-quality, sustainable and deliverable development proposals. This work will assist in ensuring that key sites brought forward through the RLDP reflect the Council's placemaking ambitions and contribute positively to the creation of sustainable and resilient communities.

5.3 Figure 2 below sets out that there was a very modest reduction in number of planning applications received (5.1%) with a total of 834. There are a variety of determinative reasons for this including, but not limited to, the UK's current economic challenges, including construction costs, as well as the lifecycle of the LDP which is in the process of being replaced. However, notwithstanding where the current LDP is, performance on major planning applications significantly exceeded the Welsh average in respect of determination within time periods required. We determined 100% of applications within these timescales, the Welsh average for the reporting period stood at 79.6%.

5.4 It is pleasing to note that the proportion of application beings being determined with 8 weeks or agreed timescales increased from 92% to 93.3%. This maintains our standard of being rated 'green' and exceeds the Welsh average for 2025/26 of 91.6%.

5.5 During 2025/26, 97% of applications were determined under delegated powers which is just above the Welsh average for the reporting period (96.5%). The performance of Development Management (applications) at appeal was also strong with 77.8% of planning appeals (including householder and minor commercial) being dismissed, which was above the Welsh average of 73.8%.

Figure 2

	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26
Applications received	1284	1117	1188	1126	1134	1126	1154	1014	956	879	834
Applications determined	1085	1087	1071	1101	1106	947	1152	1026	956	908	811
% within 8 weeks or agreed timescale	79%	90%	91%	88%	91%	91%	81%	89%	93%	92%	93.3%
% applications approved	95%	96%	95%	95%	97%	97%	97%	94%	97%	95%	97%

5.6 In respect of planning enforcement workload, there are two measures for enforcement performance. The first relates to the percentage of enforcement cases investigated (determined whether a breach of planning control has occurred and, if so, resolved whether enforcement action is expedient) within 84 days. On this measure we maintained our continued performance of "good" with 81.3% of all cases

being investigated within 84 days. This figure performs well against a Welsh average for the reporting period 2025/26 of 70.3%. Further interrogation of this performance, above that required for Welsh Government, is warranted and reveals that against the benchmark figure of 84 days, on average planning enforcement cases were investigated in 64 days.

5.7 It is acknowledged that the average time to take positive enforcement action rose to 191.1 days and therefore remained within the “fair” performance measure. This is attributed to the closing of a small number of complex, long-standing cases which skewed the overall figure. However, this is the first reporting period across Wales since 2018/29 and when compared across all Local Planning Authorities the average time of 191.1 days performs strongly against a national average of 275.1 days.

Annual Monitoring Report (AMR).

5.8 An Annual Monitoring Report was not prepared during the reporting period. Resources within the Planning Policy team were focused on the submission of the Replacement Local Development Plan (RLDP) for Examination and supporting the subsequent Examination process. The RLDP was submitted to the Welsh Government during 2025/26 and represented a significant milestone in the plan-making process.

5.9 Following submission, the Examination was temporarily suspended in December 2025 to enable additional work to be undertaken in relation to phosphorus and nutrient neutrality matters. During this period, the Council worked closely with key stakeholders to progress further evidence and supporting documentation. The Examination subsequently recommenced and hearing sessions have been progressing throughout September and October 2026. Collectively, these workstreams represented a substantial commitment of officer resources during the reporting period.

5.10 Notwithstanding the absence of an AMR, substantial progress has been made towards securing adoption of the RLDP, which will provide an up-to-date development plan framework to guide growth and development across Monmouthshire to 2033.

Current projects

5.11 During the reporting period, the Development Management Service continued to support the delivery of a number of significant projects across the County.

5.12 DM/2025/00821 – Nantgavenny Business Park, Abergavenny involved the construction of 12 small starter industrial units on land adjacent to the existing business park. The proposal responds to a recognised need for modern employment

space in Abergavenny and provides opportunities for business growth, start-up enterprises and local job creation.



5.13 DM/2024/00889 – Bio-CNG Refuelling Station, Wales One Business Park, Magor represents investment in alternative fuel infrastructure and supports the transition towards lower-carbon freight and commercial transport. Bio-CNG offers significant reductions in emissions over diesel (90% less CO₂ and 75% less NO_x) thereby improving air quality within the local area and across the wider transport network.



5.14 DM/2020/01884 – St Andrew's Crescent, Abergavenny will facilitate the redevelopment of a former garage site to provide new residential accommodation within the existing urban area. The proposal demonstrates the role of the planning system in bringing long-standing brownfield and underutilised sites back into productive use while contributing towards affordable housing delivery in sustainable locations.



5.15 DM/2025/01273 – Caldicot Castle Country Park Multi-Use Route supports the Council's active travel and placemaking objectives through the delivery of improved walking and cycling infrastructure. The scheme forms part of a wider active travel network in Caldicot and demonstrates how development management can facilitate health, wellbeing, connectivity and environmental improvements whilst respecting biodiversity and heritage considerations.



Local pressures

5.16 Key local pressures include:

- Enabling delivery of the County's housing needs: bringing forward allocated LDP sites; site viability; achieving good planning decisions, creating sustainable and balanced communities and seeking to achieve a good level of housing growth having regard to strong demand;
- Managing the development plan and development management process having regard to the impact of riverine phosphate pollution that has affected development proposals in the central and northern parts of the County significantly;
- Ensuring full capacity of our staffing levels, promoting retention of staff via training and other opportunities, and to recruit promptly where vacancies arise;
- Securing timely consultation responses from consultees, both internal and external;

- The work associated with the replacement of the adopted LDP having regard to the challenging timetable for delivery;
- The need to help resource and deliver the Strategic Development Plan for SE Wales;
- The lack of income from major planning applications due to the gap between the implementation of the current LDP and the adoption of its successor with associated impacts on budgets to resource the service;
- Career development and training support for staff in the light of limitations on budgets.

5.17 One of our key challenges is balancing our aim of creating quality places in a timely manner while ensuring schemes are viable and help deliver housing numbers. We are, however, clear that quality is more important than quantity. The introduction of a place-making emphasis in Planning Policy Wales (PPW) is welcomed, as is the form of the revised PPW that embraces the Well-Being of Future Generations Act

WHAT SERVICE USERS THINK

6.0 The number of formal complaints and letters offering compliments are recorded. There were 10 complaints received over 2025/26, compared to 18 during 2024/25. The theme of these complaints stemmed from concerns about lack of communication from case officers during the processing of planning applications and were resolved following intervention by line managers and subsequently improved dialogue with the applicant.

6.1 Planning is a contentious area dealing with access to land and changes to property values. It will always be the subject of complaint from third parties who are dissatisfied with a decision. This measure needs to be taken in context, and the number of justified complaints is arguably a more pertinent measure. We do however aim to treat all customers with care and respect and to communicate clearly with the public so that they understand what the relevant planning issues are when we make decisions. There is always a degree of subjectivity so there will inevitably be disagreement about the weight given to the respective issues in the planning decision.

6.2 Of the 10 complaints investigated under the Council's formal Complaints Procedure, five were escalated to Stage 2 (investigated by a senior council officer unconnected with the Planning Department).

6.3 We received twenty-six recorded compliments over 2025-26, an increase of five from 2024-2025. This reflects a notable increase since 2022-2023 and the highest number received since records in 2017-2018.

	2017 /18	2018/19	2019/20	2020/ 21	2021/ 22	2022 /23	2023/ 24	2024/25	2025/ 26
Number of Stage 1 formal complaints received	4	14	13	21	18	14	4	14	10
Number of Stage 2 formal complaints investigations received	1	4	2	2	6	5	1	4	5
No of Stage 2 complaints upheld or partially upheld	0	3 partially upheld	2 elements of the complaint partially upheld	2 partially upheld	0	0	0	1 partially upheld	1
No of Ombudsman complaints upheld or partially upheld	1 upheld	0	0	0	0	0	0	0	0
No of compliments received	2	6	6	4	4	17	24	21	26

Service Improvement

6.4 Actions that were included in the 2024/25 Planning APR are set out in the table below, Figure 3, with associated updates and commentary:

Figure 3

2024/25 Action	Outcome	Progress During 2025/26
Digitisation of historic planning records and Tree Preservation Order information	Ongoing	Progress continues to be made in improving the accessibility of planning records. However, the digitisation of historic planning files and the re-surveying and digitisation of older Tree Preservation Order records remains a longer-term project due to the scale of the work involved and the need to verify historic datasets before publication. This action will continue into the next reporting period.
Implementation of the Buildings at Risk Strategy	Ongoing	The Buildings at Risk Strategy has been implemented and is now used

		to prioritise officer resources and interventions. The strategy provides a structured framework for targeting activity towards those heritage assets where action is most likely to secure long-term conservation, to date this has primarily been focused on Monmouth.
Professional development and specialist accreditation	Substantially Achieved	Progress has been made in strengthening specialist expertise within the service. During the period a Senior Heritage Officer secured Cadw accreditation to determine Grade II* listed building applications and a Development Management Officer successfully completed a professional planning qualification. Further professional development and succession planning will continue as part of the Council's commitment to maintaining specialist in-house expertise.
Development Management restructure	Achieved	A comprehensive review of the Development Management structure was undertaken and a revised structure implemented. The new arrangements provide enhanced management capacity, improved service resilience and clearer career progression opportunities for staff. Recruitment to a small number of remaining vacant posts is ongoing and is expected to be completed during the current reporting period.

6.5 Overall continued progress has been made against the actions identified in the previous APR. The most significant achievement during the reporting period was the implementation of the revised Development Management structure, which strengthens service resilience and succession planning. Progress has also been made in developing specialist in-house heritage expertise and embedding the Buildings at Risk Strategy. Digital transformation projects relating to historic planning records and Tree Preservation Orders remain ongoing due to their scale and complexity and will continue to be progressed during 2026/27.

PERFORMAMCE FRAMEWORK

7.0 Based on the findings of the data set out in Annex A – Performance Framework, there are four key areas for improvement which are set out in turn below.

Action 1 – Continue the digitisation of historic planning records and Tree Preservation Order information to improve data quality, public access to information and opportunities for customer self-service.

Action 2 – Continue implementation of the Buildings at Risk (BAR) Strategy into other settlements, prioritising interventions that secure the long-term conservation, sustainable reuse and enhancement of Monmouthshire's heritage assets.

Action 3 – Explore and embed the responsible use of Artificial Intelligence (AI) across the Planning Service to support productivity, improve customer service, reduce administrative workloads and enable officers to focus more time on professional planning, place-making and decision-making activities.

Action 4 – a) To adopt a Planning Enforcement Plan to provide a clear process and procedures to how the planning enforcement service operates within the county.

7.1 The Planning Enforcement plan will outline what matters are covered by the Councils Planning Enforcement service. The plan will also lay out the processes and timeframes for how planning enforcement investigations are carried out providing clarity to the team, councillors, members of the public and other stakeholders. The aim of the plan will be to provide a fair, consistent, transparent and responsive enforcement service.

b) – Elected Member & Community/Town Council Training on planning enforcement and overview of the Planning Enforcement Plan.

7.2 As an action from the 2023/24 APR, a training session took place with Community and Town councillors focussing on planning enforcement in the current reporting period, in April 2025. A session with County councillors followed in May 2025 with a focus on how to comment effectively on planning applications, engaging in the application process and also the planning enforcement process. These events were well-attended and also well-received by all attendees with positive feedback given.

7.3 Progress for the above will be measured via our 2022/27 Annual Performance Report and our 2025 - 2028 Service Business Plan.

ANNEX A – PERFORMANCE FRAMEWORK

This section details our performance in 2025-26. It considers both the Planning Performance Framework indicators and other available data to help paint a comprehensive picture of performance.

Where appropriate, comparisons are made between Monmouthshire's performance and the all-Wales position. Following the reintroduction of national planning performance reporting by Welsh Government, all-Wales comparator data is once again available for the 2025/26 reporting period. This enables a more meaningful assessment of the Authority's performance within a national context and helps identify areas of good performance and opportunities for improvement.

Performance is analysed across the five key aspects of planning service delivery as set out in the Planning Performance Framework:

- Plan making (this aspect is not covered in this APR given the very mature stage of the current LDP);
- Efficiency;
- Quality;
- Engagement; and
- Enforcement.

Based on the performance information we can be very pleased with the service we deliver. During this period:

- The proportion of major applications determined within 8 weeks or agreed timescales improved from 89% to 100% (7 out of 7 applications). This maintains our performance well above the 'Good' target of 60%
- The end-to-end period for determining major planning applications continued its trend, falling from, 436 days in 2023/24 to 267 days in 2024/25 to 163.7 days;
- The proportion of all applications determined within 8 weeks or agreed timescales remained high at 93% (increasing from 92% in 2024/25), and remaining above the Welsh average of 91.6%
- The proportion of applications we approved remained high at 97% (up from 95% in 2024/25)
- In seven out of nine appeals (73%) against our decisions to refuse planning permission, MCC's decision was confirmed, well above the 'Good' standard of 66% or more;
- We dealt with a large number of applications for listed building consent (54 applications) and 70% within the time periods required. This dipped slightly from 78% due to changes in staff and periods of vacant posts between new officers starting, as noted in para. 4.13. However, it must also be acknowledged that the number of applications determined (54) was the second highest in Wales, only Cardiff Council determined more. The figure of listed building consent applications determined in Monmouthshire in the reporting is almost double the national average of 28 applications per year.
- Enforcement performance remained strong for the measure relating to the percentage of enforcement cases investigated in 84 days, 81% which is rated 'Good'. It is acknowledged that the time taken to take positive enforcement

action increased to 191 days, rated 'Fair', this was still well below the Welsh average in 2025/26 of 275 days. This was primarily because we closed a small number of long-standing, complex cases which inflated the average figure. The number of enforcement cases received increased in 2025/26 and we served 6 notices. With regards to appeals against enforcement notices issues, the Council were successful in 100% of appeals being upheld (5 out of 5).

- S106 monies (£244,450) were received towards important community infrastructure schemes. Whilst this figure has reduced from 2024/25 (approximately £1m) this reflects the lifetime of the current Local Development Plan.
- During 2025/26, the Council continued to use Section 106 planning obligations to support the delivery of infrastructure and community benefits arising from development. Examples included investment in the Caldicot Greenway/Multi-User Route, local play and recreation facilities, community infrastructure and affordable housing projects across Monmouthshire. These projects demonstrate the practical role of planning obligations in mitigating development impacts and securing benefits for local communities.

This shows that the team is working effectively and has overcome the longer-term effects major constraints such as phosphorous levels at the River Usk and River Wye Special Areas of Conservation (SAC). Our performance has been very good and our pre-application advice service is effective.

A summary table of our performance can be found in Appendix A of the APR. Of the 20 ranked indicators, 8 are ranked 'Good', while 4 are 'Fair' and 3 are in 'need of improvement'.

The three indicators recorded as requiring improvement relate to plan-making measures that were introduced as part of the revised Planning Performance Framework and were therefore not assessed as part of previous Annual Performance Reports. These indicators should also be considered within the wider Welsh context, where many authorities are engaged in the review or replacement of their development plans. At the end of the reporting period, fewer than half of Welsh planning authorities had a development plan that remained within its plan period. During 2025/26, Monmouthshire's principal planning policy priority was the progression of the Replacement Local Development Plan through submission and Examination. Given the scale and significance of that work programme, resources were appropriately focused on supporting the Examination process, responding to Inspector-led matters and progressing the Plan towards adoption. Whilst this affected performance against certain plan-making indicators, including the production of an Annual Monitoring Report, substantial progress was made towards securing an up-to-date development plan for the County, which will provide a stronger basis for future performance against these measures.

	Number of indicators*
Welsh Government target has been set and our performance is 'good'	8
Welsh Government target has been set and our performance is 'fair'	4
Welsh Government target has been set and our performance 'needs improvement'	3

*Performance standards are not set for 5 of the ranked indicators.

OVERVIEW

MEASURE	GOOD	FAIR	IMPROVE
Plan making			
Is there a current Development Plan in place that is within the plan period?	Yes		No
LDP preparation deviation from the dates specified in the original Delivery Agreement, in months	<12	13-17	18+
Annual Monitoring Reports produced following LDP adoption	Yes		No
Time between triggering Regulation 41 and the submission of a Delivery Agreement to review the plan, in months	<12	13-17	18+
LDP <u>revision</u> deviation from the dates specified in the original Delivery Agreement, in months	<3		3+

WALES AVERAGE [Will be available from WG website]	Monmouthshire 2024/2025	Monmouthshire 2025/2026
Yes		No
111		
Yes		No
18+		3
>3		57

MEASURE	GOOD	FAIR	IMPROVE
Delivery against the local planning authority's adopted housing trajectory	0-1 year		2>years
Efficiency			
Percentage of "major" applications determined within time periods required	>60	50.1-59.9	<50
Average time taken to determine "major" applications in days	Not set	Not set	Not set
Percentage of all applications determined within time periods required	>80	70.1-79.9	<70
Average time taken to determine all applications in days	<67	67-111	112+
Percentage of Listed Building Consent applications determined within time periods required	>80	70.1-79.9	<70
Quality			
Percentage of Member made decisions against officer advice	<5	5-9	9+

WALES AVERAGE [Will be available from WG website]	Monmouthshire 2024/2025	Monmouthshire 2025/2026
		No Data
79.6%	8 out of 9 applications = 89%	7 out of 7 Applications = 100%
298	267 days	163.7 days
91.6%	837/908 = 92%	757/811 = 93%
104.6	102 days	109 days
80/	45/58 = 78%	38/54 = 70%
9%	1 out 20 = 5%	2 out of 24 = 8%

MEASURE	GOOD	FAIR	IMPROVE
Percentage of appeals dismissed	>66	55.1-65.9	<55
Applications for costs at Section 78 appeal upheld in the reporting period	0	1	2+
Engagement			
Does the local planning authority allow members of the public to address the Planning Committee?	Yes		No
Does the local planning authority have an officer on duty to provide advice to members of the public?	Yes		No
Does the local planning authority's web site have an online register of planning applications, which members of the public can access, track their progress (and view their content)?	Yes	Partial	No
Enforcement			
Percentage of enforcement cases investigated (determined whether a breach of planning control has occurred and, if so, resolved whether or not enforcement action is expedient) within 84 days	>80	70.1-79.9	<70

WALES AVERAGE [Will be available from WG website]	Monmouthshire 2024/2025	Monmouthshire 2025/2026
73.80%	8/11 = 73%	7/9 = 78%
0	0	0
Yes	Yes	Yes
Yes	Yes	Yes
Yes	Yes	Yes
70%	214 out of 260 cases = 82%	218 out of 268 cases = 81%

MEASURE	GOOD	FAIR	IMPROVE	WALES AVERAGE [Will be available from WG website]	Monmouthshire 2024/2025	Monmouthshire 2025/2026
Average time taken to take positive enforcement action	<100	101-200	200+	275 days	134 days	191 days

SECTION 1 – PLAN MAKING

Indicator	01. Is there a current Development Plan in place that is within the plan period?	
"Good"	"Fair"	"Improvement needed"
A development plan (LDP or UDP) is in place and within the plan period	N/A	No development plan is in place (including where the plan has expired)

Authority's performance	No
The Replacement Local Development Plan (RLDP) – 2018-2033 is currently at the examination stage.	

Indicator	02. LDP preparation deviation from the dates specified in the original Delivery Agreement, in months	
"Good"	"Fair"	"Improvement needed"
The LDP is being progressed within 12 months of the dates specified in the original Delivery Agreement	The LDP is being progressed within between 12 and 18 months of the dates specified in the original Delivery Agreement	The LDP is being progressed more than 18 months later than the dates specified in the original Delivery Agreement

Authority's performance	57 months
The Replacement Local Development Plan (RLDP) – 2018-2033 is currently at the examination stage.	

Indicator	03. Annual Monitoring Reports produced following LDP adoption	
"Good"		"Improvement needed"

An AMR is due, and has been prepared		An AMR is due, and has not been prepared in time
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Authority's performance	
An Annual Monitoring Report was not prepared during the reporting period as Planning Policy resources were prioritised towards the submission of the Replacement Local Development Plan and supporting its subsequent Examination.	

Indicator	04. Time between triggering Regulation 41 and the submission of a Delivery Agreement to review the plan, in months	
"Good"	"Fair"	"Improvement needed"
The Delivery Agreement is submitted less than 12 months after Regulation 41 is triggered	The Delivery Agreement is submitted within 12 and 18 months after Regulations 41 is triggered	The Delivery Agreement is submitted more than 18 months after Regulation 41 is triggered

Authority's performance	3 Months

Indicator	05. LDP revision deviation from the dates specified in the original Delivery Agreement, in months	
"Good"		"Improvement needed"
The LDP revision is being progressed within the dates specified in the original Delivery Agreement		The LDP revision is being progressed later than the dates specified in the original Delivery Agreement (more than the 3 month slippage allowance)

Authority's performance	
The Replacement Local Development Plan (RLDP) – 2018-2033 was submitted for examination in November 2025 and is currently at the examination stage.	

Indicator	06. Delivery against the local planning authority's adopted housing trajectory. (Shortfall of cumulative housing completions against the Anticipated Annual Build Rate (AABR) or Annual Average Requirement (AAR) in years)	
"Good"		"Improvement needed"
0-1 year		2>years

Authority's performance	

SECTION 2 - EFFICIENCY

Indicator	08. Percentage of "major" applications determined within time periods required	
"Good"	"Fair"	"Improvement needed"
60% or more of applications are determined within the statutory time period	Between 50% and 60% of applications are determined within the statutory time period	Less than 50% of applications are determined within the statutory time period

Authority's performance	7 out of 7 = 100%
The Authority determined 100% (7 out of 7) of major applications within the required timescale during the reporting period. This represents excellent performance and	

demonstrates the effectiveness of the Authority's approach to managing major applications

Indicator	09. Average time taken to determine "major" applications in days	
"Good"	"Fair"	"Improvement needed"
Target to be benchmarked	Target to be benchmarked	Target to be benchmarked

Authority's performance	163.7 Days.
The council performance is good compared to the Welsh average of 298. The average time taken to determine major applications has also improved compared to the previous reporting period. The use of the Authority's pre-application service supports applicants in addressing key issues at an early stage, helping to front-load the planning process and contributing to more efficient determination times for major applications.	

Indicator	10. Percentage of all applications determined within time periods required	
"Good"	"Fair"	"Improvement needed"
80% or more of applications are determined within the statutory time period	Between 70% and 80% of applications are determined within the statutory time period	Less than 70% of applications are determined within the statutory time period

Authority's performance	757/811 = 93%
93% of all planning applications we dealt with were determined within the required timescales, which is well above the 80% threshold for the 'Good' performance ranking. This compared to 91.6% across Wales and is a small improvement on our performance last year (92%).	

The improved figure represents a willingness to work with our customers to reach a positive outcome within agreed timescales.

Indicator	11. Average time taken to determine all applications in days	
"Good"	"Fair"	"Improvement needed"
67 days or less	Between 67 and 111 days	Greater than 112 days

Authority's performance	109 days
The Authority determined planning applications in an average of 109 days during the reporting period, compared to the Welsh average of 104.6 days. This represents a slight increase from the previous reporting period, where the average determination time was 102 days. The increase reflects a number of factors such as complexities associated with phosphate constraints, which have affected the determination of applications within Monmouthshire. The service also operated without an Applications Manager for the 2025/26 reporting period, placing additional pressures on the Development Management Team. Despite these challenges, the Authority determined 1,110 applications during 2025/26, compared to 1,133 applications in the previous reporting period. Recruitment is currently underway to strengthen the management structure, with interviews scheduled in September for a Development Management Manager and a Principal Applications Manager post due to be advertised shortly. It is anticipated that these appointments will support service resilience and contribute to improvements in end-to-end determination times during future reporting periods.	

Indicator	12. Percentage of Listed Building Consent applications determined within time periods required	
"Good"	"Fair"	"Improvement needed"

80% or more of applications are determined within the statutory time period	Between 70% and 80% of applications are determined within the statutory time period	Less than 70% of applications are determined within the statutory time period
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Authority's performance	38/54 = 70%
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The Authority's performance in determining Listed Building Consent applications within the required timescales was affected by staffing changes within the Heritage Team during the reporting period. The Principal Heritage Officer joined the Authority in July 2025 and a vacancy arose following the departure of the Heritage Officer to pursue a career opportunity elsewhere. The vacant post was successfully filled in November 2025. In addition to determining Listed Building Consent applications, the Heritage Team contributes to the pre-application advice service, provides consultation responses on heritage and conservation matters, undertakes Buildings at Risk work, and supports the HMLR Land Charges Project. The team includes an officer with Grade II* delegated authority, while the Principal Heritage Officer is working towards CADW accredited delegation.

The Heritage Officer appointed to fill the vacancy in November 2025 subsequently left the Authority in July 2026 to pursue a new opportunity. The post has since been successfully filled, with the newly appointed Heritage Officer due to commence employment with the Authority in October 2025. With the Principal Heritage Officer now established in post and the Heritage Officer position filled, it is anticipated that end-to-end determination times and overall performance will improve during the next reporting period.

SECTION 3 - QUALITY

Indicator	13. Percentage of Member made decisions against officer advice	
"Good"	"Fair"	"Improvement needed"
Less than 5% of decisions are made contrary to officer advice	Between 5% and 9% of decisions are made contrary to officer advice	More than 9% of decisions are made contrary to officer advice

Authority's performance	2 out of 24 = 8 %
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Of the 24 applications determined by Planning Committee during the reporting period, 2 decisions were made contrary to officer recommendation, reflecting the important role of elected Members in exercising their planning judgement, informed by local knowledge, the evidence before them and the relevant planning policy framework.

Indicator	14. Percentage of appeals dismissed	
"Good"	"Fair"	"Improvement needed"
More than 66% of planning decisions are successfully defended at appeal	Between 55% and 66% of planning decisions are successfully defended at appeal	Less than 55% of planning decisions are successfully defended at appeal

Authority's performance	7/9 = 77.8%
The Authority successfully defended 78% of planning appeals during the reporting period, exceeding the Welsh average of 73.8% , which demonstrates that planning decisions continue to be well founded and supported by robust evidence and policy justification.	

Indicator	15. Applications for costs at Section 78 appeal upheld in the reporting period	
"Good"	"Fair"	"Improvement needed"
The authority has not had costs awarded against it at appeal	The authority has had costs awarded against it in one appeal case	The authority has had costs awarded against it in two or more appeal cases

Authority's performance	0
No awards of costs for unreasonable behaviour have been made against the Council this year. There were also no awards of costs during the previous reporting period.	

SECTION 4 – ENGAGEMENT

Indicator	16. Does the local planning authority allow members of the public to address the Planning Committee?	
"Good"		"Improvement needed"
Members of the public are able to address the Planning Committee		Members of the public are not able to address the Planning Committee

Authority's performance	Yes
Monmouthshire has an established and effective Public Speaking Protocol and also allows applicants, objectors, supports and community and town councils to speak at the Delegation Panel site visits. This has proven to be a valuable exercise in terms of making informed decisions and improved customer and community satisfaction, even if the final decision is not the one they hoped for. The Size and Composition of Local Planning Authority Committees (Wales) Regulations 2017 did not seek to control the public speaking element of a planning committee. If any future national protocol seeking consistency throughout Wales is published it is hoped it is provided as best practice guidance and does not curtail the successful delegation and public speaking systems we already employ.	

Indicator	17. Does the local planning authority have an officer on duty to provide advice to members of the public?	
"Good"	"Fair"	"Improvement needed"
A duty planning officer is available during normal office hours	A duty planning officer is available, but not always during normal office hours	There is no duty planning officer available

Authority's performance	Yes
We have a duty officer available every day from 10am to 2pm.	

Indicator	18. Does the local planning authority's web site have an online register of planning applications, which members of the public can access track their progress (and view their content)?	
"Good"	"Fair"	"Improvement needed"
All documents are available online	Only the planning application details are available online	No planning application information is published online

Authority's performance	Yes
Our website allows customers to view all public documents and plans relating to applications including officer reports and decision notices and also allows customers to comment online.	

SECTION 5 – ENFORCEMENT

Indicator	19. Percentage of enforcement cases investigated (determined whether a breach of planning control has occurred and, if so, resolved whether or not enforcement action is expedient) within 84 days	
"Good"	"Fair"	"Improvement needed"
80% or more of enforcement cases are investigated in 84 days	Between 70% and 80% of enforcement cases are investigated in 84 days	Less than 70% of enforcement cases are investigated in 84 days

Authority's performance	218 out of 268 cases = 81%
This represents a strong performance by the Enforcement Team during the 2025/26 reporting period and is well above the Welsh average of 70%. While there has been a slight decrease of 1% compared to the previous reporting period, the Authority still achieved the "Good" threshold, with 81% of enforcement cases investigated within 84 days. During the 2025/26 reporting period, the team was operating without a Principal Enforcement Officer for part of the year. The Authority successfully appointed a Principal Enforcement Officer at the end of April 2026, and the team is now operating at full capacity. It is anticipated that this additional capacity will help maintain and further improve performance during the next reporting period.	

Indicator	20. Average time taken to take positive enforcement action	
"Good"	"Fair"	"Improvement needed"
100 days or less	Between 101-200 days	Greater than 200 days

Authority's performance	191 days
It is acknowledged that the time taken to take positive enforcement action increased to 191 days, rated 'Fair', this was still well below the Welsh average in 2025/26 of 275 days.	

SECTION 6 – SUSTAINABLE DEVELOPMENT INDICATORS

The purpose of the Sustainable Development Indicators is to measure the contribution the planning system makes to sustainable development in Wales.

The Sustainable Development Indicators will be used to measure the progress against national planning sustainability objectives, set out in Planning Policy Wales, and can be used to demonstrate to our stakeholders the role and scope of the planning system in delivering wider objectives. The information will also be useful to local planning authorities to understand more about the outcomes of the planning system and help inform future decisions.

Indicator	SD1. The floorspace (square metres) granted and refused planning permission for new economic development on allocated employment sites during the year.
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Granted (square metres)	
Authority's data	332m2

Refused (square metres)	
Authority's data	9000m2

Indicator	SD2. Planning permission granted for renewable and low carbon energy development during the year.
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Granted permission (number of applications)	
Authority's data	16

Granted permission (MW energy generation)	
Authority's data	No Data

Indicator	SD3. The number of dwellings granted planning permission during the year.
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Market housing (number of units)	
Authority's data	140

Affordable housing (number of units)	
Authority's data	66

Indicator	SD4. Planning permission granted and refused for development in Flood Zone 2, 3 and Defended during the year
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Number of residential units (and also hectares of non-residential units) which were GRANTED permission	
Authority's data	0

Number of residential units (and also hectares of non-residential units) which were REFUSED permission on flood risk grounds	
Authority's data	0

Indicator	SD5. The area of land (ha) granted planning permission for new development on previously developed land and greenfield land during the year.
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Previously developed land (hectares)	
Authority's data	2.0697

Greenfield land (hectares)	
Authority's data	45.0947

Indicator	SD6. The area of public open space (ha) that would be lost and gained as a result of development granted planning permission during the quarter.
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Open space lost (hectares)	
Authority's data	No Data

Open space gained (hectares)	
Authority's data	No Data

Indicator	SD7. The total financial contributions (£) agreed from new development granted planning permission during the quarter for the provision of community infrastructure.
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Gained via Section 106 agreements (£)	
Authority's data	£244,450

Gained via Community Infrastructure Levy (£)	
Authority's data	£0*

*CIL is not adopted in Monmouthshire County Council



Equality and Future Generations Evaluation

Name of the Officer completing the evaluation Andrew Jones Phone no: 01633 644808 E-mail: andrewjones3@monmouthshire.gov.uk	Please give a brief description of the aims of the proposal Submit the Monmouthshire Planning Service's ninth Annual Performance Report (APR) to the Welsh Government in accordance with statutory requirements and publish the Report on the Council's website.
Name of Service Planning Services (Planning Policy and Development Management)	Date Future Generations Evaluation form completed 28/09/2026

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

The APR identifies areas for improvement within the Development Management Team of the Council. Actions outlined to achieve this should bring positive benefits to all members of Monmouthshire's population. A more efficient and effective Development Management service will secure the aims of the Welsh Spatial Plan, namely Promoting a Sustainable Economy, Valuing our Environment and Respecting Our Environment, be it through timely approval of planning proposals for sustainable forms of development or by preventing harm to acknowledged interests, such as amenity, public safety, health or biodiversity by either refusing permission for inappropriate development or by taking timely and reasonable enforcement action.

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Age	See statement above	None at this stage	See above

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Disability	See statement above	None at this stage	See above
Gender reassignment	See statement above	None at this stage	See above
Marriage or civil partnership	See statement above	None at this stage	See above
Pregnancy or maternity	See statement above	None at this stage	See above
Race	See statement above	None at this stage	See above
Religion or Belief	See statement above	None at this stage	See above
Sex	See statement above	None at this stage	See above
Sexual Orientation	See statement above	None at this stage	See above
Welsh Language	<i>.Under the Welsh Language measure of 2011, we need to be considering Welsh Language in signage, documentation, posters, language skills etc.and also the requirement to promote the language.</i> Welsh is treated on equal terms as English in the planning process	None at this stage	See above

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Poverty	See statement above	None at this stage	See above

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

Well Being Goal	Does the proposal contribute to this goal? Describe the positive and negative impacts.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
A prosperous Wales Efficient use of resources, skilled, educated people, generates wealth, provides jobs	Positive: The APR seeks to shape an efficient and engaging development management process providing support and guidance for customers to ensure the best development possible for the benefit of local communities and to protect the character and appearance of Monmouthshire. Planning can provide economic investment and growth, and can protect acknowledged interests such as local amenity and townscape. Identifying areas for improvement and learning what works well elsewhere can ensure that customers are getting effective advice early in the process which is critical in securing positive outcomes and appropriate forms of development. Negative: Some areas for improvement may necessitate customers having to pay for elements of	Better contribute to positive impacts: The APR identifies areas for improvement to make the development management process more responsive and efficient for our customers' applications for developments that are of a high standard. Mitigate any negative impacts: Care will be taken to improve the planning process via interventions set out in the associated report. The team will focus on positive outcomes rather than being process driven. We will continue to monitor performance through the actions we take, relevant performance measures and 1:1s with case officers.

Well Being Goal	Does the proposal contribute to this goal? Describe the positive and negative impacts.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
	the service which can be considered to be costly by some customers.	
A resilient Wales Maintain and enhance biodiversity and ecosystems that support resilience and can adapt to change (e.g. climate change)	Positive: An effective and efficient DM service allows case officers to consider the implications of any development on biodiversity and ecosystems at an early stage in the application process. Officers who are the decision-makers are able to consider the impacts of decisions on ecological interests. This system would not deteriorate as a result of the proposed revisions to the DM process and indeed may provide a more effective system. Negative: None identified.	Better contribute to positive impacts: The actions identified should speed up the delivery of sustainable development. Mitigate any negative impacts: None
A healthier Wales People's physical and mental wellbeing is maximized and health impacts are understood	Positive: Actions to improve the DM process would enhance support and guidance for customers when submitting a planning application and provide the opportunity for officers to add value to development proposals and provide acceptable forms of the development, which should improve Monmouthshire citizens' access to local services, such as shops, health and recreational/ play facilities, or prevent inappropriate development from harming the amenity of an area, or indeed the health of local people. Development should promote active travel to ensure it is sustainable. Negative: None identified.	Better contribute to positive impacts: The approval and delivery of development proposals can have a positive impact on health and well-being and foster social and community pride in their communities. Mitigate any negative impacts: None
A Wales of cohesive communities Communities are attractive, viable, safe and well connected	Positive: The area of work undertaken by the Planning Team directly and indirectly influences the	Better contribute to positive impacts: The timely approval and delivery of sustainable development

Well Being Goal	Does the proposal contribute to this goal? Describe the positive and negative impacts.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
	appearance, viability, safety and connectivity of communities via planning policy and land use planning decisions. Providing clear and effective guidance and support to customers at an early stage in the planning process is more likely to lead to positive outcomes that enable the best forms of development possible. This is critical in providing sustainable communities. Taking timely and reasonable enforcement action against inappropriate development can reduce impact on local amenity and health. Negative: None identified.	proposals can have a positive impact on the character and appearance of an area, promote well-being and foster social and community pride. Mitigate any negative impacts: None
A globally responsible Wales Taking account of impact on global well-being when considering local social, economic and environmental wellbeing	Positive: The area of work undertaken by the planning section directly and indirectly influences local social, economic and environmental well-being via planning policy and land use planning decisions. The approval of renewable energy proposals will allow Wales to play its part in tackling the effects of climate change. Negative: none.	Better contribute to positive impacts: None Mitigate any negative impacts: None
A Wales of vibrant culture and thriving Welsh language Culture, heritage and Welsh language are promoted and protected. People are encouraged to do sport, art and recreation	Positive: Planning decisions promote the value and significance of the historic built environment by ensuring that it is a direct consideration in planning policy and land use planning decisions. Planning decisions generally facilitate the provision of tourist and recreation development, including playing fields	Better contribute to positive impacts: Timely planning decisions will ensure that proposals foster civic pride through well-designed development in historic areas or through the removal of development that has a negative impact on a heritage designation via enforcement action. Mitigate any negative impacts: None

Well Being Goal	Does the proposal contribute to this goal? Describe the positive and negative impacts.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
	and built development. The Welsh language is now a material planning consideration. Negative: none.	
A more equal Wales People can fulfil their potential no matter what their background or circumstances	Positive: Appropriate and timely development management decisions should bring positive benefits to all members of Monmouthshire's population through policies that seek to achieve the five main aims of the Wales Spatial Plan, namely Building Sustainable Communities, Promoting a Sustainable Economy, Valuing our Environment, Achieving Sustainable Accessibility and Respecting Our Environment Negative: none.	None.

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

Sustainable Development Principle	Does your proposal demonstrate you have met this principle? If yes, describe how. If not explain why.	Are there any additional actions to be taken to mitigate any negative impacts or better contribute to positive impacts?
 Long Term Balancing short term need with long term and planning for the future	<i>We are required to look beyond the usual short term timescales for financial planning and political cycles and instead plan with the longer term in mind (i.e. 20+ years)</i> The LDP covers the period 2011-21. The Council's Development Management function which makes planning decisions seeks to implement the policies of the LDP which promotes sustainable development. By its nature, therefore, it cannot look beyond the next five-year period but the SA/SEA of the LDP would have ensured consideration of the impact on future generations. The revision to the LDP will seek to adopt land use planning policies up until 2033 taking into account the county's socio-economic challenges.	Ensure that the LDP and its policies have been subject to an appropriate level of scrutiny. This also applies to the current revision of the LDP.
 Collaboration Working together with other partners to deliver objectives	Monmouthshire's Planning Service believes in working with its customers (which include not just applicants but the public, other Council departments, other local authorities, third sector agencies and businesses) to improve its offer to its customers to meet their needs. This APR identifies areas for improvement to achieve this aim. It is subject to scrutiny and endorsement by Members of both the Council's Performance & Overview Select Committee and Planning Committee. Members and officers of the Council have a specific interest in the subject to ensure that sustainable forms of development are carried out in Monmouthshire.	Any observations offered by Committee will be taken into account as part of the submission process to Welsh Government.

Sustainable Development Principle	Does your proposal demonstrate you have met this principle? If yes, describe how. If not explain why.	Are there any additional actions to be taken to mitigate any negative impacts or better contribute to positive impacts?
 Involving those with an interest and seeking their views Involvement	<i>Who are the stakeholders who will be affected by your proposal? Have they been involved?</i> The APR is subject to consultation with Members of the Performance and Overview Select Committee and Planning Committee whose Members have a specific interest in the subject, as well as senior officers of the Council.	As above.
 Putting resources into preventing problems occurring or getting worse Prevention	The APR's aim is to identify areas for improvement in the Planning Service and to initiate actions for meaningful improvement. This would provide the basis for timelier decisions to secure much needed sustainable development. Taking timely and reasonable enforcement action against inappropriate development can reduce impact on local amenity and health.	N/A
 Considering impact on all wellbeing goals together and on other bodies Integration	<i>There is space to describe impacts on people, economy and environment under the Wellbeing Goals above, so instead focus here on how you will better integrate them and balance any competing impacts</i> The work undertaken by the Planning Service directly relates to promoting and ensuring sustainable development and its three areas: environment, economy and society.	Improvements to the DM process would facilitate the implementation of the LDP which has been subject to a Sustainability Assessment that balances the impacts on Social, Economic and Environmental factors.

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

	Describe any positive impacts your proposal has	Describe any negative impacts your proposal has	What will you do/ have you done to mitigate any negative impacts or better contribute to positive impacts?
Social Justice	None.	None at this stage	n/a
Safeguarding	None.	None at this stage	n/a
Corporate Parenting	None.	None at this stage	n/a

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

The APR has been written having regard to data and evidence provided by the following:
The Development Management Quarterly Survey 2025/26; Planning Performance Framework Table 2025 2026 (Welsh Government and Planning Appeal Outcomes – 1 April 2025 – 31 March 2026 (PEDW).

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

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

The work undertaken by the Council's Planning Service, and in particular the Development Management function, directly relates to promoting and ensuring sustainable development. The APR 2025/26 would enable the service to identify areas of improvement in the processing of applications and in the enforcing of planning matters, and to engage with customers at an early stage of the planning process to ensure the most appropriate forms of development are approved within Monmouthshire. The planning process promotes sustainable forms of development, helping to create jobs and investment, while protecting material interests such as amenity, public safety and biodiversity.

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

What are you going to do	When are you going to do it?	Who is responsible
See actions in the APR	See APR	See APR

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

Version No.	Decision making stage	Date considered	Brief description of any amendments made following consideration
1	Performance & Overview Select Committee (with Planning Committee Members invited)	28/09/2026	TBC